

技术、制度和可持续增长

——从产业结构角度看“中等收入陷阱”

Technology, Institution and Sustainable Growth
—— “Middle Income Trap” from the Perspective of Industrial Structure

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1. 背景 Back Ground

1.1 关键词：中等收入陷阱

1.2 概念的由来：世界银行2007年4月《亚太地区的复兴》。

1.3 OECD、CAF和ILAS倡议：

- (1) 专题研究：2011年4月~2012年4月
- (2) 国际团队：近40位专家、学者
- (3) 一本书：《“中等收入陷阱”：来自拉丁美洲的案例研究》
- (4) 5份序言：成思伟
王伟光
李若谷
安赫尔·古力亚
恩里克·加西亚
- (5) 中国进出口银行的资助

1.1 Key Word: Middle Income Trap

1.2 Origin: World Bank, *East Asia and Pacific Regional Update*, April of 2007.

1.3 Initiative among OECD, CAF and ILAS

- (1) Study program: 04/2011-04/2012
- (2) International team: about 40 scholars
- (3) One book, “*Middle Income Trap*”: *Case Studies from Latin America*.
- (4) 5 prefaces from:
Cheng Siwei (AACHILA)
Wang Weiguang (CASS)
Li Ruogu (EXIM Bank of China)
Angel Gurria (OECD)
Enrique Garcia (CAF)
- (5) Supported financially by EXIM Bank of China.

I. 背景 Back Ground

I.4 基本结论

- (1) 客观现象：经济增长相对缓慢
- (2) 结构性问题
- (3) 中国有能力走出“陷阱”。

拉美所郑秉文教授：

- ① 中国在2021~2025年期间有望进入高收入国家行列。
- ② 4个增长阶段

I.4 Basic conclusions

- (1) Existing phenomenon: relatively slower growth
- (2) Structural matters
- (3) China has the capability of going out of the trap

Professor Zheng Bingwen of ILAS thinks that:

- ① 2021-2025, it is very hopeful that China will become high income economy.
- ② 4 growth phases of China since 1978

	第一个阶段 Phase I	第二个阶段 Phase II	第三个阶段 Phase III	第四个阶段 Phase IV
时间 Period	1978~2001	2002~2010	2011~2025	After 2025 年以后
收入水平 Income level	低收入 Low	中低收入 Lower middle	中高收入 Upper middle	高收入 High
人均GDP Per Capita (美元, US Dollar)	<1000	1000~4200	4200~12300	>12300
增长动力 Driven force	市场驱动 Market	要素驱动 Factors	效率驱动 Efficiency	创新驱动 Innovation

③ 中国面临的10大“陷阱”

- ◇ 转型陷阱 Transformation trap
- ◇ 拉美(包容性增长)陷阱 Latin American (inclusive growth) trap
- ◇ 福利陷阱 Welfare trap
- ◇ 城市化陷阱 Urbanization trap
- ◇ 泡沫陷阱 Bubble trap

③ 10 “traps” being faced by China

- ◇ 老龄化陷阱 Aging trap
- ◇ 金融陷阱 Finance trap
- ◇ 美元陷阱 Dollar trap
- ◇ 捧杀陷阱 Flattery trap
- ◇ 民主陷阱 Populism trap

II. 增长之源、增长方式和增长引擎：3个假设 Resources, styles and engine of Growth, 3 hypothesis

II.1 增长之源：技术进步和制度变迁

II.2 增长方式：粗放型和集约型

K+L>50%, 粗放型增长

TFP > 50%, 集约型增长

II.1 Resources of growth:

technological advancement and institutional reforms

II.2 Styles of growth

K+L > 50%, extensive growth

TFP > 50%, intensive growth

$$G = K + L + TFP$$

G: 增长率 Growth rate

K: 资本对经济增长的贡献率 Capital's contribution to growth rate

L: 劳动对经济增长的贡献率 Labor's contribution to growth rate

TFP: 总要素生产力 (技术、制度等因素) 对经济增长的贡献率 Total factor (such as technology, institution etc) productivity's contribution to growth rate

II.3 增长引擎：制造业还是工业?

III.3 Growth engine: Service or industry?

S: 服务业占GDP比重

S: Service's percentage in GDP

I: 工业占GDP比重

I: Industrial percentage in GDP

$S/I < 1$, 工业是引擎

= 1, 两部门基本相同

> 1, 服务业是引擎

Industrial sector is the engine

The 2 sectors are almost same

Service is the engine

III. 长期历史观察：拉美相对较慢的增长

Long historical observation: Latin American relatively slower growth

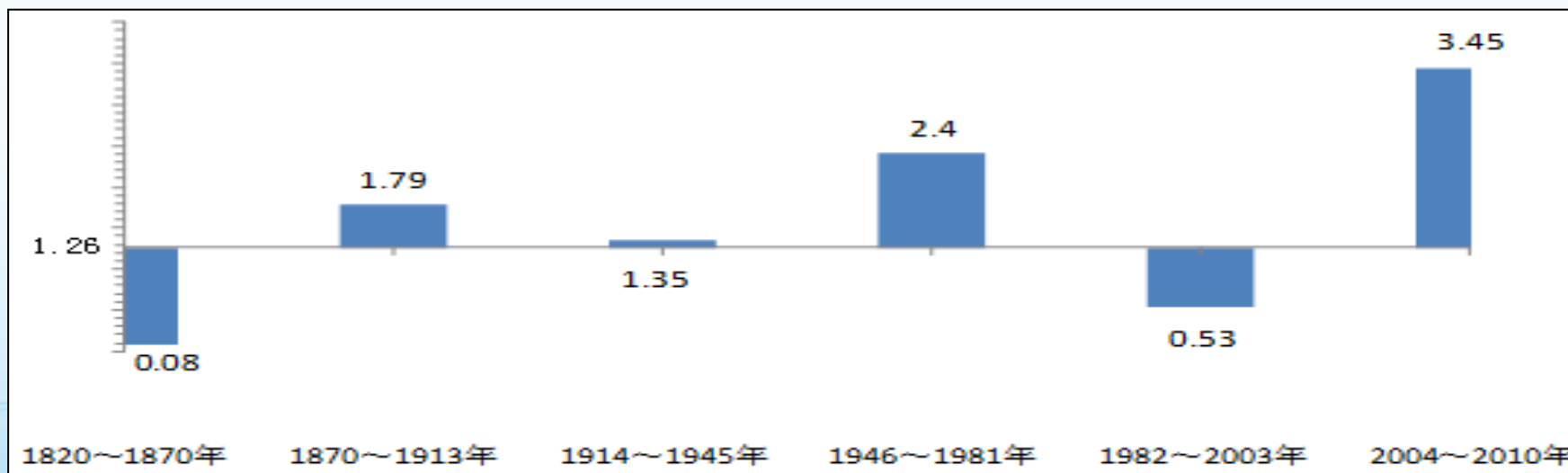
III.1 长期历史观察 (1820~2010年)

- (1) 人均GDP年均增长率1.26%
- (2) 6个长周期：“3高3低”

Long historical observation (1820-2010)

The average annual GDP growth rate per capita is about 1.26%
 6 long cycles, 3 are high and the other 3 are low

1820~2010年拉美8国人均GDP的年均增长率 (%)
 The average annual GDP growth rate of Latin 8, 1820-2010



资料来源(Resources):

1820~2003年数据, <http://www.ggdcd.net/MADDISON/oriindex.htm>

2004~2010年数据, <http://databank.worldbank.org/ddp/>

注：拉美地区的8个“核心国家”：巴西、阿根廷、墨西哥、智利、秘鲁、哥伦比亚、委内瑞拉、乌拉圭。

Note: Latin 8 are Brazil, Argentine, Mexico, Chile, Peru, Colombia, Venezuela, Uruguay.

III. 长期历史观察：拉美相对较慢的增长

Long historical observation: Latin American relatively slower growth

III.2 拉美相对较慢的增长 Latin American relatively slower growth

(1) 与美国的比较 (1820~1945年) Compared with USA (1820-1945)

① GDP增长率

GDP growth rate

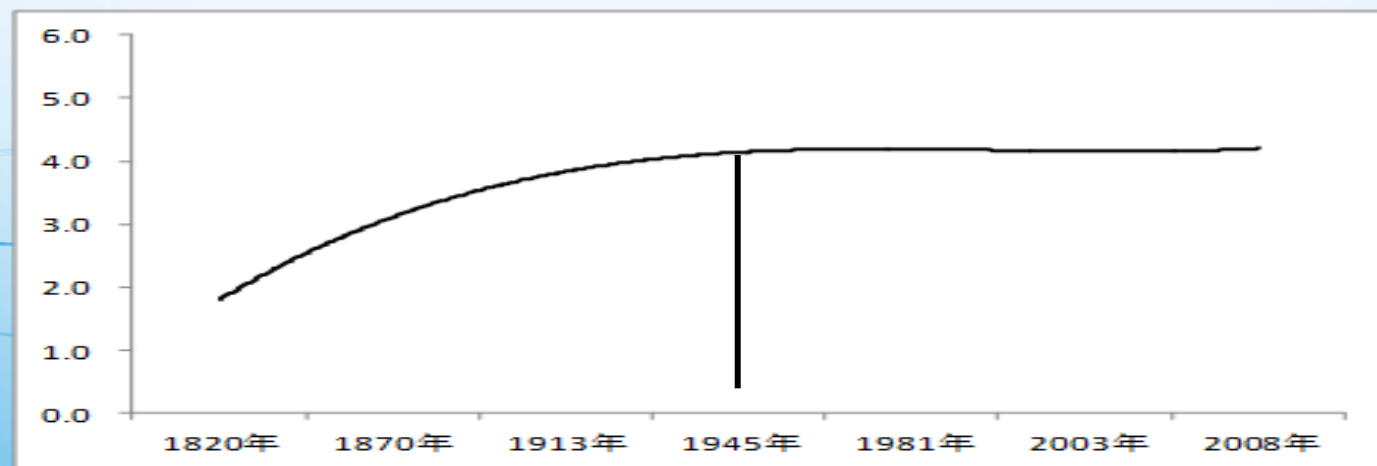
美国：	1.8%	USA:	1.8%
拉美8国：	0.51%	latin 8:	0.51%

② 收入水平差距

Gap of income level

美国与拉美8国的人均GDP差距变化趋势 (美国的人均GDP/拉美8国的人均GDP)

Trend of the per capita GDP gap between USA and Latin 8 (USA per capita GDP/ Latin 8 per capita GDP)



III. 长期历史观察：拉美相对较慢的增长

Long historical observation: Latin American relatively slower growth

(2) 与日本的比较 (1945~2008年) Compared with Japan (1945-2008)

① GDP增长率

GDP growth rate

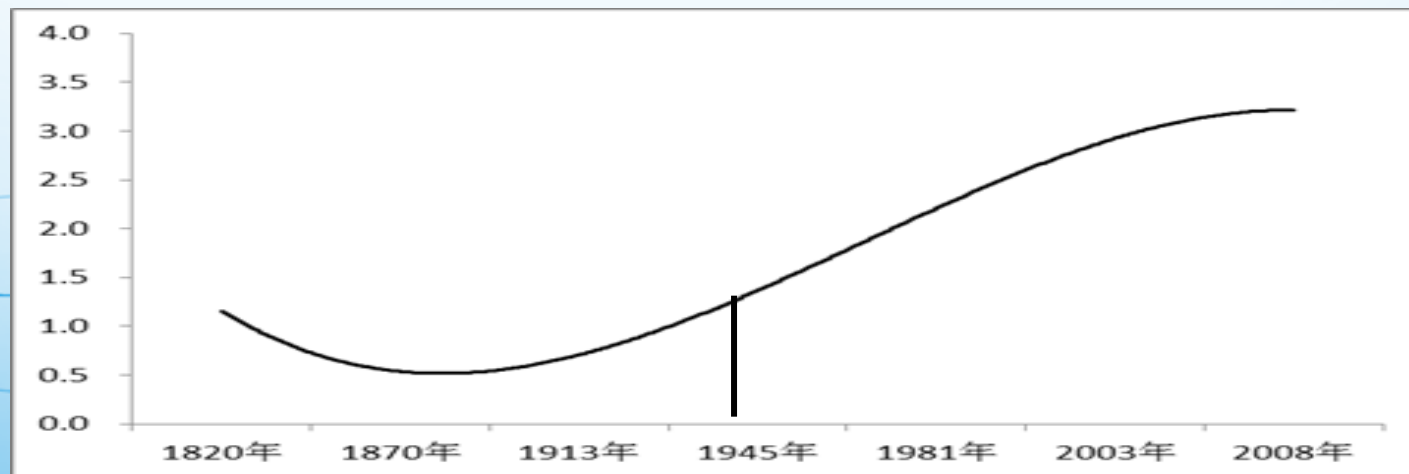
日本:	4.5%	Japan:	4.5%
拉美8国	0.51%	latin 8:	1.9%

② 收入水平差距

Gap of income level

日本与拉美8国的人均GDP差距变化趋势 (日本的人均GDP/拉美8国的人均GDP)

Trend of the per capita GDP gap between Japan and Latin 8 (Japan per capita GDP/ Latin 8 per capita GDP)



IV. 原因 why

IV.1 拉美的“初级产品出口繁荣”为什么落后于美国的“工业繁荣”？

Why Latin American “primary commodity export boom” was behind of American “industrial boom”?

(1) 技术因素：拉美国家没有抓住“第二次工业革命”的机遇。

Technologically, Latin America did not catch the opportunities brought by the second industrial revolution.

(2) 制度因素：增长模式的选择成为制约拉美国家工业化的内源性制度因素。

Institutionally, the development strategy of focusing on primary commodity export became the fundamental element in restricting the process of industrialization in Latin American countries.

IV.2 拉美地区的“进口替代工业化”为什么落后于日本的“出口导向工业化”？

Why Latin American “import substitution industrialization” was behind of Japanese “export-oriented industrialization”?

(1) 拉美国家的工业化尚未完成。

Firstly, Latin American countries did not complete their industrialization.

IV. 原因 why

(2) 拉美国家的第二次产业对GDP增长的贡献率较低。

Secondly, the Secondary Industry of Latin American countries had limited contribution to economic growth.

1971~1990年三次产业对拉美8国和日本GDP增长的贡献率 (%)

The contribution of 3 sectors to GDP growth: cooperation between Latin 8 and Japan (%)

	1971~1980年		1981~1990年	
	拉美8国 Latin 8	日本 Japan	拉美8国 Latin 8	日本 Japan
第一次产业 Primary	11.2	0.3	13.2	0.6
第二次产业 Secondary	28.9	47.6	15.7	49.7
第三次产业 Third	59.9	52.1	71.1	49.7

(3) 拉美国家的经济增长方式为粗放型增长方式。

Thirdly, economic growth has been relying on the investment of capital and labor, i.e. extensive economic growth.

1960~1990年拉美地区GDP增长因素分解 (%)

Factors' decomposition of Latin American GDP growth 1960-1990 (%)

	资本 Capital	劳动 Labor	总要素生产力 TFP
拉丁美洲 Latin America	55.9	41.2	2.9

V. 中国和拉美：共同的机遇和挑战

China and Latin America: common opportunities and challenges

V.1 中国应坚定地推动现代工业化进程，同时要避免过早或过度地发展服务业。

China should firmly push forward modern industrialization and avoid over or pre-developing the service industry.

V.2 拉美国家将努力发展农业、制造业、基础设施等产业。

Latin American economies will use more efforts to develop the industries such as agriculture, manufacture and infrastructure etc.

V.3 在今后相当长的时间里，资本和劳动力仍将是主要的增长之源。

In some longer future, capital and labor will still be the main resources of growth.

(1)到2030年，拉美地区的农业、“再工业化”、基础设施、能源等领域的投资约需50000亿美元。

By 2030, in Latin America, the needed investment in the fields of agriculture, “re-industrialization”, infrastructure and energy etc. will be about 5000 billion USD.

(2)资源与基础设施：中国—拉美可持续合作

Resources and infrastructure: sustainable cooperation between China and Latin America.



谢谢！

Thank you !

¡ Muchas gracias !