改革开放40周年丛书

温州人经济研究中心

温州工业经济竞争力比较研究

Comparative Study on Industrial Economic Competitiveness of Wenzhou

张战仁　徐剑光　著

浙江工商大学出版社
ZHEJIANG GONGSHANG UNIVERSITY PRESS

改革开放40周年丛书

温州人经济研究中心

温州工业经济竞争力比较研究

Comparative Study on Industrial Economic Competitiveness of Wenzhou

张战仁　徐剑光　著

浙江工商大学出版社
ZHEJIANG GONGSHANG UNIVERSITY PRESS

图书在版编目(CIP)数据

温州工业经济竞争力比较研究 / 张战仁，徐剑光著. —杭州 ：浙江工商大学出版社，2018.10
ISBN 978-7-5178-3026-9

Ⅰ. ①温… Ⅱ. ①张… ②徐… Ⅲ. ①地方工业经济－经济发展－竞争力－研究－温州 Ⅳ. ①F427.553

中国版本图书馆CIP数据核字(2018)第254127号

温州工业经济竞争力比较研究
张战仁 徐剑光 著

策划编辑	郑 建
责任编辑	徐 凌 谭娟娟
封面设计	林朦朦
责任印制	包建辉
出版发行	浙江工商大学出版社 (杭州市教工路198号 邮政编码310012) (E-mail：zjgsupress@163.com) (网址：http://www.zjgsupress.com) 电话：0571-88904980，88831806（传真）
排 版	杭州彩地电脑图文有限公司
印 刷	虎彩印艺股份有限公司
开 本	710mm×1000mm 1/16
印 张	14.25
字 数	224.8千
版 印 次	2018年10月第1版 2018年10月第1次印刷
书 号	ISBN 978-7-5178-3026-9
定 价	49.00元

版权所有 翻印必究 印装差错 负责调换
浙江工商大学出版社营销部邮购电话 0571-88904970

本著作是以下项目资助成果：

温州市哲学社会科学规划课题“温州工业竞争力比较研究”（编号18wsk373）

浙江省哲学社会科学规划课题“浙商回归创业的竞合关系及其网络治理机制对创新绩效影响：嵌入性视角研究”（编号15NDJC098YB）

前 言

温州是一片神奇的土地，“温州模式”讲述了一个中国工业化先发地区的成功故事，工业经济是温州区域经济“起飞”的主引擎。尽管21世纪以来，温州先于全国起步的工业经济优势有所弱化，但工业仍是现阶段温州经济发展的支柱产业，是温州参与新一轮区域竞争的主导力量。在这一前提下，本书要讨论的，是随着宏观经济环境、城市间竞争主导要素和格局的变迁，如何综合分析、客观认识温州工业经济竞争力的优势和不足，以便有的放矢、补差创优，实现工业竞争力的再造。

工业竞争力是区域内各主体在市场竞争过程中形成并表现出来的争夺资源或市场的能力，这种能力只有通过市场竞争才能够形成并展现，并且会在动态的竞争过程中不断发生变化。中国经济发展进入新时代，供给侧结构性改革深入推进，产业发展的要素环境、政策环境都发生了重大变化，温州面临的是新的市场竞争格局。全面的“短缺市场”一去不复返，商品的消费理念、消费需求、科技水平、文化品牌内涵等都对工业生产提出新的更高的要求；城市间的竞争也全面升级，而温州在地理区位、人才资源等领域的劣势愈发明显。重新审视温州工业经济的竞争力，需要系统梳理工业竞争力研究的基础理论，建立有效的评价方法；同时，也需要将温州工业经济发展指标与可类比的城市做全面深入的比较，通过这种比较，更易获得直观的政策启示。

虽然学者尚未形成对工业经济竞争力研究的统一的理论框架，但我们依然可以从马克思的竞争力理论以及传统的绝对优势理论、比较优势理论、要素禀赋理论、新贸易理论等理论，以及国家竞争优势理论、产业区理论、集群创新理论、产品生命周期理论、熊彼特的技术创新理论、区域竞争力理论等现代竞争力理论

此为试读，需要完整PDF请访问：www.ertongbook.com

中找到本研究的理论基础。区域工业的发展是多因素系统作用的结果，影响区域工业发展的因素既包括自然资源、区位、交通基础设施等一些硬环境因素，也包括制度、文化等一些软环境因素；在现代经济体系的构建过程中，工业竞争力更是受到当地的人口素质、创新能力、开放程度、环境规制等因素的影响。

本书构建了一个评价城市工业竞争力的钻石框架模型，这一评价指标体系由城市工业增长力、城市资源配置力、城市工业创新力、城市人力资源供给力及城市政府政策供给力共同构成。同时，作者选择了国内东南沿海主要的工业经济城市作为比较研究的对象，包括浙江省内的杭州、宁波、绍兴、嘉兴、台州、金华，浙江省外的深圳、东莞、佛山、苏州、无锡、常州、厦门、福州、泉州、青岛、大连。温州城市工业竞争力的综合评价结果显示，温州同国内标杆城市及省内先进城市的工业竞争力差距比较明显，这种差距是综合性的。但作者也发现，温州配置和使用各种经济资源进行工业生产活动以获得最佳经济效率的能力比较强。

与对比城市进行全方位比较后，可以发现温州工业竞争力的一些具体不足。比如企业的规模结构偏小，工业领域的创新投入不足，由于土地等主要生产要素缺乏导致的企业外迁，土地、资本、劳动力的产出效率不高等。温州的开放型经济发展也有所滞后，在实际利用外资规模和大项目招商方面表现得最为明显。现阶段，资源与环境使用的物质成本和制度成本都在快速上涨，温州一些传统的资源环境依赖型产业也受到明显的发展制约。另外，在企业上市、产业平台能级、产业政策力度等方面，温州与对比城市也有差距。

党的十九大以来，中国经济进入高质量发展新阶段，工业经济竞争力的全面提升是温州经济高质量发展的题中之义。本书认为温州的当务之急是认清不足，加快集聚适应产业升级的人才，留住新型产业工人群体，以全面创新为工业经济构筑新引擎，加快构建若干高能级的产业战略平台，促进工业经济用地空间高效配置，优化企业规模结构，鼓励民营企业做大做强，还要加大政策力度，鼓励工业经济领域制度与模式创新，招引带动性强的产业项目，增加工业有效投资以增强发展后劲，加快“新旧动能”转换。

区域经济的起伏变迁历来有之，温州正处于工业经济竞争力重构的攻坚和阵痛阶段，相信温州会在新时代的高质量发展大潮中再造新优势，再创新辉煌。

PREFACE

Wenzhou is a magical land,the Wenzhou Model tells the success story of a Chinese industrialized start-up area.The industrial economy is the main engine of the takeoff of the Wenzhou regional economy.Despite the weakening of Wenzhou's industrial economic advantages starting from the beginning of this century,industry is still the pillar industry of Wenzhou's economic development at this stage and the leading force for Wenzhou to participate in a new round of regional competition.Under this premise, this book will discuss how to comprehensively analyze and objectively understand the advantages and disadvantages of Wenzhou's industrial economic competitiveness with the changes of macroeconomic environment, the dominant factors of competition and pattern among cities, so as to make up for the deficiencies and achieve the reconstruction of industrial competitiveness.So as to have a definite aim,make up the gap and promote the advantage and achieve the reengineering of industrial economy.

Industrial competitiveness is the ability of each subject in a region to compete for resources or markets in the process of market competition.This ability can only be formed and displayed through market competition, and will constantly change in the process of dynamic competition.As China's economic development has entered a new era,the supply-side structural reform has been further advanced,and the institutional environment and policy environment of industrial development have undergone major changes,Wenzhou is facing a new market competition pattern.The comprehensive shortage

market has gone forever,the consumption concept, consumption demand,scientific and technological level and cultural brand connotation of commodities all put forward new and higher requirements for industrial production.With the overall upgrading of competition between cities,Wenzhou's disadvantages in geographical location, human resources and other fields have become more and more obvious.To re-examine the competitiveness of wenzhou's industrial economy,it is necessary to systematically study the basic theory of industrial competitiveness and establish an effective evaluation method.Meanwhile,it is also necessary to make a comprehensive and in-depth comparison between the industrial and economic development indicators of Wenzhou and the cities that can be compared with each other, which is easier to obtain intuitive policy inspiration.

Although scholars have not yet formed a unified theoretical framework for the study of industrial economic competitiveness,however,we can still find the theoretical basis of this study from Marx's theory of competitiveness,the traditional theory of absolute advantage,comparative advantage theory,the factor endowment theory,new trade theory and other competitive theories.As well as the national competitive advantage theory,the industrial zone theory,the cluster innovation theory,the product life cycle theory,the schumpeter's theory of technology innovation,and the theory of regional competitiveness in the modern competitive theory.The development of regional industry is the result of multi-factor system.Hard environmental factors like natural resources,location,transportation infrastructure,including some soft environment factors such as system and culture will influence the development of regional industry.In the construction process of modern economic system,industrial competitiveness is also affected by local population quality,innovation ability,openness,environmental regulation and other factors.

This book constructs a diamond framework model to evaluate the competitiveness of urban industry.The evaluation index system is composed of urban industrial growth,urban resource allocation,urban industrial innovation,urban human resource supply and urban government policy supply.At the same time, the main industrial and economic cities along

the southeast coast of China were selected as the objects of comparative study,including Hangzhou,Ningbo,Shaoxing,Jiaxing,Taizhou,Jinhua in Zhejiang Province,Shenzhen, Dongguan,Foshan,Suzhou,Wuxi,Changzhou,Xiamen,Fuzhou,Quanzhou,Qingdao and Dalian outside Zhejiang Province.The comprehensive evaluation results of the industrial competitiveness of Wenzhou City show that the industrial competitiveness gap between Wenzhou and the benchmark cities in China and the advanced cities in the province is obvious and comprehensive.But it is also found that Wenzhou has a strong ability to allocate and use various economic resources for industrial production activities in order to obtain the best economic efficiency.

After a comprehensive comparison with the contrast cities,we can find some specific deficiencies of Wenzhou's industrial competitiveness.For example,the scale structure of enterprises is small,the innovation input in the industrial field is insufficient,and the output efficiency of land,capital and labor is not high because of the lack of land and other major factors of production.The development of Wenzhou's open economy has also lagged behind,with the most obvious performance in terms of the actual use of foreign capital and large-scale project investment.At this stage,the material cost and institutional cost of resources and environment use are rising rapidly.Some traditional resource-environment-dependent industries in Wenzhou are also subject to obvious development constraints. In addition,in terms of the listing of enterprises,the level of industrial platform and the strength of industrial policies,Wenzhou still has a gap compared with the comparison city.

Since the 19th CPC National Congress,China's economy has entered a new stage of high-quality development.The key to the high-quality development of Wenzhou's economy is to upgrade the competitiveness of the industrial economy in an all-round way.The book holds that the urgent task for Wenzhou is to recognize the shortage,speed up the gathering of talents to adapt to industrial upgrading,retain new industrial workers,build a new engine for industrial economy with comprehensive innovation,speed up the construction of a number of high-level industrial strategic platforms,promote

efficient spatial allocation of industrial economic land,optimize the scale structure of enterprises,and encourage private enterprises to become bigger and stronger.We should also intensify policy efforts,encourage institutional and model innovation in the field of industrial economy,attract highly motivated industrial projects,increase effective industrial investment to enhance development stamina and speed up the transformation of the new and old kinetic energy.

The fluctuation and change of regional economy has always been happening.Wenzhou is in the crucial stage of the reconstruction of industrial economic competitiveness.It is believed that Wenzhou will reestablish new advantages and create new brilliance in the new era of high-quality development.

目　录 >>>>>

1　第一章 引　言
1　1.1 研究背景
5　1.2 概念界定
6　1.3 研究目的与主要内容
7　1.4 研究方法

9　第二章　工业竞争力基础理论
9　2.1 工业竞争力基础概念
23　2.2 工业竞争力基础理论
49　2.3 工业竞争力基础构成
58　2.4 小结

59　第三章　温州工业经济竞争力研究综述
60　3.1 温州工业经济的形成与历史变迁
68　3.2 温州工业经济竞争优势
71　3.3 温州工业经济竞争力的弱势与原因
83　3.4 温州工业经济竞争力的比较与评价
86　3.5 小结

88　第四章　温州工业竞争力的分类比较
88　4.1 研究目的
89　4.2 基础理论
90　4.3 研究方法与对比城市选择
130　4.4 小结

131　第五章　温州城市工业竞争力的综合评价
131　5.1 城市工业竞争力指标体系
136　5.2 城市竞争力指数评价分析
140　5.3 城市工业竞争力的测算与评价分析

此为试读，需要完整PDF请访问：www.ertongbook.com

147 5.4 聚类分析及结果
149 5.5 综合集成分析结果
150 5.6 小结

152 **第六章 温州提升工业经济竞争力的若干对策建议**
152 6.1 统一认识：“工业化后期”而非“后工业化”
153 6.2 集聚人才：适应产业升级的人才和新型产业工人
155 6.3 转换动力：以全面创新为工业经济构筑新引擎
158 6.4 提升规模：优化企业规模结构，促进企业做大做强
160 6.5 政策加力：加大政策力度，突出功能性产业政策
162 6.6 增加投入：加大工业有效投资增强发展后劲
164 6.7 构筑平台：加快构建若干高能级的产业战略平台
166 6.8 优化空间：促进工业经济用地空间优化配置
167 6.9 创新模式：鼓励工业经济领域制度与模式创新

169 **第七章 结论与展望**
169 7.1 研究结论与启示
178 7.2 研究不足与展望

183 **参考文献**

201 **后 记**

CONTENTS >>>>>

1 **Chapter One Abstract**

1 1.1 Research background

5 1.2 Conceptual definition

6 1.3 Research purpose and main content

7 1.4 Research methods

9 **Chapter Two Basic theory of industrial competitiveness**

9 2.1 Basic concept of industrial competitiveness

23 2.2 Basic theory of industrial competitiveness

49 2.3 Basic composition of industrial competitiveness

58 2.4 Summary

59 **Chapter Three A summarise of Wenzhou' s industrial economic competitiveness**

60 3.1 The Formation and Historical Changes of Wenzhou Industrial Economy

68 3.2 Advantages of Wenzhou' s industrial economy competition

71 3.3 Weakness and causes of Wenzhou' s industrial economy competition

83 3.4 Comparison and evaluation of Wenzhou industrial economic competitiveness

86 3.5 Summary

88 **Chapter Four Classification comparison of Wenzhou industrial competitiveness**

88 4.1 Research purposes

89 4.2 Basic theory

90 4.3 Research methods and comparison city selection

130 4.4 Summary

131 **Chapter Five Comprehensive evaluation of Wenzhou' s industrial competitiveness**

131 5.1 Index system of urban industrial competitiveness

136 5.2 Evaluation and analysis of urban competitiveness index
140 5.3 Calculation and evaluation analysis of urban industrial competitiveness
147 5.4 Cluster analysis and results
149 5.5 Meta synthesis analysis results
150 5.6 Summary

152 **Chapter Six Some countermeasures and suggestions for enhancing competitiveness of Wenzhou' s industrial economy**
152 6.1 Unified understanding: "the later stages of industrialization" instead of "post industrialization"
153 6.2 Talent Gathering: talents and new industrial workers adapting to industrial upgrading
155 6.3 Transforming power: building new engine for industrial economy with comprehensive innovation
158 6.4 Upgrading scale: optimizing the scale structure of enterprises and promoting enterprises to become bigger and stronger
160 6.5 Intensive policy: Intensify policy efforts and highlight functional industrial policies
162 6.6 Increase investment: increase investment in industry and enhance development potential
164 6.7 Building platform: speeding up the construction of some high-energy industrial strategic platforms
166 6.8 Optimization space: promoting the optimal allocation of industrial economic land space
167 6.9 Innovation mode: encouraging institutional and mode innovation in the industrial economy

169 **Chapter Seven Conclusion and prospects**
169 7.1 Research conclusions and enlightenment
178 7.2 Research deficiencies and Prospects

183 **References**

201 **Postscript**

图目录 >>>>>

8 图1-1 研究框架与技术路线图
35 图2-1 波特的“钻石模型”
37 图2-2 九要素模型
37 图2-3 马歇尔产业外部性经济的三维模型
49 图2-4 一般“双钻石模型”
50 图2-5 赵东成的九要素模型
59 图3-1 温州市区位图
67 图3-2 温州现代工业发展阶段图
72 图3-3 2005—2016年浙江11个地级市的GDP增长趋势图
73 图3-4 2005—2016年温州与杭州、宁波GDP增长对比图
74 图3-5 2005—2016年温州与绍兴GDP增长对比图
75 图3-6 2005—2016年浙江11个地级市的工业总产值增长趋势图
75 图3-7 2005—2016年温州与杭州、宁波工业总产值增长对比图
83 图3-8 2014年温州等省内主要7个城市国际化指标对比
91 图4-1 温州与对比城市的规上工业增加值比较（2016年）
92 图4-2 温州与对比城市的规模以上企业数比较（2015年）
93 图4-3 温州与对比城市的大中型企业数比较（2015年）
95 图4-4 温州与对比城市的R&D占GDP比重比较（2015年）
97 图4-5 温州与对比城市的发明专利授权量比较（2016年）
98 图4-6 温州与对比城市的国家高新技术企业数比较（2016年）
98 图4-7 温州与省内城市的新产品产值率、高新比重比较（2016年）
99 图4-8 温州与主要对比城市的国家级科创平台数比较（2016年）
102 图4-9 全国企业当期平均死亡率曲线（2000年—2012年）
103 图4-10 以省为单位的企业寿命众数比较（2000年—2012年）
104 图4-11 温州与浙江省企业外迁类型（%）比较
106 图4-12 温州与对比城市工业投资的比较（2016年）
107 图4-13 温州与对比城市规上工业总资产贡献率的比较
108 图4-14 各主要对比城市规上工业总资产贡献率的变动
108 图4-15 温州与主要对比城市规上工业总资产利润率的比较（2015年）

109 图4-16 温州与主要对比城市规上工业全员劳动生产率的比较（2016年）
110 图4-17 温州与省内主要产业集聚区用地产出效率比较
111 图4-18 温州与国内先进国家级开发区工业用地地均税收比较（2016年）
113 图4-19 温州与对比城市出口依存度的比较（2016年）
114 图4-20 温州与对比城市实际利用外资情况比较（2016年）
115 图4-21 温州与对比城市能耗水平比较（2015年）
116 图4-22 温州与对比城市工业用水量水平比较（2015年）
119 图4-23 温州与对比城市工业领域股份有限公司数量比较（2015年）
119 图4-24 温州与对比城市工业领域新增上市公司数量比较
122 图4-25 浙江省2016年个性化定制试点企业城市排名
125 图4-26 浙江省级产业集聚区2015年综合实力比较
125 图4-27 浙江省级产业集聚区2015年科技创新比较
132 图5-1 城市工业竞争力“钻石模型”框架图
141 图5-2 山麓图
147 图5-3 18个城市工业竞争力综合因素得分指数图
148 图5-4 城市工业竞争力聚类分析谱系图

Figure Contents > > > > >

8 Fig. 1-1 Research framework and technology roadmap
35 Fig. 2-1 Michael Porter' s diamond model
37 Fig. 2-2 The nine-factor model
37 Fig. 2-3 The three dimensional model of Marshall' s industrial externality economy
49 Fig. 2-4 The general double diamond model
50 Fig. 2-5 Dong-Sung Cho' s nine factor model
59 Fig. 3-1 The location map of Wenzhou city
67 Fig. 3-2 The stage of modern industrial development in Wenzhou
72 Fig. 3-3 The GDP growth trend chart of 11 prefecture-level cities in Zhejiang from 2005 to 2016
73 Fig. 3-4 Comparison of GDP growth of wenzhou,hangzhou and ningbo from 2005 to 2016
74 Fig. 3-5 Comparison of GDP growth of wenzhou and shaoxing between 2005 and 2016
75 Fig. 3-6 Growth trend chart of industrial total output value of 11 prefecture-level cities in zhejiang from 2005 to 2016
75 Fig. 3-7 Comparison of the growth of total industrial output value between Wenzhou,Hangzhou and Ningbo in 2005—2016
83 Fig. 3-8 Comparison of internationalization indicators of seven major cities in Zhejiang province including Wenzhou in 2014
91 Fig. 4-1 Comparison of industrial added value of above Designated Size between Wenzhou and contrasting cities (2016)
92 Fig. 4-2 Comparison of the number of Enterprises above Designated Size between Wenzhou and contrast cities (2015)
93 Fig. 4-3 Comparison of large and medium-sized enterprises between Wenzhou and contrasting cities (2015)
95 Fig. 4-4 Comparison of the percentage of R&D in GDP between Wenzhou and contrasting cities (2015)

此为试读,需要完整PDF请访问: www.ertongbook.com