
2012-2013

世界商务

发展动态

2012-2013 REPORT ON WORLD
COMMERCIAL DEVELOPMENT

上海市商务委员会 编著
上海科学技术情报研究所



上海科学技术文献出版社

F731
20136

2012—2013 世界商务发展动态

2012—2013 REPORT ON WORLD COMMERCIAL DEVELOPMENT

上海市商务委员会

上海科学技术情报研究所

编 著



上海科学技术文献出版社

图书在版编目 (CIP) 数据

2012—2013世界商务发展动态 / 上海市商务委员会, 上海科学技术情报研究所编著. —上海: 上海科学技术文献出版社, 2013.1

ISBN 978-7-5439-5767-1

I . ① 2… II . ① 上…② 上… III . ① 贸易发展—研究—世界—2012-2013 IV . ① F731

中国版本图书馆 CIP 数据核字 (2013) 第 028711 号

责任编辑: 忻静芬

2012—2013 世界商务发展动态

上海市商务委员会 编著
上海科学技术情报研究所

*

上海科学技术文献出版社出版发行
(上海市长乐路 746 号 邮政编码 200040)

全国新华书店经销

上海市北印刷 (集团) 有限公司印刷

*

开本 787×1092 1/16 印张 25.75 字数 487 000

2013 年 1 月第 1 版 2013 年 1 月第 1 次印刷

印数: 1-1 000

ISBN 978-7-5439-5767-1

定价: 150.00 元

<http://www.sstlp.com>

编审委员会

顾问：艾宝俊

主编：张新生

副主编：王新培 陈先进 顾 军 顾嘉禾 王新平
胡文君 吴星宝 俞建明 菅和平 余如鹤
桑 琦

执行主编：菅和平

组织编写：葛 菁 陈 晖 马俊生 蒋 静

研究编写成员：（按姓氏笔划顺序排列）

王静波 叶晓芊 宋 凯 张 耘 杜 渐
陈 晖 崔晓文 倪炜瑜 姚恒美 祝 毓
党倩娜 黄 吉 葛 菁

研究单位：上海科学技术情报研究所

前言

“十二五”时期是上海全面落实创新驱动、转型发展战略，加快“四个中心”建设的关键时期，提高商务活动的质量和能级、改善商务活动的环境对于上海经济发展的成功转型具有重要作用。为此，上海市商务委员会偕同上海科学技术情报研究所对世界商务发展动态进行持续跟踪研究，较为全面地梳理各商务领域发展的新特点和新趋势，为政府决策和行业发展提供参考。

当前，本轮金融危机的阴霾尚未消散，全球贸易复苏的步伐依然不稳健，但是也出现了一些令人欣慰的迹象，如，世界服务贸易稳步增长、国际投资也回到危机前的平均水平、电子商务特别是移动电子商务迅猛发展。其次，国际化城市作为全球商贸流通网络化的关键节点，逐渐向信息港、服务港、自由港的方向发展，成为综合资源配置与高端贸易的中心，其在全球经济中的带动影响力日益增强。另外，为了重振经济，全球各个经济体都采取了积极的应对方略，通过一系列的政策措施来改善内外商务环境，促进商务领域的就业水平，提高商务活动的活跃程度。

本书是“世界商务发展动态研究”第三期成果的结集，沿袭“研究国外、结合国内、针对上海”的原则，同时保持研究内容的延续性，主要包括重点商务领域的动态研究和热点问题的专题研究。

重点商务领域的动态研究主要涉及国际贸易的总体发展、传统商业领域(批发零售贸易)、大宗商品贸易、现代物流以及外国直接投资

的现状与动向，并且专门对发展中经济体的对外投资、主要国际贸易中心的发展动态以及黄金钻石贸易进行了更为深入细致的研究。此外，梳理了近年来美欧日等发达经济体在商务振兴计划与政策方面的动向，并对我国的商务促进政策提出相应的对策思考。

在专题研究方面，对商务服务业领域的税收政策进行了比较研究，重点关注电子商务、服务外包、物流等领域税收制度及政策，并初步考察了上海部分服务业增值税试点的效果。其次，针对蓬勃发展的电子商务，专门研究了该领域的相关专利问题，如电子商务的可专利性及其标准、电子商务的专利纠纷等。第三，以纽约曼哈顿、伦敦市和东京新宿为例研究了商务服务业在城市中心区域集聚的态势。

在研究过程中，作者尽可能收集并参考国内外的最新文献，希望能客观全面地反映世界商务的发展图景，但囿于作者的研究能力和学术水平，书中一定存在疏漏和讹谬之处，作者愿诚心就教于方家，以期在后续的研究中能够得以改善和提高。

编者

2012 年 12 月

Preface

Term of China's 12th Five-Year Plan for National Economic and Social Development (2011 – 2015) is a key period for Shanghai to fully implement its strategy of “Driven by Innovation & Developing via Transition” and to accelerate its construction of the “Four Centers”, so it is pivotal to successful transition of economy development in Shanghai by improving quality and capabilities of its business activities, and meanwhile, modifying environment for such activities. In this connection, Shanghai Municipal Commission of Commerce, together with Institute of Scientific and Technical Information of Shanghai, have continuously tracked and studied world business development status by, in the round, analyzing new features and trends across all business sectors in order to provide implications for government decision-making and industrial development.

Currently, the haze of the financial crisis hasn't disappeared and the global trade still hasn't revived, yet some encouraging signs have become visible. For instance, trade in services has begun to show steady expansion, international investment has already bounced back to its pre-crisis level, e-commerce especially mobile e-commerce grows rapidly. Secondly, as a pivotal node in global networks of commerce trade, the internationalized metropolis aims at developing into an information port, service port and free port ultimately. Coupled with this direction, the city becomes the center of comprehensive resource allocation and high-end trade gateways, which increasingly enhance its influence on the global economy. Moreover, to revitalize their economy, almost all economies around the world have developed proactive strategies by facilitating a series of policies and measures to improve the business climate at home and abroad, to promote the employment in the commerce sector and to elevate the actual

performance of business activities.

This is the third study collection of Annual Report on Commercial Development in the World, which follows with general principles of “study the overseas world, combined with domestic realities and targeted at Shanghai locality”, and meanwhile, keeps continuity of study contents with emphasis on trend study of major business fields and specialized research of hot issues.

The trend study of major business fields primarily involves international trade development, conventional commerce sectors (wholesale trade and retail trade), bulk stock trade, modern logistics and the current situation and tendencies of FDI, and meanwhile, specifically takes a deeper look at the outward FDI from developing economies, development trends of major international trade centers, and gold and diamond trading market. Besides, the study also reviews the commerce revitalization plans and strategies adopted by developed economies such as the United States, Europe, Japan, and thus presents possible countermeasures in pace with our strategies.

As to the specialized research of hot issues, comparative studies have been conducted in tax policies that impact business service sectors, with particular focus on tax system and policies of e-commerce, outsourcing services, logistics and etc., and thus preliminary steps are taken in reviewing results of the pilot VAT program among several service sectors in Shanghai. Secondly, the study exclusively discusses some related patent issues in the flourishing e-commerce sector, e. g. e-commerce patentability and related standards, and patent conflicts of e-commerce. Thirdly, the study illustrates the geographical concentration of business services in metropolitan areas with examples of Manhattan in New York City, City of London and Shinjuku in Tokyo.

Against this background, the research team has made the best of collecting the latest reference resources in the hope of establishing the full, objective landscape of commerce development throughout the world. However, constrained by our research capabilities and academic ranks, this publication is bound to have some oversights, errors and omissions. Hence, the research team looks forward to sharing and discussing our work and our findings, and sincerely welcomes your comments and suggestions.

Editors

December 2012

目 录

第一章 世界商务总体发展动态

- 一、世界商务发展动态综述 1
- 二、世界商务重点行业发展动态综述 11
- 三、世界商务发展政策动态综述 20

第二章 金融危机背景下国际贸易发展动态

- 一、国际贸易总体发展态势 27
- 二、主要地区国家贸易发展动态 32
- 三、后金融危机时期贸易保护主义发展态势 40
- 四、中国贸易发展现状及应对策略 43

第三章 国际贸易中心与国际航运中心发展动态

- 一、国际贸易中心与国际航运中心的基本特征 51
- 二、世界主要贸易中心与航运中心发展现状 54
- 三、上海国际贸易中心与航运中心建设思考 104

第四章 世界外国直接投资发展动态

- 一、世界外国直接投资总体发展态势 112
- 二、跨国公司外国直接投资战略 119
- 三、金融危机后美国外商投资政策的动向 126

第五章 发展中经济体国家对外投资比较研究

一、发展中经济体对外投资理论演进	137
二、发展中经济体对外投资总体发展态势	142
三、金砖四国对外投资总体发展态势	146
四、主要发展中经济体对外投资政策比较与借鉴	163

第六章 世界商业发展动态

一、世界商业总体发展态势	168
二、世界主要国家和地区的商业动态	171
三、商业热点业态发展态势	184
四、商业典型企业发展态势	198

第七章 世界现代物流业发展动态

一、世界现代物流业总体发展态势	208
二、主要国家发展现代物流业发展态势及政策举措	212
三、世界第三方物流发展态势	220
四、世界绿色物流发展态势及经验借鉴	228

第八章 大宗商品交易市场发展动态

一、世界大宗商品交易市场发展态势	237
二、世界大宗商品主要交易品种发展情况	243
三、主要国家大宗商品交易市场	252
四、主要国际商品指数的比较研究	260

第九章 世界商务服务业税收制度及政策发展动态

一、世界商务服务业税收制度及政策发展态势	268
二、重点商务服务业税收制度及政策发展态势	280
三、上海部分服务业“营改增”试点及“扩围”	289

第十章 金融危机以来主要经济体商务振兴计划及政策发展动态

一、美国商务振兴计划及政策发展动态	293
二、日本商务振兴计划及政策发展动态	298
三、欧洲商务振兴计划及政策发展动态	305
四、振兴我国商务发展的政策思考	308

第十一章 电子商务领域专利发展及其纠纷

一、电子商务领域专利发展的背景	315
二、部分发达国家电子商务可专利性演进历程	316
三、电子商务专利纠纷的现状	324
四、电子商务专利诉讼的手段	326
五、商业方法专利的诉讼案例和商业价值	327
六、电子商务领域专利发展的对策思考	329

第十二章 世界黄金钻石市场发展动态

一、世界黄金市场发展动态	331
二、世界钻石市场发展动态	346
三、黄金钻石业及其创意发展	355

第十三章 世界主要城区商务服务业集聚比较研究

一、商务服务业在中心城区集聚的识别及比较方法	363
二、世界主要城区商务服务业集聚发展态势	364
三、世界主要地区商务服务业集群特征	391

Contents

Chapter I Global Business Development Trends

- I. Overview of global business development 1
- II. Trends of major global business industries 11
- III. Summary of global business development strategies 20

Chapter II Development Trends of International Trade Against the Financial Crisis

- I. Overall trends of international trade 27
- II. Trends of trade in major economies 32
- III. Trends of trade protectionism in post-crisis period 40
- IV. Current situation and adapting strategies in trade in China 43

Chapter III Development Trends of International Trade Center and International Shipping Center

- I. Fundamental features of international trade center and international shipping center 51
- II. Current situation of global major trade and shipping centers 54
- III. On the establishment of Shanghai as an international trade and shipping center 104

Chapter IV Development Trends of Global FDI

I. Overall trends of global FDI	112
II. FDI strategies adopted by multinational corporations	119
III. Post-crisis tendencies of United States in FDI policies	126

Chapter V Comparative Study of Outward Investment from Developing Economies

I. Theoretical evolution of outward investment from developing economies	137
II. Overall trends of outward investment from developing economies	142
III. Overall Trends of outward investment from BRICs	146
IV. Comparison of outward investment policies among major developing economies	163

Chapter VI Development Trends of Global Commerce

I. Overall trends of global commerce	168
II. Trends of commerce in major economies	171
III. Trends of new forms of commercial sectors	184
IV. Trends of typical commercial enterprises	198

Chapter VII Development Trends of Global Modern Logistics

I. Overall trends of global modern logistics	208
II. Trends and policies of major countries in developing modern logistics	212
III. Global third-party logistics trends	220
IV. Trends and Lessons of global environmental logistics	228

Chapter VIII Development Trends of Global Bulk Stock Market

I. Overall trends of global bulk stock market	237
II. Categories of global bulk stock trading	243
III. Bulk stock market in major countries	252
IV. Comparative study of major international commodity index	260

Chapter IX Development Trends of Tax Policies within Global Business Services

I. Overall trends of tax policies within global business services 268

II. Overall trends of tax policies on key business sectors 280

III. Exploration into pilot VAT policies and expansion among several service sectors in Shanghai 289

Chapter X Commerce Revitalization Plans and Policies of Major Economies since crisis

I. Trends of Commerce Revitalization Plans and Policies in the United States 293

II. Trends of Commerce Revitalization Plans and Policies in Japan 298

III. Trends of Commerce Revitalization Plans and Policies in Europe 305

IV. On the government decision-making of revitalizing commercial development in China 308

Chapter XI Patent Development and Conflicts in E-commerce

I. Background of patent development in e-commerce 315

II. Evolving process of e-commerce patentability among typical developed countries 316

III. Current situation of patent conflicts in e-commerce 324

IV. Methods of patent litigation in e-commerce 326

V. Litigation cases and commercial values of business method patent 327

VI. On the countermeasures of patent development in e-commerce 329

Chapter XII Development Trends of Global Gold and Diamond Market

I. Trends of global gold market 331

II. Trends of global diamond market 346

III. Creative development of gold and diamond industry 355

Chapter XIII Comparative Study of Concentration of Business Services in Major Metropolitan Areas in the World

I. Identification and comparative methods of concentration of business services in metropolitan areas 363

II. Trends of concentration of business services in major metropolitan areas in the world 364

III. Research conclusions 391