
2011世界 商务发展动态

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上海市商务委员会 编著
上海科学技术情报研究所

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前言

“十二五”期间是上海实现经济转型和新一轮产业结构战略调整升级的关键时期，服务业发展更是关系上海未来长远发展的战略性任务，加快发展服务业是上海建设国际经济、金融、贸易、航运中心的必然要求，是构建以服务经济为主产业结构的重要途径，也是落实科学发展观、转变经济发展方式的必然选择。

近十多年来，在经济全球化、网络化和信息化的推动下，世界商务领域发生重大变化，呈现出若干新动向、新特点；商务领域覆盖范围逐步拓展，经营和服务模式以及业态创新层出不穷。后金融危机时期，随着世界经济缓慢恢复，主要经济体对外贸易出现恢复性增长，国际贸易回升态势显著，全球商品和服务贸易继续显示出对世界经济增长较强的拉动作用。发达国家仍处国际商贸主导地位；而与此同时，新兴市场国家，尤其是中国、印度、俄罗斯和巴西在国际贸易体系中的地位进一步增强。2010年，受到各主要经济体及时推出的大规模经济刺激计划的提振，世界经济较为迅速地走出了衰退，全球国内生产总值（GDP）的增速从2009年的-2.1%恢复到3.9%，接近危机前的最好水平。但是，由于遭受危机重创的发达经济体，尤其是美国，其总需求的增长尚需要较长的时间来恢复；此外，欧元区的主权债务及银行系统中存在的问题远比先前预期的要严重；再加之日本经济受到地震与海啸的影响，以及中东和北非地区的社会与军事动荡给国际石油市场带来的不确定性等因素的存在，2011年世界经济增长的步伐已经较之于2010年有所放缓，复苏进程显现疲态。就全球贸易总量而言，发达经济体贸易恢复缓慢，发展中经济体回升显著；世界银行的数据显示，2010年1~10月，高收入国家的出口量年增长率为10.4%，而发展中国家则达到15.5%。随着全球经济环境改善、消费者和投资者信心回稳、市场需求回暖，食物、金属、

能源等初级产品价格开始全面攀升上涨。大宗商品期货交易市场量价齐升。2010年以来,全球外商直接投资的回升主要受发展中国家和转型经济体带动,发展中国家和转型经济体首次吸引全球过半数的 FDI 流入,未来这一态势将得以延续。跨国并购整体规模重拾升势,制造部门并购规模企稳回升,服务部门并购呈现跨界融合态势。一系列动向表明,世界商务已成为全球经济复苏和发展的重要动力。

日前,我国《“十二五”现代服务业发展规划》(下称《规划》)基本框架已形成,《规划》明确提出,要把推动服务业大发展作为产业结构优化升级的战略重点,深刻理解加快发展服务业对转变方式、调结构的重要战略意义,适应产业结构优化升级新要求,全力推进我国服务业现代化进程,开创服务业大发展的新局面。《规划》基本确定两条主线八大方向。一是要大力发展面向生产的服务业,包括金融服务业、现代物流业、高技术服务业、商务服务业等;二是要规范提升面向生活的服务业,大力发展商贸服务业、家庭服务业、旅游业、体育产业等。其中现代物流、商务服务业、商贸服务业将构成我国商务领域发展的重点方向。

2011年,上海市商务委员会委托上海科学技术情报研究所立项开展的“世界商务发展动态研究”进入第二年,本着“研究国外、结合国内、针对上海”的精神,遵循宏观性、前瞻性、新颖性、针对性原则,从国际贸易、投资合作、商业流通、政策法规以及商务模式创新和商务集聚区发展两大专题入手,研究世界商务领域总体发展态势、特点以及国外发展经验对我们的启示。研究成果向社会公开,作为政府部门转变职能,服务上海、服务长三角、服务全国的一项工作,为有关部门领导和管理人员,以及研究机构、大学和企业提供参考。

由于本项目是首次开展研究,而商务领域涉及面广、资料繁多、信息量大,虽然研究人员在探索中尽可能收集国内外最新资料,不少都是第一手文献,但仍难免有疏漏和不妥之处。为此,热忱欢迎各界提出宝贵意见和建议,以便我们不断改进和提高。

编者

2011年10月

Preface

The “Twelfth Five-Year” Plan period is the critical period for Shanghai to realize economic restructuring and a new round of industrial structure adjustment and upgrade strategy. Developing service industry is the strategic task for Shanghai's long-term development; accelerating the development of service industry is the inevitable requirement for Shanghai to be the international economic, financial, trade and shipping center, the important means to build the industrial structure which focuses on service economy and the inevitable choice to implement the scientific outlook on development and transform the mode of economic development.

Over the past decade, driven by economic globalization, networking and informatization, world business experienced significant changes, showing a number of new trends and new features. Business gradually has wider coverage area; management and service models and business innovation emerge one after another. After the financial crisis, along with the recovery of world economy, foreign trade has increased continuously in major economies, international trade is in a significant upward trend and world trade in goods and services continue to promote the growth of world economy. Developed countries still dominate international trade; the position of some emerging countries, especially China, India, Russia and Brazil has further enhanced in the international trading system. In 2010, driven by the timely large-scale economic stimulus plan introduced by major economies, the world economy quickly got out of the recession; the growth rate of the world's gross domestic product (GDP) increased to 3.9 from -2.1% in 2009, close to the best pre-crisis level. However, some crisis-hit developed economies such as the United States

still need long time to increase its total demand. In addition, sovereign debt in the euro zone and the problems existing in the banking system are more serious than previously expected; coupled with that the Japanese economy affected by the earthquake and tsunami and the uncertainty of international oil market because of the social and military upheaval in Middle East and North Africa, the growth rate of world economy slows down in 2011 than 2010 and the recovery process weakens. In terms of global trade volume, the recovery of trade in developed economies is slow and that in developing economies is notable. World Bank data show that from January to October, 2010, the annual growth of exports in high-income countries was 10.4%, while the growth rate reached 15.5% in developing countries. With the improved global economic environment, consumer and investor were confident, market demand increased and the price of food, metals, energy and other commodity began to rise. Commodity forward exchange and commodity market volume both increased. Since 2010, the increase of global foreign direct investment has been mainly driven by developing countries and transition economies; developing countries and transition economies attracted more than half of global FDI inflows for the first time and this trend would continue in the future. The overall scale of cross-border mergers and acquisitions enlarged, the scale of manufacturing sector mergers and acquisitions raised, mergers and acquisitions in service sector showed an integration trend. A series of trends showed that world business has become an important driving force for the recovery and development of the world economy.

Recently, the basic framework of the “Twelfth Five-Year modern service industry development plan” (hereafter refer as the Plan) has formed. The Plan stated that we should take promoting the development of service sector as the strategic focus for industrial structure optimization, deeply understand the importance of accelerating the development to the service sector to mode transformation and structure adjustment, adapt to new requirements of the upgrading and structural optimization of industry, promote the modernization of China’s service industry and create a new situation of the great development of service industry. The Plan determined two principle lines and eight basic directions. First is to vigorously develop production-oriented services, including financial service industry, modern logistics industry, high-tech service industry, business service industry, etc.; second is to standardize and upgrade life-oriented service, to develop business and trade service industry, family service industry, tourism and sports industry. Among them, modern logistics, business service industry, business and trade service industry will be the key directions for China’s business development.

Shanghai Municipal Commission of Commerce authorized Institute of Scientific and Technical Information of Shanghai to develop the “dynamic study of world business development”

and 2011 is the second year of this study. Abiding by “study abroad, combine China, focus on Shanghai” spirit and upholding the macro, forward-looking, novelty and target-oriented principles, the study started with international trade, investment cooperation, commercial circulation, policies and regulations, business model innovation and the development of business start gathering area; studied the overall development and characteristics of world business industry and the inspiration of overseas development to China. The research result is open to the public; it is one part for the government departments to change its functions to serve Shanghai, the Yangtze River Delta and the whole nation; it is also serves as the reference for leaders and managers, research institutions, universities and enterprises.

The project is researched and written for the first time. Businesses cover a wide range of information and data; although researchers collected the latest information at home and abroad as much as possible and many of them are first-hand documents, there are still some omissions and improprieties. To this end, we warmly welcome valuable comments and suggestions so that we can continuously make improvement.

Editor

October, 2011

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