



新兴经济体蓝皮书[®]

BLUE BOOK OF EMERGING ECONOMY

金砖国家发展报告 (2012)

合作与崛起

ANNUAL REPORT ON BRICS DEVELOPMENT (2012)

Cooperation and Rise

顾问 / 李 扬 高 翔 裴长洪 张宇燕 汪 戎

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Lin Yueqin , Ph. D. in Economics, executive editor of Chinese Social Science Magazine , deputy secretary general of Economic Transition and Development Center in Economic Research Institute of Chinese Academy of Social Science (CASS). Deputy director of Economic Development Strategy Committee in China Strategy Research Board. In recent years, Lin has directed programs of the National Social Science Fund and significant projects authorized by the State Council, centre ministries and commissions and CASS, some of the research achievements has been highly valued by central and local governments. Lin has also published many books (including translations and complied works) and over 100 essays in academic journals both in domestic and abroad. Major field: macro-economy, international economy, transitional economy.

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Liu Wenge , Ph. D. in Economics, professor in the Department of International Economics and Trade of Central University of Finance and Economics, Co-Executive Director of China Economic Development Research Association. Presided over a number of national research projects, he has won Scientific Research Awards at Ministerial and Provincial level, New Century Excellent Talents Award of Ministry of Education, Beijing Publicity Department Talent Award, etc. He has published more than 20 research papers, 3 scholarly monographs mainly in journals like *World Economy* , *Economic Research Journal*, *The Journal of World Economy*, *Review of Economic Dynamics*.

摘 要

日月轮回，世事变迁。“金砖”问世已经整整十年了！十年，不过是历史长河之一粟，虽然，作为新兴经济体的一个国家群体，金砖国家从被冠以名称到主动走到一起的时间还不长，但金砖崛起、金砖合作却已给 21 世纪头十年变幻剧烈的世界经济社会与国际关系刻下了深深的印记，并正对全球发展、全球治理变革产生着日益广泛和深刻的影响。

2011 年金砖国家继续引领全球增长。按照 IMF 2012 年 1 月 24 日发布的《全球经济展望》，2011 年金砖国家中中国、印度和俄罗斯经济增长率（分别为 9.2%、7.4% 和 4.1%）均高于全球经济平均增长率（3.8%），只有巴西、南非略低于平均数，但也远高于发达国家平均（1.6%）水平。作为一个整体，金砖国家的平均增长率比世界尤其是发达国家整体高出很多，凸显了金砖国家继续引领全球经济增长的火车头的角色。

同时，金砖国家之间的合作也迈上了一个新台阶。2011 年初，在中国海南三亚举办的第三届金砖峰会上非洲大国南非加盟金砖，使金砖群体的国家多样性和代表性更为凸显。第三次峰会上达成的诸多共识和合作协议，是金砖国家对话与合作机制建设走向成熟的新平台和新机遇。

一年来，金砖框架下的各种合作得到了进一步发展。金砖国家间一个非政府性质的研究团体“金砖国家贸易与经济研究网络”（BRICS-TERN）于 2011 年 11 月 19 日由中国上海 WTO 事务咨询中心、印度国际消费者团结与信任协会、巴西格图里奥·瓦加斯研究基金会、俄罗斯环境和可持续发展中心以及南非国际事务研究院共同在上海发起设立。它旨在通过以网络为基础的政策研究和对当代相关发展问题的倡导，协助金砖国家政府间贸易和经济的合作，共同创造出有助于金砖国家政策制定的成果。这是中国三亚金砖国家领导人第三次会晤发表的《三亚宣言》中有关“考虑建立金砖国家成员国研究中心网络”、“联合开展经贸研究”的具体落实。2011 年 12 月 1～3 日，在海南省三亚市成功举办了首届“金



砖国家友好城市暨地方政府合作论坛”。这是致力于推动金砖国家区域层面合作的尝试。

金砖国家深化合作的另一个体现是金砖国家之间的贸易投资合作继续大步前进。如 2011 年中国与其他金砖国家的贸易额达到 2800 多亿美元，同比增长超过 35%，远超过同期中国对外贸易增长速度和世界贸易增长速度。中国与其他金砖国家之间以及其他金砖国家之间的投资合作也进一步发展。金砖国家之间的金融与货币合作也提上日程。在即将举办的第四届峰会上，建立金砖国家银行的提议已经在成员国之间讨论。这说明合作正在成为助推金砖国家繁荣发展的强大动力，也为未来金砖的壮大发展奠定了良好基础和注入新的活力。

基于此，以合作与崛起作为《金砖国家发展报告（2012）》的主题是有理由的。全书基本构架由总论（1 篇）、国别（5 篇）与专论（10 篇）三大板块以及附录金砖国家 2011 年大事记构成。全书共约 40 万字。

第一大板块为总报告，“金砖国家合作，助推共同崛起”，主要分析金砖国家合作背景，合作对于金砖国家发展的意义，近年金砖国家合作趋势，深化合作面临的机遇和挑战，深化合作、共促崛起需要破解的难题等，展示金砖国家发展崛起和合作的全景图。

第二大板块为国别篇，分别介绍金砖五国 2011 年经济发展情况、特点，展示金砖国家在全球经济复苏背景下的经济表现、政府调控政策变化、发展展望等。

“巴西经济与社会发展：2011 年回顾与 2012 年展望”部分，回顾了 2011 年巴西经济社会发展变化走势，分析了与 2010 年相比巴西 2011 年经济出现较大幅度下调的基本原因，减贫政策及成效，巴西与金砖国家的合作关系，并对 2012 年的经济社会发展前景进行了预测。

“俄罗斯经济现代化：神话与现实”部分，通过分析俄罗斯经济增长源泉，明晰了俄罗斯在国际分工地位中的利和弊。在剖析当代俄罗斯经济现代化制度环境的基础上，论证了发展人力资本对俄罗斯以知识型经济替代资源型经济的必要性。

“印度经济社会发展及其与金砖国家的合作”部分，总结了 2011 年印度经济与社会减贫政策等情况及变化特点，印度与金砖国家的经贸合作发展等，还对 2012 年印度经济社会发展走势进行了展望。

“中国经济：增长转型机制及政策路径”部分，总结、分析了 2011 年中国



经济运行出现转型的基本特征事实，转型的原因，目前及未来中国经济转型面临的诸多挑战，以及促进转型的中长期政策选择和未来发展前景。

“南非经济发展及其与金砖国家的合作”部分，展示了 2011 年南非在推动国内经济改革和结构调整、促进经济社会发展取得的不俗表现；分析了南非通过加入金砖国家合作机制，积极参与金砖国家间经贸合作的机制化建设，推动金砖国家为南非及非洲的发展作贡献，并与金砖国家一道参与全球治理体系改革的努力；对 2012 年南非将继续借重与金砖国家的合作，推动国内经济与社会繁荣稳定前景进行了展望。

第三板块为专论，共分 10 个专题，从不同视角和层面观察金砖国家的发展与合作以及对金砖现象的研究与评价。

“金砖国家研究综述”部分，对近年学术界有关金砖国家经济增长动力、趋势、增长方式、未来崛起趋势、发展转型、金砖国家之间的竞合及对全球治理结构变革的影响等研究状况进行了简单扫描，帮助读者更好地厘清学术界对金砖现象的关注。

“金砖国家经济周期的协动性研究”部分，指出 2000 年之后金砖国家经济周期波动存在比较明显的协动性。SPSS 因子分析的结果表明，金砖国家经济周期协动性的出现在很大程度上源自世界经济特别是先进经济体经济波动的冲击和发展中大国特征因素综合作用的结果。这一研究结论从一个侧面反映了金砖国家合作机制的形成原因及其在未来进一步加强经济合作和政策协调的必要性。

“金砖国家新兴产业发展及其比较”部分，指出大力发展新兴产业是金砖国家的共同点：五国都将促进科技创新和新兴产业发展上升到国家战略高度，新兴产业发展重点主要集中在新能源、生物技术等领域，研发强度不断提高。同时，分析了目前金砖国家新兴产业发展中存在的一些问题，如企业在创新体系中的地位仍不够突出、技术创新能力还比较薄弱、科技人力资源日益短缺。还分析了新兴产业发展对金砖国家将产生的促进产业结构升级和助推经济赶超与崛起的深远影响。

“金砖五国能源发展与合作研究”部分，认为金砖五国在全球经济、政治和能源领域都有着重要地位，从能源消费总量、能源效率等方面来看，金砖国家在世界能源消费中的比例越来越重，能源效率也在不断提高。金砖国家能源供求互补性显著，能源合作既是金砖国家间经济合作的重要接轨点，也是增强五国整体活力与凝聚力的重要途径。主要分析了金砖国家最新的能源资源储备情况、能源



消费和供应情况，中国与其他金砖国家间能源合作的经济效应规模，展望了未来金砖国家间以新能源合作为主体的能源发展前景。

“金砖国家合作新阶段”部分，对金砖五国近年的国内生产总值及其结构变化和人均实际收入水平变化进行了比较，指出金砖国家中产阶级队伍正在壮大，俄罗斯、中国和巴西在减贫方面的巨大成就和印度与南非在减贫穷方面面临的挑战，还指出了巴西和中国的不平等问题十分突出，分析了五国财政预算平衡面临的困难、金砖国家加强合作的潜力与方向。

“金砖国家金融合作”部分，分析了金砖国家之间开展金融货币合作的意义、困境和努力方向，为金砖国家丰富合作内容、提升合作水平提供借鉴，助推其共同崛起。

“金砖国家之间的经贸合作关系”部分，基于2003~2011年的统计数据，运用显性比较优势指数、贸易强度指数、贸易互补性指数、出口相似度指数和经常市场份额模型对中国与金砖国家的贸易关系进行了实证研究，讨论了中国与金砖国家的双边经贸发展的现状、潜力及稳定性等问题，及其对于促进中国与金砖国家双边经贸稳健发展的现实意义，还就进一步推动金砖国家之间的经贸合作提出了相关政策建议。

“金砖国家在国际组织框架下的合作”部分，通过分析金砖国家在WTO、G20和世界气候大会等国际组织或论坛合作的现状，指出其目前的合作成效及问题，指出加强合作提升金砖国家在重大国际组织中的话语权面临的挑战，并展望未来在WTO、IMF、世界银行、联合国贸发会议和气候大会等国际组织中的合作前景。

“中印经济增长：趋势、问题与展望”部分，分析了近10多年来中英两国经济发展趋势，解读了印度赶超中国的所谓“龙象之争”现象，认为，中国和印度都是在21世纪世界发展格局中的新兴上升力量，两国经济各有长短，都有可资对方借鉴的成功经验并存在需要进一步完善的软肋。强调分析比较中印两国经济发展潜力时不应过分迷恋于现实状态，而应该更为看重未来演变趋势。中国与印度的竞争不是零和博弈而是优势互补、合作共赢。

“金砖国家2011年大事记”，记录了2011年金砖国家的主要活动和事务。

林跃勤

2012年3月5日

Abstract

Samsara moon, things change. “BRICS” has come into being for a decade! Ten years is just a short period of the history of the sea. As a national group of the emerging economies, it is not a long time from the birth of the name of BRICS to jointly getting together, but its abrupt rising and cooperation have left not only a deep imprint on the world economic society and international relations that are changing violently in the first decade of the 21st century, but also an increasing and deepening impact on the global development and governance reform.

The BRICS countries continued to lead the global grow in 2011. According to World Economic Outlook issued by IMF on Jan. 24, 2012, the economic growth rates of China, India and Russia (9.2% , 7.4% and 4.1% respectively) in all the BRICS countries were higher than the global economic average growth rate (3.8%) with only Brazil and South Africa slightly lower than the average growth but much higher than the average growth of the developed countries (1.6%). As a whole, the growth rate of the BRICS countries is much higher than the world average growth rate, especially the overall growth rate of the developed countries, which has proved that the BRICS countries have continued to lead the global economic growth and further enhanced their role of locomotive in it.

In the meanwhile the cooperation among the BRICS countries has also scaled a new height. With a big country South Africa of Africa joining the BRICS at the third BRICS summit meeting held in Sanya, Hainan Island, China at the beginning of the year, the diversity and representative of the BRICS group are strikingly more obvious. Many consensuses and cooperative agreements reached at the third summit meeting have brought about mature new platforms and new opportunities for the dialogues and cooperative mechanism construction of the BRICS countries.

In one year various cooperations under the BRICS frame have been further developed. Various cooperative activities under the BRICS frame have been orderly launched, which are actually the specific implementation of the Sanya Action Plan issued at the third BRICS leaders meeting in Sanya, China. Another manifestation of deepening cooperation among the BRICS countries is a continuous great leap of the



trade and investment cooperation themselves. For instance, the trade volume of China with other BRICS countries reached to 45 billion US dollars in 2011, increasing by over 35%, which was faster than both the foreign trade growth rate of China and the trade growth rate of the world. The investment cooperation between China and other BRICS countries as well as among other BRICS countries has been further developed. The financial and currency cooperation among the BRICS countries has been also put on the calendar. For the upcoming fourth summit meeting, the proposal of establishing the BRICS countries bank has been discussed among the member countries. That is to say the cooperation has not only become a strong force to promote a prosperous development of the BRICS countries but also laid a sound foundation and injected new vitality to strengthen the development of the BRICS in the future.

Based on which there is some reason with the theme of cooperation and rising for the development report of the BRICS countries (2012). The whole book is basically composed three parts—Introduction (1 paper), Countries (5 papers) and Monographs (10 papers) as well as the major events of the BRICS countries in 2011.

The first part is General Report, “BRICS Countries’ cooperation to thrust its rise”, mainly analyzing the cooperation background of the BRICS countries, the significance of cooperation to the development of the BRICS countries, the cooperation tendency of the BRICS countries in recent years, opportunities and challenges in deepening cooperation, deepening cooperation, the problems to be solved in the joint effort to rise, etc., as well as demonstrating a panorama of the development, rising and cooperation of the BRICS countries.

The second part is Country Report, separately introducing the economic development situations and features of five BRICS countries, illustrating the economic performance, government adjustment policy variation, future development outlook, etc.

The section of “Brazil’s society and economic development; retrospect in 2011 and outlook in 2012” reviews the variation tendency of Brazil economic and social development in 2011, analyzes the basic reason of great slash in the economy of Brazil in 2011 against the previous year, poverty reduction policy and achievement, the partnership between Brazil and other BRICS countries, and forecasts the prospect of economic and social development in 2012.

The section of “Russia’s economic modernization; myth and reality” makes clear the pros and cons of the situation in Russia in the international division of labor with the analysis on the sources of economic growth in Russia. Based on the analysis of the



contemporary Russia's economic modernization system and environment, the necessity of development of human capital is justified as a real alternative resource to replace resource-based economy with knowledge economy.

The section of "Development of the economic and society in India and cooperation between India and BRICS countries" summarizes the situation and variation of India's economic and social poverty reduction policies, etc., the economic and trade cooperation and development of India with other BRICS countries, etc., and forecasts the India's economic and social development tendency in 2012.

The section of "China's economy: growth transformation mechanism and policy path" summarizes and analyzes the basic features and facts of the transformation appearing in the economic operation of China in 2011, the reason of transformation, many challenges in the current and future economic transformation in China as well as the medium term and long term policy choice to promote the transformation and the prospect of future development.

The section of "South Africa's economic development and its cooperation with the BRICS countries" reflects a good performance achieved by South Africa in promoting domestic economic reform, structure adjustment and socioeconomic development in 2011; describes the efforts made by South Africa to actively participate in the mechanism construction of economic and trade cooperation with other BRICS countries by joining the cooperation mechanism of the BRICS countries, encourage the BRICS countries to make a contribution to the development of South Africa and Africa and join the BRICS countries in the global governance system reform; forecasts the stable prospect of South Africa promoting the domestic economic and social prosperity resorting to the cooperation with the BRICS countries.

The third part is Thematic Report with 10 special topics, observing and comparing the development and cooperation of the BRICS countries from multiple domains and dimensions, and reviewing the research and appraisal of the "BRICS".

The section of "Overview of the studies on BRICS countries" briefly scans the studies conducted by academic circles in recent years on the BRICS countries' economic growth dynamics, tendency, growth mode, future rising tendency, development transformation, competition and cooperation among the BRICS countries as well as the effect on the global governance structure reform with the aim to help the readers better clarify and understand the concerns of academic circles on the BRICS phenomenon.

The section of "Studies on the business cycle synchronicity of BRICS countries" points out that an obvious co-movement exists in the economic cycle fluctuation of the



BRICS countries after 2000 and the occurrence of such co-movement is, to a great extent, caused by the impact of the world business, especially the advanced economies' business fluctuation and the comprehensive effect of the characteristic factors of big developing countries, which reflects the cause of formation of the cooperation mechanism of the BRICS countries and the necessity to further strengthen the economic cooperation and policy coordination in the future from one side.

The section of "Studies and comparison of the development of the emerging industries in BRICS countries" points out that the five countries have raised the promotion of innovation of science and technology and emerging industry development to the national strategy level, put the focus of emerging industry development mainly on new energy, biotechnology, etc. and continuously improved the research and development intensity. Furthermore, the analyses are made on the current challenges and existing problems in the development of emerging industries in the BRICS countries as well as the profound influence of emerging industry development on the promotion of industrial structure upgrading and economic overtaking development that will occur in the BRICS countries.

The section of "Energy development and cooperation in BRICS countries" analyzes the important status of five BRICS countries in the areas of economy, politics and energy in the globe, investigates and compares the energy resources reserve, energy consumption and supply, complementary energy supply and demand, energy cooperation potential, opportunity and cooperation economic effect of the BRICS countries from the aspect of total energy consumption, energy efficiency, etc., and forecasts the prospect of new-energy-based energy cooperation among the BRICS countries in the future.

The section of "New stage of BRICS countries' cooperation" compares the GDP, structural change and real income per capita level change of five BRICS countries in recent years, and analyzes the huge success of Russia, China and Brazil in poverty alleviation, the challenge faced by India and South Africa in poverty alleviation, the issue of inequality in Brazil and China, the difficulties of balanced budget in the five countries as well as the potential and direction of the BRICS countries strengthening cooperation.

The section of "BRICS countries' financial cooperation" Analyzing the meaning, dilemma and direction of financial and monetary co-operation among BRICS is beneficial to enlarge and improve the co-operation and promote the common rise among its members.



The section of “Foreign trade cooperation and trade relationships among BRICS countries” conducts an empirical study on the trade relations between China and other BRICS countries with revealed comparative advantage index, trade intensity index, trade complementary index, export similarity index and regular market share model on the basis of the statistical data of 2003 – 2011, discusses the present situation, potential, stability, etc. of the bilateral economic and trade development between China and other BRICS countries as well as the realistic significance in promoting the bilateral economic and trade stable and healthy development between China and other BRICS countries, and also puts forward the relevant policy suggestions on further promoting the economic and trade cooperation among the BRICS countries.

The section of “BRICS countries’ cooperation within the context of international organizations” analyzes the present situation of the cooperation of the BRICS countries in the international organizations or forums such as WTO, G20 and World Climate Conference, noting the current cooperative effects and problems, strengthening the cooperation to improve the discourse right of the BRICS countries and face the challenges in any important international organizations, and forecasting the cooperation prospects in international organizations such as WTO, IMF, the World Bank, the UN Conference on Trade and development, World Climate Conference in the future.

The section of “Sino-Indian economic growth: trends, problems and prospect” compares the economic development tendencies of China and India in recent 10 years, thinks China and India are the emerging rising powers in the world development pattern of the 21st century, two countries have its own advantages and disadvantages in economy and they can draw on the successful experience and deficiency of each other. It also emphasizes that “competition of the dragon and the elephant” is not zero-sum game but advantageous complementation and win-win cooperation. When investigating the development of the two countries, importance should be attached to the future evolution tendencies rather than the actual state.

The section of “BRICS countries’ chronicle of events in 2011” records the main activities and affairs of the BRICS countries in 2011.

The last year 2011 was a year full of ups and downs in the global economic and social development. The BRICS countries have achieved great success and made a positive contribution to the global economic development and social prosperity by optimizing their policies and dedicating to stable and sustainable development. While extending the mutual dialogues and the cooperation in economy and trade and other areas and promoting each other’s development, the BRICS countries also have positive



effects on the global re-equilibrium process and global governance structure reform. The present book tries to fully reflect the development, transformation and latest cooperation tendencies of the BRICS countries as well as the thoughts on these developments and changes.

Lin Yueqin

5 March, 2012

序一

合作：金砖国家崛起的助推器

进入 21 世纪以来，世界经济的一个重要变化就是以金砖国家为代表的新兴经济体的群体性崛起。它们的崛起宛如人类发展历史长河中的耀眼浪花，推动着世界经济奔涌向前，而金砖国家的赶超发展引领潮头。金砖国家用十年时间书写了一部成功史：从十多年前一个引导市场投资的“虚拟概念”发展成令世人瞩目的“现实存在”。2009 年 6 月，中国、俄罗斯、印度、巴西四国正式启动“金砖四国”领导人会晤机制，拉开了金砖国家合作机制化建设的序幕，2011 年 4 月南非加入金砖机制并在中国三亚成功举办金砖国家领导人第三次会晤，标志着金砖国家合作机制逐渐走向成熟。

作为世界经济增长的主引擎，以金砖国家为代表的新兴国家快速发展改变了一直以来由发达国家推动世界经济发展的动力格局。当前，金砖国家外汇储备约占全球的 40%，贸易占世界的 15%，对世界经济增长的贡献率已超过 50%。正如金砖概念创始人奥尼尔（Jim O'Neill）所言，金砖国家“已经构成当代世界的部分砖石”。近年来，金砖国家在致力于自身发展的同时，在金砖框架下开展务实合作，在重大国际事务中相互协调，向国际社会传递了在全球经济金融治理中维护金砖国家发展权和提升自身话语权的自觉意识。在这方面，2011 年 4 月在中国三亚举行的金砖国家领导人第三次会晤及会议通过的《三亚宣言》具有里程碑式的意义。《三亚宣言》凝聚了五国领导人在世界经济、国际金融、全球治理等重大议题上的共识，其“行动计划”规划了金砖国家在金融、工商、智库、统计、科技、农业、卫生等宽领域、多层次的对话、交流与合作，展示了金砖国家合作共赢的美好愿景。可以看出，加强合作已成为金砖国家的战略选择。

2012 年 3 月，印度将举办金砖国家领导人第四次会晤。此次会晤将深入探讨全球治理、绿色经济、气候变化、粮食和能源安全、可持续发展等多项议题。