

New Economy Report

国际比较研究院 编
Edited by the Academy of International Comparison

2017 新动能新产业 发展报告

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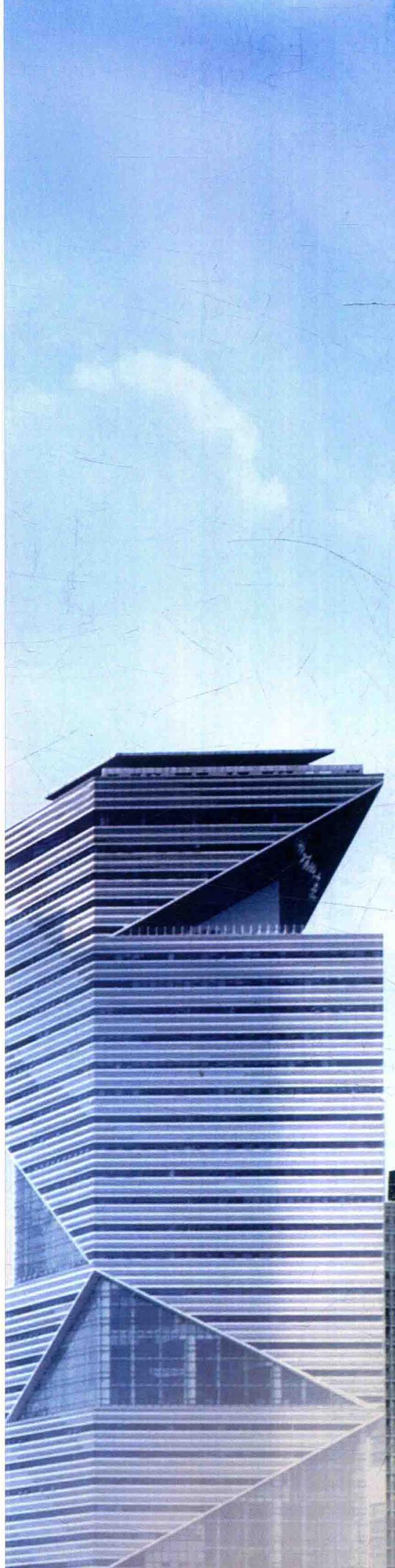
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EDITOR'S NOTE

当今，以“互联网+”、物联网、云计算、电子商务、人工智能、生物工程等高新技术为代表，以满足消费者的需求为核心的新型经济迅速发展。它不同于以往人类历史上的任何经济发展，它的现实环境是全球经济一体化，它的承载基础是信息技术和互联网，它的驱动力是思维创新和技术创新，它是前所未有的科技型、创新型经济，是经济发展的新动能，是全新的生产力。

它跟互联网、物联网、云计算、大数据、信息化、数字化、共享型、知识型、全球化等多种要素相关。它与所有的产业融合，涉及一、二、三产业，不仅仅是指三产中的“互联网+”、物联网、云计算、电子商务等新兴产业和业态，也包括工业制造当中的智能制造、大规模的定制化生产等，还涉及到一产当中像有利于推进适度规模经营的家庭农场、股份制合作制，农村一、二、三产融合发展等等。专家和学者难以准确给它命名，难以划分种类，难以确定业态，难以归纳特点，甚至于在世界各国，其发展形式、发展阶段和发展程度都不同。它对经济社会、人民生活等高度渗透，覆盖面广，内涵丰富。它蓬勃发展，日新月异，推动经济发展，改变人类生活。人们要认知它、界定它、量化它、研究它。

在这种背景下，我们编辑出版了《新动能新产业发展报告》，它共包括五个部分。第一部分是“国家篇”，试图将“新经济”概念及其演进梳理清楚，给读者一个大概

编者的话

的线条。同时归纳了世界各国在研究“新经济”的过程中所面临的挑战及做出的努力，尤其是相关统计工作所面临的挑战。最后重点介绍了中国国家统计局在“三新”统计中所做的工作及取得的初步成果，有些成果是第一次向社会公布。第二部分是“专题篇”，从行业角度对信息经济、分享经济、新金融服务、战略性新兴产业、装备制造业、新能源、新市场主体等进行了描述，吸收了目前有关机构的最新研究成果。第三部分是“地区篇”，收录了北京、上海、天津、重庆、江苏、浙江、山东、深圳、青岛、厦门、苏州共11个省市的报告，分别介绍了本地区新动能新产业的发展情况和创新经验，这些地区主要分布在东部沿海发达省市，是我国新动能新产业发展的排头兵和领头羊，也是形成全国燎原之势的星星之火。第四部分是“企业篇”，收录了海尔、海信、中粮集团、腾讯、京东、小米、携程、顺风、滴滴、陆金所、蚂蚁金服等16家企业，包含了产品制造、农业生产、通讯、物流、旅游、金融、生物医药、教育文化等方面，较全面地揭示了各类型企业网络能力、信息获取与企业绩效的关系。第五部分是“国际篇”，介绍了美国、德国、法国及英国的创新战略，并简要介绍了20国集团互联网经济情况、“一带一路”信息基础设施建设情况等。此外，书的最后还收录了近3年来我国领导人就科技发展方面的重要讲话及出台的有关新动能新产业方面的政策措施，以供读者更好地了解党中央国务院对新动能新产业发展的激励和规划。

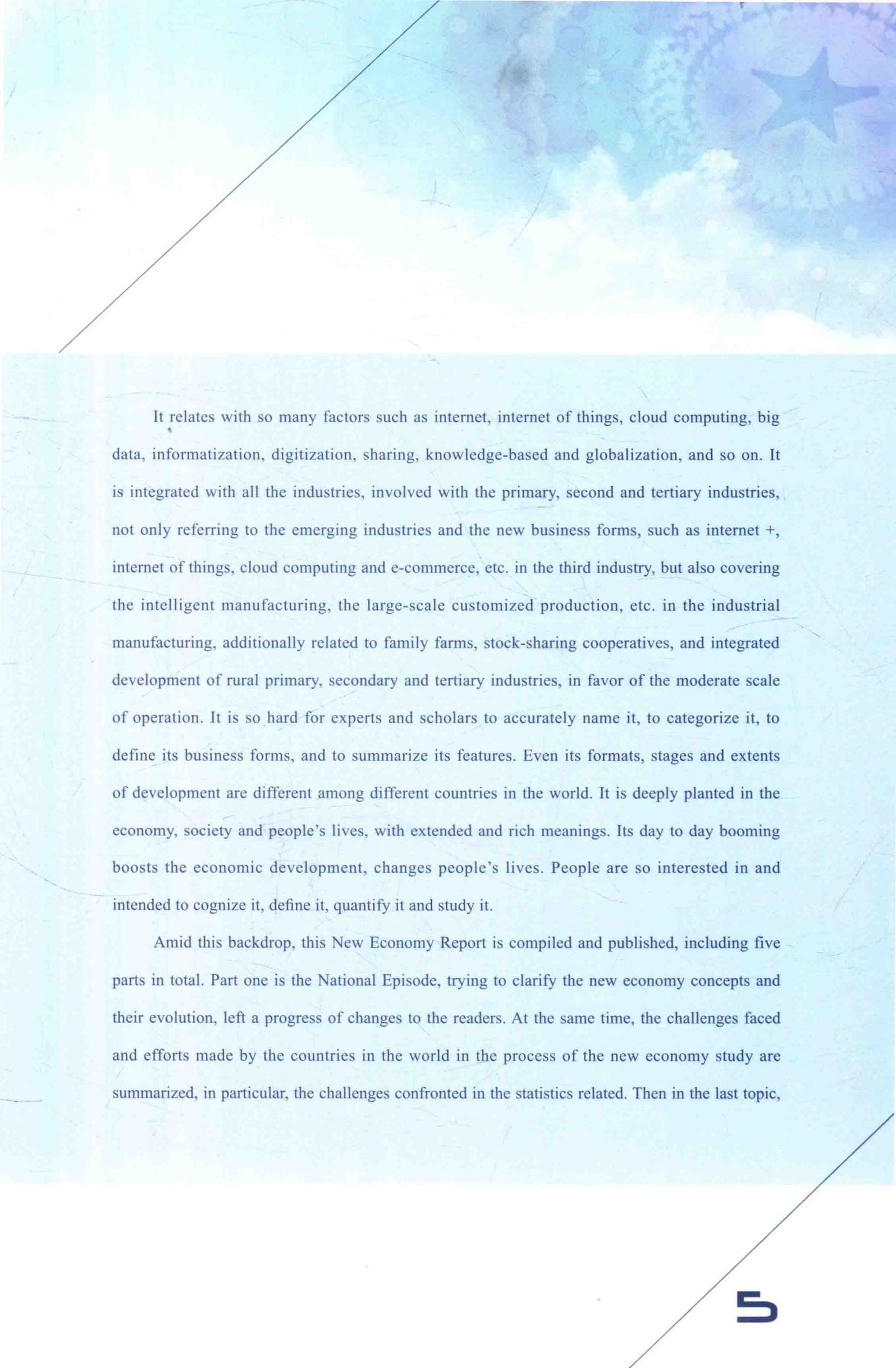


编辑此书，主要出发点是从整体上让读者对我国新动能新产业的状况有一个概览，对其发展的基本情况有一个了解。因此，本书更多地是收集、汇总、介绍，权作抛砖引玉。本书在编辑过程中，得到了国家统计局设管司、综合司、工业司、能源司、贸经司、社科文司、服务业司及研究所的大力支持，也得到了社科院金融研究所、国家信息中心、机械工业经济管理研究院等很多单位及企业的大力协助，在此一并感谢。由于是第一次编辑，时间仓促，水平能力有限，有任何不妥、不准之处，敬请批评指正。

编者

2017年7月25日

Nowadays, the new types of economy grows so fast focusing on meeting the demands from the consumers in typical forms of high and new technology, such as internet +, internet of things, cloud computing, e-commerce, artificial intelligence, and biological engineering, etc. It is differing from any of the economic development in the past history of the human beings. Its real surroundings are the integration of the global economies and its supporting base is the information technology and the internet. Its driving forces are thinking innovation and technology innovation. It is an economy typed as science and technology and as innovation, never seen before. it is a new driving force for economic development, and a brand-new production force.

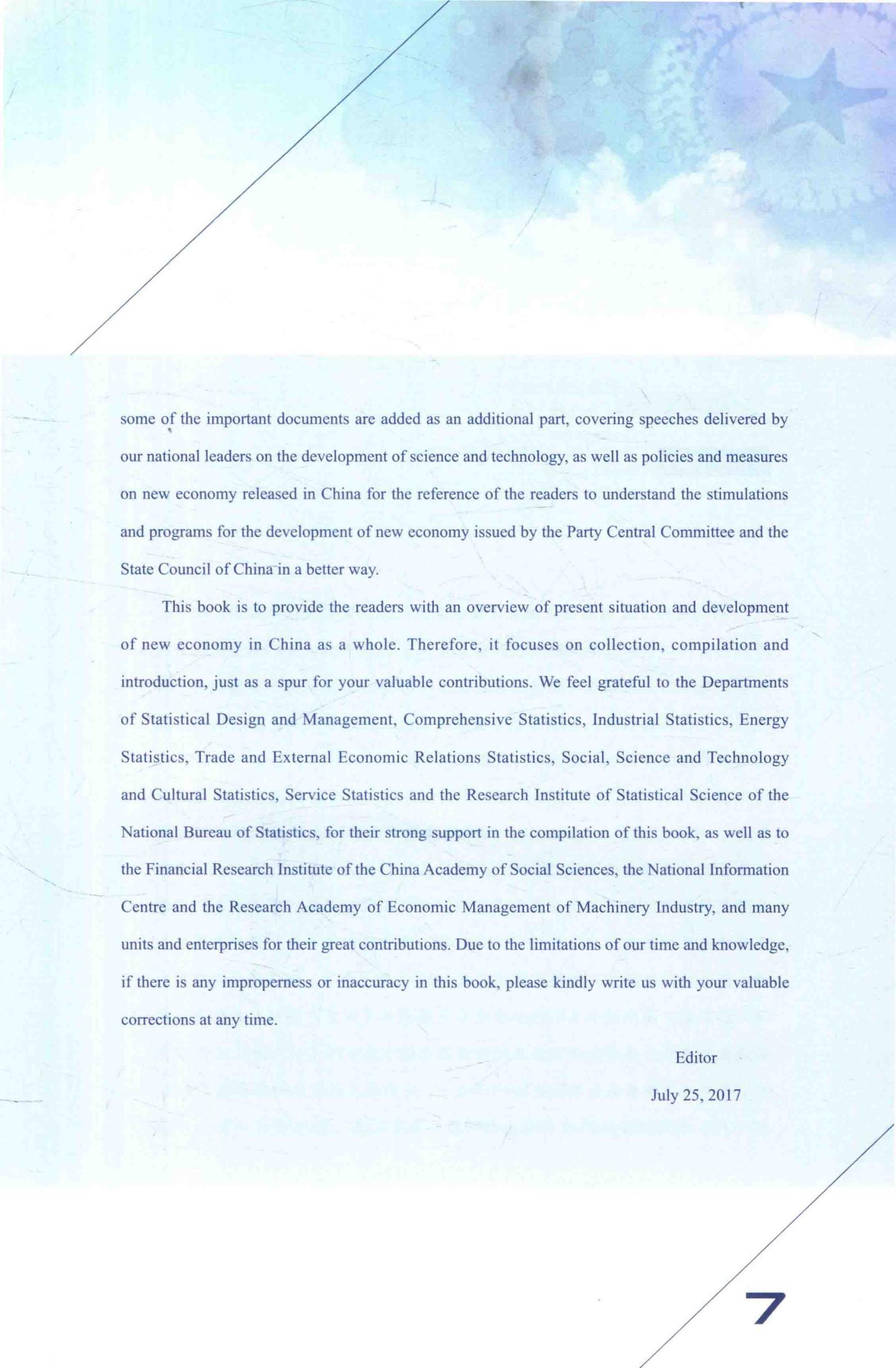


It relates with so many factors such as internet, internet of things, cloud computing, big data, informatization, digitization, sharing, knowledge-based and globalization, and so on. It is integrated with all the industries, involved with the primary, second and tertiary industries, not only referring to the emerging industries and the new business forms, such as internet +, internet of things, cloud computing and e-commerce, etc. in the third industry, but also covering the intelligent manufacturing, the large-scale customized production, etc. in the industrial manufacturing, additionally related to family farms, stock-sharing cooperatives, and integrated development of rural primary, secondary and tertiary industries, in favor of the moderate scale of operation. It is so hard for experts and scholars to accurately name it, to categorize it, to define its business forms, and to summarize its features. Even its formats, stages and extents of development are different among different countries in the world. It is deeply planted in the economy, society and people's lives, with extended and rich meanings. Its day to day booming boosts the economic development, changes people's lives. People are so interested in and intended to cognize it, define it, quantify it and study it.

Amid this backdrop, this New Economy Report is compiled and published, including five parts in total. Part one is the National Episode, trying to clarify the new economy concepts and their evolution, left a progress of changes to the readers. At the same time, the challenges faced and efforts made by the countries in the world in the process of the new economy study are summarized, in particular, the challenges confronted in the statistics related. Then in the last topic,



the work done and the results achieved in the new economy statistics by the National Bureau of Statistics of China are shown, with some of the parts are released for the very first time. The second part is the Subject-matter episode, describing the information economy, sharing economy, new financial services, emerging strategic industries, equipment manufacturing, new energy, and new market entities, etc. in the respect of industries, covering the up-to-date research results from the related institutions. In the third part, the regional episode, reports from 11 municipalities, provinces and cities are included, i.e. Beijing, Shanghai, Tianjin, Chongqing, Jiangsu, Zhejiang, Shandong, Shenzhen, Qingdao, Xiamen and Suzhou. The developments of the new driving forces and new industries in the new economy and the innovation experiences are introduced in their respective regions, which are mainly scattered in the east coastal areas, except Chongqing Municipality. They are the vanguards and the first runners in the development of new economy in China, changing from being minor to being major all over China. Part four is the enterprise episode, embodying 16 enterprises, such as, Haier Group, Hisense, COFCO Group, Tencent, JD.com, Xiaomi, Ctrip, SF Express, Didi, LUFAX and Ant Financial, and so on, covering product manufacturing, agricultural production, communications, logistics, tourism, finance, bio-medicines, education and culture, etc. The relationships of internet capabilities, information captures and performances among the variety of enterprises are presented in a comprehensive way. Part Five is the international episode. It covers the innovation strategies of USA, Germany, France and UK, and briefs the internet economies in the G-20 and the constructions of information infrastructure along the Belt and Road. In addition,



some of the important documents are added as an additional part, covering speeches delivered by our national leaders on the development of science and technology, as well as policies and measures on new economy released in China for the reference of the readers to understand the stimulations and programs for the development of new economy issued by the Party Central Committee and the State Council of China in a better way.

This book is to provide the readers with an overview of present situation and development of new economy in China as a whole. Therefore, it focuses on collection, compilation and introduction, just as a spur for your valuable contributions. We feel grateful to the Departments of Statistical Design and Management, Comprehensive Statistics, Industrial Statistics, Energy Statistics, Trade and External Economic Relations Statistics, Social, Science and Technology and Cultural Statistics, Service Statistics and the Research Institute of Statistical Science of the National Bureau of Statistics, for their strong support in the compilation of this book, as well as to the Financial Research Institute of the China Academy of Social Sciences, the National Information Centre and the Research Academy of Economic Management of Machinery Industry, and many units and enterprises for their great contributions. Due to the limitations of our time and knowledge, if there is any imperfection or inaccuracy in this book, please kindly write us with your valuable corrections at any time.

Editor

July 25, 2017

发展新动能 引领新时代

宁吉喆

NING JIZHE

中国国家统计局局长

2017年8月1日

Commissioner

National Bureau of Statistics of China

August 1, 2017

科技是国家强盛之基，创新是民族进步之魂。党的十八大以来，以习近平同志为核心的党中央把创新摆在国家发展全局的核心位置，高度重视科技创新，创业创新已经成为全社会的共识。2015年“大众创业、万众创新”首次写入政府工作报告，在全国范围内掀起了创业创新的热潮，新动能新产业的发展已经成为势不可挡的时代潮流。

最新公布的统计数据显示，2017年上半年，我国国内生产总值增速为6.9%，取得了高于预期的成绩，宏观经济稳中向好的态势更加明显。这得益于在党中央国务院坚强领导下，各地区各部门的共同努力，是多种因素综合作用的结果。其中一个重要因素就在于积极发展新产业培育新动能，促进了经济发展的内生动力不断增强。近年来，新主体加速孕育、新产业蓬勃发展、新业态层出不穷、新模式不断涌现。2017年上半年，全国新登记市场主体887万户，同比增长13.2%，平均每天新设4.9万户，再创历史新高；我国高技术产业、战略性新兴产业增加值同比增长13.1%和10.8%，分别比规模以上工业增加值高6.2个和3.9个百分点。分享模式创新推动分享经济崛起，2016年，我国分享经济市场交易额约为3.5万亿元，同比增长103%；参与

序言

PREFACE

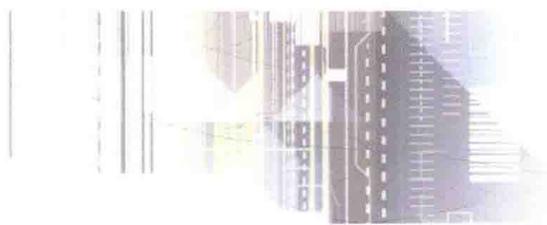
分享经济活动人数超过6亿人，比上年增加1亿人左右。

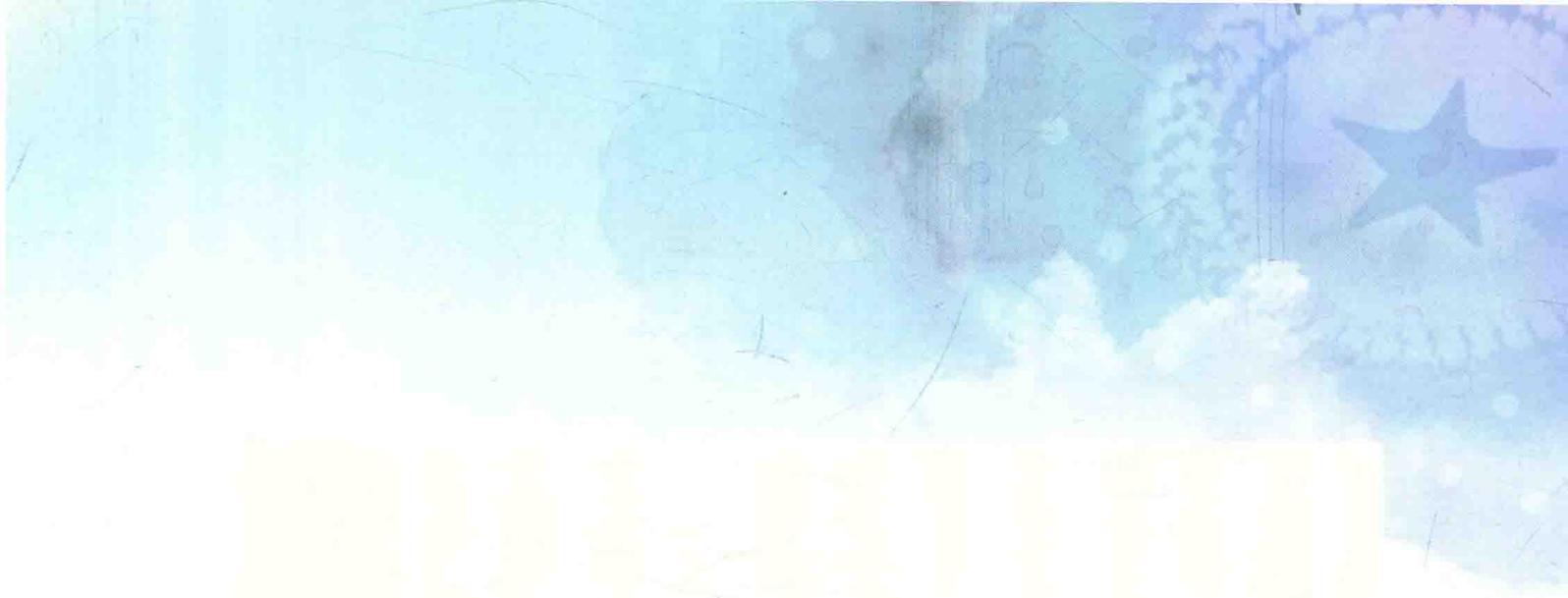
世界经济的发展历程表明，传统动能发展到一定阶段出现减弱是客观规律，很多国家都走过这样的路径，尤其是发达国家，有很多先例可寻。每当这个时候，就需要新动能新产业异军突起，来引领产业革命新趋势，并以新技术加快改造提升旧动能。18世纪后期到20世纪末，世界先后经历了三次科技革命，人类社会的生产、生活发生了翻天覆地的变化。18世纪60年代以瓦特的蒸汽机为主导的第一次技术革命，使人类进入“蒸汽时代”，实现了生产方式的机械化，创造了巨大生产力。19世纪70年代以电力为主导的第二次技术革命，使人类进入“电气时代”，电力的广泛应用，对经济发展和社会进步起了巨大的促进作用。20世纪四五十年代以信息为主导的第三次技术革命，原子能、电子计算机、航天工程、生物技术等领域取得重大突破，推动社会生产力空前发展。每次技术革命都起源于某一两项具有根本性和强大带动性的重大技术的突破，引发出新的技术体系的建立和新的产业升级。三次技术革命和三次产业升级，将人类社会由农业社会推进到工业社会，创造了人类社会的现代文明。20世纪90年代以来，在信息技术的引领下，美

国经济出现了二次大战后罕见的持续性的超高速增长。就我国当前而言，培育壮大经济发展新动能，加快新旧动能接续转换，不仅是促进经济结构调整和实体经济转型的根本途径，而且是推进供给侧结构性改革的重要着力点。

世界大势，浩浩荡荡，新动能新产业发展方兴未艾，一日千里。在这样的发展趋势下，发展新动能新产业，引领新时代，不仅成为全球共同关注的话题，也给各国政府带来前所未有的机遇和挑战。只有顺应历史潮流，迎难而上，开拓创新，才能在这场变革中赢取主动，在更新、更高、更远的未来引领全球发展。我国作为世界第二大经济体、世界最大的发展中国家，在新动能新产业迅猛发展的时代大潮下，如果能把亿万群众的创造力、积极性调动起来，形成万众创新、百舸争流的气势，再加上众志成城、百炼成钢的意志，必将会在推动全球发展变革的历史进程中发挥重要作用和积极贡献。

正是在这样的大背景下，为了全面反映我国新动能新产业的发展态势及其有关方面取得的成果，国家统计局和北京师范大学联合组建的国际比较研究院组织编撰了这部发展报告。全书围绕着新动能新产业汇集了一系列文章，既有概念内涵的梳理、统计工作面临的挑战和统计调查最新成果，也有行业宏观纵览、知名企业的微观创新历程等，较全面地反映了当前国内外新动能新产业发展状况与成就。本书还汇集了近三年国家领导人就科技发展发表的讲话和党中央国务院出台的发展新产业、培育新动能的一些重要政策文件。希望这部研究报告能为致力于观察、研究中国新动能发展的人士提供有益参考。





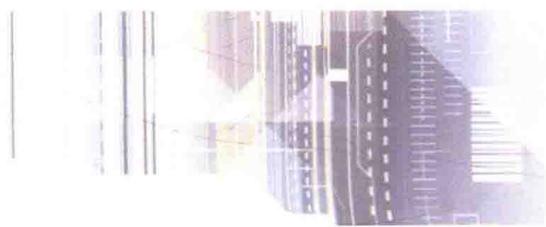
Breeding New Driving Forces Leading New Development

Science and technology is the base for a powerful and prosperous country and innovation is the soul of a progressing nation. Since the 18th National Congress of the Communist Party of China, the innovation has been set at the core of national development as a whole by the Party Central Committee with Comrade Xi Jinping as the core, and a great emphasis on technological and entrepreneurial innovation has become a consensus of the whole society. In 2015, the *Mass Entrepreneurship and Innovation* was written into the Government Work Report, therefore a wave of entrepreneurial innovation has risen, and the development of new economy (new driving forces and new industries) has become the trend of times, which cannot be halted.

The statistics released recently showed that in the first half of 2017, the growth rate of Gross Domestic Product (GDP) of China was 6.9%, higher than expected. It is much obvious now that the trend of macro economy is stable and positive. It benefits from the joint efforts by various departments and regions under

the strong leadership of the Party Central Committee and the State Council. It is the result from the actions of various factors. Of the important factors is that the new industries have vigorously developed and the driving forces have fast cultured, therefore the endogenous dynamics for economic development becomes stronger and stronger. In recent years, it shows the new market entities are cultured at a high rate, new industries boom fast and new types of business emerge continuously. In the first half of 2017, the national registration of market entities was 8.87 million, 13.3 % more than that in the same period of the previous year. On average, 49 thousand new entities were set up every day, which again broke the historical record. The value added of high tech and emerging strategic industries in China increased 13.1% and 10.8% over the same period of the previous year, 6.2 and 3.9 percentage points higher than that of the value added of industrial enterprises above designated size respectively. As the innovation of sharing models boosts the sharing economy, the market trade volume of sharing economy was around 3.5 trillion RMB, increasing 103% over the previous year and the participants to the sharing economy reached over 600 million, increasing 100 million people more compared with the previous year.

The progress of the world economic development shows that it is an objective law that the traditional driving forces will diminish after certain period of development. Many countries went through such a path, particularly the developed countries. There are so many examples to be traced. Every time at this





moment, it needs a new driving force, a new industry to rise to lead the new tendency of industrial revolution, and to expedite the renewal and escalation of the old driving forces by new technology. From late 18th century to the end of 20th century, there were three revolutions of science and technology experienced in the world, brought out enormous changes to the production and lives of the human society. In 1760s, the first technological revolution started with the steam engines invented by James Watt, which brought human beings into the *age of steam*, achieved the mechanization of production modes and created great productive power. The second technological revolution started in 1870s led by electricity, enabled the human beings to enter into the *age of electricity*. The extensive use of electricity greatly promoted the progress of economic development and social progress. From 1940s to 1950s, the third technological revolution came into being by information as an orientation. A major breakthrough was brought about in the fields of atomic energy, electronic computer, space engineering, biological technology, etc., which pushed forward an unprecedented development of the social productive force. Each technological revolution is sourced from breakthroughs of one or two major technologies which have a fundamental and strong driving force, triggering the establishment of a new system of technology and the escalation of new industries. Three technological revolutions and three industrial escalations advanced the human society from agriculture to industry, and brought a modern

civilization into the human society. In 1990s, led by the information technology, USA experienced a rare and continuous high speed growth after the Second World War. After the international financial crisis broken out in 2008, when the other economies were still at depression, the American economy took the lead into recovery. Its fundamental driving force came from the new economy (new driving force and new industry). As to the present situation in China, to culture and boost the new driving force for economic development, and to expedite the conversion of the old driving force into new one not only provide an important path to the adjustment of economic structure and the transformation of the real economy, but also is an important force to push forward the supply-side structural reform.

The world tide of development is majestic. The new economy is still on its way to boost, advancing in a tremendous pace. In this trend, to generate a new driving force and industry heading to the new times, not only becomes a common attentive topic of the world, but also brings out unprecedented opportunities and challenges for all the governments of the world. Only those who follow the historical trend, confront with the difficulties and keep on exploiting and innovating can take the initiatives in this great change and lead the development in the world in the future for newer, higher and further goals. As the second largest economy in the world and the largest developing country, China can and must play a most important role in and make an active contribution to pushing forward the great development and change if all the creativity and enthusiasm of all the people

