
2016-2017 世界商务

发展动态

2016-2017 REPORT ON WORLD COMMERCIAL
DEVELOPMENT

上海市商务委员会 编著
上海科学技术情报研究所



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前言

当今世界比以往任何时候都要繁荣,但也充满了更多不确定性和不安的情绪。一方面,技术、产业和商业模式的创新给人们生活带来极大的便利;另一方面,整个世界发展的图景并不如期望那样美好——在过去的一年里,全球贸易规模锐减、贸易保护主义抬头、民粹主义甚嚣尘上、英国脱欧等逆全球化日益严重,这些都削弱了全球经济复苏的基础。在全球经济重拾增长的过程中,发展中国家日益成为主要的贡献力量。近年来,我国倡议建立了亚洲基础设施投资银行(AIIB)、实施“一带一路”战略、推进“金砖国家”合作等,为探索新型的全球治理模式做了积极的努力,成为经济全球化的重要推动者。

目前,上海正处于将要基本建成“四个中心”和社会主义现代化国际大都市,步入全面深化改革、加快创新发展的新时期。在这一背景下,本轮“世界商务发展动态”研究继续结合上海商务发展的战略布局,对世界商务发展总体态势、重点商务领域动态,以及近期世界商务领域的热点问题跟踪。

本书分为三大部分。第一部分为总论,即第一章,阐述了世界商务总体发展态势,对商务领域的重点行业的发展动态作了综述。另外,考虑到近年来我国实施“走出去”战略,专列一节介绍近两年来国际投资领域的一些政策新动向。

第二部分包括九章(第2~10章),主要对一些重点商务领域的动态及其相关热点问题做了介绍,这些领域涉及货物贸易、服务贸易、商业批发零售贸易、电子商务、大宗商品贸易、现代物流、外国直接投资、会展服务,以及主题乐园等。相关的热点问题包括全球贸易中的保护主义、全



球服务外包服务、新兴技术在商务活动中的应用(如区块链技术在大宗商品交易中的应用、3D 打印在物流服务中的应用)、会展城市品牌的营销等。

第三部分由三章组成,涉及三个专题。其一,研究分享经济下商务发展的新模式。分享经济是近年来的热点话题,也是利用新兴技术进行商务模式创新的典型例子之一,这里简要分析了分享经济的发展现状和趋势,总结其商业模式,并分析了分享经济对商务行业的渗透及影响。其二,讨论全球技术贸易的发展问题。技术是经济增长的关键动力之一,随着技术贸易的发展,相应的贸易方式也在不断创新,如专利许可使用权证券化成为新兴贸易模式;此外,国外的一些技术贸易展示交易平台的发展及其经验也值得我们关注。其三,研究全球贸易功能平台的发展问题。随着新兴技术的发展,商务模式的创新层出不穷,如出现了所谓的“平台经济”,日常消费品、大宗商品、知识产权等的交易,甚至数据的交易都通过不同的功能平台得以实现。这里重点介绍了全球贸易功能平台发展的现状与趋势,介绍了相关国家发展贸易功能平台的经验,以期对上海构建此类贸易功能平台有所裨益。

在本书的撰写过程中,研究人员尽可能收集并参考国内外的最新文献,希望能客观全面地反映世界商务发展的新动向和新特点,但囿于作者的研究能力和学术水平,报告中一定存在疏漏和讹谬之处,欢迎各方专家、学者提出宝贵意见,以助于我们在后续的研究中能够得以改善和提高。

编者

2017 年 6 月



Preface

The world today is more prosperous than ever, but it is also full of more uncertainty and unease. On the one hand, innovations of technologies, industries and business models bring great convenience to people's life. The whole picture of the world development, on the other hand, is not as good as expected. During the past year, the foundation of the global economic recovery had been weakened by the most severe anti-globalization with the Brexit, the shrinking of global trade scale, and the rising trade protectionism and populism. In the process of regaining the global economic growth, developing countries are becoming the main contributors. In recent years, China has made positive efforts to explore new model of global governance, and become the important drivers of economic globalization, with establishing the Asian Infrastructure Investment Bank (AIIB), implementing the strategy of "the Belt and Road", and promoting the cooperation among BRICS countries.

At present, Shanghai is stepping into a new era of comprehensive development through deepening reform and speeding up innovation. According to the development strategy of Shanghai business, "2016—2017 Report on World Commercial Development" continue to analyze new features and trends across all business sectors, and to offer a global vision for government decision-making and industrial development.

This annual report includes three parts, i.e. the general induction, the study of dynamic status of main industries in commerce, and some special topics about commerce. Chapter one, as the first part, describes the general status quo of world commerce, and the dynamic status of some commercial industries are also summarized. Moreover,



considering the implementation of China's "going out" strategy in recent years, a special section introduces some new developments in international investment in the last two years.

There are nine chapters in the second part, covering the main commerce industries, such as international merchandise trade, international commercial services trade, conventional commerce sectors (wholesale trade and retail trade), e-commerce, bulk commodities trade, and modern logistics, foreign direct investment, global MICE (meetings, incentives, conventions, exhibitions) industry, and international theme parks. In each chapter, the author describes the general status quo of the topic industry, and analyzes respectively such issues as the market structure of each industry, the leading enterprises among the industry, emerging modes of business, industry policies. In addition, some hot issues in above-mentioned main commerce industries have also been discussed. These issues include trade protectionism, global service outsourcing, brand marketing for the MICE cities, and the application of emerging technologies in business activities, such as the technology blockchain's application in commodity trades and the using of 3D printing in logistics services.

The third part consists of three chapters, which involve three topics. Firstly, we study the new model of business development in the sharing economy. Being a hot topic in recent years, sharing economy is a typical example of innovation in business model through emerging technologies. We analyze briefly the development status and trend of the sharing economy, and summarize its business models. The penetration and influence of sharing economy to other commercial sectors are also analyzed. Secondly, we focus on the development of global technology trade. It's well known that technologies are one of the key drivers of economic growth. With the development of technology trade, the corresponding trade patterns are also being innovated, such as the securitization of patent licensing right being a new trade mode. In addition, experiences of platforms for technology trade and display in foreign countries



are also worthy of learning from. Thirdly, the development of functional platforms for global trade is studied. With the emerging technologies, innovations in business models take place in succession. For example, exchange for daily goods, bulk commodity, intellectual properties, and even for data is implemented through different functional platforms. And so-called “platform economy” emerged. We introduce the present situation and trend of the development of global trade function platforms. The experiences of developing trade function platform in some countries are introduced, with hope to benefit building this kind of trade function platform in Shanghai.

In the process of study, we have made the best of collecting the latest reference resources in the hope of establishing the full, objective landscape of commerce development throughout the world. However, constrained by our research capabilities and academic ranks, this publication is bound to have some oversights, errors and omissions. Hence, the authors look forward to sharing and discussing our work and our findings, and sincerely welcome your comments and suggestions.

Editors

June 2017



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第一章 世界商务总体发展动态

世界经济仍处于金融危机后深度调整阶段。据国际货币基金组织(IMF)2017年4月发布的《世界经济展望》报告,2016年世界经济以3.1%低迷增长,为2008—2009年以来最弱,其中发达经济体增长1.6%,发展中和新兴经济体增长4.1%。展望未来两年,世界经济复苏仍然乏力,贸易和投资低迷,贸易保护主义升温,美国加息步伐加快,欧美政治不确定性加剧,经济下行风险依然存在。IMF预测未来几年世界经济仍将低速增长,2017年和2018年世界经济增速分别为3.5%和3.6%。发达经济体前景将改善,2016年下半年经济活动已有所增强,且美国或将实施财政刺激;新兴市场和发展中经济体增长预期加快,但金融环境普遍收紧。预计中国2017年经济增速为6.6%,2018年为6.2%,仍是世界经济发展的主要驱动力。联合国、世界银行、经合组织等主要国际机构也都对世界和主要经济体经济增长进行了预测,对世界经济增长形势总体乐观,认为2017年较2016年增长将小幅加快。虽然世界经济面临许多重大挑战,但也充满机遇,新一轮科技和产业革命正孕育兴起,全球供应链和价值链将深度重塑,赋予经济全球化新的内涵,给世界经济发展带来重大影响,也给各国和地区商务活动带来新的发展机会。

一、世界商务发展动态综述

(一) 2016年世界贸易更加低迷

由于世界经济复苏乏力,自2012年以来,世界贸易处于持续低迷状态,2016年更是成为金融危机以来世界贸易增速最慢的一年。根据世界贸易组织(WTO)2017年