

# 新兴经济体蓝皮书<sup>®</sup>

## BLUE BOOK OF EMERGING ECONOMY

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# 金砖国家经济社会 发展报告 (2011)

ANNUAL REPORT ON BRICS' SOCIAL-ECONOMIC  
DEVELOPMENT (2011)

主 编/林跃勤 周 文

执行主编/林跃勤



社会科学文献出版社  
SOCIAL SCIENCES ACADEMIC PRESS (CHINA)

2011  
版



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## 中文摘要

近数十年来，新兴经济体的崛起宛如全球发展长河中的耀眼浪花，推动着全球经济与社会奔涌向前。而在新兴经济体大家族中，金砖国家的赶超发展鹤立鸡群，引领潮头。未来全球的发展及治理越来越取决于金砖国家的发展与参与。考察金砖国家的赶超发展战略、政策、路径选择等，不仅可以更好地理解新兴经济体的发展规律，也有助于观测世界经济与社会发展及全球治理的演变趋势。

本书的编写的目的正是通过考察金砖国家的崛起，研究新兴经济体的发展变化规律和全球发展与治理变革的新趋势。

本书具有如下几个基本特点：

第一，选题前卫。由于金砖国家概念出现的时间不长，对于金砖国现象的观察和研究还处于起步阶段，一些研究成果多停留在对金砖国家短期的零星现象观察、简单总结层面，对于金砖国家赶超发展的真实动因、内在软肋和缺陷以及未来长期发展面临的挑战，认识不够。因此，加强和深化金砖国家崛起问题的研究，具有重要理论创新意义，可以极大地丰富发展经济学、国际经济学、转型经济学及制度经济学理论等。

第二，内容充实。本书涉及面广，既对金砖五国整体的过往经济社会发展梗概进行了全面回顾总结、比较分析和前景展望，又对各国近年的经济社会发展进行了国别考察，还从经济社会发展专门领域视角对各国进行了比较分析，尽可能向读者展示金砖国家作为新兴经济体中出色表现群体的全景图，又力求突出各国发展特点以及各国在经济社会一些重要领域的表现、动因、潜力和趋势，构建一个全方位、多层面、长跨度、大深度的立体观测系。

第三，作者阵营强大。本书作者代表性广并具有多层次的专业学术背景。本书作者来自中国、巴西、印度、俄罗斯四个国家，共18人，其中中国11人。他们是来自俄罗斯科学院、印度经济社会转型研究所、中国社会科学院、中国社会科学院巴西研究中心（特约外籍研究员）、中国国家发改委、中国财政部科研



所、中国国家统计局、云南财经大学、北京邮电大学、广东工业大学等单位的知名学者。

第四，资讯丰富与观点新颖。本书各部分编撰者力图基于金砖国家的最新事实与变化、可靠翔实的统计数据展开论述，如2010年12月底南非加入金砖后，我们立即增加了南非的内容，力图反映金砖国家最新发展变化态势，同时，对金砖国家经济与社会发展重大问题以及横向比较展开独特的分析研究，力求不落俗套、不人云亦云。

本书由总报告、国别报告、专门报告三部分组成，共40余万字。此外，邀请了巴西、印度、俄罗斯、南非驻中国大使为本书致辞，为本书增色不少。

各部分主要内容如下。

第一部分，总报告“新兴经济体加速崛起与金砖国家赶超发展”，描述了近数十年来新兴经济体的出现、发展、崛起的趋势；金砖国家赶超发展趋势、特点与动因；金砖国家发展中的软肋与面临的挑战；后危机时代金砖国家通往持续赶超与崛起的路径与可能的前景。

第二部分，国别报告由金砖国家5个独立国家分报告组成。

“巴西经济与社会发展：2010年总结与2011年展望”部分，全面概述近十年来巴西经济的发展状况，巴西应对本次金融危机的政策、效果均与以往不同，同时论证了巴西宏观经济结构的转变，以及巴西社会包容性政策的成效与中产阶级较快增加的事实，提出了未来扩大投资、促进经济较快发展的政策选择。最后总结了巴西和中国之间贸易和投资关系的发展及前景。

“俄罗斯经济社会发展回顾与展望”部分，全面回顾分析了近年俄罗斯社会经济发展变化状况、周期性演变特点，提出了推进后危机时代国家经济现代化的方法以及更为科学合理的发展政策建议。

“印度经济社会发展：与金砖伙伴共进”部分，回顾了印度过去20年尤其是21世纪头十年的经济和社会发展，着重分析了全球金融危机对印度经济社会的冲击，以及印度如何应对这一危机和获得稳定发展，探讨了印度与其他金砖伙伴合作共进的方向与前景。

“中国经济社会发展回顾与展望”部分，介绍了2010年中国经济与社会发展政策取向与发展成就，分析了中国在反危机中率先复苏的动因。指出了中国2011年面临的发展环境变化及可能采取的政策措施，并对发展前景进行了预测。



“南非经济社会发展回顾与展望”，总结了1994年废除种族隔离制度以来，南非通过成功政治变革，改革和调整旧制度造成的种族之间资源占有和经济收入的巨大悬殊，保持宏观经济稳定和经济社会繁荣的历程。分析了2008年金融危机期间，南非实施稳健财政政策和货币政策，扩大社会开支和公共投资的政策等，避免了巨大衰退，并在短暂小幅下降后很快复苏，蓄势待发。此外，还论述了南非加入金砖国家对于南非乃至整个非洲加速发展和强化金砖合作机制的共赢意义。

第三部分，专门报告，由7个分报告组成。

“金砖国家财政政策及其比较”，总结了金砖国家财政体制基本特点、金砖国家财政政策变化状况。特别是重点分析了金砖国家反危机财政政策对于各国稳定经济与社会发展中的作用与贡献。

“金砖国家金融体制改革与运行比较”，综合考察了金砖国家的金融体制改革与运行机制，特别是对各国在反危机期间的金融政策及其特点进行了比较，指出了进一步健全金融风险管理机制和提高金融效率所面临的挑战和努力方向，总结了金砖国家金融改革与发展中可资借鉴的经验。

“金砖国家对外经贸改革与发展比较”，梳理了金砖国家外贸体制改革过程与外贸发展概况，考察了2008年国际金融危机对金砖国家对外贸易与合作的冲击，这些国家采取的有针对性的对外经贸刺激政策及成效，对外贸易恢复对本国经济复苏进程的影响。总结了金砖国家应对外部冲击、维持外贸稳定的调控特点与经验启示，并展望了2011年及以后金砖国家经贸合作发展的前景。

“金砖国家区域发展比较”，探讨了大国区域不平衡发展规律，分析了金砖国家区域差距突出、区域发展不平衡的现状；总结了近年来金砖国家为致力区域均衡发展所做的努力、政策取向及特点；指明了推进区域繁荣与均衡发展，促进经济社会和谐可持续发展，实现大国崛起的重要意义以及制度创新与政策优化的重要性。

“金砖国家就业、收入分配与社会保障改革与发展比较”，从经济增长、就业、收入分配与社会保障改革的角度对金砖国家在危机后发展的变化做出全面的分析和总结，应用比较分析的方法概括金砖国家在社会发展方面的特点，及其对中国加快社会发展的启示。

“金砖国家国际竞争力比较”，从WEF和IMD的国际竞争力指标入手，分析





了国际竞争力概念及评价体系；在对金砖国家的国际竞争力排名进行分析比较的基础上，发现金砖国家各有所长，并指出，金砖国家建立有效的合作机制，能够将潜在的比较优势专变为国际竞争优势，并极大地促进金砖国家整体国际竞争力的提升。

“金砖国家合作及其与经济社会发展互动”，从非合作博弈理论、合作博弈理论和国际合作理论入手，分析了金砖国家合作的理论基础，并以此为基础考察了经济全球化背景下，金砖国家在发展战略、国际格局构建、应对全球问题和经济政策困境上的利益交汇点。进而剖析了金砖国家合作与经济社会发展之间的互动关系。最后提出金砖国家合作与经济社会发展互动的策略与机制。

金砖国家是个多元化的复杂综合体，其发展变化一日千里，任何试图对这一群体的内在发展动因和特点进行最为真切的比较、评价，以及把握其未来变化脉搏的尝试，注定是充满风险的和难度极高的。尽管本书作者极力通过自己的努力对金砖国家的经济社会发展的方方面面进行全面深入的考察和独具匠心的剖析，但囿于时间、资料、视野、知识的局限、准备之不足、力度之不够等，我们现在奉献出来的这本“蓝皮书”，依然无法达成我们最初所设想的期望值，更有挂一漏万之处，尚希读者谅解，敬祈指正！

如同金砖国家的成熟、前进与崛起，对金砖国家的关注与研究也不会有止境。我们真诚期盼，诚如巴西联邦共和国驻中华人民共和国特命全权大使 Clodoaldo Hugueney 先生在本书扉页致辞中所希望的——出版“新兴经济体蓝皮书”这一尝试能够唤起全球各地的响应和效仿——如此，幸甚！

执行主编 林跃勤

2011年3月10日

## Abstract

In the recent decade, emerging economies are rising like brilliant waves in the long river of global development, pushing global economy and community to move ahead. Among the big family of emerging economies, BRICS (Brazil, Russia, India, China and more recently South Africa) have distinguished themselves with their rapid development to lead the tide of the world. The future development and disposal of the whole globe are dependent more and more on the development and participation of BRICS. Investigating the exceeding development plans, policies, path selections, etc. of BRICS can help us not only understand more the development law of emerging economies, but also observe the evolution tendency of the world economic and social development as well as the global disposal.

The purpose to compile this book is just to study the development and variation law of emerging economies as well as the new tendency of global development and disposal reform.

The present book has several basic features as follows:

First, the project chosen is advanced. Since the concept of BRICS just appeared recently, the observation and studies on the phenomenon of BRICS are just in the initial stage, some achievements of the studies are just from a short-term scattered phenomenon observation or simple summarization to BRICS and there is a shortage of realization to the BRICS' real motives of exceeding development, inner rib cartilages and defects as well as the challenges facing the long-term development in the future. Therefore, strengthening and deepening the research on the rising of BRICS is significant not only in innovating theories, but also greatly enriching the theories of economics, international economics, transformation economics, institutional economics, etc.

Secondly, the contents are substantial. With its wide coverage, the present book fully reflects and summarizes the past economic and social development of BRICS—the five countries as a whole, comparing the analyses, viewing the prospects, individually investigating the recent economic and social development of each country, conducting a comparative analysis to each country from an angle of economic and social development,



trying to present readers with a panorama of outstanding performances of BRICS as emerging economies, emphasizing the development feature, performance, motive, potential and tendency of each country in some important areas of economy and society, establishing a full-angle, multi-layer, long-span and great depth stereo observation system.

Thirdly, there is a strong force of authors. All the eighteen authors are featured with wide, multi-layer, professional and academic backgrounds, coming from China, Brazil, India and Russia, of which 11 are from China. Namely, these outstanding scholars are from 10 units, Russian Academy of Sciences, Indian Economic and Social Transformation Research Institute, Chinese Academy of Social Sciences (CASS), the Brazilian Center Studies from the CASS (special foreign research fellow), Chinese National Development and Reform Commission, Research Institute for Fiscal Science of Ministry of Finance of P. R. China, National Bureau of Statistics of China, Yunnan University of Finance and Economics, Beijing University of Posts and Telecommunications and Guangdong University of Technology.

Last but not least, information and views are new and novel. The compiler of each part of the book tried to present his or her explication based on the latest facts and variation, reliable and real statistical data of BRICS. For instance, with South Africa's entry into BRICS by the end of December, 2010, South Africa is added to the content immediately, a very good example that the editors are striving hard to reflect the latest development and variation of BRICS, conducting an independent and unique analytical study on the important issues of the BRICS' economic and social development as well as the horizontal comparison, and trying not to fall into convention and echo the views of others without thinking.

The composition of the book: the text is composed of thirteen parts, namely, one general report, five reports on each country of BRICS and seven comparison reports on special fields with total words of about 400000. In addition, there are the addresses made by Brazilian, Russia, Indian and South African ambassadors to China, the preface and so on.

The main contents of each part:

#### Part I: General Report

*"Emerging economies on the rise by catch-up growth"*, describes the appearance, development and rising tendency of emerging economies in the recent decade; exceeding development tendencies, features and motives of BRICS; the rib cartilages and facing challenges in the development of BRICS; the paths and possible prospects for



the BRICS to sustainably exceed and rise in the post-crisis era.

Part II: Report on Each Country, which is composed five individual reports on the BRICS.

*“Brazil’s social and economic development: retrospect and prospect”* thoroughly introduces the situation of Brazil’s economic development in the recent decade, the variations between this financial crisis and the previous crises to Brazil in difference, countermeasure and effect as well as the transformation of Brazil’s macro-economy, proving the achievements of Brazil’s social inclusion policies and the fact that the size of the middle class has greatly increased, raising the policy selection of expanding investments and promoting rapid economic development in the future; finally, summarizes the development and prospect of the trade and investment relationship between Brazil and China.

*“Russia’s social and economic development: retrospect and prospect”* fully reviews and analyzes the variation of Russia’s social and economic development in recent years and the feature of cyclic evolution, putting forward the method of national economic modernization as well as the proposal on the policies of more scientific and rational development in the post-crisis era.

*“India’s society and economy: rise with its “BRICS” counterparts”* reviews the economic and social development in the past two decades, especially the first decade of 21st century, making a special effort to analyze the impact of the global financial crisis on India’s economy and society as well as the method for India to deal with such crisis and obtain a stable development, discussing the direction and prospect for India to cooperate with other BRICS partners for co-development.

*“China’s social and economic development: retrospect and prospect”* introduces the policy orientation and development achievements of China’s main economic and social development in 2010, analyzing the motive of China to firstly recover in the anti-crisis, pointing out the variation of development environment faced by China in 2011 and the possible policy measures taken by China, conducting a forecast to the prospect of development.

*“South Africa’s social and economic development: retrospect and prospect”* summarizes the courses for South Africa to maintain its macro-economic stability and socioeconomic prosperity with its successful political transformation, reform and adjustment to the resource possession and big economic income gap between races caused by the old system since its abolishment of the racial segregation system in 1994, analyzing the stable fiscal policy, monetary policy and other policies to expand social expenditure and public investments taken by South Africa in the 2008 financial crisis, which led to the



avoidance of huge recession, the quick recovery upon a short decrease and the storage to rebound, discussing the win-win significance of its entry into BRIC to accelerate the development of South Africa and even the whole Africa as well as enhance the BRICS' cooperative mechanism.

Part III: Development Comparison Reports in Special Fields which are composed of seven reports.

*“BRICS' differences on fiscal policies”* summarizes the basic features of the fiscal systems and the variations of the fiscal policies of BRICS, especially analyzing the roles and contributions of the anti-crisis policies of BRICS in and to stabilizing the economy and social development of each country.

*“BRICS' differences on financial policies”* comprehensively investigates the BRICS' financial system reform and operating mechanisms, especially comparing the financial policies and their features of each country in the anti-crisis era, pointing out the challenges and directions to further perfect the financial risk management mechanism and improve the financial efficiency, summarizing the experience that can be drawn on in the financial reform and development of BRICS.

*“BRICS' differences on international business and economics”* discusses the large countries' regional imbalanced development law, analyzing the current situation of the sharp regional gap and imbalanced regional development of BRICS; summarizing the efforts, policy orientation and features made by the BRICS to maintain a balanced regional development in recent years; pointing out the significant role of promoting the regional prosperity and balanced development in cultivating a socioeconomic harmonious and sustainable development and making a large country grow up as well as the importance in systematic innovation and policy optimization.

*“BRICS' differences on regional growth”* depicts the foreign trade reforms and development of BRICS, reviewing the impact of the 2008 international financial crisis on the foreign trade and cooperation of BRICS, the special foreign trade stimulating policies and effects taken and results achieved by these countries as well as the effect of the foreign trade restoration on the economic recovery of the country, summarizing the adjustment features and experience inspiration of BRICS in dealing with the external impact, maintaining the foreign trade stability, looking to the prospect of the BRICS' economic and trade cooperation in 2011 and in the future.

*“BRICS' differences on labor and social security policies”* thoroughly analyzes and summarizes the variations of the post-crisis development of BRICS from the angle of economic growth, employment, income distribution and social security, generalizing



the features of the BRICS' social development as well as the inspirations for China to accelerate its social development with the comparative analysis method.

*"BRICS' differences on competitive capabilities international"* analyzes the concept and appraisal system of international competitive force from the indexes of WEF and IMD international competitive force; finding out that each country of BRICS has its own advantage on the basis of analyzing and comparing the rank of international competitive force of BRICS; pointing out that if BRICS establish an effective cooperative mechanism, they can turn the comparative advantages into the international competitive advantages and greatly improve the integrate international competitive force of BRICS.

*"Cooperation and interactions of social and economic developmetn among the BRICS"* analyzes the theoretical basis for the BRICS' cooperation on the basis of non-cooperative game theory, cooperative game theory and international cooperative theory, inspecting the interest line intersection of BRICS in making the development strategy and international pattern as well as in dealing with the global issues and economic policy plight under the background of economic globalization, further analyzing the interactive relationship between the BRICS' cooperation and socioeconomic development, finally raising the tactics and mechanism for the interaction of the BRICS' cooperation and socioeconomic development.

The BRICS is a multi-element complicated synthesis with a tremendous variation in development, so any attempt to really compare and appraise the inner development motives and features of this group as well as grasp the pulse of its future variation is doomed to be fully risky and extremely difficult. Although the authors have made their efforts to thoroughly investigate and delicately analyze all the aspects of the BRICS' economic and social development, the book is still far from reaching our initially assumed values due to the time, data, horizon and knowledge limitation, insufficient preparation, inadequate strength, etc. Furthermore, if any missing, defect or mistake exists, we sincerely expect your forgiveness and correcting!

In parallel with their maturity, advance and rising, concerning and studying BRICS are always beyond limitation. We sincerely wish that the publication of this book on the BRICS could arouse responses and replications in different areas in the world just like the hope expressed by Clodoaldo Huguene, Ambassador of Brazil to China, in his address on the head page. That's our wish and luck too!

Executive Editor Lin Yueqin

10 March, 2011

## 巴西联邦共和国驻中华人民共和国特命 全权大使 Clodoaldo Hugueney 先生致辞

自金砖五国倡议发起以后，该倡议已在重要的新兴经济体中，很快演化成合作与协调的定期论坛。该论坛为这些国家在其世界角色以及自身的国家特色和政策方面交流观点创造了新的机会。尽管作为发展中国家，巴西、俄罗斯、印度和中国以及刚加入的南非共同面临许多挑战，对许多国际事务的看法一致，但这些国家民族各异，来自不同洲，有各自的文化和历史。因此，这些国家的政府、学者和社会相互交流观点对更好了解彼此社会将作出重大贡献，并为相互学习带来种种机遇。



由中国社会科学院学者牵头编撰的这本著作，对促进金砖成员国间进行经济与社会发展的讨论是一次重要的倡议，进而促进学者对这些国家的经济与社会政策和发展状况加深了解。有关巴西的篇章不仅阐述了该国如何平安度过最近的危机，而且还论述了过去几十年经济政策的变化，对最近的社会与经济发展进行了长期的展望。该篇章还重点讲述了坚定的经济原则以及作为重要因素的中产阶级的出现对巴西对抗此次国际金融危机以及经济快速复苏的作用。

正当金砖五国筹备 2011 年 4 月在中国举办第三次金砖峰会之际，更多地开展金砖国家有关政策调整的讨论与研究，对于推进国际贸易和经济体系的重大调整和促使金砖成员国之间更好地协调政策和合作显得尤其重要。金砖五国人口占世界人口的 40% 以上，但经济总量只占世界 GDP 的 16%（或根据购买力平价计算占 25%），这一事实说明这些国家在摆脱贫困和改善人民生活方面还



有很长的路要走。

由中国社会科学院学者发起并组织来自多国别、多部门的专家编写的这本《金砖国家经济社会发展报告（2011）》是关注、重视金砖国家发展的重大尝试，我希望这种研究也会得到其他国家和地区的效仿和推广，并期望该书有助于推进金砖成员国之间就经济和社会发展开展富有成果的对话与合作，为金砖国家应对各种挑战提供更多、更好的参考与选择。

专此，受林跃勤博士之邀，特为由社会科学文献出版社出版的《金砖国家经济社会发展报告（2011）》致辞。

巴西联邦共和国驻中华人民共和国特命全权大使 Clodoaldo Hugueney

2011年3月1日于北京



## Preface by Ambassador of Brazil to China

Preface to the article “Brazil-Economic and Social Developments in 2010 and Prospects for 2011”, to be included in the *Annual Report on BRICS’ Social-Economic Development (2011)*, to be published by the Social Sciences Academic Press of CASS.

Since its launching the BRICS initiative has rapidly evolved into a regular forum for cooperation and concertation among important emerging economies. This has opened up new opportunities for the exchange of ideas between those countries not only about their role in the

world but also about their own national characteristics and policies. Although Brazil, Russia, India and China, joined recently by South Africa, share many challenges as developing countries and have a common view on a host of international issues, they comprise very different nations, which pertain to different continents and express very different cultural traditions and history. As such, the exchange of ideas between authorities, scholars and the civil society in the BRICS is an important contribution to allow for a better mutual understanding between their societies, which also creates opportunities for learning from each other’s lessons.

This publication by the Specialist’s initiation of Chinese Academy of Social Sciences represents an important initiative to foster a debate among the BRICS about their recent economic and social developments and thus promote a deeper understanding among scholars about economic and social policies in those countries. The chapter on Brazil

