



产业安全蓝皮书[®]

BLUE BOOK OF INDUSTRIAL SECURITY

中国海洋产业 安全报告 (2011~2012)

ANNUAL REPORT ON CHINA'S MARINE INDUSTRIAL
SECURITY (2011-2012)

主 编 / 李孟刚



社会科学文献出版社
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主编简介

李孟刚 男，1967年4月出生，山东省博兴县人，中共党员；经济学博士，交通运输工程和理论经济学双博士后；北京交通大学教授、博士生导师、国家社科基金重大招标项目首席专家、新华社特约经济分析师、国家社科基金评审专家、中国博士后科学基金评审专家。

现任北京交通大学中国产业安全研究中心（CCISR）主任、北京市哲学社会科学北京产业安全与发展研究基地（省部级科研平台）负责人、首席专家；兼任中国产业安全论坛秘书长、《管理世界》常务编委、《管理现代化》编委会副主任、《中国国情国力》编委会副主任、《中国流通经济》专家指导委员会委员、《北京交通大学学报》（社科版）编委委员。2009年12月入选教育部新世纪优秀人才支持计划。

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在《光明日报》（理论版）等权威学术报刊发表论文80余篇，多篇被《新华文摘》、人大报刊资料复印中心全文转载；主持或参与撰写的高水平内参报告获得党和国家领导人的专门批示，相关政策建议多次被有关部委采纳。

作为首席专家主持国家发改委“十二五”规划前期重大研究课题——我国“十二五”粮食安全保障体系构建研究；2008年作为首席专家中标国家社科基金重大招标项目——应对重大自然灾害与构建我国粮食安全保障体系对策研究；主持的国家级、省部级科研课题还有：国家社科基金重点课题、中国博士后科学基金特别资助项目、国家商务部部级课题、教育部重大研究专项课题、国家保险监督管理委员会部级课题等。

摘 要

在经济全球化深入推进、国际竞争日趋激烈的大背景下，积极发展海洋经济已经成为世界各国掌握未来经济发展主动权的重要举措。中国是一个海洋大国，2010年，海洋经济生产总值占GDP的比重已达到9.7%，海洋三次产业结构也在逐步优化。但相对于欧美发达国家来说，中国的海洋经济起步晚，整体海洋产业结构仍有待完善，海洋科技创新能力存在明显不足，海洋高新技术和高端海洋产业装备还得依赖从发达国家进口。《国民经济和社会发展的“十二五”规划纲要》要求大力推进海洋经济发展，加强统筹协调，完善海洋管理体制，健全海域使用权市场机制；同时也明确提出要制定实施海洋主体功能区规划，优化海洋经济空间布局，推进山东、浙江、广东三大国家级海洋经济区发展战略相继出台，各省也纷纷推出了自己的海洋经济发展计划，“3+N”沿海经济区发展布局基本形成。

中国海洋产业总体运行情况：改革开放以来，全国海洋经济保持良好的发展势头，海洋经济总量稳步增长，海洋产业涉及领域不断丰富。在经历了短暂的波折之后，2010年，全球海运量逐渐复苏，中国海洋产业发展重新步入快速增长轨道，海洋生产总值占国内生产总值的9.7%。与此同时，沿海各地下大力气淘汰落后产能，采取多种方式培育新兴产业，海洋产业自我发展能力得到了显著提升。但全球海洋产业发展的风险因素依然很多，产业结构有待调整。

中国蓝色国土安全现状及趋势：中国是海陆兼备的大国，长期以来“向海”意识相对薄弱，海洋权益保障不足。改革开放以来，中



国海洋事业发展取得长足进步，海洋经济蓬勃发展为整个国民经济腾飞做出了积极贡献，但能够充分维护我国海洋权益的海洋安全战略尚未真正形成，海洋不安全因素所导致的系列摩擦仍影响着我国周边环境的和平与稳定，反过来也制约了海洋经济的持续、健康、安全发展。开发海洋资源、发展海洋产业的前提是拥有一个稳定完整的海洋国土。中国在南海和东海的资源开发利用方面一直处于争端中，亟待妥善解决。

中国海洋产业环境承载力分析：海洋产业环境承载力是指海洋对于人类经济活动的最大支持程度，大致包括要素环境、市场环境、政策环境三个方面。中国海洋自然资源丰富，形态多样，劳动力成本低且储量长期充裕，但科技要素的贡献度明显不足；从市场供求格局来看，居民消费结构升级带动海洋产业需求趋旺，带动海洋开发能力快速提升，但重要设备和技术对国外的依赖度过高；各级政府改善海洋产业政策环境的努力正在逐步得到落实，未来科学的布局、高效的管理及多元化的扶持措施都值得期待。

中国滨海旅游产业安全分析：中国滨海旅游业有着光明而广阔的发展前景，我国滨海旅游业虽然已取得了显著的成绩，但其在发展规模、综合竞争力、品牌效应等方面与法国等旅游业发展成熟的国家仍存在差距。其中，政府产业政策扶持力度较弱导致产业投入不足，管理体制机制无法适应旅游业特殊的产业性质等，从根本上制约了旅游业发展的活力。沿海地区旅游公共服务的模式是粗放式的，滨海旅游产品开发不能适应多元化、多层次、个性化的旅游需求。

中国海洋交通运输业安全分析：随着我国经济的不断发展，对海洋交通运输的需求也将持续增加，海洋交通运输产业的安全问题尤为重要。2010年，我国海洋交通运输业实现增加值3816亿元，海洋交通运输业占我国整体海洋经济总量的24.6%，是海洋经济的第二大产业。海洋交通运输业是国际贸易运输的主要方式，是国家节省外汇



支付、增加外汇收入的重要渠道之一，有利于改善国家的产业结构和国际贸易出口商品结构。海运企业还要尽快建立和完善公司管控体系，实施全面风险管理，尤其要着眼于未来，积极拓展多元化融资渠道，夯实企业长远发展的资金基础。

中国海洋渔业安全分析：我国加入 WTO 后，我国渔业以更加开放的姿态融入世界渔业发展格局。虽然我国的海洋渔业取得了一定的成就，但与发达国家相比仍有很大的差距。我国渔业产业在资金、技术、管理等方面处于劣势，整体竞争力不强，此时直接参与国际竞争不利于我国渔业经济的长远发展。因此，合理运用世贸组织规则，确定产业保护的方向，采取有效的产业保护措施，是很有必要的。

中国其他海洋产业安全分析：2010 年中国滨海旅游业、海洋交通运输业和海洋渔业在主要海洋产业增加值中的比重达到 73.8%，对整个海洋产业安全起着决定性的作用。除这三大主要海洋产业外，其余海洋工业和建筑业产业增加值超过 1000 亿元的仅有海洋油气业和海洋船舶制造工业。在全球向海洋进军和我国工业化加速推进的大背景下，海洋工业的安全对于未来我国经济安全的影响力正在逐步提升。

中国海洋产业安全度总体简评及分析：当前我国海洋产业整体上处于基本安全状态，短期内海洋产业的生存和发展不存在明显的威胁，但这种安全的程度并不高。海洋产业增加值近年来在国民经济中的比重稳步上升，说明海洋经济对于国家经济安全提升的贡献率在增大；但考虑到整个海洋产业要素承载力情况，改变海洋产业生产方式的任務同样艰巨，特别是自然要素的总量衰减和海洋环境的局部退化已经发生，而市场环境具有瞬时不确定性的特征，市场体制下的政策支持也是有限的，从技术进步和制度革新入手努力提升海洋产业竞争力将成为一个长期要求。

Abstract

As economic globalization deepens and international competition is increasingly fierce, the active development of marine economy has already become an important measure for every country in the world to seize the initiative in future economic development. China is a major marine country, of which the proportion of GOP (gross ocean product) in GDP reached 9.7% in 2010 and the marine industrial structure has been gradually optimized. However, since China is a late starter relative to developed countries in Europe and America, the overall marine industrial structure remains to be further improved, there are notable defects in the marine science and technology innovation ability, and most marine high technologies and hi-end marine equipment are imported from developed countries. In the Outline of the Twelfth Five-Year Plan for the National Economic and Social Development of the PRC, the government is required to give a great push to the development of marine economy, strengthen overall coordination, improve the current marine management system, and perfect the market mechanism for maritime use right; besides, the government is explicitly recommended to establish and implement the marine priority zone planning and optimize the spatial layout of marine economy. As the strategies for development of marine economy in Shandong Province, Zhejiang Province and Guangdong Province were released one after other, other provinces also launch their own plans for development of marine economy and the “3 + N” development pattern for coastal economic zone has taken shape.

An Analysis of the Overall Operation Condition of China's Marine Industry: Since the reform and opening-up, China's marine economy has enjoyed a sound momentum of development, the economic



aggregate of marine industry has been growing steadily, and the marine industry has involved more and more fields. After the short-lived crisis, in 2010, the world seaborne volume began to recover from its recession, the development of China's marine industry began to grow strongly again, and the proportion of GOP in GDP was up to 9.7%. Meanwhile, coastal areas made great efforts to close down backward production facilities and developed new industries in various ways, so that the self-development capability of marine industry was greatly improved. However, the development of global marine industry still faces many risk factors and the industrial structure remains to be further adjusted.

Current Situation and Trend of Security of China's "Blue Territory": China is a big country in both land and sea, but in long term, it has had relatively weak marine consciousness and provided inadequate protection for its marine rights and interests. Since the reform and opening-up, China has made great progress in the development of marine industry and the booming of marine economy has made great contributions to the rapid development of national economy. However, the ocean security strategy that can protect China's marine rights and interests has not been wholesomely established, so that a series of conflicts caused by marine insecurities still affect the peace and stability of the peripheral environment of China and restrict the sustainable, sound and secure development of marine economy. The premise behind the exploitation of marine resources and the development of marine industry is to possess a stable and complete ocean territory. China has always been involved in the disputes over the exploitation and utilization of resources in South China Sea and East China Sea and the disputes urgently need to be solved.

An Analysis of the Environmental Carrying Capacity of China's Marine Industry: The environmental carrying capacity of marine industry refers to the maximum level of support given by the ocean to human economic activities and generally consists of element environment, market environment and policy environment. In China, there are rich and diverse marine natural resources as well as abundant cheap labors, but the



contribution of technological elements is obviously insufficient. From the current market supply and demand pattern, it can be seen that the demand of marine industry gradually increases and the marine development ability is greatly improved due to the upgrading of resident consumption structure, but major equipment and technologies are mostly imported from foreign countries; the government at all levels are making efforts to improve the policy environment of marine industry and will establish some measures concerning scientific layout, efficient management and diversified support in the future.

An Analysis of the Security of China's Coastal Tourism: China's coastal tourism has bright and vast potential for future development. Although China has made remarkable achievements in coastal tourism, it is still inferior to those countries with developed tourism in level of development, comprehensive competitiveness and brand effect, e. g. France. The government's weak policy support to the industry leads to insufficient input in the industry and the management systems and mechanisms that cannot adapt to the special industrial nature of tourism fundamentally restrict the development of tourism. Due to extensive public tourist service in coastal areas, the development of coastal tourism products cannot meet diversified, multi-level and personalized tourism demands.

An Analysis of the Security of China's Marine Communications and Transportation Industry: With the development of China's economy, the marine communications and transportation demand will continue to grow, so that the security issue of marine communications and transportation industry will seem more and more important. In 2010, China's marine communications and transportation industry achieved a value added of RMB 381.6 billion, accounting for 24.6% of the economic aggregate of China's marine industry, so that marine communications and transportation industry became the second largest industry in marine economy. Marine communications and transportation industry is the major means of international trade transportation and one of important channels to reduce foreign currency payment and increase foreign currency earnings and



it is in favor of the improvement of industrial structure and export commodity structure in international trade of China. Marine enterprises are recommended to establish and improve their management and control systems as soon as possible, implement comprehensive risk management, and develop diversified financing channels to reinforce the funding base for their long-term development in future.

An Analysis of the Security of China's Marine Fishery: As China joined the WTO, China's fishery has been blended into the development pattern of world fishery in a more open posture. Although China has made certain achievements in marine fishery, it is still greatly inferior to developed countries. At present, China's fishery is disadvantaged in fund, technology and management and has a relatively low overall competitiveness, so that it is improper for China's fishery to participate in international competition now for the sake of long-term development. Thus, it is very necessary to make proper use of WTO rules to determine the protection direction of the industry and adopt effective industry protection measures.

An Analysis of the Security of China's Marine Industries: In 2010, China's coastal tourism, marine communications and transportation industry and marine fishery accounted for 73.8% of the value added of marine industry and played crucial roles in the security of the whole marine industry. Except the three major marine industries, among other marine industries and construction industries, only offshore oil and gas industry and shipbuilding industry exceeded RMB 100 billion in value added. However, as the world is marching to the sea and China is speeding up the industrialization process, the influence of the security of marine industry on China's economic security in future is being improved gradually.

A Brief Evaluation and Analysis of the Degree of Security of China's Marine Industry: At present, the marine industry is basically secure in China and there is no obvious threat in the survival and development of marine industry in short term, but the degree of such security is not high. In recent years, the proportion of the value added of marine industry in national economy has been growing steadily, which



indicates that the contribution of marine economy to the improvement of national economic security has been growing. However, considering the effect carrying capacity of the whole marine industry, it's a rough task to change the mode of production of marine industry, because the total number of natural elements is declining, the marine environment is locally degrading, the market environment is featured by instantaneous uncertainty, and the policy support in the market system is limited. Thus, it has become a long-term requirement to improve the competitiveness of marine industry by means of technological progress and institutional innovation.

进入 21 世纪，一场突如其来的国际金融危机让不少欧美发达国家和地区深陷主权债务泥潭，产业发展动力锐减，经济复苏进程缓慢。为了保障国家产业安全，促进经济增长和稳定劳动就业，受危机冲击的国家努力地寻找着新的经济增长点，在所有被关注的新兴产业和高端产业中，海洋产业以其广阔的前景、顽强的生命力以及显著的竞争优势而受到格外的重视。在这一背景下，发达国家相继提出了“大力发展海洋经济，向海洋进军”的口号，积极发展和壮大海洋经济已经成为世界多数国家和地区抢占经济发展先机、掌握未来经济发展主动权的共识。作为拥有漫长海岸线的发展中经济体，中国大力提升海洋经济实力的决心同样坚定，但中国距离海洋经济强国的目标还有很大距离，未来务必要在追求海洋经济规模增长的基础上，加大对海洋产业环境尤其是海洋产业安全的关注。

海洋产业安全是发展海洋经济的基础，是保障海洋经济可持续增长、保证国家和地区战略安全的内在要求。中国要发展海洋经济就必须为海洋产业营造一个安全、稳定的内外部发展环境，明确研究海洋产业安全的重要性。首先，研究海洋产业安全是开发海洋资源、缓解陆地资源短缺的保障；其次，研究海洋产业安全可以提升产业国际竞争力，保障国民经济安全；再次，研究海洋产业安全可以促进我国经济增长方式转变，优化产业结构，平衡区域发展；最后，研究海洋产业安全还可以保障海洋产业自身健康发展。

近年来，海洋经济的发展已经得到各级政府愈来愈多的重视，与