

# B 缅甸蓝皮书<sup>®</sup>

LUE BOOK OF MYANMAR

## 缅甸国情报告 (2012~2013)

ANNUAL REPORT ON MYANMAR'S  
NATIONAL SITUATION (2012-2013)

主 编 / 李晨阳

副主编 / 祝湘辉 邹春萌



社会科学文献出版社  
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## 摘要

云南大学缅甸研究中心整合校内外力量，从2012年开始撰写并出版缅甸年度发展报告，以向社会各界提供翔实准确的系统性研究成果和最新资讯。《缅甸国情报告（2012~2013）》是缅甸系列年度报告之二，本报告分为三部分。

第一部分是总报告。2012~2013年，吴登盛政府继续强力推动政府转型与民族和解，促进经济发展，拓展外交空间，并取得了显著成效。2012年4月1日议会补选成功举行，民盟成为议会最大反对党，并重新合法参与缅甸政治发展进程。缅甸政府与多支少数民族武装达成了停火或和平协议。缅甸政府领导人和昂山素季频频出访，美国总统奥巴马等一大批西方政要来访。但政府仍然面临着若开邦罗兴伽人与若开族佛教徒冲突以及克钦独立军与缅政府军冲突等一系列重大挑战，公民维权运动和宪法修改等问题也困扰着缅甸政治发展进程。与此同时，缅甸的经济活力虽得到了极大的释放，但投资环境没有明显改善，西方投资和援助未能大规模进入，中国对缅投资总额下降。

第二部分是分报告，总体上按照政治、经济和外交三个板块来具体介绍2012~2013年缅甸形势，同时也收录了其他与主题密切相关的论文和有深度的研究报告。这也是缅甸年度发展报告的一大特点，既紧靠年度形势，又对与本年度形势相关的重大问题进行全方位的深入研究。政治领域收录了关于政党政治、NGO和媒体在缅甸政治转型与对外关系中的作用以及世人瞩目的“罗兴伽人问题”四篇论文。政党政治是缅甸民主化进程中的关键因素之一。自2010年以来，缅甸的政党建设有了较大的发展，但从总体上看，不论是执政的巩发党还是反对党民盟以及其他中小型政党和少数民族政党，各政党的自我发展能力都有限，执政能力更是欠缺。巩发党和民盟围绕2015年大选展开激烈竞争，但未来缅甸将形成何种政党格局，还有待观察。当前，缅甸NGO活



动的范围越来越广，在缅甸发挥着越来越重要的作用，已经成为缅甸政治转型中的一股新兴力量。由段然与梁晨合作撰写的《非政府组织在缅甸政治转型与对外关系中的作用》，介绍了 NGO 在缅甸不同时期的发展历程，分析了 1988 年至今缅甸 NGO 崛起的原因，阐述了缅甸 NGO 数量、类型、主要领域及活动范围、资金来源、主要援助方、活动方式等现状，分析了 NGO 在缅甸国家政治转型中的作用及局限性、在国家对外关系中的作用及局限性。同时，结合缅甸 NGO 涉华活动的几个具体案例，作者分析了缅甸 NGO 的活动对我国的影响，还提出了应对缅甸 NGO 涉华活动的几点思考。媒体作为传播信息的介质，是国家和民众双向互动的桥梁；国家的政治制度决定了媒体传播信息的方向，而既定的信息传播又有利于维护统治者的政权。由黄娴与梁晨合作撰写的《1988 年以来媒体在缅甸政治转型中的作用》一文，主要介绍了 1988 年以来缅甸不同媒体的运作状态、运作特点，宏观分析了缅甸媒体在国家政治转型中的积极作用和消极影响，并以莱比塘铜矿事件为例，具体分析缅甸不同类型的媒体在这一公共事件中的作用，以及它们如何影响民众对公共事件的认知和反应，如何影响民众与政府的互动，如何影响缅甸国家的政治转型进程。缅甸若开邦的罗兴伽人与若开族的冲突引起全球关注，类似的文章很多，但郭秋梅《身份认同视角下的缅甸“罗兴伽人问题”》一文颇具特色。该文指出，作为一个群体，罗兴伽人存在族群身份和公民身份两种角色。从族群特征来看，罗兴伽人的族群特征是明显的，且族群认同较高。但从 1982 年的《缅甸民法》来看，罗兴伽人不是缅甸本土族群，亦未被赋予公民身份。由此带来的问题是，原本广泛存在于世界上多族群国家的族群认同与公民认同之间的矛盾在罗兴伽人身上变得模糊，演变为另一对事实上的矛盾：罗兴伽人面临着“自我假定”的族群身份认同与未被“他者赋予”族群身份、公民身份之间的矛盾。这一矛盾呈现出当前罗兴伽人身份认同的尴尬之境。

经济部分收录了三篇文章。邹春萌、许清媛合作撰写的《2012~2013 年度缅甸经济政策与经济形势》指出，缅甸政府在 2012~2013 财年设定了新的发展目标，致力于第二阶段的经济改革，重点改善民生问题，调整汇率和税收制度，促进对外贸易，改善外资投资环境，经济实现了较高水平的增长，农业、矿业、制造业及服务业等各产业均获得不同程度的发展。但在对外经济



方面,2012~2013年缅甸对外贸易和外来投资均呈现下降趋势,尤其是外来投资出现大幅下降。由李涛、卢光盛、邹春萌三人完成的《缅甸的电力产业与中缅电力合作》一文指出,缅甸是一个水能资源丰富但水电开发水平较低的国家。根据缅甸目前的电力生产和电网运输供应能力来看,缅甸国内的电力消费短期内难以得到有效的保障。缅甸除大力发展本国的电力产业与大量进口电力外,还需积极开展对外电力合作。由于地缘优势、水电开发领域的丰富经验和技術优势,中国成为缅甸对外电力合作的主要伙伴,中国电力企业纷纷开拓缅甸市场,极大地改善了缅甸电力供应短缺的状况。展望未来,中缅电力合作需要在推进现有合作的基础上,积极寻找其他的电源投资项目,如发展天然气发电和燃煤发电以及可再生能源发电等新能源领域的合作,尤其是要促进缅甸有序、科学、合理地开发水电资源。电力领域的合作有利于进一步夯实中缅关系的基础。由温雅洁撰写的《缅甸独立后货币银行体系的发展》也有较大的参考价值。该文指出,缅甸独立后就建立起了现代银行体系,但奈温执政期间对银行业彻底进行了国有化,这对缅甸初步建立的银行体系造成毁灭性的破坏,其间三次停止货币流通的行为对缅甸银行业造成巨大的打击。1988年军人集团上台后,对缅甸银行业进行了改革与重组,允许私营银行从事金融业务,同时重组国有银行。2011年缅甸新政府开始着手改革缅甸银行业,实行有管理的浮动汇率制,但缅甸的货币金融体系仍存在较大的问题,需要进行深刻的改革。

外交部分收录了三篇文章。自从密松电站被搁置、缅美关系不断升温,国人对当前中缅关系的看法可谓“仁者见仁,智者见智”。因此,究竟该如何认识缅甸的政治转型以及中缅关系的变化成为《缅甸国情报告(2012~2013)》外交部分的主要内容。由李晨阳研究员撰写的《探索不同规模国家间关系模式:以近年来的中缅关系为例》一文指出,中缅关系曾被誉为不同社会制度国家之间友好合作的典范。2011年启动的缅甸政治转型对中缅此前20余年的特殊关系构成了重大的冲击,导致缅甸民间对华不满情绪急剧上升、知华友华力量遭到削弱、中缅经贸合作趋于停滞、双边关系发展的变数增加。在全面和深入反思中缅关系存在的问题的同时,中国也从推动中缅不同规模国家间关系构建的角度做出了重大政策调整,特别是加大与缅甸民间交往的力度、督促中



国企业更好地履行企业社会责任、创造性地介入缅北“民地武”与缅政府之间的和谈以及加强与反对党民盟和昂山素季的沟通。着眼于构建中国与周边不同规模国家间关系的典范，中国下一阶段的对缅外交应进一步调整心态和思路，加强顶层设计、机制建设和政策的执行力度，倾力解决双边关系中存在的重大问题，积极推进务实有效的经济合作，加强各种外交策略的综合运用。缅甸政治转型之后，中国对缅投资被过度政治化，成为中缅关系的负面资产。中国对缅援助不是直接面向缅甸老百姓，因而也未得到广泛的支持。为了准确了解处于转型期的缅甸社会民意，为今后制定中缅经贸合作政策提供有价值的参考，云南大学缅甸研究中心 2013 年上半年在缅甸的内比都、曼德勒和仰光发放了 100 份调查问卷。从统计结果来看，缅甸民众对中国的投资与援助存在较大的负面看法，中国在缅投资的一些大型项目一定程度上在缅甸缺乏民意支持。但是缅甸民众普遍期待国际投资和援助，对西方国家在缅投资和援助的增长抱有很大期盼，以期提高缅甸自身的发展能力，同时也有很多民众能够清醒地看到缅甸实际上还并不具备大规模引进外资的条件。因此，许多缅甸民众依然希望加强与中国的经济联系，同时希望今后中国在缅开展投资和援助时改变投资方向和运作方式。此外，毕世鸿教授撰写的《日本对缅甸新政府的政策与日缅关系的新发展》一文指出，缅甸实行政治转型后，日本基于地缘政治和地缘经济以及制衡中国等方面的考量，重启对缅大规模援助和投资。日本将缅甸纳入“价值观外交”体系，以日本首相安倍晋三为首的政商学考察团频繁访问缅甸，开始全方位介入缅甸事务。除了提供大量援助以外，日本还借机介入缅甸民族和解进程，日本企业也准备大举重返缅甸。日缅关系的迅速升温对中缅关系产生了一定的影响。

第三部分是附录。近年来，美国对缅政策的调整以及美缅关系的发展已经对中缅关系的巩固与合作的深化造成了较大的压力。因此，这部分收录了由杨祥章和王璐翻译的与美缅关系有关的四篇文献。第一篇是美国国务院 2013 年 3 月颁布的《美国国务院关于 2013 年缅甸投资环境评估》。2013 年 5 月 21 日，缅甸总统吴登盛访美期间，在华盛顿与美方签署了《双边贸易投资框架协议》，积极邀请美国企业前往缅甸投资。《美国国务院关于 2013 年缅甸投资环境评估》对美国企业投资缅甸产生较大影响。第二篇是美国国家民主基金会

(National Endowment for Democracy) 2012年在缅甸实施的项目概况。从该基金会2012年在缅甸实施项目的情况来看,美国NGO在缅甸的活动日益增多,影响逐步扩大。第三篇是美国战略与国际问题研究中心(CSIS)对缅甸进行实地考察后发布的调研报告。CSIS是美国乃至全球有名的智库,该机构美缅政策研究项目专家的意见在很大程度上代表了美国学术界对缅甸政治转型与对外关系的看法。第四篇节选了由美国布鲁金斯学会研究员雷克斯·瑞菲尔和詹姆斯·W.福克斯共同完成的《过多,过快?——对缅援助的困境》一文,该文从历史与现状两个维度对国际社会对缅甸的援助进行了有一定新意的解读。

结合附录以及平时的关注,我们发现,虽然缅甸对中国更重要,但是美国社会各界对缅甸的研究还是比我们要深入得多,无论是从成果数量、质量还是影响力来看,都是如此。因此,中国加强对缅甸的深入研究更是迫在眉睫。

## Abstract

Center for Myanmar Studies of Yunnan University started to call together experts in and around the university to write and publish annual report on Myanmar development since 2012, aiming to provide detailed and accurate systematic studies as well as latest information to the public. *Annual Report on Myanmar's National Situation 2012 – 2013* is the second one of the series annual reports on Myanmar. This book is composed of three parts.

The first part is General Report. In 2012 – 2013, the Thein Sein government continued to promote governmental transition, national reconciliation and economic development while expanding diplomatic space, the efforts of which achieved remarkable results. The by-election was held successfully on April 1, 2012. The NLD became the largest opposition party in the Parliamentary and gained legitimate right to participate in Myanmar politics once again. The Myanmar government reached ceasefire or peace agreement with several armed ethnic forces. The government leaders and Aung San Suu Kyi visited foreign countries frequently while a large number of Western politicians visited Myanmar, including the U. S. President Obama. However, the Myanmar government still faces a series of major challenges, such as the clash between the Rohingya and Buddhists in Rakine and conflict between KIA and the Government Army. Moreover, issues like civil rights movement and constitutional amendment also impede the process of political development in Myanmar. Meanwhile, Myanmar's economic vitality has been released, but there was no significant improvement in its investment environment. There was no massive investment and aids from the West while Chinese investment dropped.

The second part is Sub-Reports. It introduces Myanmar's political, economic and diplomatic situation in 2012 – 2013, incorporating with related in-depth research papers. Linking closely to the annual situation while carrying in-depth studies on major issues, this is a major feature of this book. Four papers are collected for politics part, including party politics, NGO and media in Myanmar's political transition and

diplomacy and the Rohingya issue. Party politics is one of the key factors that whether Myanmar's democratization process can be pushed successfully. Myanmar's party construction has made great progress since 2010. However, the self-development capabilities of Myanmar's political parties are limited, which is true for the ruling party UNDP, the opposition party NLD and other small political parties and ethnic political parties. There are deficiencies in their governing capacity as well. It's undoubted that UNDP and NLD will compete for the 2015 election, but Myanmar's future political outlook remains to be seemed. Currently, NGO engages in wider issues and plays an increasingly important role in Myanmar. It has become an emerging force in Myanmar's political transition. "NGO in Myanmar's Political Transition and Foreign Relations" (by Duan Ran and Liang Chen) introduces NGO's development in Myanmar. It analyzes the reasons for NGO's rise in Myanmar since 1988, explores its types, engaged areas, fund resources and activities, and looks into its role and limits in Myanmar's political transition and foreign relations. The authors analyzed the impacts of NGO activities on China through case studies, and made suggestions to deal with it. As the medium for information dissemination, media is the bridge for interaction between the country and its people. The political system has determined the direction of media activities, while the dissemination of certain information will benefit to the ruling of the government. "The Role of Media in Myanmar's Political Transition since 1988" (by Huang Xian and Liang Chen) introduces Myanmar media's activities and features since 1988. It provides macro analysis on the role of media in Myanmar's political transition. It takes Letpadaung copper mine issue as an example to analyze different media's roles in this public event, how do they affect audiences' perceive, response and interaction with the government, and what impact do they have on the national political transition in Myanmar. The conflict between the Rohingya and Buddhists in Rakhine arise global concern. There are lots of articles talking about the issue, but the one from Guo Qiumei is quite unique. It points out that, the Rohingya has two roles, an ethnic group and citizen identity. The Rohingya has obvious ethnic characteristics. However, the 1982 *Myanmar Citizen Law* has neither take the Rohingya as native minority group nor Myanmar citizen. As a result, the conflict between ethnic identity and citizenship, which is widely present in today's multi-ethnic states, is unclear on the Rohingya. There comes another de facto contradiction: the Rohingya has highly "self-assumed"



ethnic identity while there is no “outside-endowed” ethnic identity and citizenship. This contradiction shows the embarrassment of the Rohingya identity.

There are three papers focus on Myanmar’s economy. “Myanmar’s Economic Policies and Situation in 2012 – 2013” (by Zou Chunmeng and Xu Qingyuan) points out that the Myanmar government set new economic objectives for 2012 – 2013 fiscal year. It commits to promote the second phase of economic reform improve people’s livelihood, adjust the exchange rate and tax system, promote foreign trade and improve foreign investment environment. In 2012 – 2013 fiscal year, Myanmar’s economy achieved a reasonable growth, with varying degrees of development in agriculture, mining, manufacturing and service industries. However, both of its foreign trade and investment went downward, with sharp drop in foreign investment. In “Myanmar’s Electricity Industry and China-Myanmar Cooperation in Electricity” (by Li Tao, Lu Guangsheng and Zou Chunmeng), the authors point out that Myanmar is rich in hydropower resources, but its hydropower is underdeveloped. Myanmar’s current electricity production capacity and power grid deliverability make it difficult to guarantee domestic power demand in the short term. In addition to develop electricity industry and import massive power, Myanmar also needs to strengthen international cooperation. China becomes Myanmar’s major partner due to its advantages in geography, rich experience in hydropower development and advanced technologies. Chinese enterprises enter Myanmar electricity market one by another, and significantly improve Myanmar’s power shortage. China and Myanmar have to promote current cooperation and exploit new electricity cooperation projects, such as gas-fired and coal-fired energy generation and renewable energy development. Most importantly, they must promote Myanmar to develop hydropower in an orderly, scientific and rational manner. In “The Evolution and Development of Banking System after Myanmar’s Independence”, Wen Yajie believes Myanmar has established modern banking system after its independence, which has destroyed by the nationalization of the Ne Win government. The suspension of money circulation gave huge blow on Myanmar’s banking. After it took power in 1988, the military government reformed and restructured the banking and allowed private banks engage in financial business. Myanmar’s current government started to reform the banking in 2011, introducing floating exchange rate regime. However, Myanmar’s monetary and financial system still faces serious problems and

needs for profound reform.

For Myanmar's diplomacy, three papers are provided. Due to the suspension of Myitsone Hydropower Station and the development of Myanmar-U. S. relations, Chinese people hold quite different view on China-Myanmar relation. Thus, how to understand Myanmar's political transition and the change of China-Myanmar relations becomes the focus of the diplomatic section in this annual report. Li Chenyang's "Study on International Relations between Countries of Different Scales: Taking China-Myanmar Relations as an Example" points out that China-Myanmar relation enjoyed fame as friendly cooperation model between countries of different social system. Myanmar's political transition since 2011 brings China-Myanmar relation significant impact. Common Myanmar people's dissatisfaction with China rises while pro-China strength weakens. The economic cooperation between China and Myanmar stagnates while the future of their relation faces more variable factors. China rethinks the problems facing its relations with Myanmar and makes major policies adjustment. It enhances non-government exchange with Myanmar, urge Chinese enterprises to fulfill social responsibility, engage in the peace talk between armed ethnic group and Myanmar government army, and strengthen communication with NLD and Aung San Suu Kyi. To build China-Myanmar relation new model for China's international relations with neighboring countries of different scale, China should further adjust its policies, strengthen top-level design and mechanism construction, solve issues hindering the development of China-Myanmar relations, actively promote pragmatic and effective economic cooperation, and enhance the comprehensive implement of various diplomatic strategies. Since the political transition of Myanmar, Chinese investment has been excessively politicized and became a burden of China-Myanmar relations. As Chinese investment is not target at common people, it gains little support from the Myanmar public. In order to understand the public opinion of Myanmar and provide valuable reference for future policy making, Center for Myanmar Studies of Yunnan University did a questionnaire survey in Naypyidaw, Mandalay and Yangon in the first half of 2013. The result shows that negative perception of Chinese investment and aid is common among Myanmar public. They look forward to international investment and assistance to improve the self-development of Myanmar. But some of them see the fact that Myanmar's current situation is not ready for large-scale foreign investment.



Therefore, many Myanmar people still wish to strengthen economic relations with China, and hope China to change its investment and assistance operation mode in Myanmar. In “Japan’s Policies towards Myanmar New Government and the New Development of Japan-Myanmar Relations”, Bi Shihong points out that Japan provides massive aids and investments for Myanmar after its political transition for geopolitical and geo-economic consideration. Japan includes Myanmar into its Value Oriented Diplomacy System and intervenes in Myanmar affairs comprehensively. Japanese government takes opportunity to engage in Myanmar’s ethnic issues while its enterprises are looking for chances to return to Myanmar. The rapid development of Japan-Myanmar relations does impact on China-Myanmar relations.

The third part is the Appendix. As the adjustment of U. S. policies and the development of U. S. -Myanmar relations bring great pressure to China-Myanmar relations, four papers relating to U. S. -Myanmar relations are embodied in this part. In March 2013, the U. S. Department of State released an assessment on Myanmar investment environment, which do will affect U. S. enterprises when they considering whether to invest in Myanmar. On May 21, 2013, President Thein Sein signed a Myanmar-U. S. bilateral trade and investment framework agreement during his trip to U. S. The second one is an overview of projects in Myanmar supporting by the National Endowment for Democracy in 2012. It can be seen from the overview that both the activities and influence of U. S. NGO are increasing. The third one is a report released by the Center for Strategic and International Studies (CSIS) after a team conducted field study in Myanmar. As a famous think tank enjoying worldwide fame, the opinion of CSIS Myanmar exports represents the U. S. academic’s view of Myanmar’s political transition and diplomacy. The last one is “Too Much, Too Soon? The Dilemma of Foreign Aid to Myanmar/Burma”, which is written by former Brookings Institution fellow Lex Rieffel and James W. Fox. By analyzing the history and current foreign aid in Myanmar, it provides audiences with new understanding of Myanmar’s international aid.

From the reports in the appendix and special attention paid to Myanmar studies, we find that although Myanmar is more important to China, the study of U. S. on Myanmar goes further. No matter the results of quantity, quality or impact. Therefore, it’s urgent for China to strengthen in-depth study on Myanmar.



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