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上海论坛论文与演讲精选集

亚洲的发展：突破约束

袁堂军 主编

复旦大学出版社



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编委会主任：杨玉良、朱之文、朴仁国

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袁堂军 主编
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序 言

Preface

自 20 世纪 90 年代以来,亚洲经济取得了飞速的发展,成为拉动全球经济增长的中心区域。同时,随着经济全球化的不断深化,亚洲与国际市场之间的联系愈加紧密,经由国际金融和国际贸易这两个途径受到全球经济波动的影响也越大。我们可以看到 2008 年的危机对亚洲金融体系的冲击表现得较为轻微,而对国际贸易的影响较大。后者不仅反映在对欧美市场的出口减少,而且影响到域内实体经济的生产。产生这样结果的原因,是全球产业链分工的形成与深化。20 世纪 90 年代以后的亚洲,基于生产环节的分工日趋细分化,为追求生产成本的最小化,跨国企业针对每一生产环节,尽可能地选择立地条件最合适的国家和地区进行生产。而伴随这种生产过程碎片化的深化,区域外对亚洲生产的最终品的需求增加,并进一步推动了区域内中间品、零部件贸易扩大。毫无疑问,出口增长拉动了亚洲经济的增长。然而,此次金融危机的冲击,也使得亚洲经济这种外需依存体制的脆弱性凸显无遗。危机发生后,亚洲各国,特别是中日韩都出现了比预期更为厉害的出口萎缩,其程度远远超出了凯恩斯经济学假说。

亚洲区域内所形成的多层次生产网络是亚洲竞争力的源泉所在,而基于产业链和价值链的国际分工是推动亚洲经济可持续发展的主动力,这也决定了亚洲各国出口导向的基本模式不会轻易改变。但要实现可持续稳定的经济增长,关键是如何调整现行增长方式,减少对欧美诸国市场的依赖,形成能够抵抗外部冲击的经济结构。这要求我们对现行的亚洲发展模式所面临的问题有准确的判

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断和认识,尽可能地从亚洲与国际经济之间的关联以及从短期和中长期的角度厘清亚洲经济发展的主要约束条件。

从亚洲与国际经济关联的角度,首先从短期来看,欧美发达国家的市场持续低迷。尽管最近对欧洲和美国的经济预测报告显示出经济缓慢复苏的基调,但信贷紧缩、就业恶化等阻碍复苏的因素依然存在,因此,欧美诸国的经济要全面复苏到危机前的状态,可能需要较长的时间。如果现行的发展模式不能及时调整,那么从贸易的渠道对亚洲经济产生的负面影响就会日趋明显,外需依存的经济结构亟待突破。另一方面,虽然亚洲克服了1997年的通货膨胀危机,但整体的金融体系仍然相当脆弱。此次得益于所持有证券化商品相对较少,而受到全球金融危机的冲击有限。但值得注意的是,随着危机后遗症的蔓延,一旦欧美诸国的金融调整陷入长期化,那么全球金融市场将再次陷入不稳定,这很可能导致外国资本从亚洲撤离,亚洲各国不得不面对外汇储备减少、货币和股市暴跌的风险。

其次,从中长期来看,亚洲面临全球经常账户失衡中暗藏的风险。特别是如果过度失衡是资产泡沫等非效率投资所引起的,就更应警惕。此次全球金融危机的原因是美国的过度消费和住房投资。我们看到,虽然危机后美国的经常账户赤字一度出现缩小,但随后很快再次显示出扩大的迹象。如果美国维持目前的财政赤字水平,经常账户失衡继续加剧,势必引起投资者对美国财政产生疑虑,导致流入美国的资本减少(或者资本流出),美国经济很可能因美元和股市的暴跌而失速,进而导致全球金融市场动荡和全球经济硬着陆。虽然此次资金没有从美国逃离到欧洲等地,而是转向了相对安全的美国国债,才得以回避硬着陆,但只要导致失衡的因素继续存在,中长期美元贬值的可能性就会增大。亚洲因拥有庞大的以美元计价的外汇储备,而不得不承担巨大的资本损失。

毫无疑问,未来的亚洲将会继续推进贸易和投资的自由化,而融入更加开放的国际经济体系中,因此无论从贸易通道还是金融渠道,亚洲都可能会面临更大的外来冲击。出口商品多样化及出口目的地多样化,对提升亚洲抗拒外来冲击的能力十分重要。亚洲本身的市场规模巨大,收入水平也有较大的上升空间,因此开拓亚洲自身的需求市场可谓首选,让亚洲在作为“世界工厂”的同时也成为“世界市场”,就可以将以中间品为中心的贸易扩张至最终品为中心的贸易,这不仅有助于亚洲的平衡增长,还能藉此减轻或摆脱对欧美市场的过度依赖。同

时,如前所述,为了防止经常账户失衡成为未来全球经济的一个不稳定因素,我们也需要通过扩大内需等方式来降低风险。

从亚洲区域内部看,扩大内需的关键是亚洲对最终商品消费能力的培育和提高。亚洲的人口规模巨大,随着经济的持续增长,人均收入水平也在不断提高,形成了具有一定消费能力的中间收入层。而根据 OECD 的预测,在未来的 20 年,亚洲的中等收入人群会翻番。但现实是与 EU、NAFTA 等其他区域相比,现阶段的亚洲对区域内的最终商品出口比率较低,其背后所折射的原因之一,是亚洲各国的收入差距和需求结构差异较大。近年来,亚洲在增长至上的开发战略下,在取得快速增长的同时,也随之产生了各种扭曲,其中最为突出的是收入差距的扩大,增加了跌入中等收入陷阱的风险,也存在市场成熟度的差异,以及内外制度上的障碍,比如关税和非关税壁垒和投资规则一体化的滞后。这些因素会提高制度性的交易成本,不仅影响区域内生产网络的进一步紧密化,也制约着区域整体的对外竞争力的提升,更为重要的是会影响区域经济增长的活力,阻碍内需扩大的进程。

亚洲内需堪忧的原因还源自于亚洲各国经济的结构性障碍。亚洲各国的人口规模和劳动力禀赋条件差异很大,特别是一些国家存在的劳动力市场的二元结构难以消除,大量低素质劳动力无法直接参与价值链的中高端行业。结果是一部分中高端产业工资上升较快,同时因为低端产业生产率上升缓慢,而形成工资上涨的压力,使亚洲的低端行业失去国际竞争力,对非熟练工人有挤出效果,导致就业机会减少而内需不旺。要实现扩大内需的增长模式,纠正这些差距,刺激中间层消费十分重要。这需要完善社会保障体系,缩小地区间差距,形成包容性增长。

环境和资源也是亚洲现行增长模式的约束条件。在国际分工结构调整的过程中,亚洲作为“世界工厂”的重要性与日俱增,然而随着亚洲经济的快速发展,亚洲的产业结构也逐渐转向了资源消耗型。资源消耗增加的速度甚至超过了经济增长速度。这样对资源需求的急速增长,孕育出阻碍亚洲经济可持续稳定增长的资源约束和环境约束两个制约条件。资源约束有多种形式,首先是资源匮乏的问题,如化石燃料和矿产资源等不可再生资源的枯竭。亚洲农业人口多,农业集约化生产水平低,受到土地、水等资源的约束比其他地区更为严峻。其次,即使某种资源的储量丰富,但如果短期供应能力不能满足需求,该资源价格也会

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上升,从而增加发展的要素成本。这也是资源约束的另一种形式。实际上我们也能观察到,亚洲的能源既有总量短缺的问题,又有结构失衡的问题。这使得亚洲经济增长中的能源需求必须通过外部市场来加以平衡。然而,国际能源市场的金融投机,再加上严格限制使用高碳能源的政策不断推出,都增加了亚洲发展的制度性交易成本,使亚洲经济增长的红利大规模地流向具有能源、金融优势和新能源技术优势的国家以及非煤炭类的能源出口国。而关于环境约束,主要表现在对废弃物等的环境容量的不足及处理的功能性缺失,导致生态环境因负荷过重而持续恶化。最近亚洲一些城市频发的雾霾现象,更是凸显了这种环境容量资源的稀缺性。

诚然,尽快普及节能减排技术等低碳发展路线对保护环境十分重要,但这对大部分尚处在工业化发展初级阶段的亚洲国家来说仍然是一种高成本经济,缺乏必要的投资和相应的收入水平来支撑对高成本清洁能源的消费。因此亚洲的低碳转型应该考虑到增长的边际成本,可以从改造现行能源供需体系着手,在保障经济发展的前提下,逐步过渡到新能源技术的开发和利用。资源环境问题具有很强的外部性,因此不能靠一个国家单独应对,而是需要多方相互协作共同参与,不可分割。对于亚洲各国来说更是如此,合则共利,分则俱损。特别是要防止一些国家或地区为了要摆脱贫困,所以采取了为增长而增长所形成的对环境资源破坏的恶性循环。为此,亚洲各国政府应致力于低碳节能和新能源技术领域的多边合作,建立常态化的资源环境政策协调机制,共同促进新能源产业、环保产业、节能型制造业的发展。

相对经济紧密化和一体化的推进,亚洲在国际贸易、国际投资规则的制定,以及政治法律、社会文化等制度层面的合作显得相对滞后。这主要是由于历史的、文化的原因。亚洲各国的社会制度以及社会转型程度和速度不一,存在较大的差异。这不仅妨碍了亚洲国际分工体系的进一步深化,也增加了亚洲各国之间的制度性的交易成本。换句话也可以说亚洲在制度创新上还有巨大的空间,制度创新的红利尚未得到有效发掘。近年来,亚洲一些国家之间的内部竞争和摩擦日益增强,提醒我们为了推进亚洲整体发展,维护亚洲和平、促进区域合作尤为迫切。亚洲国家非常有必要在贸易投资、经贸金融、民商事务、知识产权、环境资源、司法协作等主要领域加强法律合作,为进一步推动更高层次的经济一体化提供制度性的保障。而促进亚洲合作,需要亚洲各国在世界和亚洲秩序调整

中积极有效地管理矛盾和冲突,排除各种有可能加剧矛盾的干扰,尊重各国的重大利益,协调各国发展策略,为亚洲发展创造和平稳定的内外环境。

综上所述,亚洲要实现可持续稳定的经济增长的关键,是如何突破约束条件,摸索出一条提高国际竞争力、推动外需,同时致力于扩大内需的转型之路。亚洲各国的市场成熟度不同,制度的缺失等导致劳动力素质的两极分化以及收入差距的扩大。而基于价值链的国际分工体系的深化也往往伴随着工资上涨的压力。因此一旦外需出现萎缩,则易陷入低端均衡被打破而高端均衡又暂时无法实现的困境。突破口应该放在如何实现亚洲实际人均收入的持续增长。为达成这一目标,在内需不旺的现状下,对外依然需要与欧美发达国家共同推进国际贸易和投资规则,从制度上保障亚洲与其他地区之间国际分工体系的进一步深化;对内则要通过制度的完善、金融体系的一体化,提高自身的效率,提升出口竞争力,做到不断融入全球价值链分工体系,并通过效率驱动产业链分层次的高端递进,实现“工资深化”,同时也要充分利用现有的人口红利发挥劳动力的比较优势,扩大产业规模增加就业机会,实现“工资广化”,并通过推进城市化来培育内需市场。另外,从中长期看,随着亚洲人口的老龄化,劳动力减少的趋势将会越来越强,为此,还应致力于增加教育投资,培育创新型人力资本,为未来知识型、技术型产业转型做好必要的准备。

还有一点值得强调的是,直接投资是形成亚洲域内分工和生产网络的直接推动力。是否能够充分发挥和提高亚洲生产网络的效率,在于是否能进一步促进区域内直接投资的活跃。这要求进一步改善亚洲的投资环境和商业环境,充实和改善硬件基础设施的数量和质量,培育高端的人力资源。而贸易和投资的自由化等制度层面的高度合作和及时跟进则是亚洲竞争力提升的制度保障。

上海论坛着眼于亚洲“未来十年的战略”,汇集了来自世界各国的优秀专家和学者,围绕亚洲自贸区建设、亚洲货币、城市化、法律合作、能源与环境、企业创新、社会责任、税收治理等领域,展开了热烈的讨论和交流,并形成了一定的共识,大家一致认为未来10年将是世界秩序和亚洲秩序的深入调整期,也是亚洲力量整体崛起的重要历史机遇期,继续积极应对危机仍然是当前亚洲发展面临的基本挑战。而面对挑战,需要各国充分发挥政府作用,推进经济体制和货币体系改革,在能源等领域不断突破,探索属于亚洲的发展之路;也确认了未来10年亚洲发展的重大主题之一是经济社会结构的大幅调整及地区经济关系重构。而

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为了更好地促进亚洲的发展,各个国家应根据所处的不同发展阶段,推动自身结构性转型,并合力推动亚洲的整体性发展转型。另外,国家之间还应加强合作,努力形成更加具有主导型和互补型的区域合作机制,并通过不断创新来促进新兴战略产业的培育和成长,重塑区域产业分工的格局。

本次论坛汇集的论文数量众多,覆盖领域全面,内容丰富,其中不乏体现作者智慧结晶的精辟之作。遗憾的是精彩论文太多,不能悉数收录,我们不得不忍痛割爱,仅从中精选出 16 篇,分为上下两册汇编成集,以飨读者。其中上册以“亚洲的发展：突破约束”为主题,选编了与东亚经济发展战略、单边多边贸易规则制定和选择,以及从产业链、货币体系的角度阐述亚洲一体化的相关论文,也收录了几篇论述亚洲如何在法律、环境、城市化和税收治理等方面合作的文章。下册则围绕“中国发展与亚洲的未来”的主题,选编了中国发展与东亚格局的演变、中国资本账户与经常账户开放、新型产业的发展等对亚洲经济的影响以及从能源安全、生态环境等角度论述中国发展与亚洲各国之间关系的论文。我们衷心希望这些论文能够对读者理解和思考亚洲未来的发展方向有所启发。

袁堂军

2013 年 3 月

Contents

Economic and Strategic Order-Building in East Asia: Emerging Great Power Politics and Role of Regionalism

Takashi Terada^①

I. Introduction

The Trans-Pacific Partnership (TPP) agreement, established in 2006, was an obscure trade pact among the four small economies of Singapore, Chile, New Zealand and Brunei until 2008, when American President George W. Bush signalled the intention of the United States to join the accord. Australia, Peru, Vietnam and Malaysia subsequently decided to become members, adding momentum to the TPP's emergence as a potentially important free trade forum. But it has been the recent vocal support of American President Barack Obama's administration for the TPP that has catapulted it to the forefront of debate about trade liberalization in Asia and the Pacific and given momentum to its institutional development. Current member countries — Singapore, Malaysia, Australia, New Zealand, Brunei, Vietnam,

① 作者简介: Takashi Terada, Department of Political Science, Doshisha University, Kyoto, Japan。

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Chile, Peru and the United States — are seeking a highly ambitious trade and investment accord addressing regulatory convergence, issues posed by state-owned enterprises, supply chains, intellectual property and other so-called “21st century” issues that in some cases go beyond current World Trade Organization (WTO) rules. Participating countries are seeking to make TPP a model free trade agreement, one that will be open to new members and will serve as a stepping stone to a Free Trade Area of the Asia Pacific (FTAAP) encompassing the world’s most dynamic region and economies representing more than half of global economic output and trade. The consequences of this could be far reaching.

To be sure, American interest in an Asia Pacific free trade area is not new. At a meeting of the Asia Pacific Economic Cooperation (APEC) forum in Hanoi in 2006, the United States proposed the FTAAP — in effect, an APEC-wide free trade agreement. Although the idea received a cold shoulder from many APEC members and negotiations have not gotten off the ground, the proposal did help generate greater interest in an idea that was first mooted by business leaders in 2004. The motive behind American support for the FTAAP and now the TPP is clear. As Kurt Tong, a senior official in the State Department’s Bureau of East Asian and Pacific Affairs, testified before the Congress in 2009: “America risks becoming disadvantaged economically if we do not participate constructively in the process of economic integration that is already underway in the region.” The American push for the FTAAP and TPP has five major implications for economic and strategic regional order-building in East Asia.

II. Normative change in APEC

First, these trade initiatives by the United States have significant consequences for the course of functional cooperation within APEC, the only multilateral economic framework in Asia in which the United States officially participates. APEC long adopted an approach to trade liberalization based on the concept of “open regionalism,” which applies the benefits of liberalization agreements entered

into by members to outsiders in the form of non-discriminatory, most-favoured-nation status. Critics, however, identified APEC's open regionalism, with its emphasis on non-discriminatory trade liberalisation, concerted unilateral liberalization and peer pressure system as key weaknesses. The TPP, however, requires a discriminatory approach to trade liberalization and thus represents a substantial change in APEC's norms. Considering the fact that the majority of APEC's members have now established bilateral or regional FTAs, the groundwork enabling FTAAP to be accepted has probably been prepared, compared with the time when the majority of APEC members stuck to the non-discriminatory and voluntary-based trade liberalization. Today's APEC has turned away from this open regionalism, recognizing the effectiveness of discriminatory FTAs and positioning them as an engine driving liberalization within the region. One factor that has been expanding the network of East Asian FTAs is in fact related to the discriminatory nature of the FTAs. The recognition has been more widespread in the region that it was necessary to sign more FTAs with major trading nations. These ideational structural changes have helped the American proposal of an FTAAP and its promotion of the TPP to be more seriously accepted by other APEC members. If these schemes move forward as the growing number of APEC economies show an interest in the FTAAP/TPP with the acceptance of discriminatory and legally binding agreements and negotiation as APEC norm, it would represent a victory for the Americans because the United States long struggled to introduce a discriminatory and legally binding mechanism into the APEC process and establish it as an APEC norm. In other words, the United States would finally succeed in transforming the organization into a regional institution of the type it has long desired — an outcome-oriented, trade-liberalizing institution, and succeeded in the coalition-building with like-minded states for the first time in the history of APEC's trade politics.

III. Encircling China

Second, the American embrace of the TPP also entails political and strategic

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motives. In other words, America's involvement in the regional order and its preference for standardized rules-based agreements is also evident in changes in Asian security architecture. The United States had never been interested in participating in any East Asian (as opposed to Asia Pacific) regional institution until Barack Obama assumed office in January 2009 and subsequently declared himself "America's first Pacific president." The most significant decision Obama has made in this context has been America's participation in EAS in 2011, while also urging the need to promote TPP and FTAAP by hosting the APEC Honolulu meeting in 2011. Under President Obama, the American commitment to multilateral regional institutions has mainly been aimed at constraining behaviour by China that is not in line with American national interests or those of other like-minded states, as seen in growing tensions between China and some ASEAN members, such as Vietnam and the Philippines, over maritime territorial disputes in the South China Sea. The United States has used regional institutions, including the ASEAN Regional Forum (ARF) and the Shangri-La Dialogues, as a venue to press China to reconsider its maritime claims to the entire South China Sea.

Previously, regional discussion on security focused on "soft" or non-traditional security issues through a pattern of dialogue stressing consensus and non-interference in sovereign affairs. Since Obama came into power, however, the United States and some nations in the region have begun to construct a rules-based framework that tackles traditional "hard" security issues, such as territorial disputes. This has been marked by a shift away from a focus on the ARF, which has the reputation of being more a discussion session than a meeting with clear political goals, and greater emphasis on more substantive deliberations at the EAS, in which the United States is now a full participant.

ARF and EAS have been governed by the so-called "ASEAN Way" which informally stipulates non-intervention, non-binding and consensus-based decision-making approaches to regional cooperation, and ASEAN's function is often described as being limited to a 'talk shop' that merely provides venues where ministers and leaders from larger states join together to exchange views on regional

security and economic issues. The talk shop's value could be enhanced if delegates discussed the hard issues, regardless of whether any binding obligations ensued, and the United States has played a key role in the enhancement of this talk-shop function through placing territorial disputes on the ARF agenda in 2011, a move that could be viewed as confrontational, because China, which has significant territorial claims in the South China Sea, has traditionally insisted on bilateral negotiations with other claimants rather than multilateral forums to resolve disputes. The body of water is an important fishing ground that has an estimated 23 – 30 billion barrels of oil under its floor. Of significance was the American insistence that all parties in dispute should provide "legal evidence" to support their territorial claims. The White House's insistence on using the EAS to "address strategic and security challenges" by reaffirming "international rules and norms in these areas," thus poses problems for Beijing's approach to these disputes. China is therefore engaged in subtle attempts to resist greater U.S. engagement in the region. This approach, initially promoted by the Philippines, is something China had previously not taken seriously. Obama repeated this call for legal evidence at the East Asian Summit (EAS) in November 2011 in Bali, a move that was seen as boosting the role of the EAS as a more results-oriented institution capable of tackling hard issues. As a consequence, all participating leaders, except for those from Cambodia and Myanmar, touched on the need of the peaceful settlement of the maritime territorial disputes in the South China Sea. Prior to the America's Asia pivot strategy, ASEAN had never successfully acted as an effective shield to protect the interests of its members in territorial disputes.

America's increased engagement in Southeast Asia, including its keener interest in the use of Asian multilateral institutions, has given renewed significance to the ASEAN ministerial meetings. The Obama administration's commitment to the region, epitomised by the term "Obama's Asia pivot", is in sharp contrast to the apathetic attitude of the Bush administration as evinced by former US Secretary of State Condoleezza Rice's two absences from the ARF in just four years. Through the Obama Administration and its participation in the ASEAN meetings we are seeing the

first serious US engagement in Southeast Asia since the end of the Vietnam War.

Some in China view the American commitment to the TPP as also motivated by checking China's growing influence on regional economic integration. The TPP is generally considered a high-standard trade arrangement suitable to the American template for FTAs, which, for instance, aims to have no exceptions to tariff elimination. This is an approach that China cannot accept. What makes it politically impossible for China to join the TPP are provisions relating to labour standards and the environment, which potentially require members to abide by standards set by the International Labor Organization, including freedom of association and collective bargaining. Given the size of its market, Japan's entry, which the United States hopes to realise in the near future, would greatly enhance the prospects that TPP will lead more quickly to the establishment of a region-wide FTA, China has been urged to accelerate the pace toward the establishment of a regional FTA framework in which China can set up its own standards for economic integration with its own schedule.

American policymakers, for their part, have been frustrated by criticism that the United States has been disengaged from the proliferation of East Asian FTAs, while China has enjoyed credit for promoting so-called low-quality FTAs in the region that include numerous exceptions to tariff elimination. Eventually, the United States began to use the FTAAP/TPP to change expectations regarding where the politics of regional trade would be headed in the future. This move is especially important at a time when the pragmatic ideas of economic development espoused by the Beijing Consensus, which justifies government intervention in the markets, have won more supporters in developing countries after the 2008 collapse of Lehman Brothers and the ensuing global financial crisis. The rivalry and tensions between the America-led capitalist model and the Beijing Consensus have been symbolically intensified in the debate surrounding the TPP.

IV. A tool for strengthening US-Japan relations

A third implication of American support for the TPP is that it has encouraged