



跨太平洋伙伴关系协定 (TPP) 与中国: 贸易与投资

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**Trans-Pacific Partnership Agreement
(TPP) and China: Trade and FDI**

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内 容 摘 要

跨太平洋伙伴关系协定（The Trans-Pacific Partnership Agreement，简称 TPP）是由美国主导，涵盖亚太地区主要经济体的区域贸易协定，成员包括澳大利亚、文莱、加拿大、智利、日本、马来西亚、墨西哥、新西兰、秘鲁、新加坡、美国和越南。目前，TPP 成员的国内生产总值（Gross Domestic Product，简称 GDP）占全球的近 40%，贸易量约占世界三分之一，已经超越欧盟，成为全球最大的贸易集团。在美国的高调加入与极力推动下，TPP 的迅速发展引发了亚太地区乃至全世界的广泛关注。在区域经济联系越来越紧密的情况下，TPP 很可能成为未来区域贸易协定的代表，使亚太地区的贸易投资自由化面临新的突破。当前复杂的亚太区域合作形式，对中国来说，既是机遇也是挑战，为此，中国应该密切关注 TPP 发展进程，对其经济影响进行深入研究，以便在未来世界区域一体化进程中取得主动。

本书以 TPP 对中国的经济影响为研究对象，以区域经济一体化理论为基础，针对 TPP 的主要特征，对目前中国与 TPP 成员的经济关系进行了深入分析，从货物贸易、服务贸易及投资三个领域展开了实证研究，在总结 TPP 与中国现行贸易机制及吸引外国直接投资（Foreign Direct Investment，简称 FDI）关系的基础上，就 TPP 成立后可能对中国经济产生的影响进行了模拟，并对中国如何应对 TPP 提出了可行的政策建议。

本书的理论价值在于，首先，有助于传统区域经济一体化理论在新形势、新环境中的应用与拓展。其次，从组织外部成员的视角来研究区域贸易协定的经济影响，有助于为区域一体化组织的研究提供新的思路。再次，本书从中国的角度研究了新兴区域一体化组织 TPP 的发展，为 TPP 建立后与之经济合作、贸易往来，及其成员国的产业结构调整、国民经济发展等诸多方面的研究做好准备。最后，本书为区域经济一体化对发展中国家和地区经济影响的研究提供了实证检验。

本书的现实意义在于，第一，有利于深入了解未来国际贸易规则的发

展趋势。第二, 有利于正确认识与评估未来 TPP 带给中国经济贸易的影响, 加快产业结构的改造与升级。第三, 有利于科学制定应对 TPP 的策略。第四, 有利于中国更好地参与亚太区域经济一体化建设, 提高国际地位, 扩大在世界经济中的影响力。

根据研究的目的与性质, 本书以国际区域经济一体化理论为基础, 在理论分析的基础上展开实证研究, 主要采取了定性 with 定量分析相结合的方法, 就 TPP 对中国的经济影响进行了深入探讨。首先, 本书采用理论分析的方法, 在总结国内外学者对 TPP 的研究方向、主要的观点及存在问题的基础上, 提出了本书的研究问题, 从区域一体化理论角度分析了 TPP 的经济效应, 为本研究的展开提供理论支持。其次, 采用定性的分析方法, 重点研究了 TPP 的发展历程及主要特点, 旨在说明 TPP 的发展对中国经济可能产生的影响, 为后面的实证研究奠定基础。再次, 本书采用统计分析的方法, 就 TPP 与中国贸易及投资的现状进行了研究, 通过对大量数据资料的分析表明, TPP 成员国与中国存在紧密的经济联系, 将在中国未来经济发展及区域一体化建设中扮演重要角色。最后, 本书采用引力模型实证分析方法, 就 TPP 与中国的贸易及投资关系进行研究。在贸易影响分析中, 本书构建了用以观测贸易效应的指标, 通过将该指标引入计量模型, 分析了 TPP 与中国的贸易机制及影响因素; 在投资影响分析中, 通过在计量模型中引入表征“TPP 投资效应”的变量, 研究了 TPP 与中国在吸引 FDI 方面的关系, 以判断未来 TPP 是否将与中国在吸引 FDI 方面形成竞争; 基于此, 本书采用一般均衡分析方法, 模拟了 TPP 的经济效应, 全面、客观地评价了 TPP 给中国宏观经济及各产业部门带来的影响。

本书的主要创新点有:

第一, 以往对 TPP 经济影响的研究多以总体效应为主, 缺乏针对具体经济领域的分析。本书抓住 TPP 主要涉及贸易和投资相关政策的特点, 从货物贸易、服务贸易、投资三个角度入手, 在统计分析的基础上, 就 TPP 对中国的经济影响进行了深入研究。

第二, 以往对于 TPP 与中国贸易状况的分析多采取定性分析的方法, 缺乏定量研究, 本书通过构建贸易转移指数, 量化考察了中国与 TPP 成员之间贸易结构的匹配程度, 对中国与 TPP 的贸易潜力进行了定量分析。

第三, 以往对于区域经济一体化组织贸易效应的研究多采取在引力模

型中引入虚拟变量的方式实现，本书通过构建含有“贸易转移”指数的引力模型，来考察影响 TPP 成员与中国货物及服务贸易的主要因素，既避免了虚拟变量带来的模型内生性问题，又客观地反映了 TPP 成员与中国的贸易关系。

第四，以往鲜有就 TPP 与中国投资是否存在竞争关系进行实证分析的研究，本书通过构建含有“TPP 影响因素”的计量模型，研究了 TPP 与中国在吸引 FDI 方面是否存在竞争关系，说明了未来 TPP 对中国吸引外资的潜在影响。

第五，本书采用事前分析方法，对 TPP 成立后的经济影响及中国区域经济一体化的其他路径选择的收益及损失做出了预测。本书利用全球贸易分析模型（Global Trade Analysis Project，简称 GTAP）及最新版数据库，就 TPP 对中国宏观经济及各产品部门贸易平衡的影响进行了模拟，并对比了中国加入 TPP 与区域全面经济伙伴关系（Regional Comprehensive Economic Partnership，简称 RCEP）的收益及损失，基于此为中国应对 TPP 及区域经济一体化建设提供了可行的建议。

本书主要的研究结论为：

首先，从 TPP 对中国货物贸易的影响分析，短期内，基于中国货物贸易出口大国的地位，TPP 对中国货物贸易的影响不显著；但长期来看，由于中国与 TPP 成员出口结构相似引起的竞争可能加剧，中国对 TPP 成员的出口将呈现增速放缓的情况。第一，在贸易关系方面，统计分析结果显示，TPP 成员与中国货物贸易的关系非常紧密，相关国家在中国货物贸易中的地位不容忽视。第二，在贸易结构方面，中国与 TPP 整体贸易匹配程度较高，表明中国与这些国家签署自贸协定、发生贸易转移的可能性较大，同时也说明了，如果中国被排除在主要贸易伙伴国之外，由于出口结构的趋同，未来货物贸易将受到较大的竞争压力。第三，在贸易机制方面，贸易转移效应为主要影响因素。中国与 TPP 成员的贸易建立在进口国需求的基础之上，而出口结构趋同引起竞争增加，出口替代弹性指数较高，也从侧面证明了贸易创造效应对中国出口表现并不明显，中国对于 TPP 成员，尤其是发达成员同质产品的替代能力不足，TPP 的成立对中国的出口将会造成不利影响。

其次，从 TPP 对中国服务贸易的影响分析，TPP 成员与中国出口结构

的相似性造成竞争的影响远大于对中国服务贸易需求增加的影响，而中国服务贸易竞争力整体水平较低，未来，如果 TPP 设置了高端市场准入门槛，会使得中国服务贸易逆差继续扩大，其负面影响远远超过货物贸易。第一，在贸易关系方面，虽然中国与 TPP 成员的服务整体贸易规模不断扩大，但中国与 TPP 主要经济体的服务贸易呈逆差状况，而且逆差有逐年扩大趋势。第二，在国际竞争力方面，统计分析的结果显示，与 TPP 主要经济体相比，中国服务贸易无论是从综合实力上，还是从具体行业上都不具备较强的国际竞争力，TPP 的成立将给中国服务业发展带来巨大挑战。第三，在贸易匹配程度方面，虽然中国与 TPP 发达经济体具有良好的服务贸易基础，但由于中国服务贸易整体竞争力相对较差，完全开放服务贸易市场将对中国整体服务业产生较大的冲击。第四，在贸易机制和影响因素方面，中国对 TPP 的服务贸易出口主要建立在贸易转移基础上，由 TPP 成员需求引起。在对中国服务出口贸易的影响因素中，与 TPP 成员出口结构的相似性的影响远大于 TPP 成员对中国服务贸易需求对中国整体服务贸易出口的影响，因此，中国未来应以增强服务贸易的国际竞争能力为主要目标。

再次，从争夺全球价值链的角度，分析 TPP 对中国吸引 FDI 的影响。目前 TPP 成员与中国在吸引 FDI 方面存在竞争，以此实证结果推论，若 TPP 达成协议，将对中国的 FDI 引资产生较大的负面影响。第一，比较中国及 TPP 成员吸引 FDI 现状，从 FDI 来源地来看，发达经济体均为 TPP 及中国未来吸引 FDI 的重要来源；从引资行业来看，中国服务业吸引外资增长较快，但与 TPP 主要经济体相比，中国服务业利用外资能力尚待提高。第二，中国与 TPP 成员吸引 FDI 能力比较分析表明，中国在吸引外商投资方面并不具备明显优势，未来利用外资能力有待进一步加强。第三，基于目前的状况，TPP 成员对中国吸引 FDI 已经产生竞争，未来若 TPP 达成协议，对中国吸引 FDI 产生的负面影响必将扩大。因此，未来对于 TPP 协定达成后所产生的投资转移效应，中国应予以充分重视。

最后，利用 GTAP 对 TPP 经济效应的一般均衡分析表明，TPP 成立对中国经济将产生一定影响，而推动实现 RCEP 不失为应对 TPP、参与亚太区域一体化进程的有效选择。第一，TPP 协议一旦达成，将会对中国的宏观经济及对外贸易产生负面影响，无论 GDP 还是福利均有下降。第二，如

果选择加入 TPP，对中国宏观经济会产生有利影响，但同时，对弱势行业将产生较大的负面影响。中国如果选择加入 TPP，应该按照自己的步调，有计划、有步骤地开放弱势产业，同时，调整产业结构，扩大高附加值产品的出口，提高产品的国际竞争能力。第三，推动实现 RCEP 为应对 TPP 提供了一条可行的路径。虽然实现 RCEP 比加入 TPP 的宏观经济收益略小，但是，就行业影响来看，在扩大中国优势行业出口的同时，对相对劣势的产业所产生的负面影响较小。第四，促进亚太区域经济一体化进程，对区域经济及贸易规模均有促进作用。

针对 TPP 的主要特点及影响，本书从短期、中期、长期几个方面对中国应对 TPP 提出了可行的建议。在短期内，将重点放在发展国内经济、推动产业转型升级、提高产品国际竞争能力上，同时关注 TPP 谈判的进展，尝试与美国展开对话，为未来加入 TPP 谈判做好准备。中期内，在深化产业结构优化与升级的同时，中国应加强与亚洲地区国家的合作，加快与日、韩等国的自由贸易区谈判进程，以亚洲“东盟+”模式为基础，推动实现以中国为主导的亚洲区域一体化。从长期来看，中国加入类似 TPP 高标准贸易协定是大势所趋。虽然 TPP 严格的准入条款引起了一些争议，但不可否认其代表了未来国际贸易规则的发展趋势。更重要的是，TPP 所倡导的多数原则和标准与中国进一步改革开放、打造中国经济升级版的发展方向一致。在未来，中国应该适时启动 TPP 谈判，并加快以中国为主导的自贸区建设，赢得主动权。

关键词：跨太平洋伙伴关系协定（TPP）；货物贸易；服务贸易；外商直接投资（FDI）；全球贸易分析模型（GTAP）

Abstract

Trans-Pacific Partnership Agreement (TPP) is a regional trade agreement covers the major economies in Asia-Pacific region, which includes Australia, Brunei, Canada, Chile, Japan, Malaysia, Mexico, New Zealand, Peru, Singapore, the United States and Vietnam. Its GDP accounts for about 40% and the trade volume is estimated about one-third of the world, which has surpassed the EU and became the largest trade group. By the high profile joining and utmost propelling from the US, the rapid development of the TPP has triggered a widespread concern in the Asia-Pacific region and whole world. Since the regional economic tend to be increasingly closer, TPP is likely to become a representative of the future regional trade agreements, which will make the trade and investment liberalization of the Asia-Pacific region faces new breakthroughs. The current complex cooperation forms in the Asia Pacific region, is both an opportunity and a challenge for China. Therefore, China should be concerned about the TPP negotiation progress, and run an extended analysis and research on the TPP, so as to take initiative in the future global regional integration revolution.

This book aims to the study of the economic effects of TPP on China, bases on the economic effects of regional economic integration theory, directs at the main features of TPP, analyses the current economic relations between China and member countries of the TPP, and makes empirical studies on three aspect: goods trade, service trade and FDI. It bases on the summary of China's current trade mechanism and its relation with FDI attracting, makes a an analysis to the TPP's economic effects to China with CGE model. Furthermore, it contrasts the benefits and losses on China's participation in other regional economic integration paths. Finally, bases on the findings, this book proposes some feasible propositions about China's coping strategy towards TPP.

From the theoretical aspects, firstly, this study helps the expansion and deepen of the traditional theory of regional economic integration. Secondly, from the perspective of an external member, the study will help to provide new perspectives and ideas for the study of regional integration organizations. Thirdly, this study concerns an emerging regional integration organization—TPP's development, from the perspective of China, makes some basic preparations for the future study of TPP. Finally, this book will provide some empirical experience for the impact of regional economic integration of developing countries.

The practical significance of this study is, first of all, in favor of an in-depth understanding of the development trend of the future international trade rules. Second, it will facilitate a proper understanding and evaluation of the relationship between China and the TPP. Third, it will help to make a correct understanding of TPP's influence on China, so as to develop scientific strategies to deal with TPP. Fourth, it is conducive for China to a better participation in the Asia-Pacific regional economic integration; and will enhance China's international status, and expand its influence in the global economy.

Under the character and purpose of the study, bases on the theory of regional economic integration in the international economics, this book mainly adopts the qualitative and quantitative analysis to discuss the TPP's impact on Chinese economy. Firstly, this paper proposes the research questions by the use of theoretical analysis method, bases on the summary of previous studies of domestic and overseas scholars on the research direction, the main point of views and the existing problems of TPP. Secondly, this book uses qualitative analysis method, focusing on the development process and the main features of TPP, aims to explain the impact of TPP and the future challenges it may bring to China. Thirdly, this book uses the method of statistical analysis, focuses on the trade and FDI relationship between TPP and China, through the inductive proof from a large number of data, it shows that TPP will play an important role in the future economy development of China. Finally, this book uses gravity model to analysis the trade and investment relation between TPP and China. Based on the

result of empirical analysis, the general equilibrium methods are used to simulate the economic effects of TPP on China's, macroeconomic and other industrial sectors.

Contributions of this book are:

First, previous studies on TPP's economic impact is more about the overall effect, it lacks analysis on specific economy sectors. This article captures the feature that TPP mainly involves in services and investment-related policy, starting from the perspective of trade in goods; trade in services, investment impact, on the basis of statistical analysis, makes in-depth research on TPP's impact on China's economy.

Second, in previous studies, analyses about trade status between TPP and China usually use qualitative analysis method, and they are lack of quantitative research, through the construction of trade diversion index, this book quantifies and analyzes the matching degree of the trade structure between China and the TPP member countries, makes quantitative analysis about the trade potential of China and TPP.

Third, in previous studies, analyses on trade effects of regional economic integration organizations usually carry out by introducing dummy variables into gravity models, through the construction of gravity model index that contains "trade diversion", this book analyzes the main factors of services trade of TPP countries and China. It avoids the endogenous of the model that dummy variables might bring, also objectively reflects the TPP member countries' trade relations with China.

Fourth, in the past few empirical studies were made on existence of investment competition between China and TPP, through the construction of econometric model that contains "TTP's influencing factors", this book studies the existence of competition between China and TPP on FDI, so as to indicate the TPP's potential impact of attracting foreign investment to China in the future.

Fifth, this study adopts pre-analysis method, makes predictions to the impact of the establishment of TPP, and the benefits and losses of China's other regional economic integration path selection. This book uses the global trade

analysis project (GTAP) and the latest version of database, makes a simulation on TPP's impact of China's macroeconomic and the trade balance of products sectors, and compares the benefits and losses of China's joint of TPP and RCEP, provides practical advice bases on this proposition for China's coping with TPP and regional economic integration.

The results of the research as follows:

Firstly, for the analysis of TPP's effects towards China's trade in goods, due to China's over-reliance goods trade exports to TPP countries with its domestic demand for imports, while the similar export structure makes the trade creation effect was not significant. In the long run, TPP will have a negative influence on the export of Chinese goods, and due to the increasing competition, China's export growth will be slow. Firstly, in terms of trade relations, statistical analysis shows that the relationship between TPP and China's trades in goods is very close, TPP's position in China's goods trade cannot be ignored. Secondly, in terms of the trade structure, the overall trade matching degree between China and the TPP is relatively high. It indicates that since the signing of FTA between China and these countries, there is a greater possibility of trade diversion, but it also shows that if China is excluded from the main trading partners, due to the convergence of the export structure, the future goods trade will be subject to greater competitive pressures. Thirdly, in terms of trade mechanisms, the main factors affecting the TPP trade with China is the trade diversion effect, trades between China and the TPP countries are based on the requirements of the importing country, but because of the national export structure convergence between China and TPP, the export elasticity of substitution index is relatively high. This demonstrates that the performance of trade creation effect to China's export is not obvious; China still lacks the substituting capacity for homogeneous products towards TPP countries, and particularly developed countries. Bases on the theory of trade effect of regional economic integration, the establishment of TPP will be an adversely impact to China's export trade.

Secondly, for the aspect of TPP's effects on China's service trade, due to the weakness of China's overall service trade competitiveness, the impact of

competition caused by the similarity of the current export structure between TPP countries and Chinese is far greater than the impact of increased demand on Chinese service trade. In the future, if the TPP set a high-end market access threshold, it would expand China's service trade deficit, and its negative impact would be far beyond goods trade. First, in terms of trade relations, although the overall services trade scale between China and the TPP countries continue to expand, but the services trade between China and the TPP's major economies showed a situation of deficit, and the deficit has expanded year by year. Second, in terms of international competitiveness, statistical analysis shows that, compare with TPP's major economies, China's service trade either from the overall strength, or from the specific industries do not have a strong international competitiveness. Based on the current level of overall competitiveness of China's service trade, the establishment of the TPP will bring enormous challenges towards the development of China's service industry. Third, in terms of the trade matching degree, China and the developed TPP economies have a good foundation in service trade, but due to the overall weak competitiveness of China's service trade, the full liberalization of the services market, will have a greater impact on China's service trade. Fourth, in terms of the trade mechanisms and influence factors, China's service trade exports to TPP is mainly built on the basis of trade diversion, which is caused by the needs of TPP countries. Among the factors that influence China's export trade in services, the impact of the similarity of export structure with TPP countries is far greater than the impact of China's service trade demand for China's serviceexport; therefore, China should enhance the international competitiveness of trade in services in the future.

Thirdly, from the perspective of global value chains completion, analyze the TPP's impact on China's inward FDI, bases on the empirical results, there is a competition between TPP countries and China in FDI. Thus, if the TPP comes to an agreement, there will be a negative impact on China's inward FDI. First, China's inward FDI situation compares to the TPP member countries: from FDI source countries, the developed economies are important sources of TPP and China for future FDI; from major investment sectors, the development of FDI

attraction in service industry is faster, but compares with TPP major economies, Chinese service industry still need to improve its ability to use foreign capital. Second, comparative analysis between China's and the TPP countries' capacity of inward FDI shows that, in terms of attracting foreign investment, China does not have an obvious advantage, the ability to use foreign capital need to be strengthened in the further. Third, based on the current situation, the competition in FDI attraction has begun, if the TPP came to an agreement in the future, there would be an expanded negative impact on China's inward FDI. Therefore, China should pay great attention to the effect of investment transfer in the future when the TPP reaches to an agreement.

Finally, the general equilibrium analysis which uses the method of GTAP on TTP's economic effects shows that, the establishment of TPP will have an impact on the Chinese economy. Although this effect is not enormous, but as the reflection of its dynamic effects, the future development of the TPP should attract the attention of China, and the promotion of RCEP can be regarded as a coping method to TPP, and a valid path selection to the participation of the Asia-Pacific regional integration process. First, once the TPP reaches to an agreement, there will be some negative impact on China's macro-economy, China should be concerned about the TPP negotiation process, and make early preparations. Second, if China choose to join TPP, there will be a favorable impact on China's macro economy, but at the same time, the vulnerable industry will face a greater negative impact. China If joint TPP, China should follow its own paces, systematically opened the vulnerable industries, meanwhile adjusted the industrial structure, expanded the export of high value-added products, improved the international competitiveness of the products. Third, promoting the realization of RCEP can provide a viable response to TPP path selection. Although the macroeconomic benefits of the achievement of RCEP is smaller than the joining of TPP, but from the perspective of industrial impact, during the expanding export of Chinese advantaged industries, the negative effects of relatively disadvantaged industries will be smaller. Fourth, the expansion of the Asia-Pacific regional integration process, and the achievement of the overall regional economic integration, will

have a promoting effect on regional economy and trade scales.

For the main characteristics and the impact of TPP, from the short, medium and long-term aspects, this study presents some practical recommendations to China's coping method towards TPP. In the short term, China should focus on the development of domestic economy, promote industrial restructuring and upgrading, improve the international competitiveness of products, meanwhile pay proper attention to the progress of TPP negotiations, make dialogues with the United States, and prepare negotiations for the future joint of TPP. In the medium term, while deepening the industrial structure optimization and upgrading, China should strengthen the cooperation with Asian countries and accelerate FTA negotiations with Japan, South Korea and other countries, on the basis of Asian "ASEAN + 3" model, promote the realization of the leader in Asian regional integration. In the long term, it is an irresistible trend for China to join the TPP or other high standard trade agreements. Although TPP's strict access terms caused some controversy, but it is not deniable that it represents the development trend of the future international trade rules. More importantly, the principles and standards that TPP advocated are in accordance with the China's development of further reform and opening up policy, and upgraded version of China's economy. China should start TPP negotiations at the right time, so as to accelerate China's leading role in free trade area construction, and win the initiative in the future.

Keywords: The Trans-Pacific Partnership Agreement (TPP); Goods Trade; Service Trade ; Foreign Direct Investment (FDI); Global Trade Analysis Project (GTAP)

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