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◎ 章迪平 著

流通产业发展方式转变 实证研究

——以浙江省为例
Empirical Study on Transformation
of the Circulation Industry Development Mode:
Evidence From Zhejiang Province



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Abstract

摘要

伴随着改革开放 30 多年经济和社会的快速发展,我国商品市场供求格局发生了根本性变化,已经从总体短缺转变为总体过剩,从卖方市场转变为买方市场,市场需求对经济发展的约束作用越来越大,流通产业在国民经济及社会发展中的地位与作用日益明显。但长期以来,我国流通产业发展方式较为粗放,流通效率不高,流通企业管理手段和技术落后。要促进国民经济持续健康快速发展,满足人民群众日益增长的物质文化需求,迫切需要转变流通产业发展方式,充分依靠科技进步,提高劳动者素质,不断调整与优化流通产业结构。

为了科学地评价流通产业发展方式转变,探讨流通产业发展方式转变的影响因素,寻找流通产业发展方式转变的路径,本书将视角对准市场经济较为发达、流通产业发展具有代表性的经济大省——浙江,通过建立流通产业发展方式转变评价体系,对浙江省的流通产业发展方式转变进行特征分析,并与经济发达或经济发展水平相近的省市进行比较分析,进一步从产业经济学的视角实证研究流通产业发展方式转变与流通产业关联、流通产业结构、流通产业所有制结构等方面的关系,在此基础上再结合发达国家流通产业发展方式转变的成功经验,提出流通产业发展方式转变的政策建议。本书利用多层次、多维度数据,结合投入产出分析、综合评价、动态计量、比较研究等多种方法对流通产业发展方式转变进行实证研究,整个过程注重突出统计特色。

全书共分为九章,每章的主要内容如下:

第一章阐明选题的背景、理论意义和实际意义,回顾相关研究

的现状,开展文献综述,提出研究思路、研究结构及研究方法,给出本研究的难点与创新点。

第二章在梳理国内外学者对流通、流通产业内涵研究的基础上,界定了本研究中流通与流通产业的范围,并借鉴有关学者对经济增长方式及经济发展方式内涵研究的成果,提出流通产业发展方式转变的内涵与重点。其中的主要理论包括新经济增长理论、产业经济理论、新制度经济学理论等。

第三章是流通产业发展方式转变评价体系(包括评价原则、评价指标、评价方法)。本章在前人研究的基础上,根据综合评价学原理,构建较为全面、客观和科学的流通产业发展方式转变评价指标体系,并给出相应的评价方法。

第四章利用第三章构建的流通产业发展方式转变评价指标体系,以浙江省为例,采用1980—2007年统计数据,按照索洛余值法,动态考察了改革开放以来浙江省流通产业发展方式转变状况;运用因子分析法对流通产业发展方式转变进行综合评价,并进一步利用计量经济模型实证分析流通产业发展方式转变的影响因素。最后,对流通产业发展方式转变进行横向与纵向比较分析。

第五章以产业经济学为主要理论依据,运用投入产出模型,对历年浙江省投入产出表进行调整,编制出流通业投入产出表,并通过对计算结果的分析及纵向和横向(与经济发达地区)比较,研究浙江省流通业的产业特性,指出浙江省流通产业发展中存在的问题。

第六章首先论述了流通产业结构优化的内涵及产业结构优化对经济发展方式转变的影响。接着,对浙江省流通产业结构现状进行统计分析,建立了流通产业结构优化的评价指标体系,运用因子分析法对浙江省流通产业结构优化状况进行评价,并进一步利用计量经济模型实证分析流通产业结构变动的影响因素。

第七章首先论述了所有制结构变动对经济发展方式转变的影响。接着,对浙江省流通业所有制结构变动与流通产业发展方式转变进行实证分析,主要包括:浙江省流通业所有制结构变迁历程、现状与趋势,浙江省流通业所有制结构变迁与绩效增长实证研究。

第八章是流通产业发展方式转变的条件及国际经验。主要内容:一是流通产业发展方式转变的紧迫性;二是流通产业发展方式转变的条件;三是流通产业发展方式转变的国际经验。

第九章在综合前面的理论分析、实证研究及国际经验的基础上,做出整体总结,得出相应结论,提出流通产业发展方式转变的政策建议,并对流通产业发展方式转变和这一领域有待进一步研究的问题进行展望。



本书运用新经济增长理论、产业经济理论、新制度经济学理论等主流经济学理论,以浙江省为例,选用多种统计方法和计量经济学方法对流通产业发展方式转变的内涵、特征、机理等方面进行多角度的理论探讨和实证分析,得到以下主要结论:(1)流通产业在国民经济中的地位和作用在不断加强,流通产业具有较强的吸纳劳动力的能力,但其基础产业特征还不够明显;在产业特性方面,浙江省同经济发达地区相比存在着一定的差距。(2)浙江流通业属于消费拉动、投资拉动和出口拉动型产业部门,流通业受到国民经济最终消费、投资需求和出口需求的诱发作用较强,其中又以消费的诱发作用为最大,当前刺激最终需求尤其是全面启动农村消费市场,培育城镇新的消费热点,可以促进流通产业的快速发展。(3)改革开放以来浙江省流通产业发展方式发生了很多积极的变化,但与经济发达地区或经济发展水平相近的省市比较,在某些指标上还存在差距,现阶段浙江省流通产业发展方式基本还处于投入推动型的粗放发展阶段。(4)发展规模、发展潜力、市场化、城市化等诸多因素对浙江省流通产业发展方式转变具有正向促进作用;简单劳动的投入不利于流通产业的技术进步,人力资本对流通产业发展方式转变具有积极的推进作用。(5)改革开放以来浙江省流通产业结构得到不断优化,其中传统行业优势有所减弱,新兴行业则发展较快;但浙江省流通业内部各行业的发展并不均衡,内部结构短期内存在走向不合理的趋势;影响流通产业结构变动的因素及其作用程度存在明显差异。(6)浙江省流通业所有制结构调整已取得了巨大成就,所有制结构变动对改善流通业市场绩效具有显著的正向影响;但流通业所有制结构变动对流通业增长的贡献率还不够大,不同经济成分的流通企业所有制结构经济绩效相差较大。

根据上述流通产业关联、流通产业结构、流通业所有制结构与流通产业发展方式转变的实证研究结果,再结合发达国家流通产业发展方式转变的成功经验,本书对浙江省流通产业发展方式转变提出了相应的政策建议。

本书在借鉴众多学者已有研究成果的基础上,在研究视角、研究方法、研究对象、研究思路等方面有所创新:(1)本书将主流经济学理论运用于流通产业,从产业关联、产业结构与所有制结构等方面入手,揭示流通产业发展方式转变的机理;(2)本书利用多层次、多维度数据,结合投入产出分析、综合评价、动态计量、比较研究等多种方法对流通产业发展方式进行实证分析,整个过程注重突出统计特色;(3)本书在进行实证分析时,立足浙江,浙江流通经济具有活力,行业类型丰富,多种所有制并存,因此这样的研究对象的选择符合中国国情,具有很好的代表性;(4)本书尝试性地从制度的角度探索流通产业发展方式转变的制度根源,具体分析了流通产业所有制结构变迁对改善流通产业经济绩效、



促进流通产业发展方式转变所起的重要作用。与此同时,本书也存在着诸如研究内容的全面性、评价指标体系的综合性、统计数据的完整性等方面的遗憾与不足,这些都将未来进一步学习和研究的主要方向。

关键词:流通产业;发展方式转变;综合评价;产业关联;产业结构;所有制结构



ABSTRACT

With the rapid development of economy and society, commodity market in China has undergone a fundamental change in supply and demand pattern since more than 30 years of reform and opening up. General shortage of commodity market has been transformed into overall surplus and the market has changed from a seller's market into a buyer's market. Moreover, the constraint role of market demand to economic development is getting larger and larger. The status and role of circulation industry in national economy and social development are increasingly obvious. However, for a long time, the development mode of China's circulation industry has been relatively extensive and its organization level is low. There are inefficient distribution and backward management tools, technologies and standards in circulation enterprises. To promote sustained and healthy development of national economy and meet people's growing material and cultural needs, it is urgent to transform the development mode of the circulation industry and fully rely on scientific and technological progress for improving the quality of workers and continuously optimize the circulation industrial structure.

In order to scientifically evaluate transformation of the

circulation industry development mode, and to explore impacting factors and look for the path of transformation of the circulation industry development mode, this book takes Zhejiang province as a study object, which has more developed market economy and is the representative of circulation industry development. By establishing evaluation index system for transformation of the circulation industry, the book analyzes the characteristics of transformation of the circulation industry development mode in Zhejiang province and compares Zhejiang province with other coastal regions or provinces, and cities in East China where the economic development levels are close to that of Zhejiang province. Further, from the perspective of industrial economics, the book has an empirical study on the relationship between transformation of the circulation industry development mode and circulation industry association, circulation industry structure, circulation industry ownership structure, etc. On this basis, the paper combines with successful experience of transformation of the circulation industry development mode in developed countries and puts forward some corresponding policy recommendations. In addition, this book uses multi-level, multi-dimensional data and combines with various methods, such as input-output analysis, comprehensive evaluation, dynamic measurement, and comparative study, etc., to empirically study transformation of the circulation industry development mode. It focuses on outstanding statistical characteristics in the whole study course.

The book is divided into nine chapters, with the main themes of each chapter as follows:

Chapter One elucidates the background as well as theoretical and practical meaning, and it reviews the related literature and brings forth the viewpoint, methods, aims and research paths. The difficulties and innovations are also showed in this part.



Based on reviewing the research of scholars at home and abroad about the

circulation and circulation industry, Chapter Two redefines the circulation and circulation industry and draws on relevant outcomes of economic growth and economic development mode, also puts forward the content and crux of the transformation of the circulation industry development mode. The major theories in this chapter include new economic growth theory, new institutional economics theory and industrial economic theory.

According to the general principles of evaluation, Chapter Three establishes the assessment system for transformation of the circulation industry development mode, which includes a few evaluation principles, evaluation index and evaluation methods.

Based on the data of Zhejiang province of 1980—2007, Chapter Four uses the evaluation index system for transformation of circulation industry development mode in the third chapter to dynamically analyze the status of transformation of the circulation industry development mode in accordance with Solow residual value method, and carries out comprehensive evaluation for the transformation of circulation industry development mode using the factor analysis method. Then using econometric models, it analyzes empirically affecting factors of transformation of the circulation industry development mode. Finally, the vertical and horizontal comparison and analysis on transformation of the circulation industry development mode are conducted in this chapter.

Taking industrial economics as the main theoretical basis and using the input-output model, Chapter Five adjusts the input-output tables over the years in Zhejiang province and compiles input-output tables of the circulation industry. Through the analysis of calculation results as well as vertical and horizontal comparison (with the economically developed regions), it studies industrial properties of Zhejiang circulation industry and points out the problems of Zhejiang circulation industry development.

Chapter Six firstly discusses the content of circulation industrial structure



optimization and the impact on industrial structure optimization to transformation of the economic development mode. Then using the factor analysis method, it analyzes statistically on the status of Zhejiang circulation industrial structure and establishes the evaluation index system of circulation industrial structure optimization. In addition, it carries out comprehensive evaluation for the status of circulation industry structure optimization in Zhejiang province using factor analysis method. It also analyzes empirically these affecting factors of industrial structure changes using econometric models.

Chapter Seven first discusses the impact on changes in ownership structure to transformation of the economic development mode. Then, it analyzes empirically on changes in ownership structure of Zhejiang circulation industry and transformation of the circulation industry development mode. The contents include change history, current status and trend in ownership structure of Zhejiang circulation industry, and empirical research on changes in ownership structure of Zhejiang circulation industry and performance growth.

Chapter Eight expounds the conditions and international experience of transformation of the circulation industry development mode.

Based on the results of the previous theoretical analysis and the empirical research and combined with international experience about transformation of the circulation industry development mode, Chapter Nine draws corresponding conclusions and puts forward some policy recommendations. The future orient of this research field is also expected.

Taking Zhejiang province as an example, this book uses mainstream economic theories, such as new economic growth theory, industrial economics theory and new institutional economics theory, etc. and selects different statistical and econometric methods to theoretically discuss and empirically study the contents, characteristics, mechanisms of transformation of the circulation industry development mode from multiple perspectives. Some



conclusions are drawn in this study. First, the position and role of the circulation industry in national economy continue to be strengthened. The circulation industry has strong ability to absorb the labor force, but its basic industrial characteristics are not obvious enough. There is a certain gap between Zhejiang province and the other economically developed regions in terms of circulation industrial features. Second, Zhejiang circulation industry is the consumer-driven, investment-driven and export-driven industry. The induced role of final consumption, investment demand and export demand is strong to the circulation industry, of which the induced role of consumption is strongest. Currently, to stimulate the final demand, particularly to positively develop the rural consumer market and cultivate a new consumption hot in cities and towns can promote the circulation industry to rapidly develop. Third, a lot of positive changes have taken place in Zhejiang circulation industry development mode since the reform and opening up, but some indicators still lag behind comparing Zhejiang province with other coastal regions or provinces and cities in East China, where the levels of economic development are close to that of Zhejiang province. At this stage, the circulation industrial development mode of Zhejiang province is still at the extensive investment-driven stage. Fourth, many factors such as development scale, development potential, marketization, urbanization, etc., have a positive role for transformation of the circulation industry development mode. Simple labor investment does not favor circulation industry technology advancement. Human capital has positive advancement function for transformation of the circulation industry development mode. Fifth, generally speaking, the circulation industrial structure of Zhejiang province has been continuously optimized since the reform and opening up. Advantage in traditional circulation industries has been weakened while new industries are rapidly developing. But the various industries development is not balanced within Zhejiang circulation industry and there is an unreasonable trend for the



internal structure of the circulation industry in the short term and there is significant difference in the impacting factors and function degree of circulation industrial structure changes. Sixth, the ownership structure adjustment of Zhejiang circulation industry has made great achievements. The circulation industry changes in the ownership structure have significant positive effects on promoting circulation industry market performance. However, the contribution of changes in the ownership structure to growth rate of the circulation industry is still not large enough and the difference of economic performance among different ownership structures in circulation enterprises is large.

According to above empirical research findings of circulation industry association, circulation industry structure, circulation industry ownership structure and transformation of the circulation industry development mode, and combined with successful experience of transformation of the circulation industry development mode in developed countries, the book presents the corresponding policy recommendations about transformation of the circulation industry development mode in Zhejiang province.

Comparing with other researches, this study has several innovations such as the research perspective, research method, research object, research idea and so on. First, this book uses mainstream economic theories to reveal the mechanism of transformation of the circulation industry development mode from the perspectives of industry association, industry structure and ownership structure. Second, this book uses multi-level and multi-dimensional data, and combines with various methods such as input-output analysis, comprehensive evaluation, dynamic measurement and comparative study, and so on. It focuses on outstanding statistical characteristics in the whole study course. Third, this book takes Zhejiang province as an example to conduct the empirical analysis. Zhejiang circulation economic is dynamic. There are rich industry types and a variety of forms of ownership in Zhejiang circulation



industry. Therefore, the choice of such a study object is entirely consistent with China's national conditions and is a very good model. Fourth, the book tries exploring the system root of transformation of the circulation industry development mode from the perspective of the system and analyzes specifically an important role of the changes in ownership structure of the circulation industry to improve circulation industrial economic performance and to promote transformation of the circulation industry development mode. In the meantime, some regrets and insufficiencies also exist in this study, such as the comprehensive of study contents, comprehensiveness of evaluation index system, completeness of statistical data and other aspects, and so on, which will be the main direction of further study and research in the future.

KEYWORDS: circulation industry; development mode transformation; comprehensive evaluation; industry association; industry structure; ownership structure



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