

# 打造“一带一路”前行航标 ——新时代中国海外园区再出发

林拓 蔡永记 著

SETTING UP BEACONS FOR THE BELT AND ROAD INITIATIVE:  
READVANCE OF CHINESE OVERSEAS PARKS UNDER NEW ERA

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**摘要：**“一带一路”是构建人类命运共同体的重要先导，海外产业园区是“一带一路”的重要平台。为此，本研究全面追踪1995—2017年中国204个海外产业园区的发展进程，系统采集相关资料，并与世界产业园区发展作比较分析。研究发现，历经20多年的发展，在“一带一路”倡议下，中国海外产业园区正在实现全面转型提升，深刻体现了人类命运共同体构建的新动向；同时，剖析当前面临的不容忽视的新挑战与新问题，提出中国海外园区的新方略。报告共分为六章。

本研究首先探查海外园区初期艰难探索历程及其成长经验。此后的两轮拓进奠定了当前的总体格局，第一轮拓进主要是世界发展机遇与挑战下的中国作为，精心选择境外经贸合作区，为融入全球经济培育新力量；提供国内特定地域组团支撑，为开创机会空间培育新优势；推动园区出海意愿与东道国需求的契合，为区域合作培育新样板。第二轮拓进鲜明体现了“一带一路”倡议下全球范围的中国贡献，以“中国制造”促进国际产能合作，以“中国经验”助推东道国区域振兴，以“中国平台”形成双边战略对接等。（第一章）

在充分把握总体进程与格局的基础上，从三个关键方面深入展开探讨。

一是海外园区的功能转型，从经贸合作载体提升为战略合作平台。与发达国家的海外园区相似，中国海外园区也曾作为经贸合作载体，取得成效却也具有内在局限。“一带一路”倡议引领中国海外园区的功能转型，首脑外交、顶层设计、地方协同等共同推动战略合作平台的打造，当前海外园区功能转型的基本特征是，合作区域从被动适应转向主动抉择，合作格局从局域布点转向全局培育，合作关系从硬性协调转向柔性亲和。（第二章）

二是海外园区的布局转变，从“圈层扩散”提升为梯度拓展。中国海外园区起步阶段主要集中在亚洲、非洲、俄罗斯三

个地区，此后在第一轮拓进中除在俄罗斯从东向西略有扩散外，在亚非两地均产生了较为明显的“圈层扩散”：在亚洲逐渐从东南向西北扩散，在非洲则从西北向东南扩散。“一带一路”建设从根本上改变了原先的分立布局，形成沿“一带一路”由东而西，以东南亚、东北亚传统分布重心为第一梯度，南亚—中亚新兴分布重心为第二梯度，西亚北非—独联体—中东欧潜力分布重心为第三梯度的空间新格局。2013—2017年新办园区101个，相当于前19年总和，主要分布在“一带一路”沿线国家，其中位于中蒙俄走廊、中国—中南半岛走廊、中国—中亚—西亚走廊、孟中印缅走廊的102个，占现有园区总数的一半。拥有中国海外产业园区最多的国家依次是俄罗斯（35个）、柬埔寨（15个）、印度尼西亚（13个）、越南（7个），全部是“一带一路”沿线国家，而且主要集中于东北亚、东南亚两翼。（第三章）

三是海外园区的模式转换，从嵌入带动提升为集群联动。中国海外园区具有构建地域发展共同体的天然“基因”，早期多主体参与开发、多产业混合经营的独特“嵌入”带动模式，背后有路径依赖和关系认同的内在联结基础，而中华传统文化处事方式又为之增添了内生基质。随着“一带一路”建设的推进，海外园区发展模式提升到集群联动的更高层次，呈现出运营企业品牌引领、开发主体新型协作、旗舰园区衍生设置、专业园区高端联动等一系列新动向，实现了从“外来人”到“自己人”、从“授人以鱼”到“授之以渔”、从“两难选择”到“两全其美”的重大转变，这不仅来自于多方面主体和多渠道资源的共同支持，更来自于园区与当地的发展合作、文化交融、利益共赢，逐步体现出构建新型发展共同体的深层走向。（第四章）

然而，不容忽视的是，中国海外产业园区正面临着新挑战和新问题：从国内方面看，园区过热苗头不容忽视，政策红利

效应亟待释放，认识理念误区尤须克服；从东道国方面看，主要表现为机遇与风险权衡的纠结，合作与竞争抉择的窘迫，园区与当地磨合的难局；从园区自身方面看，更复杂情形考验园区调适能力，更艰难处境考验园区配置能力，更高端竞争考验园区战略能力。（第五章）

为此，本研究提出基于新型共同体构建的新时代海外园区发展方略。一是顶层统筹方略，全面整合集成政策法规，深度创新宏观管理体制；二是布局优化方略，培育当代“丝路驿站”，打造支点型园区组群，构建“两横三纵”廊道；三是多维协调方略，加强跨国政策沟通，升级投资促进机制，推广三级联动共治；四是“海外护航”方略，扩容多元化的资金投入，畅通多渠道的信息共享，凝聚多方面的合作力量；五是根植融合方略，全面夯实产业根植之基，有效探寻产城融合之路，积极践行人本发展之道。（第六章）

**关键词：**海外产业园区；“一带一路”；人类命运共同体；区域发展

**Abstract:** The “Belt and Road Initiative” is an important precursor to build a community of human destiny. The overseas industrial parks constitute an important platform for the “Belt and Road Initiative”. Therefore, this study comprehensively tracks the development process of 204 overseas industrial parks in our country from 1995 to 2017, collecting the relevant data systematically and making a comparative analysis with the development of the world industrial parks. The study finds that after 20 years of development the overseas industrial parks in our country are undergoing an overall transformation, which reveals the new direction of constituting the community of human destiny. Meanwhile it analyzes the new challenges and issues that can not be ignored nowadays and puts forward the new strategy of overseas industrial parks in China. The report is divided into six chapters.

This study firstly explores the initial hard exploration of overseas industrial parks and their growth experience. Since then, the two rounds of further development have laid the current overall pattern. The first round of further development features in China’s endeavors in the opportunities and challenges of development in the world. It carefully selects the foreign economic and trade cooperation zones and fosters new forces for its integration into the global economy. It also provides domestic specific geographical grouping support for creating new advantages to create the opportunity space. It promotes the integration of the parks’ wishes of going overseas and the needs of the host country, fostering a new model for regional cooperation. The second round of further development clearly reflects China’s global contribution under the “Belt and Road Initiative”. It promotes the international production capacity cooperation based on “Made in China”. It enhances the rejuvenation of the host country region with “China’s experience”. And it forms a bilateral strategic partnership with “China’s Platform”.

### (Chapter One)

On the basis of fully grasping the overall process and pattern, we conducted in-depth discussions from three key aspects.

Firstly, the functional transformation of overseas industrial parks has been promoted from a carrier of economic and trade cooperation to a strategic cooperation platform. Similar to overseas industrial parks in developed countries, our overseas industrial parks have also served as carriers of economic and trade cooperation and have their own inherent limitations. The “Belt and Road Initiative” has led the transformation of our overseas industrial parks. The national leader diplomacy, top-level design and local coordination jointly promote the establishment of a strategic cooperation platform. At present, the basic feature of the functional transformation of overseas industrial parks is that the cooperative regions shifting from passive adaptation to active choice, the cooperation pattern shifting from local distribution to global cultivation, and the cooperation shifting from hard coordination to flexible affinity.

### (Chapter Two)

Secondly, the layout change of the overseas industrial parks has been transformed from the “circle proliferation” to the gradient expansion. The initial stage of overseas industrial parks in our country mainly concentrated in three regions of Asia, Africa and Russia. Since then there was a clear “circle proliferation” in both the Asian and African regions (It gradually spreads from southeast to northwest in Asia and from northwest to southeast in Africa), however Russia experienced an expansion from east to west in the first round of further development. The “Belt and Road Initiative” has fundamentally changed the original discrete layout. A new spatial gradient layout has been formed from the east to west along the “Belt and Road” route. The first gradient focuses on the traditional distribution centers of Southeast Asia and North-



east Asia. The second gradient centers on the emerging South Asia-Central Asia distribution. The third gradient is the potential West Asia and North Africa-Commonwealth of Independent States-Central and Eastern Europe distribution. There are 101 newly-started industrial parks from 2013 to 2017, equivalent to the sum in the previous 19 years, mainly distributed in the countries along the “Belt and Road” route, including 102 located in the China-Mongolia-Russia Corridor, the China-Indochina Peninsula Corridor, the China-Central Asia-West Asia Corridor, Bangladesh-China-India-Myanmar Corridor which account for half of the total. The countries with the largest number of overseas industrial parks from China are Russia (35), Cambodia (15), Indonesia (13) and Vietnam (7), all of which are along the “Belt and Road” route, and mainly concentrate in the two wings of Northeast Asia and Southeast Asia. (Chapter Three)

Thirdly, the paradigm shift in the overseas industrial park has been promoted by the embedding driving to a cluster linkage. The overseas industrial parks in our country have the unique natural “gene” for building a community of regional development. The early unique “embedding” driving paradigm with the multi-agent participation and multi-industry mixed management has an inherent connection basis of path dependence and relationship identification while the traditional Chinese culture helps add an endogenous foundation in it. With the development of “Belt and Road Initiative”, the development model of overseas industrial parks has been upgraded to a higher level of cluster linkage, showing a series of new trends such as brand leadership of the operating enterprises, new cooperation of development entities, derivative settings of flagship parks and high-end linkage of specialized parks. This has brought a major shift from “alien people” to “own people”, from “giving the fish” to “giving how to fish” and from “dilemma choice”

to “both win”. The situation not only stems from the common support of multiple entities and channel resources, but also from the cooperation with local community, cultural integration and win-win benefits. It gradually embodies the deep trend of building a new type of shared development community. (Chapter Four)

However, it can not be ignored that our overseas industrial parks are facing new challenges and problems. From a domestic perspective, the overheating signs of the parks can not be ignored. The policy dividends need to be released and the misunderstandings of concepts must be overcome. From the perspective of the host country, it is haunted by the tangled trade-off between opportunities and risks, the embarrassment of cooperation and competition, the difficult situation of the industrial parks and the local community. From the perspective of the park itself, more complicated situations are there to test the park's ability to adapt. More difficult surroundings are there to test the park's allocation ability and higher competitions to test Park's strategic capabilities. (Chapter Five)

To this end, this study proposes a strategy for the development of overseas industrial parks based on the new community building in the new era. Firstly, the top-level strategy of overall planning needs the full integration of policies and regulations, in-depth innovation of macro-management system. Secondly, layout optimization strategy needs to cultivate the contemporary “Silk Road Inn”, to create a fulcrum-type park groups and to build a “two horizontal and three vertical” corridor. Thirdly, a multidimensional coordination strategy needs to strengthen the cross-border policy communication, to upgrade the investment promotion mechanism and to publicize the joint management of the three levels. Fourthly, the strategy of “overseas escorting” needs to expand the diversified capital investment, to facilitate the multi-channel infor-

mation sharing and to unite the various cooperation forces. Fifthly, the rooting strategy of integration needs to comprehensively consolidate the foundations of industries, to effectively explore the road of industrial integration with urban development and to actively pursue the benefits of human beings. (Chapter Six)

**Key words:** China's Overseas Industrial Parks; Belt and Road Initiative; a community of shared future for mankind; Regional Development

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## 引 言

正如习近平总书记明确指出，“提出‘一带一路’倡议，就是要实践人类命运共同体理念”。的确，全球迎来了构建人类命运共同体的新时代！

200 多个国家、70 多亿人民共同生活在一个蓝色星球上，但“世界怎么了、我们怎么办”？人们试图告别动荡和冲突、低迷与倒退，建设持久和平、普遍安全、共同繁荣、开放包容、清洁美丽的世界，这一声黄钟大吕由中国敲响，正在当今世界范围内激荡回音，引发共鸣，凝聚共识。

中国不曾忘记，从积贫积弱到世界经济第二，这个伟大转变不是一枝独秀，而是融入世界进程，汇集了四面八方的力量；中国更不会忘记，“合则兴，分则衰”，古今中外概莫能外。事实上，中国没有满足于全球第一大货物贸易大国、第二大对外投资国，对世界经济增长平均贡献率超过 30% 的成绩，而是更多地看到那些与自己拥有共同历史遭遇、共同发展任务、共同战略利益的国家，看到沿线各国共创丝绸之路的辉煌历史，希望通过共商、共建、共享，将“一带一路”建成一条和平之路、繁荣之路、开放之路、创新之路、文明之路。“坚持推动构建人类命运共同体”被列为新时代中国特色社会主义发展的基本方略之一，共建“一带一路”正是汲取世界文明精髓、充满中华文明智慧的中国方案，如今已经深入人心，中方与 80 多个国家和组织已签署合作协议，同 30 多个国家开展了机制化产能合



作，中国企业对相关国家投资累计超过 500 亿美元。

积跬步以致千里，构建人类命运共同体需要更务实、更有效的平台去推动，中国海外产业园区正是其中的典范之一，党和国家领导人高度重视。党和国家领导人高度重视，2013 年习近平主席在访问印度尼西亚提出建设“21 世纪海上丝绸之路”倡议时，就见证了青山综合产业园区协议的签署；此后在与多国首脑会见商谈中，都把支持产业园区建设与促进战略对接、重大项目、贸易投资、产能合作放在同等重要的位置，例如，提出要“把中白工业园建成‘丝绸之路经济带’标志性工程”，“蓬勃发展的西哈努克港经济特区是中柬务实合作的样板，要在‘一带一路’构架下运营好柬埔寨西港特区”，“打造钦州、关丹产业园区成为中马合作旗舰项目和中国—东盟合作示范区”，“加快研究中巴走廊沿线产业园区建设规划”，“积极参与印尼沿海经济特区建设”等。海外产业园区不仅在共建“一带一路”中发挥重要作用，而且充分体现了人类命运共同体的深深刻意涵。

本研究追踪了 1995—2017 年中国企业在海外创办的产业园区 204 个，发现 20 多年发展的历程呈现出两轮拓进，前一轮拓进反映了机遇与挑战下的中国作为，后一轮拓进展现的正是“一带一路”倡议下的中国贡献，发生了重大的功能转型、布局转变和模式转化，正朝着构建人类命运共同体的方向不断迈进。

实际上，中国海外产业园区具有构建共同体的天然“基因”。一方面，在海外园区创办之初，因开发企业出海不久、实力不强、经验不足，大多倾向于借原先国内熟悉行业以打开局面，同时主要依靠企业关系引进国内关联配套企业，降低成本，增强抵御风险的能力，带有浓厚的中国式“关系”色彩，而国内悠久历史发展形成的地缘关系发挥着重要的认同与联结作用，这一特征可以追溯到早期海外移民聚居的“工业唐人街”模式，具有基于地缘关系促发构建共同体的内在基础。另一方面，中国海外产业园区毕竟在中华文化长期浸润中成长，并不像某些