Economists' Judgement on China's Socio-Economic Development in the 14th Five-Year Plan Period*

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Abstract: *2020 is the final year of China's 13th Five-Year Plan period and an intersection between the "two centennial goals." It is also a vital year for drafting the 14th Five-year Plan and embarking on a new journey of socialist modernization. What socio-economic progress has China achieved during the 13th Five-Year Plan period and what are the opportunities, challenges and countermeasures for the 14th Five-Year Plan period? In May 2020, the China Economist conducted a questionnaire survey among economists. Results suggest that during the 13th Five-Year Plan period, China has achieved remarkable progress in the following areas: significant socio-economic development, deepening industry-ICT integration, and rapid growth of new economy; mass entrepreneurship and mass innovation, and enhanced R&D capabilities for cutting-edge technologies; green production and the abatement of air and water pollution; and poverty reduction. In the 14th Five-Year Plan period, opportunities co-exist with challenges for China's socio-economic development, which brims with resiliency. Surveyed economists felt sanguine about China's development outlook. Based on the results, surveyed economists believed that the Chinese government should focus on the following priorities during the 14th Five-Year Plan period: expediting industrial transition, strengthening the real economy, and exploring domestic consumption potentials; ramping up research in fundamental science, and accelerating the research of critical technologies; increasing equal access to basic public services; and promoting green development in all respects, including green consumption, production, distribution, innovation, and finance.*

Keywords: *14th Five-Year Plan period, economic development, innovation-led growth, public welfare, environmental protection*

JEL classification code: O11, P28
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1. Introduction

2020 is the final year for China's building of a moderately prosperous society in all respects during the 13th Five-Year Plan period (2016-2020). It is an historical intersection between the "two centennial goals" and a critical year for drafting the 14th Five-Year Plan (2021-2025) towards building a modern socialist country. At this historical juncture, it is of great significance to evaluate China's socio-economic achievements during the 13th Five-Year Plan Period, forecast challenges and opportunities in the 14th

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中国经济社会发展“十三五”时期回顾与“十四五”时期展望*

——基于《中国经济学人》问卷调查的分析

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摘　要：2020年是中国“十三五”时期的最后一年，是“两个一百年”奋斗目标的历史交汇之年，也是编制“十四五”规划并开启基本实现社会主义现代化新征程的关键之年。整个经济学界对“十三五”时期中国经济社会发展取得的成就、“十四五”时期机遇、挑战及对策是怎样判断的？2020年5月，《中国经济学人》杂志就此问题开展了面向经济学人的问卷调查。调查发现，“十三五”时期中国经济社会发展取得显著成绩，工业化和信息化深度融合，新经济快速成长；大众创业万众创新效果显著，高精尖技术研发实力增强；绿色生产、大气污染和水污染治理等成效明显；脱贫攻坚成就突出。展望未来，“十四五”时期中国经济社会发展机遇与挑战并存，且韧性十足；经济学人预判发展形势总体乐观。基于这些回顾与展望，经济学人认为“十四五”时期中国政府工作重点主要包括以下几个方面：加快产业转型升级，培育壮大实体经济，持续挖掘内需潜力；加强前沿基础科学研究，加快关键技术自主攻关；促进基本公共服务均等化；推进包括消费、生产、流通、创新和金融在内的全方位绿色发展。

关键词：“十四五”时期；经济发展；创新驱动；民生福祉；生态环境保护

JEL 分类号：O11, P28

一、引言

2020年是中国全面建成小康社会和“十三五”规划的收官之年，是“两个一百年”奋斗目标的历史交汇之年，也是编制“十四五”规划并将进入全面建设社会主义现代化国家新时期的关键之年。评估“十三五”时期中国经济社会发展成就，预判“十四五”时期面临的挑战与机遇并明确今后五年的政府重点工作任务，对于顺利开启基本实现社会主义现代化新征程具有至关重要的意义。

回顾“十三五”时期，中国国内生产总值从2016年的74万亿元增长到2019年的99.1万亿元，年均增速在6%以上，经济总量稳居世界第二。根据世界银行2020年划分标准，按照Atlas方法，2018年人均国民生产总

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Five-Year Plan period, and identify government priorities in the coming five years.

During the 13th Five-Year Plan period, China became the second largest economy in the world with gross domestic product (GDP) increasing from 74 trillion yuan in 2016 to 99.1 trillion yuan in 2019, up over 6% on an annual average basis. According to the World Bank's criteria for 2020, countries with per capita gross domestic product (GDP) above 12,376 US dollars (Atlas method) are high-income countries. In 2018, China's current-price domestic per capita GDP stood at 9,770.8 US dollars with per capita GDP (Atlas method) at 9,460 US dollars. In 2019, China's per capita GDP reached 10,276 US dollars converted by the annual average exchange rate, exceeding 10,000 US dollars for the first time. By the World Bank's criteria, China is yet to cross the threshold as a high-income country. The 14th Five-Year Plan period is, therefore, a critical stage for China to overcome the middle-income trap.

In May 2020, the *China Economist*, journal of the Institute of Industrial Economics (IIE), the Chinese Academy of Social Sciences (CASS), conducted a questionnaire survey among Chinese economists asking for their opinions about China's socio-economic development in the 13th Five-Year Plan period and the future outlook for the 14th Five-Year Plan period. This survey was conducted by sending questionnaires to the email addresses of economists registered in the *China Economist* database and via the *China Economist* WeChat portal. In two weeks, we collected 172 responses from college professors (59.88%), college students (16.28%), personnel at CASS, government offices, public institutions, and research bodies (11.05%), as well as financial institutions, companies, and consulting firms (12.79%).

In accordance with the *Outline of the 13th Five-Year Plan for the National Economic and Social Development of the People's Republic of China* ("Outline"), China's socio-economic development targets for the 13th Five-Year Plan period include economic development, innovation, regional coordination, public welfare, education and social civility, environmental protection, and the sophistication of fundamental systems. Based on the seven objectives, this survey comprehensively reviews China's achievements in socio-economic development during the 13th Five-Year Plan period, forecasts socio-economic opportunities, challenges and resiliency in the 14th Five-year Plan period, and identifies government priorities for the 14th Five-Year Plan period.

2. China's Outstanding Socio-Economic Achievements during the 13th Five-Year Plan Period

The Outline identifies quantitative indicators only for four of the seven primary socio-economic development targets for the 13th Five-Year Plan period, including economic development, innovation-led growth, public welfare, and environmental protection. How much did China achieve with respect to these seven primary targets? Given the inadequacies of conventional indicators, the *China Economist* conducted a questionnaire survey on China's socio-economic development during the 13th Five-Year Plan period.

2.1 Great Achievements in Economic Development, Environmental Protection, Innovation-Led Growth and Public Welfare

First of all, we invited economists to rate and rank China's achievements of the seven primary socio-economic development targets during the 13th Five-Year Plan period. According to the results, most respondents ranked China's achievements of the seven primary targets in the following descending order: economic development, environmental protection, innovation-led growth, public welfare, regional coordination, the populace's cultivation and social civility, as well as the sophistication of fundamental systems. As shown in Figure 1, the economists gave an average score of 7.08 points on the seven primary targets (full score is 10 points, and six points or more means pass), which indicates that China's socio-

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值超过12376美元为高收入国家，而2018年中国现价人均国内生产总值为9770.8美元，人均国民生产总值（Atlas方法）为9460美元。2019年中国人均国内生产总值按年平均汇率折算达到10276美元，首次突破1万美元大关，但仍未迈过高收入国家的门槛。因此，“十四五”时期是中国努力跨越中等收入陷阱的关键阶段。

为了解经济学人对中国经济社会发展“十三五”时期回顾与“十四五”时期展望的思考和判断，2020年5月，中国社会科学院工业经济研究所《中国经济学人》（*China Economist*）杂志进行了一次面向中国经济学人的问卷调查。此次调查对《中国经济学人》数据库中的经济学人进行邮件问卷调查和“中国经济学人”微信公众号定向调查，在两周的时间内共回收问卷172份。受访经济学人有59.88%为高校老师，16.28%为高校学生，11.05%来自社科院、政府机关、事业单位及科研机构，12.79%来自金融机构、企业及咨询公司等。

根据《中华人民共和国国民经济和社会发展第十三个五年规划纲要》（以下简称《规划纲要》），“十三五”时期中国经济社会发展的主要目标有经济发展、创新驱动、发展协调性、民生福祉、国民素质和社会文明、生态环境保护、基础性制度成熟七项。因此，本调查从以上七项目标出发，首先系统评估了“十三五”时期中国经济社会发展取得的成就；接着，展望“十四五”时期，总结提炼经济社会发展面临的机遇、挑战及其韧性，并预判未来五年发展前景；在此基础上，明确“十四五”时期为促进中国经济社会发展应开展的政府重点工作。

二、“十三五”时期中国经济社会发展成就突出

根据《规划纲要》，“十三五”时期中国经济社会发展的七项主要目标中只有经济发展、创新驱动、民生福祉、生态环境保护四个方面设置了量化考核指标。那么，在这七项主要目标中，中国到底取得了哪些突出成就呢？仅仅依靠常规的数据指标对比，无法开展这一综合性评估。基于此，《中国经济学人》就“十三五”时期中国经济社会发展的成就开展了问卷调查。

（一）经济发展、生态环境保护、创新驱动和民生福祉取得突出成就

本次调查首先邀请经济学人对中国经济社会发展七项主要目标进行了总体评分排序，为“十三五”时期经济社会发展提供了概括性评价。调查结果显示，经济学人普遍认为“十三五”时期中国经济社会发展的主要目标实现程度从高到低排序依次为经济发展、生态环境保护、创新驱动、民生福祉、发展协调性、国民素质和社会文明、基础性制度成熟。如图1所示，按照满分10分、6分及以上为及格的设置，经济学人对这七项目标判定的平均分是7.08分。这表明“十三五”时期经济社会发展总体进展符合预期，完成情况良好。其中，经济发展、生态环境保护、创新驱动、民生福祉四项目标取得突出成绩，经济学人评分分别为7.53分、7.47分、7.35分、7.09分，均在七项目标平均分之上。近年来，中国政府坚持以经济建设为中心，注重创新培育经济增长新动能，践行“绿水青山就是金山银山”的生态环境保护理念，牢牢把握人民群众对美好生活的向往，始终坚持“以人民为中心”的政策出发点和落脚点，这些政策效果受到经济学人的充分肯定。

发展协调性、国民素质和社会文明、基础性制度成熟的评分分别为6.92分、6.61分、6.6分，均在及格线之上，但仍低于经济社会发展七项目标平均分。这表明政府需要进一步部署实施计划促进经济社会发展协调，

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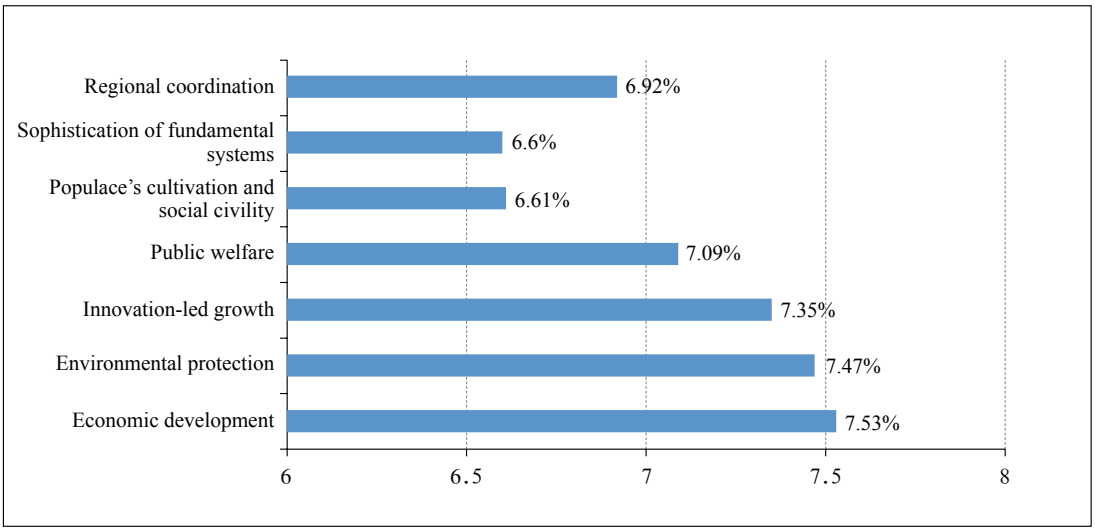

Figure 1: China's Achievements of the Seven Primary Socio-Economic Targets during the 13th Five-Year Plan Period Rated by Economists

Note: Full score is 10 points and six points and above means pass.

economic development during the 13th Five-Year Plan period is generally consistent with expectations. Specifically, respondents rated China's economic development, environmental protection, innovation-led growth and public welfare at 7.53, 7.47, 7.35 and 7.09 points, respectively, all above the average score. Respondents applauded the Chinese government's efforts to promote economic development as its central task, foster innovation-led growth drivers, implement the environmental concept that "lucid waters and lush mountains are invaluable assets," satisfy people's needs for a better life, and put people at the center of every facet of policy-making.

Respondents rated China's regional coordination, the populace's cultivation and social civility, and the sophistication of fundamental systems at 6.92, 6.61 and 6.6 points, respectively, all above the pass line but below the average score on the seven primary socio-economic development targets. This suggests that the government should take further steps to coordinate socio-economic development, promote socialist cultural and ethical progress, and improve fundamental systems.

2.2 Industry-ICT Integration and the Rise of the New Economy

In the survey, we asked economists in which (no more than three) of the seven aspects of economic development did China achieve the most. According to the questionnaire results (Figure 2), 72.67% of respondents believed that China achieved the most in industry-ICT integration. The 13th Five-Year Plan period saw China's economy enter a new normal. Through supply-side structural reforms, the Chinese government made great efforts to promote industry-ICT integration as a new driver of manufacturing transition; 66.28% of economists identified the emergence of new industries, business formats, and models as the most significant achievement. As the Research Group of the Macroeconomic Research Center of the CASS (2020) noted, emerging economic activities have effectively unleashed economic momentum underpinning China's high-quality economic development.

Of the surveyed economists, 34.30%, 45.35% and 37.79% respectively identified "advanced manufacturing", "modern infrastructure" and "rising share of services" as the most significant achievements. In their view, China also made some headway in these aspects during the 13th Five-Year Plan period. In contrast, fewer respondents identified "rising level of opening-up" (14.53%) and

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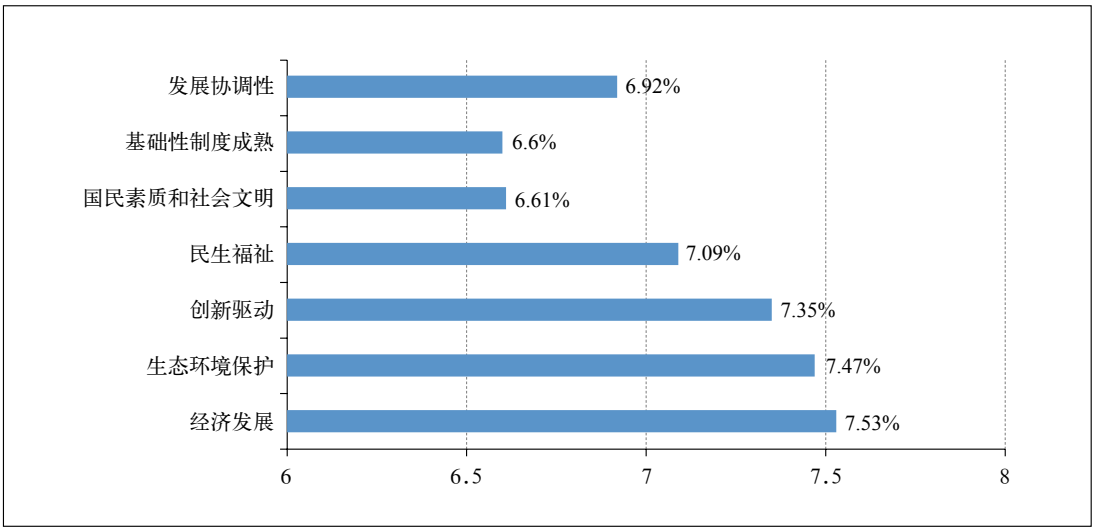

图1:经济学人对“十三五”时期中国经济社会发展七项主要目标实现程度的评分

注:满分是10分,6分及以上为及格。

加强社会主义精神文明建设,并完善各领域基础性制度体系。

(二)工业化和信息化深度融合、新经济快速成长是中国经济发展取得的突出成就

为一步掌握经济学人对中国经济发展突出成就的看法,该调查按照经济发展范畴设置了7个选项,并规定每位参与者选择不超过三项。本问卷调查显示(见图2),有72.67%的经济学人认为工业化和信息化融合发展水平提高是经济社会发展最突出的成就。“十三五”时期,中国经济发展进入了新常态。围绕供给侧结构性改革,中国以激发制造业创新活力、发展潜力和转型动力为主线,大力促进工业化和信息化深度融合,为制造业转型升级增强新动能。有66.28%的经济学人认为最突出的成就是新产业、新业态、新模式不断成长。这正如中国社会科学院宏观经济研究中心课题组(2020)指出的,新兴经济活动持续发展壮大,新动能得到有效释放,成为支撑中国经济迈向高质量发展的重要力量。

选择“先进制造业加快发展”“现代化基础设施完善”“服务业比重上升”的经济学人分别有34.30%、45.35%、37.79%,这说明“十三五”时期中国经济在这三方面也取得了一定的成绩。相对而言,选择“对外开放水平提高”(14.53%)和“农业现代化深入发展”(14.53%)的经济学人占比较小,说明中国在这些方面的经济发展工作仍需加强。

(三)大众创业万众创新和高精尖技术研发是中国创新驱动的显著成绩

创新是引领发展的第一动力,是建设现代化经济体系的战略支撑。“十三五”时期,中国坚持将发展基点放在创新,以创新引领经济高质量发展,具体措施包括以技术创新为核心,以人才发展为支撑,推动科技创新与大众创业万众创新有机结合。那么,经济学人判断哪些成绩最为显著呢?

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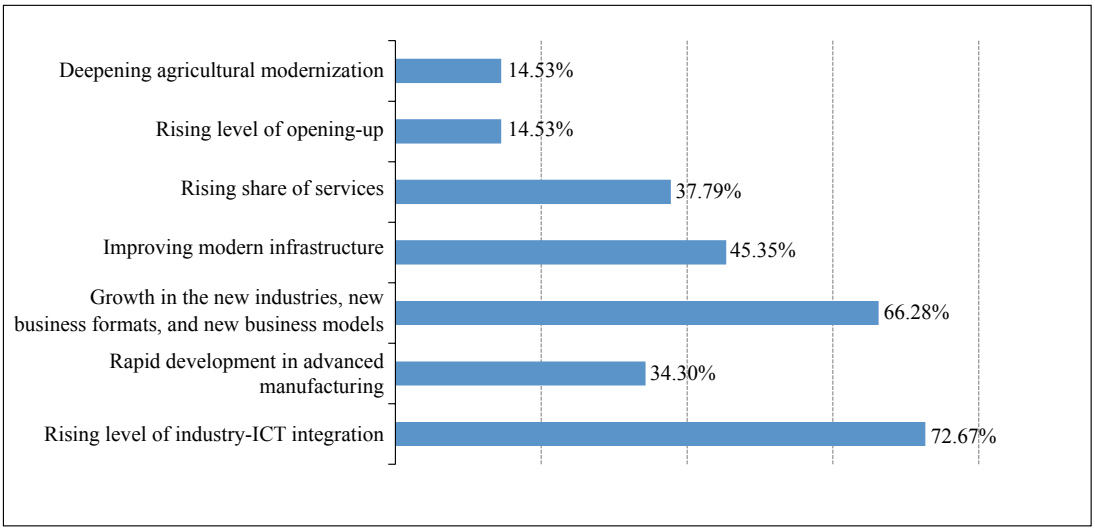

Figure 2: China's Most Significant Economic Achievements during the 13th Five-Year Plan Period Identified by Economists

Note: Each participant may select no more than three answers.

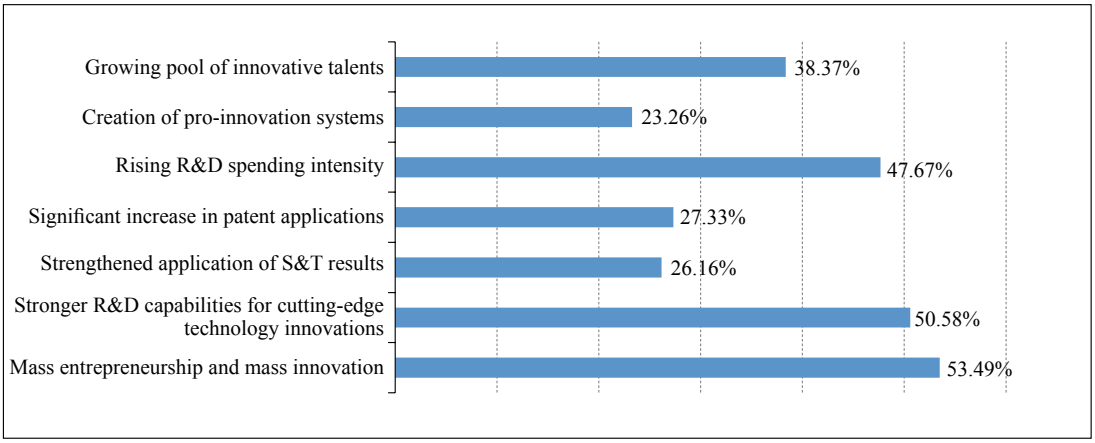

Figure 3: Most Significant Achievements of China's Innovation-Led Growth during the 13th Five-Year Plan Period Identified by Economists

Note: Each participant may select no more than three answers.

"deepening agricultural modernization" (14.53%) as the most significant achievements, which suggests that China is yet to enhance these aspects of development.

2.3 Mass Entrepreneurship, Innovation and Cutting-Edge Technology Research: The Most Significant Achievements of Innovation-Led Growth

As the primary driver of development, innovation offers strategic support to the modernization of the economic system. During the 13th Five-Year Plan period, China strove to promote innovation-led economic development by means of technology innovation, education, and integrated "mass entrepreneurship" and "mass innovation" campaigns. Which achievements did economists consider the most significant?

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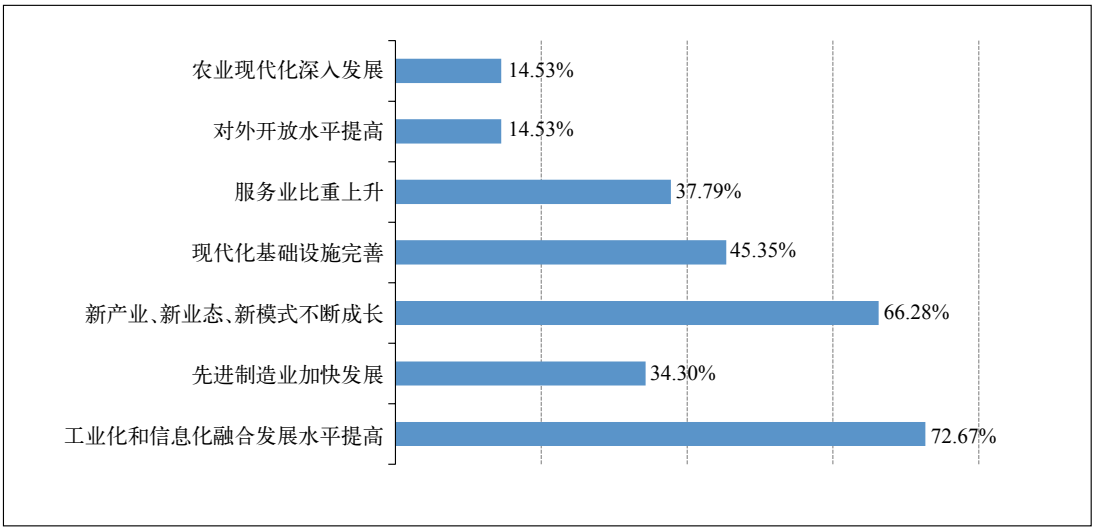

图2：经济学人对“十三五”时期中国经济发展最突出成就的判断

注：每位参与者选择不超过三项。

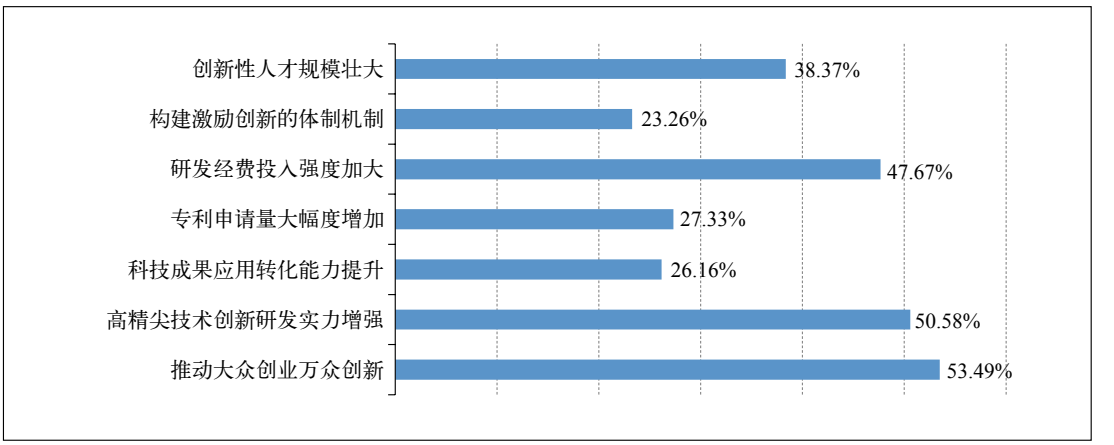

图3：经济学人对“十三五”时期中国创新驱动最突出成就的判断

注：每位参与者选择不超过三项。

本次调查显示，在每位受访者选择不超过三项的设置下，过半的经济学人认为“推动大众创业万众创新”（53.49%）和“高精尖技术创新研发实力增强”（50.58%）是中国创新驱动取得的最突出成就（见图3）。一方面，创新创业支持服务平台不断涌现，扶持创新创业的政策体系逐渐完善，深化改革激发市场活力，促使（上文所提到的）新经济蓬勃发展，大众创新正成为经济转型升级新引擎。另一方面，中国政府加快实施国家重大科技专项，加强基础研究，强化原始创新、集成创新和引进消化吸收再创新，自主创新能力得到显著增强。而选择“构建激励创新的体制机制”是中国创新驱动最突出成就的经济学人仅有23.26%，这表明我国在深化科技管理体系改革、完善知识产权市场体系方面仍有进一步提升的空间。

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Our survey indicates that more than half of surveyed economists identified "mass entrepreneurship and mass innovation" (53.49%) and "enhanced cutting-edge technology innovations and R&D capabilities" (50.58%) as the most significant achievements of innovation-led growth (Figure 3). Mass innovation has emerged as a new driver of economic transition, as manifested in the emergence of service platforms, policy systems for innovation and entrepreneurship, and market dynamism unleashed by reforms. Along with this, the Chinese government has sped up the implementation of national key S&T projects and ramped up fundamental research, and original and integrated innovations on the basis of importation and assimilation. These efforts have significantly enhanced homegrown innovations. However, only 23.26% of respondents believed that "pro-innovation systems are the most significant achievement of China's innovation-led growth," which indicates gaps in China's reform of S&T administrative and intellectual property systems.

2.4 Significant Achievements in Green Manufacturing and Air and Water Pollution Abatement

During the 13th Five-Year Plan period, the Chinese government addressed the imbalance between economic growth and environmental capacity in accordance with the principle that "lucid waters and lush mountains are invaluable assets," vowing to build a "beautiful China." The result of our survey suggests that most respondents held positive views about the achievements of China's environmental protection during the 13th Five-Year Plan period. As Table 1 shows, 89.53% of surveyed economists considered that China's energy consumption per unit of GDP was brought under better control.

Comparatively, China made much more progress in green manufacturing than it did in green consumption. Whereas 80.24% of surveyed economists believed that "progress was made in green consumption," 90.70% considered that "progress was made in green manufacturing"; 11.05% and 20.93% indicated that "significant progress" was made in green consumption and green manufacturing, respectively. This result correlates with the fact that most of China's current environmental policies are focused on manufacturing rather than household consumption (Wang *et al.*, 2020). In 2018, consumption contributed 76.2% to China's economic growth. With great consumer potential to be released amid new urbanization, consumption will add to the pressures of natural resources and the environment. In this context, the government should give more prominence to green consumption, implement relevant policy

Table 1: China's Environmental Achievements during the 13th Five-Year Plan Period Identified by Economists (%)

Item	Much better	Better	About the same	Worse	Much worse
Energy consumption per unit of GDP	18.60	70.93	9.30	1.16	0.00
Green manufacturing	20.93	69.77	8.14	1.16	0.00
Green consumption	11.05	69.19	18.60	1.16	0.00
Air pollution treatment	25.00	59.30	11.05	3.4	1.16
Water pollution treatment	13.37	61.05	20.93	3.49	1.16
Soil pollution treatment	8.14	54.07	28.49	8.72	0.58
Solid waste treatment	8.14	56.98	24.42	9.88	0.58

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表1:经济学人对“十三五”时期中国生态环境保护的评价

单位:%

选项	显著提升	有所提升	保持持平	有所恶化	显著恶化
单位GDP能耗控制	18.60	70.93	9.30	1.16	0.00
绿色生产	20.93	69.77	8.14	1.16	0.00
绿色消费	11.05	69.19	18.60	1.16	0.00
大气污染治理	25.00	59.30	11.05	3.4	1.16
水污染治理	13.37	61.05	20.93	3.49	1.16
土壤污染治理	8.14	54.07	28.49	8.72	0.58
固体废弃物污染治理	8.14	56.98	24.42	9.88	0.58

(四)绿色生产、大气污染和水污染治理等方面成效明显

“十三五”时期,面对经济增长与生态环境承载力之间的不平衡问题,中国政府坚持“绿水青山就是金山银山”的发展理念,以解决生态环境领域突出问题为重点,积极推进美丽中国建设。本次调查显示,总体来看,经济学人对“十三五”时期中国生态环境保护成效持肯定态度。如表1所示,有89.53%的经济学人认为单位GDP能耗控制得到提升。

相对而言,绿色生产成效要显著高于绿色消费。尽管80.24%的经济学人认为“绿色消费水平得到提升”,但有90.70%的经济学人认为“绿色生产水平得到提升”。其中,认为“绿色消费水平显著提升”“绿色生产水平显著提升”的经济学人分别占11.05%、20.93%。这一结果与中国目前环境政策多集中于企业主体的生产行为而对生活领域居民消费行为的约束较少(王宇等,2020)有关。消费已成为中国经济增长的主要动力,2018年消费对经济增长的贡献率达76.2%。伴随新型城镇化建设,中国居民消费增长空间依然巨大,而消费对资源环境的消耗和压力持续增大。因此,政府亟待将绿色消费摆上生态文明建设的重要位置,强化系统战略部署并推动具体有效的政策措施实施,引导全民参与。

按照污染要素划分,环境污染主要包括大气污染、水污染、土壤污染和固体废弃物污染四类。本次调查邀请经济学人比较了“十三五”时期不同污染类型的治理效果。结果显示,按照判断治理成效得到提升的经济学人占比排序,从大到小依次为大气污染治理(84.30%)、水污染治理(74.42%)、固体废弃物污染治理(65.12%)和土壤污染治理(62.21%)。一方面,相对于其他污染类型,大气污染易于直观感受,治污压力较大,并受到国际层面应对气候变化的协同效应影响,大气污染治理成效显著(史丹和陈素梅,2019)。另一方面,土壤污染治理难度最大,治理效果也会相对不显著。值得注意的是,分别有10.46%、9.30%的经济学人认为“固体废弃物污染治理效果下降”“土壤污染治理成效下降”,这表明固体废弃物污染和土壤污染的治理效果还非常有限。

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measures, and encourage public participation.

In our survey, we took four types of environmental pollution into account: air, water, soil, and solid waste pollution. We asked economists for their views on the effects of pollution abatement; 84.30% of the surveyed economists considered that air pollution improved the most, followed by water (74.42%), solid waste (65.12%), and soil (62.21%) pollution. In coordination with international efforts in tackling climate change, China has made perceptible progress in tackling air pollution despite great challenges (Shi and Chen, 2019). In comparison, soil pollution abatement is the most difficult to achieve with less visible effects. Notably, 10.46% and 9.30% of respondents reported "declining effects" of solid waste and soil pollution abatement.

2.5 Poverty Reduction Contributed the Most to Public Welfare

The ultimate goal of development is to improve public welfare. Our survey found that 75.58% of economists identified poverty reduction as China's most significant public welfare improvement (Figure 4). This finding correlates with the result of the questionnaire survey about the "most significant public welfare improvement in four decades since reform and opening-up" conducted by the *China Economist* in December 2017 (Qin and Li, 2018). Great efforts made by the Chinese government have paid off. To date, China has lifted more than 700 million people out of poverty, contributing over 70% to global poverty reduction. By the current poverty line, China is expected to eradicate absolute poverty by the end of 2020.[1] With poverty reduction achievement on an unprecedented scale, China may contribute experience and wisdom to global poverty abatement (Huang and Yuan, 2020). Of the respondents, 63.37% identified access to transportation as the most prominent improvement in public welfare. With rising living standards, there has been a steady increase in multi-tiered, diverse and personalized demand for the express transportation of small-batch, high-value and sporadic cargo. Today, China boasts the longest high-speed railway and highway networks in the world and has boasted the largest courier business volume for the past five straight years. Extensive courier services available in all cities and villages have satisfied people's growing demand for transportation. More than half of respondents named

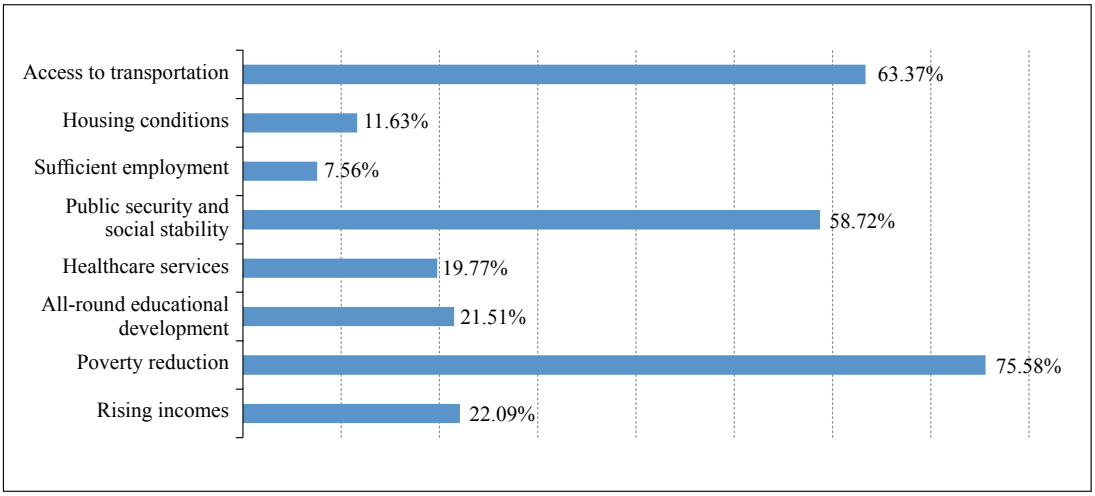

Figure 4: Most Significant Public Welfare Improvements during the 13th Five-Year Plan Period Identified by Economists

Note: Each participant may select no more than three answers.

[1] Source: http://world.people.com.cn/n1/2019/0925/c1002-31371571.html

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（五）脱贫攻坚是中国增进民生福祉最大的成就

发展的根本目的是增进民生福祉。本次调查发现（见图4），75.58%的经济学人认为减贫脱贫是民生改善最显著的成就。这与2017年12月《中国经济学人》关于“中国改革开放40年民生改善最突出的成就”问卷调查结果（秦宇和李钢，2018）一致，中国政府在反贫困斗争中付出了持之以恒的巨大努力，取得了举世瞩目的成就。截至目前，中国有七亿多贫困人口成功脱贫，对全球减贫贡献累计超过70%，在现有贫困标准下将于2020年底消除绝对贫困。[1]中国特色减贫事业取得前所未有的辉煌成就，也将为全球贫困治理贡献中国经济与中国智慧（黄承伟和袁泉，2020）。有63.37%的经济学人认为交通便捷是民生改善最为突出的成就。随着社会主要矛盾的变化，多层次、多样化、个性化的出行需求和小批量、高价值、分散性、快速化的货运需求特征增加明显。目前，中国高速铁路和高速公路运营里程均居世界第一，快递业务量连续5年稳居世界第一，总体实现村村通邮，极大地满足了人民日益增长的交通需求。还有过半的经济学人认为社会治安稳定是民生改善最为突出的成就。面对复杂多变的国际环境形势，中国始终保持社会大局稳定，增强居民安全感，已成为世界上治安最好、人民安全感最高的国家之一。

排在后三位的分别是“就业比较充分”（7.56%）、“住房条件改善”（11.63%）、“医疗水平提升”（19.77%）。可见，经济学人对中国在就业、住房以及医疗等方面显著改善的认可度不高。首先，近年来中国就业局势总体平稳，即使在经济下行压力加大的当下，依然通过部署实施就业优先政策，持续保持比较充分的就业。2019年1月至10月，全国城镇新增就业1193万人，提前实现全年城镇新增就业1100万人以上的目标。因此，经济学人眼中就业形势变化相对不显著并不意味着政府在稳就业方面没有成效。其次，面对居高不下的房价，购买住房在居民资产配置中占据较大的比重，造成住房改善并不太显著。最后，尽管医学技术进步显著，但医疗服务

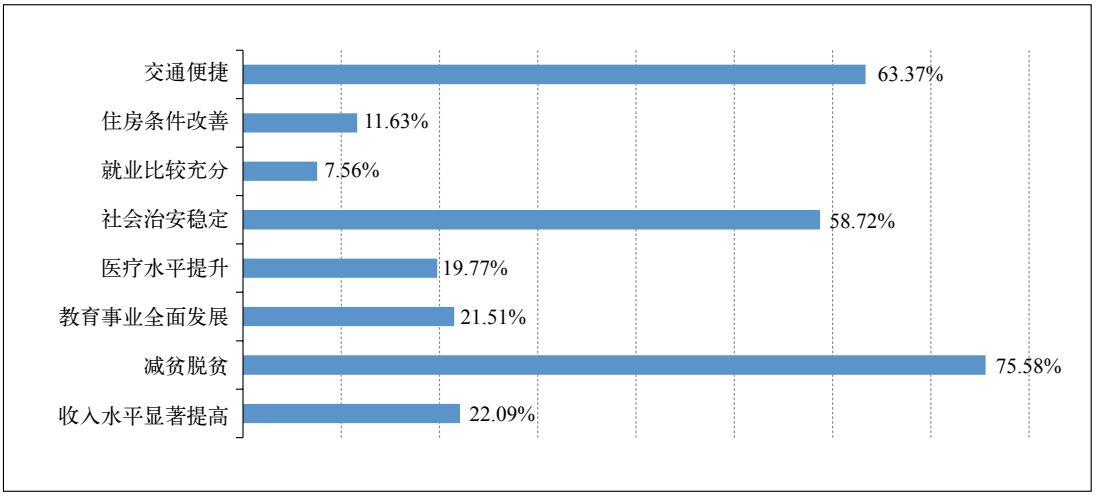

图4：经济学人对“十三五”时期中国增进民生福祉最突出成就的判断

注：每位参与者选择不超过三项。

[1] 资料来源：人民网，http://world.people.com.cn/n1/2019/0925/c1002-31371571.html

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social security and stability as the most prominent improvement in public welfare. Amid a complex and volatile international situation, China has maintained a high degree of domestic social stability and security.

The fewest respondents named employment (7.56%), housing conditions (11.63), and healthcare (19.77%) as the most significant improvements in public welfare. That is to say, most surveyed economists did not recognize any significant improvement in employment, housing, and healthcare. Despite downward economic pressures, China has managed to maintain relatively sufficient employment. From January to October 2019, China added 11.93 million urban jobs, overshooting the goal of 11 million urban jobs. Contrary to the perceived lack of increase in new jobs, the government was effective in creating jobs. Due to high housing prices, housing makes up a large share in household assets, and lacks affordability. As a result, perceived improvement in housing conditions was insignificant. Lastly, the government should give priority to accessibility to premium healthcare services, so that average people will benefit from the latest advances in medical science and technology.

3. China's Socio-Economic Development during the 14th Five-Year Plan Period: Challenges and Opportunities

Today's world is faced with unprecedented challenges and opportunities arising from the new industrial revolution, the backlash against globalization, and COVID-19. Domestically, China has entered a new chapter of socio-economic development as new growth drivers are taking the place of old ones and a modern economic system is in the making. To guide China's socio-economic development during the 14th Five-Year Plan period, we should evaluate China's socio-economic opportunities, challenges, and resiliency. Our survey also raised this question to economists.

3.1 Technology Dividends from the New Industrial Revolution Presents the Biggest Opportunity

The 14th Five-Year Plan period will unveil a new era of China's development to be a modern socialist country. As shown in Figure 5, our survey found that most respondents (81.40%) believed that technology dividends from the new industrial revolution present the biggest opportunity for China's socio-economic development. While promoting inclusive development and human welfare, the new industrial revolution, driven by digital, internet, and smart applications, creates a rare window period for late-moving countries to compete with and catch up with leading nations (Xie, 2019). China should seize the historic opportunity provided by this new industrial revolution to become a leader in the digital

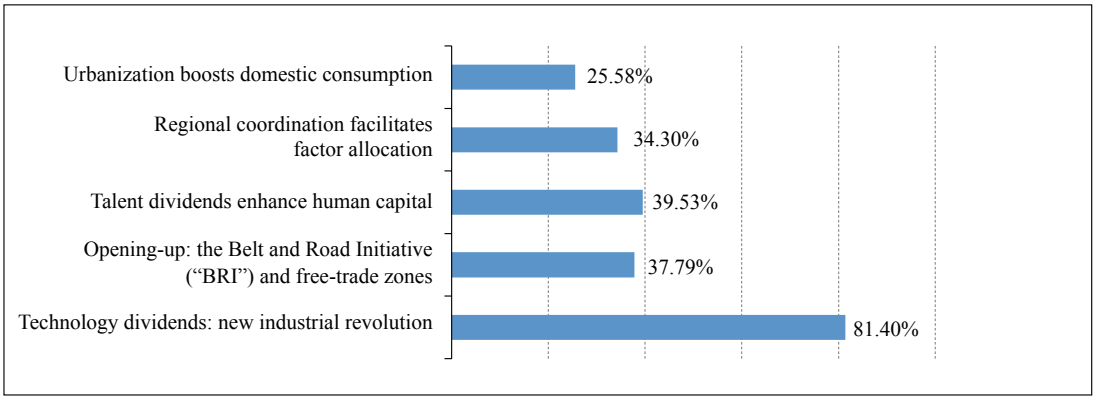

Figure 5: China's Socio-Economic Development Opportunities during the 14th Five-Year Plan Period Identified by Economists

Note: Each respond may select no more than three answers.

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均等化使得基层的居民就近就医并享受到高端稀缺的优质医疗服务仍是接下来政府增进民生福祉的重点内容。

三、“十四五”时期中国经济社会发展机遇与挑战并存，且韧性十足

当前，新工业革命正在蓬勃兴起，贸易保护主义与逆全球化思潮抬头，加上新型冠状病毒肺炎疫情（以下简称“新冠疫情”）的全球蔓延，世界处于百年未有之大变局。从国内看，中国新旧动能正在转换中，现代化经济体系正在形成，经济社会发展进入了新的历史时期。为了更加准确预判“十四五”时期经济社会发展态势，我们需要全面辨析其面对的机遇、挑战及其韧性。因此，本文就此问题对经济学人进行了问卷调查。

（一）以新工业革命为代表的技术红利是中国经济社会发展面临的最大机遇

“十四五”时期中国迈入了全面建设社会主义现代化国家的新时期，处于可以大有作为的重要战略机遇期。如图5所示，调查发现，大多数经济学人（81.40%）认为以新工业革命为代表的技术红利是中国经济社会发展面临的最大机遇。以数字化、网络化、智能化为核心特征的新工业革命日益兴起，在促进全球包容性发展和提升人类福祉的同时，也将为后发国家的竞争与赶超提供难得的窗口期（谢伏瞻，2019）。因此，中国需要努力把握新工业革命历史机遇，在数字经济、人工智能、量子计算、5G等关键领域抢占科技创新制高点。

此外，有39.53%的经济学人指出人才红利是中国经济社会发展面临的最大机遇。21世纪以来，中国高等教育特别是理工科高等教育快速发展，培养了规模庞大的有一定专业知识储备的工程技术人员，人力资本的长期积累为发挥后发优势奠定了基础（中国社会科学院工业经济研究所课题组，2020）。还有37.79%的经济学人认为开放红利是中国面临的最大机遇。高水平对外开放在全球范围内优化资源配置，有利于加速国内产业转型升级，同时拓展国际市场，为国内相关产业发展形成强劲拉动效应。因此，人才红利与开放红利也是“十四五”时期中国经济社会发展面临的重要机遇，应该受到政府的重视。

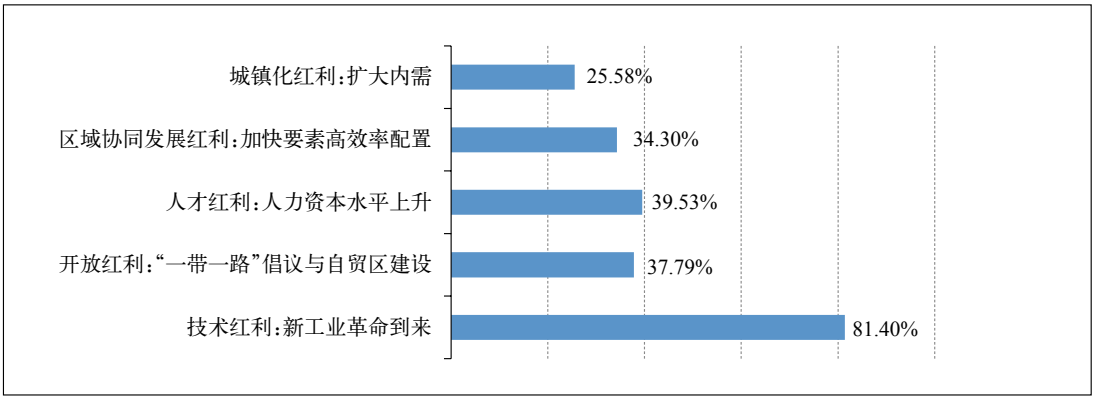

图5：经济学人对“十四五”时期中国经济社会发展机遇的判断

注：每位参与者选择不超过三项。

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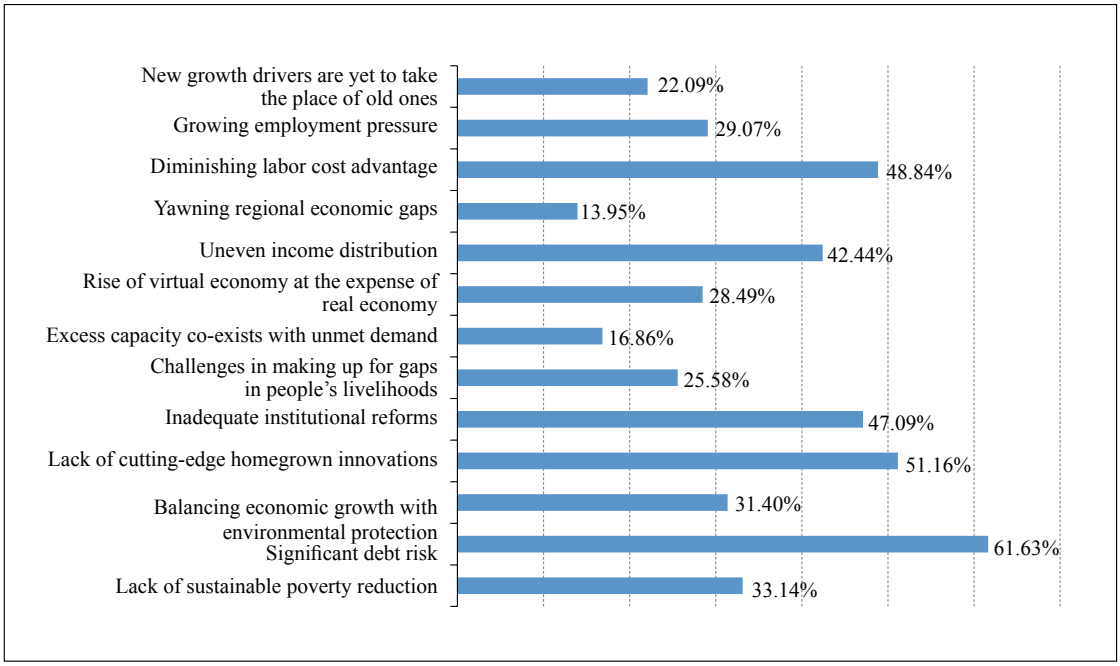

Figure 6: Internal Challenges to China's Socio-Economic Development during the 14th Five-Year Plan Period
Note: Each participant may select no more than five answers.

economy, artificial intelligence (AI), quantum computing, and 5G technology.

In addition, 39.53% of surveyed economists identified talent as the biggest opportunity for China's socio-economic development. Since the dawn of the new millennium, China has trained a large number of engineers, whose human capital underpins China's late-mover advantage (Institute of Industrial Economics, CASS Research Group, 2020). Of the respondents, 37.79% considered that opening-up presents the biggest opportunity to China. A high level of opening-up will facilitate global resource allocation, speed up domestic industrial transition, and broaden access to the international market for domestic industries. During the 14th Five-Year Plan period, talent and opening-up present vital opportunities for China's socio-economic development, which warrant policymakers' attention.

3.2 Financial Debt Risk and Anti-Globalization Present Daunting Challenges

According to the result of our survey (Figure 6), more than half of respondents (61.63%) believed that financial debt risk constitutes the gravest challenge to China during the 14th Five-Year Plan period. As China's economy entered the new normal, debt risks left over from the previous stage of rapid growth began to surface. With the COVID-19 outbreak in 2020, China's small, medium-sized and micro enterprises (SMMEs) saw their financial fragilities intensify (Zhu *et al*., 2020). Hence, the Chinese government should stay alert about financial debt risk and take precautions against regional risks. More than half of respondents (51.16%) considered the lack of homegrown innovations as the biggest challenge facing China. These concerns are widely shared among economists amid the backlash against globalization, which impedes China's participation in the international division of labor. Close to half of respondents (48.84%) believed that "diminishing cheap labor advantage constitutes the greatest challenge to China's socio-economic development." With an increasingly ageing population, China's demographic dividends are fading. Labor-intensive industries are relocating to other developing

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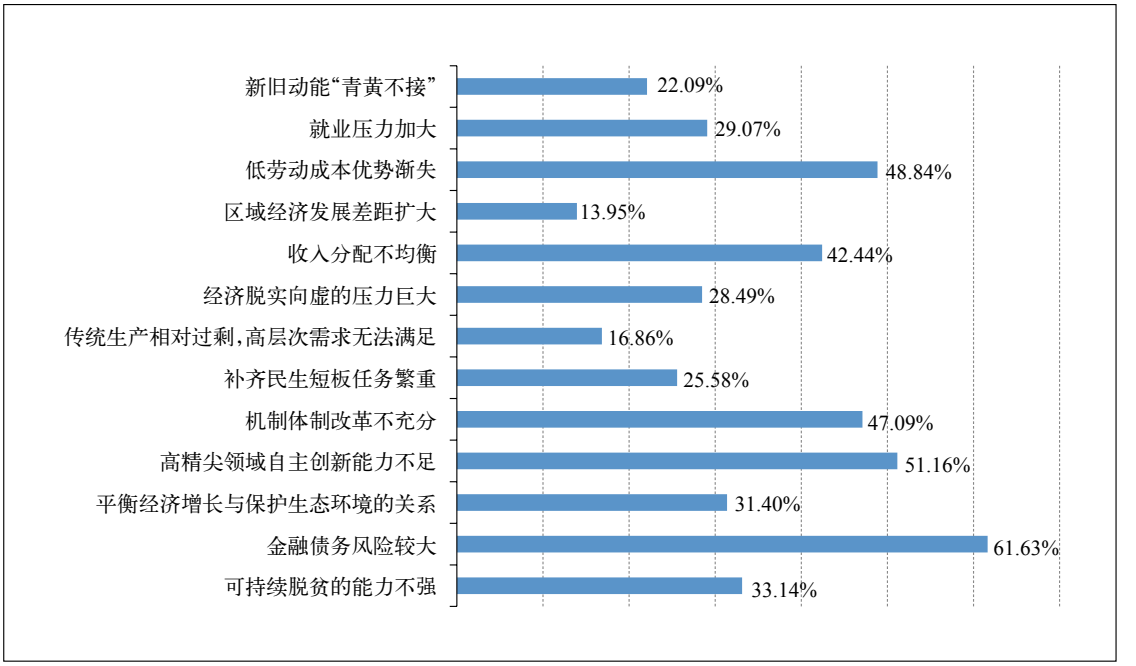

图6：经济学人对“十四五”时期中国经济社会发展内部挑战的判断

注：每位参与者选择不超过五项。

（二）金融债务风险和“逆全球化”思潮是中国经济社会发展最为严峻的内外部挑战

从国内来看，调查显示（见图6），一半以上的经济学人（61.63%）认为较大的金融债务风险是“十四五”时期中国面临的最严峻挑战。自中国经济发展进入新常态后，以往高速增长时期积累下来的很多债务问题开始显现。随着2020年新冠疫情向全国甚至全球蔓延，中国中小微企业财务脆弱性风险提高（朱武祥等，2020）。因此，中国政府在金融债务风险上需存忧患意识，以前瞻性布局防控化解风险。过半的经济学人（51.16%）认为高精尖技术自主创新能力不足是中国接下来面临的最大挑战。这是在当前“逆全球化”阻碍中国经济参与国际分工的现实背景下经济学人的普遍担忧。此外，认为“低劳动成本优势渐失”是中国经济社会发展面临的最大挑战的经济学人接近一半（48.84%）。中国人口老龄化趋势日渐明显，“人口红利”消失。劳动密集型产业逐渐失去成本优势，已出现向其他低工资发展中国家转移的趋势。这需要政府从西部承接东部产业转移（中国社会科学院工业经济研究所课题组，2020）、寻找“改革红利”替代“人口红利”（陆旸和蔡昉，2016）等角度入手及时应对。

从国际来看，如图7所示，接近六成的经济学人认为“卡脖子”技术封锁力度加大是中国经济社会发展面临最为严峻的外部挑战。还有55.81%、50.00%的经济学人分别选择了“国际反华情绪高涨阻碍对外开放”“发达国家制造业回流”。归根结底，这些挑战都是“逆全球化”思潮抬头造成的。其一，“科技冷战”使得中国引进使用国外先进技术的难度加大。这与前文经济学人对国内高精尖技术自主创新能力不足的担忧相吻合，足以说明中国关键技术领域自主创新需要举国体制突破。据统计，95%的高端专用芯片、70%以上的智能终端处理

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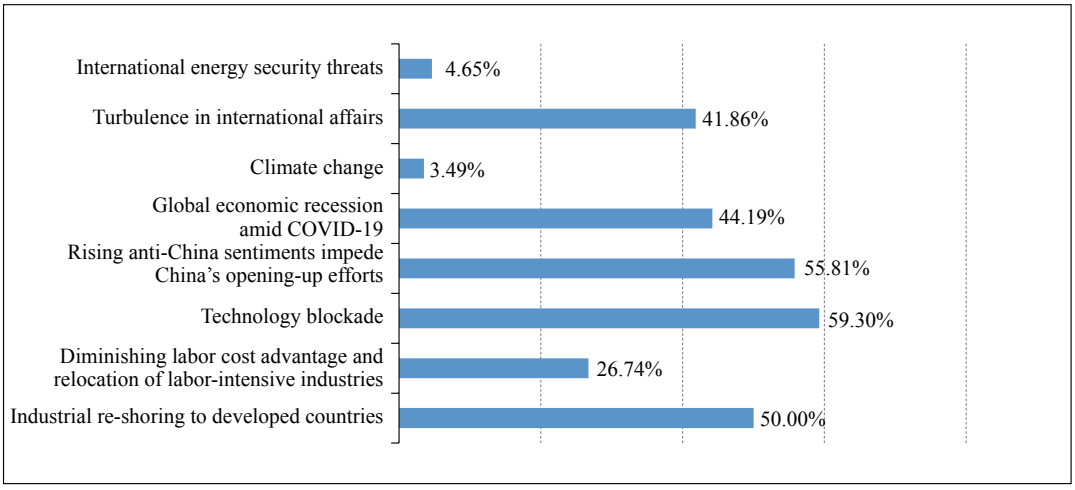

Figure 7: External Challenges to China's Socio-Economic Development during the 14th Five-Year Plan Period
Note: Each participant may select no more than three answers.

countries where the labor cost is more competitive. China's policymakers should respond by encouraging industrial relocation from the eastern region to the western region (Institute of Industrial Economics, CASS Research Group, 2020), and reform dividends should replace diminishing demographic dividends (Lu and Cai, 2016), among other means.

As shown in Figure 7, close to 60% of the economists identified technology blockade as the biggest external challenge to China's socio-economic development. Of the surveyed economists, 55.81% and 50.00% selected "rising anti-China sentiments impede China's opening-up efforts" and "developed countries started to re-shore manufacturing industry." In the final analysis, all these challenges stem from rising anti-globalization sentiments. First, the "technology cold war" has made it harder for China to introduce advanced foreign technology. This finding is consistent with the earlier-mentioned concern among surveyed economists over the lack of cutting-edge homegrown innovations, pointing to the imperative need for state-led support for indigenous innovations. China relies on imports for 95% of high-end special-purpose chips, over 70% of smart device processors, and the vast majority of memory chips; once developed countries cease to supply these components, China's supply chain security will face devastating disruptions.[2] Given the high stakes, China must lose no time in seeking alternative critical components and core technologies. Second, China's policymakers must stay alert about anti-China sentiments from developed countries in the Western world, which have started to impede China's participation in the global division of labor. Third, the eruption of the global financial crisis caused developed countries led by the United States to recognize the harmfulness of industrial hollowing-out as a result of offshore outsourcing and introduce a host of "re-industrialization" policies to re-shore manufacturing activity. The current COVID-19 pandemic will facilitate the restructuring of global supply chains and prod developed countries to beef up their domestic manufacturing supply chains.

3.3 China's Economic Resiliency Primarily Stems from Large-Economy Advantage and the Rise of Emerging Industries

Given the multitude of challenges to China's socio-economic development during the 14th Five-

[2] Source: https://www.thepaper.cn/newsDetail_forward_2271086.

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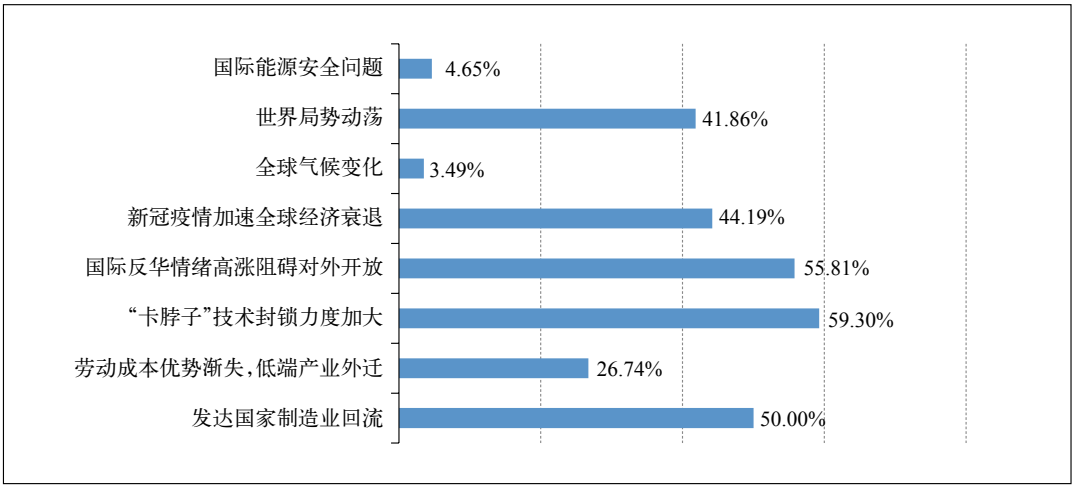

图7：经济学人对“十四五”时期中国经济社会发展外部挑战的判断

注：每位参与者选择不超过三项。

器以及绝大多数存储芯片依赖进口，一旦发达国家“断供”，将对我国产业链安全带来巨大风险。[2]因此，中国不得不“破釜沉舟”，加快研究关键零部件、核心技术的可替代性措施。其二，伴随中国崛起，西方发达国家反华情绪高涨，正在阻碍中国参与全球分工，中国应有所警惕。其三，国际金融危机发生后，以美国为代表的发达国家重新认识到离岸外包造成的产业空心化的危害和制造业对支持创新、促进就业的重要作用，纷纷出台一系列“再工业化”的政策措施，鼓励制造业回流。而此次新冠疫情的全球性蔓延造成部分行业生产中断，全球制造业供应链无法正常运转，这将会加剧全球制造业供应链的重构，促使发达国家强化、完善其国内的制造业供应链。

（三）中国经济韧性主要来自经济超大规模性优势和新兴产业快速发展

既然“十四五”时期中国经济社会发展面临着诸多挑战，那么在经济学人的眼中，为应对这些挑战，经济发展的韧性主要来自哪些方面呢？在本次调查问卷中，关于该问题设置了7个选项，且规定每个参与者选择不超过三项。如图8所示，调查发现接近70%的经济学人认为中国经济发展的韧性主要来自超大规模人口、国土空间、经济体量和统一市场所形成的经济超大规模性优势。中国是世界上人口最多、经济体量最大的国家之一，具有规模经济效应超大、范围经济效应超大、空间集聚效应超大、创新学习效应超大、发展外溢效应超大五大特征（国务院发展研究中心课题组，2020）。因此，尽管“逆全球化”抬头使得进出口市场不确定性增加，但在“十四五”时期，依靠庞大的国内市场规模和不断升级的需求结构，中国有能力、有条件、有信心将经济增长保持在合理区间内。

还有66.86%的经济学人认为以5G、互联网+为代表的新兴产业快速发展是中国经济韧性的主要来源。

[2] 资料来源：https://www.thepaper.cn/newsDetail_forward_2271086。

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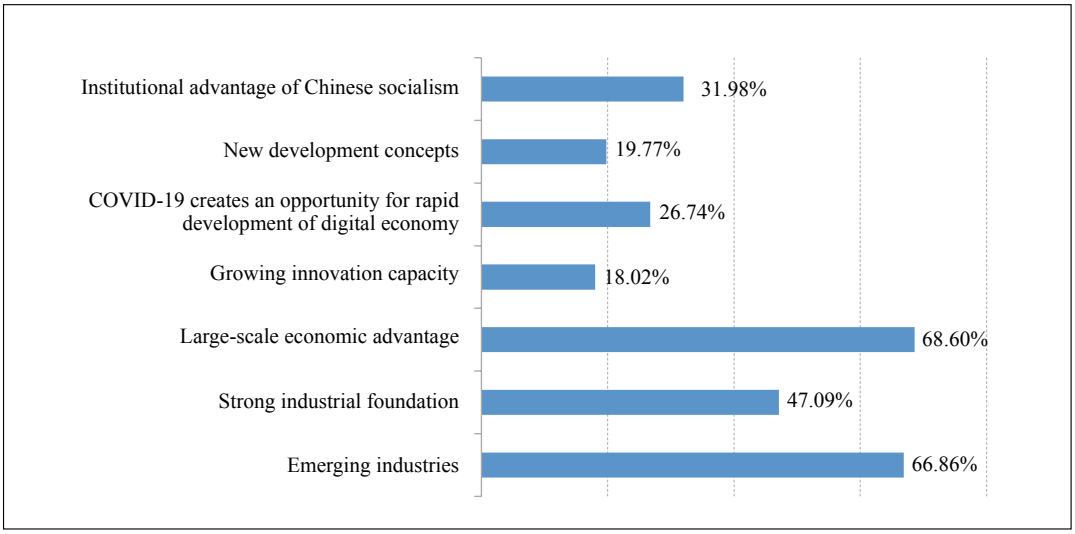

Figure 8: China's Socio-Economic Resiliency during the 14th Five-Year Plan Period Identified by Economists
Note: Each participant may select no more than three answers.

Year Plan period, we asked economists to name the challenges to China's economic resiliency. In our questionnaire survey, we asked each participant to select no more than three from among seven optional answers. As shown in Figure 8, our survey found that close to 70% of the economists considered that China's economic resiliency stems from a large population, land space, economic aggregate, and broad domestic market. As the most populous country and the second largest economy in the world, China boasts significant economies of scale, economies of range, spatial agglomeration, innovative learning, and development spillover effects (Research Group of the State Council Development Research Center, 2020). Despite rising uncertainties in the export market, China has the capabilities, conditions, and confidence to maintain economic growth within a reasonable range.

Of the surveyed economists, 66.86% identified emerging industries led by 5G and internet+ as the main sources of China's economic resiliency. In 2019, China's high-tech manufacturing and strategic emerging industries saw their value-added increase by 8.8% and 8.4%, respectively, over the previous year, 3.1 and 2.7 percentage points higher than the average growth of large industries. Strategic emerging services, technology services, and high-technology service enterprises reported business revenue growth of 12.4%, 12.0%, and 12.0%, respectively, 3.0, 2.6 and 2.6 percentage points above the average growth of large service companies. Despite the grim outlook of a "technology cold war," China's emerging industries are booming, with the digital economy emerging as a new growth engine underpinning China's rise towards medium- and high-end links of the global value chain.

Some economists considered that "a strong industrial foundation" (47.09%), "institutional advantage of Chinese socialism" (31.98%), "opportunities from COVID-19 for digital economy development" (26.74%), the "new development concepts of innovation, coordination, greenness, openness, and shared development" (19.77%), and "growing innovation capacity" (18.02%). In their view, China's economy is highly resilient with sufficient room to cope with internal and external challenges.

4. Forecast of China's Socio-Economic Situation during the 14th Five-Year Plan Period

The 14th Five-Year Plan period will witness deepening changes in the global landscape, and China

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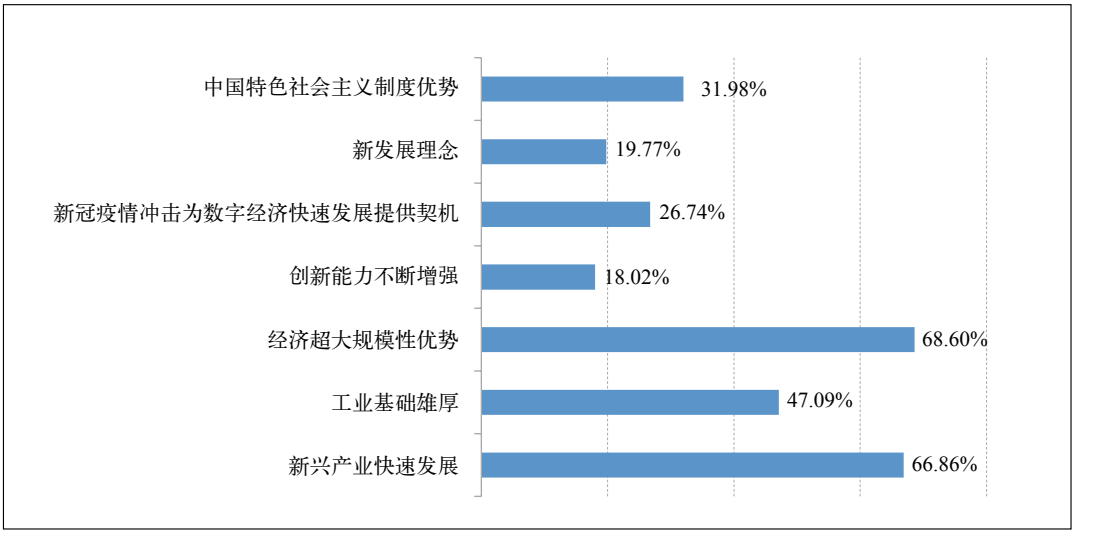

图8:经济学人对“十四五”时期中国经济社会发展韧性的判断

注:每位参与者选择不超过三项。

据统计,2019年,中国高技术制造业和战略性新兴产业增加值分别比上年增长8.8%和8.4%,增速分别比规模以上工业高3.1个和2.7个百分点;战略性新兴服务业、科技服务业和高技术服务业企业营业收入分别增长12.4%、12.0%和12.0%,增速分别快于全部规模以上服务业3.0个、2.6个和2.6个百分点。尽管国际“技术冷战”可能会长期持续,但中国新兴产业蓬勃发展,数字经济已成为中国经济增长新亮点、新引擎,也成为向全球产业链中高端迈进的重要动力。

此外,关于中国经济发展韧性从哪来,“工业基础雄厚”(47.09%)、“中国特色社会主义制度优势”(31.98%)、“新冠疫情冲击为数字经济快速发展提供契机”(26.74%)、“创新、协调、绿色、开放、共享的新发展理念”(19.77%)、“创新能力不断增强”(18.02%)等观点受到部分经济学人的肯定。这充分说明中国经济发展韧性强,回旋余地大,足以应对上述内外部挑战。

四、“十四五”时期中国经济社会发展形势预判:总体乐观

“十四五”时期,世界百年未有之大变局将深度演化,中国将开启全面建设社会主义现代化国家新征程。那么,经济学人对这一时期机遇、挑战和韧性进行了全面评估后,对整个经济社会发展又持有什么样的看法呢?基于此,本次问卷从年均增速、能否迈入高收入国家行列、与发达国家差距三个角度来开展调查。

(一)中国经济年均增速将在5%及以上

如图9所示,本次调查发现有6.98%的经济学人认为“十四五”时期中国经济年均增速在6.5%以上;有19.19%的经济学人认为年均增速将在6%~6.5%之间;有45.93%的经济学人认为经济年均增速在5%~6%之

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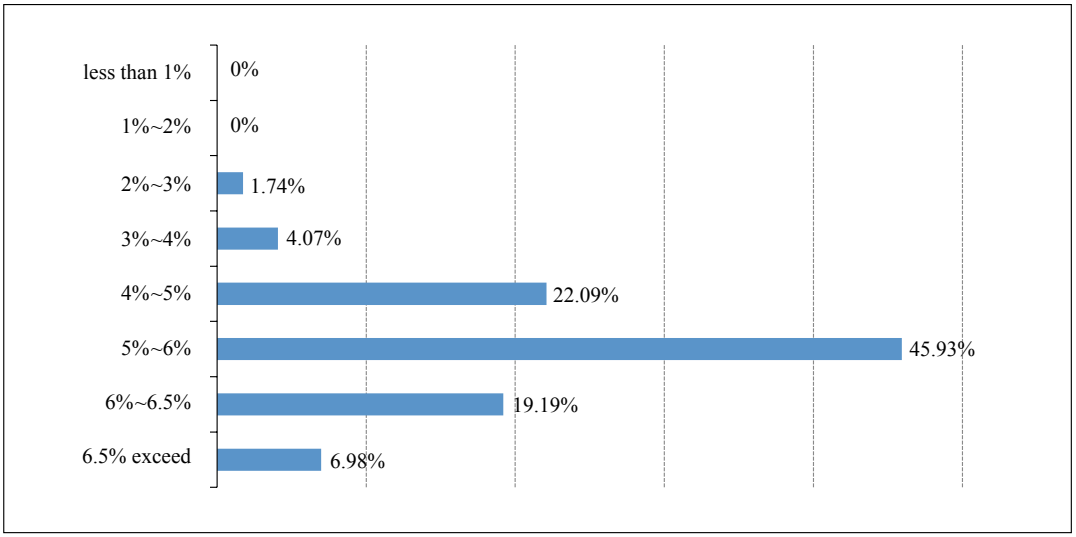

Figure 9: Annual Average Growth of China's Economy during the 14th Five-Year Plan Period Forecast by Economists

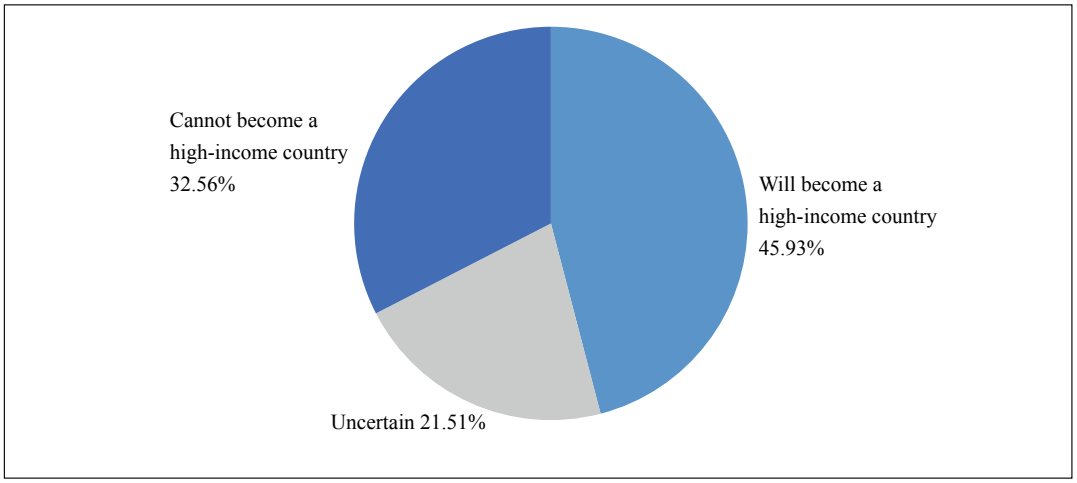

Figure 10: Economists' Views about Whether China Will Become a High-Income Country during the 14th Five-Year Plan Period

is about to embark upon a new journey of building a modern socialist nation. After evaluating the opportunities, challenges, and resiliency, what are economists' views about China's socio-economic development in the coming five years? In our survey, we asked economists about their estimates of China's annual average growth rate, whether China may join the rank of high-income countries, and China's gaps with developed countries.

4.1 China's Economy Will Grow 5% or More

As shown in Figure 9, this survey found that 6.98% of economists believed that China's annual average economic growth would exceed 6.5% during the 14th Five-Year Plan period; 19.19% put the estimate within a range of 6% to 6.5%, while 45.93% considered 5% to 6% to be more likely. That is to say, 72.10% of surveyed economists considered that China's economy would grow at 5% or more during

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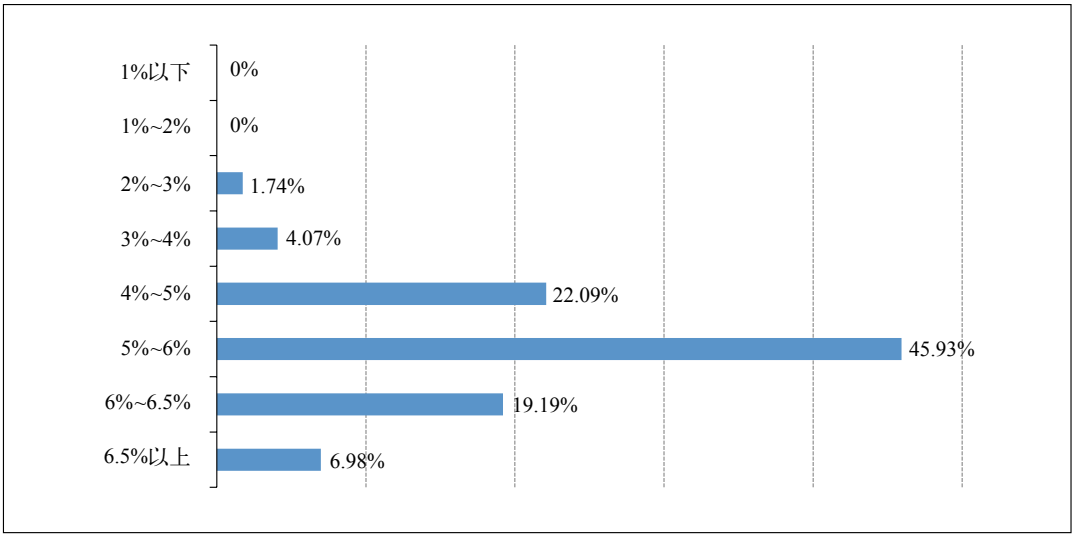

图9:经济学人对“十四五”时期中国经济年均增速的预判

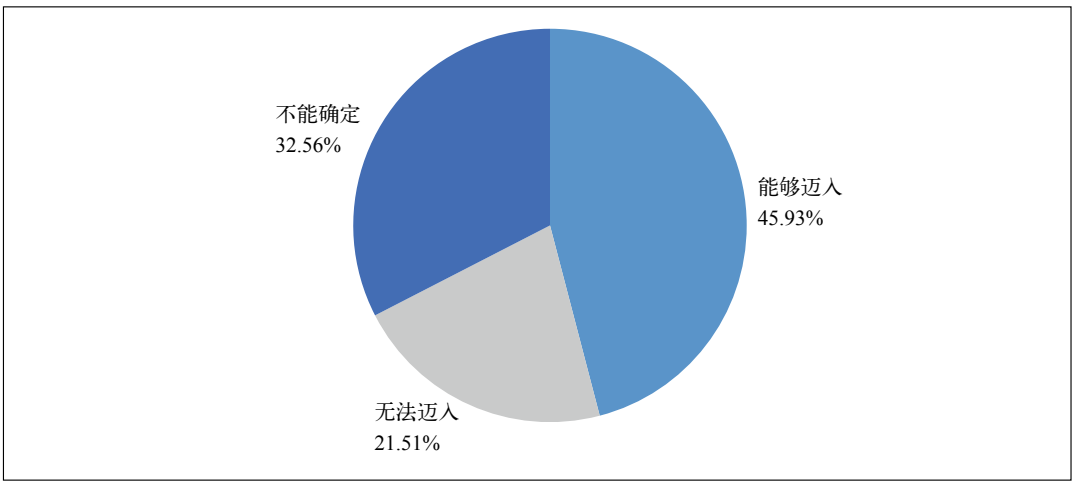

图10:经济学人对“十四五”时期中国能否迈入高收入国家行列的判断

间,也就是说,有七成以上(72.10%)的经济学人认为“十四五”时期中国经济年均增速在5%及以上。而经济年均增速在2%以下的选项无人选择。这说明经济学人对未来五年中国经济稳定增长充满信心,唱衰中国经济的论调不符合实际情况。同时,也说明我国受新冠疫情冲击的负面影响是暂时的,并不会改变经济长期向好的基本面。

(二)虽有不确定性,但中国仍有望迈入高收入国家行列

正如前文所提到的,“十四五”时期是中国努力跨越中等收入陷阱的关键阶段。调查显示(见图10),有接近一半(45.93%)的经济学人认为“十四五”时期中国能够迈入高收入国家行列,还有32.56%的受访者表示无

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the 14th Five-Year Plan period. None of the respondents answered that they thought it would grow less than 2%. These results suggest that surveyed economists felt confident about China's economic growth stability in the coming five years. Pessimistic views about China's economy are contradictory with reality. The surveyed economists believed that the negative impact of COVID-19 will be short-lived and will not change China's long-term economic outlook.

4.2 China Remains Hopeful to Join the Ranks of High-Income Countries

As mentioned before, the 14th Five-Year Plan period is a critical stage for China to cross the middle-income trap. According to our survey (Figure 10), close to half (45.93%) of respondents believed that China could become a high-income country during the 14th Five-Year Plan period, and 32.56% felt uncertain. This suggests that most economists felt uncertain about whether China could become a high-income country during the 14th Five-Year Plan period. Despite the risks, China is more likely to join the ranks of high-income countries. Notably, whether China can become a high-income country is subject to such factors as economic growth rate, income gaps, price level, the development status of other countries, and renminbi's exchange rate against the US dollar. While the Chinese government did not set any policy goal to attain high-income status, China's relentless inclusive economic development and improvement in people's livelihoods will naturally bring about such an outcome. Hence, we may conclude that the surveyed economists are confident about China's inclusive development and public welfare.

4.3 China Is Poised to Reach or Surpass the Level of Developed Countries in Certain Fields

Despite rising living standards, China remains the world's largest developing country. In our survey, we asked economists to forecast China's international status during the 14th Five-Year Plan period. As shown in Figure 11, 76.16% of respondents believed that China would reach or surpass the level of developed countries by 2025 in certain fields, which is 41.59% higher than the percentage of surveyed economists who considered that China had achieved such an international status in 2017 (Qin and Li, 2018). In addition, 18.02% of surveyed economists believed that China would remain at the middle- and upper-level of developing countries by 2025, but still lag far behind developed countries. Of the respondents, 4.65% believed that China would reach or surpass the level of developed countries in most fields, and 1.16% of economists considered China a mid-level developing country. This result indicates

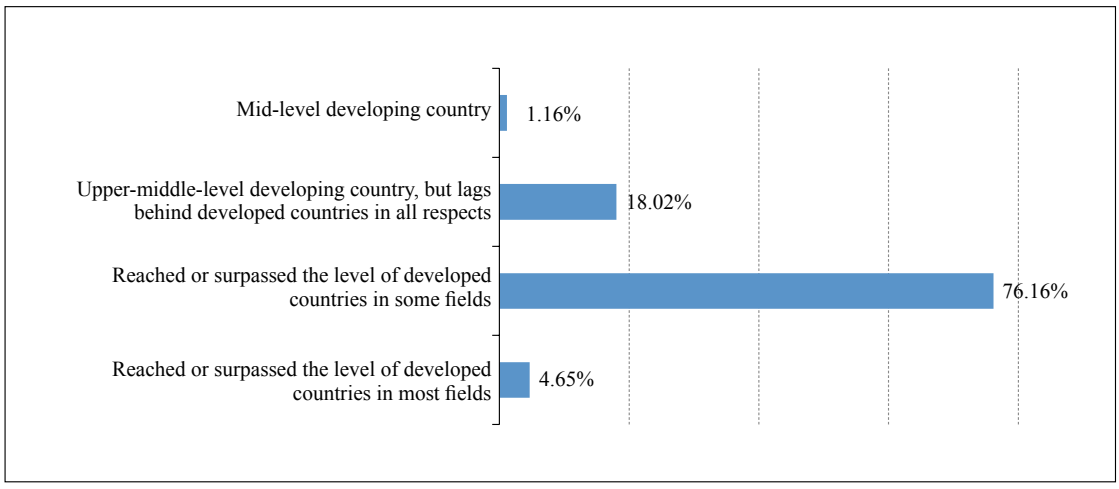

Figure 11: Economists' Forecast of China's Development Stage by 2025

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法确定。这表明大多数经济学人判断“十四五”时期中国能否成为高收入国家还存在一些不确定，可以说有风险，但更有希望。值得说明的是，由于中国能否成为高收入国家取决于多种因素，比如经济增速情况、收入差距、价格水平、世界其他国家发展情况、人民币对美元的汇率等，所以，迈入高收入国家行列并非是中国政府制定政策的直接目标，而是集中精力促进包容性发展和经济高质量发展、持续增进居民福祉的必然结果。基于此，可以判断，经济学人对“十四五”时期中国经济包容性发展、高质量发展、增进居民福祉充满了信心。

（三）中国部分领域将达到或超过发达国家水平

尽管社会主要矛盾发生变化，但中国是世界最大发展中国家的国际地位没有变。为了能够对“十四五”时期中国的国际地位有一个明确判断，本次调查就2025年中国与世界其他国家相比所处地位开展调查。结果显示（见图11），76.16%的经济学人认为2025年中国部分领域将达到或超过发达国家水平，这比经济学人判断2017年中国处于此类国际地位的选择率高出41.59%（秦宇和李钢，2018）。此外，18.02%的经济学人认为2025年中国将处于发展中国家中上游水平，但仍然全面落后于发达国家，4.65%的经济学人认为中国多数领域将达到或超过发达国家水平，1.16%的经济学人认为中国将处于发展中国家中游水平。该结果说明“十四五”时期中国有望进一步缩短与发达国家在经济发展、创新驱动、民生福祉、发展协调、国民素质等方面的硬实力和软实力差距，这也是建设社会主义现代化国家的必然要求。

五、“十四五”时期中国经济社会发展的重点任务

为推动“十四五”时期中国经济社会健康持续发展，政府最需要采取哪些措施呢？本次调查立足于经济学人对“十四五”时期中国经济社会发展挑战、机遇和韧性的思考，分别从经济发展、创新驱动、民生福祉和生态环境保护四个方面就政府工作重点开展调查。每个问题设置了7~9个选项，受访者选择不超过三项。

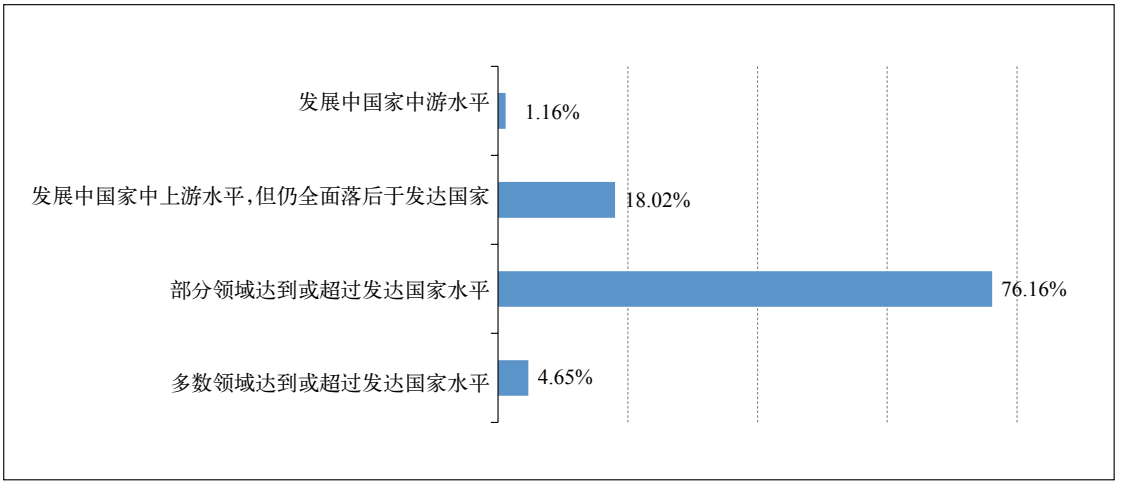

图11：经济学人对2025年中国发展阶段的判断

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that during the 14th Five-Year Plan period, China hopes to further narrow its gaps with developed countries with respect to economic development, innovation-led growth, public welfare, regional coordination, and national competence. Such progress is essential for China to build a modern socialist country.

Contradiction between people's ever-growing needs for a better life and unbalanced and inadequate development has become China's primary social contradiction.

5. China's Socio-Economic Development Priorities during the 14th Five-Year Plan Period

Which priorities should top the government agenda to bring about sustained socio-economic development during the 14th Five-Year Plan period? Based on the challenges, opportunities and resiliency of China's socio-economic development during the 14th Five-Year Plan period, we conducted a survey on government work priorities with respect to economic development, innovation-led growth, public welfare, and environmental protection. Each question offers seven to nine options, from among which each participant may select no more than three.

5.1 China's High-Quality Economic Growth Hinges upon Industrial Transition, the Real Economy, and Domestic Consumption

Close to 80% of surveyed economists believed that the Chinese government should seize opportunities from the new industrial revolution to spur economic development and industrial transition during the 14th Five-Year Plan period (see Figure 12). As mentioned before, the new industrial revolution provides late-moving countries with historic opportunities to catch up with developed countries. With a complete range of industrial sectors and significant economies of scale, China is well-positioned in the new round of industrial revolution. China's industrial transition entails ICT-based applications to raise productivity, quality, and value-added while conserving cost and energy.

More than half of the respondents stressed the need for the Chinese government to strengthen the real economy and economic resiliency during the 14th Five-Year Plan period. This echoes the above-

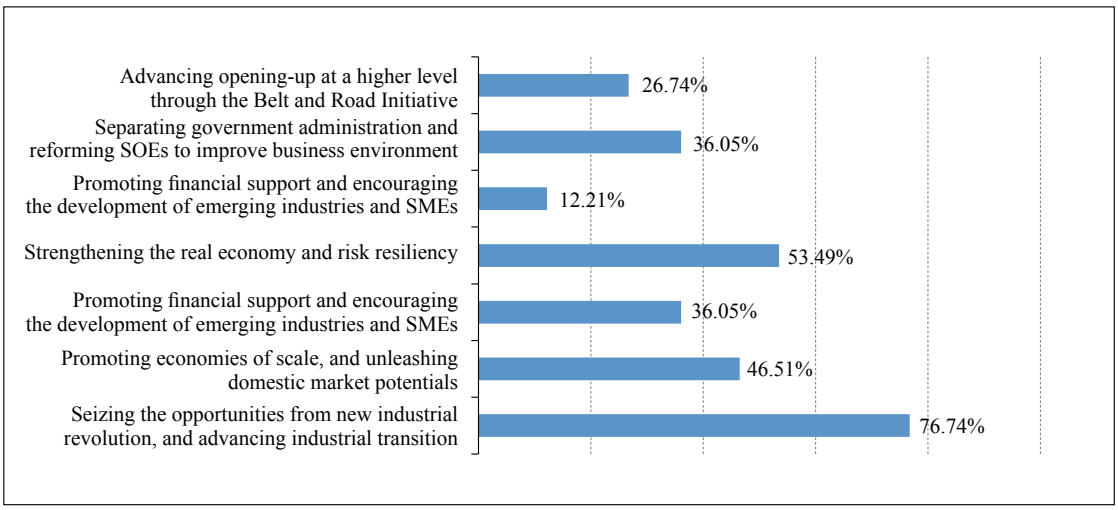

Figure 12: China's Economic Development Priorities for the 14th Five-Year Plan Period Identified by Economists

Note: Each participant may select no more than three answers.

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（一）加快产业转型升级、培育壮大实体经济、持续挖掘内需潜力是促进中国经济高质量发展的重要举措

调查结果显示（见图12），为促进“十四五”时期中国经济发展，接近八成的经济学人认为中国政府应抢抓新工业革命机遇，推进产业转型升级。诚然，正如上文所提到的，新工业革命为后发国家提供了弯道超车的历史机遇。而中国拥有全球最齐全的产业门类，具有完善的产业供应链体系和雄厚的工业基础，规模经济优势显著，为广泛参与新一轮工业革命带来了发达国家及其他发展中国家难以超越的产业体系优势。因此，将传统产业与新一代信息技术深度融合推进产业智能化、自动化、高端化，节约成本，降低能耗，提高劳动生产率和生产质量，提升产品附加值，是促进中国产业转型升级的有力抓手，也是构建现代化经济体系的重中之重。

一半多的受访者表示“十四五”时期中国政府需要壮大实体经济，增强经济抗风险能力。这与上文经济学人认为“金融债务风险是中国严峻的内部挑战”相对应。当下，全球经济发展存在巨大的不确定性，尤其是新冠疫情仍在全球持续蔓延，带来了前所未有的经济风险。因此，中国政府需要增强金融服务实体经济的能力，推行财政扶持政策，帮扶实体企业渡过难关；坚持创新驱动，提升产业核心竞争力，壮大实体经济，增强其抵御市场风险能力。

接近一半的经济学人认为中国政府需要发挥超大规模经济体优势，释放内需潜力。这同样与上文大多数经济学人判断“中国经济韧性主要来自超大规模经济优势”相吻合。伴随新型城镇化，中国具有庞大的国内市场规模和不断升级的需求结构。因此，在全球经济增长乏力的背景下，“十四五”时期政府应充分挖掘国内市场潜力，扩大内需，弘扬工匠精神，创造多元化、高品质的产品和服务，并加快教育、医疗、公共设施、社会保障等方面的传统基础设施建设；以消费需求升级为引领，积极培育新兴产业发展，前瞻性布局大数据、人工智能、工业互联网等新型基础设施建设。

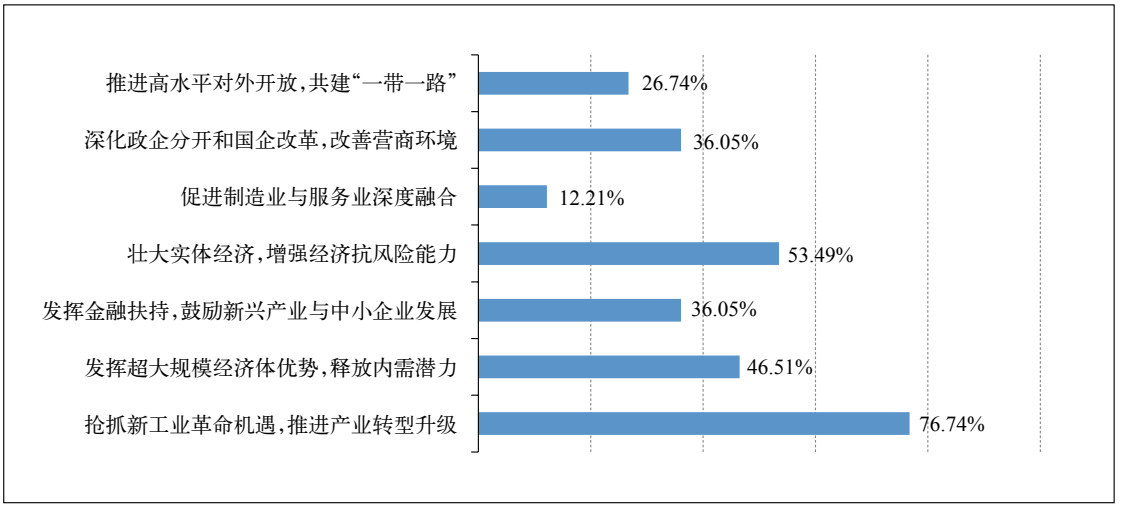

图12：经济学人对“十四五”时期中国经济发展重点任务的判断

注：每位参与者选择不超过三项。

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mentioned view that "financial debt risk constitutes a grave challenge to China's economy." The continuing spread of COVID-19 has brought about unprecedented economic risks, compounding the already significant world economic uncertainties. In this context, the Chinese government must put the financial industry at the service of the real economy, and introduce fiscal policies to tide over real-economy businesses. It should pursue innovation-led growth, boost core industrial competitiveness, and enhance risk resiliency.

Close to half of the surveyed economists believed that the Chinese government should bring into play China's significant economies of scale and unleash domestic consumption potentials. This agrees with the above-mentioned view that "China's economic resiliency mainly stems from tremendous economies of scale" held by most economists. New-type urbanization will unleash tremendous domestic market potential and speed up consumption upgrade. Amid the sluggish world economy, the Chinese government should fully tap the domestic market potential, promote craftsmanship, create diverse and high-quality products and services, and speed up the development of education, healthcare, public facilities, social security, and other types of traditional infrastructure. Consumption upgrade should drive the development of emerging industries, and require the early development of a new infrastructure for big data, artificial intelligence, and industrial internet.

In addition, 36.05%, 36.05%, 26.74%, and 12.21%, respectively, of surveyed economists identified "separating government administration and reforming SOEs to improve business environment," "promoting financial support and encouraging the development of emerging industries and SMEs," "advancing opening-up at a higher level through the Belt and Road Initiative," and "integrating manufacturing and services" as key policy initiatives essential for China's high-quality economic development during the 14th Five-Year Plan period.

5.2 Fundamental Research and Key Technology R&D

As shown in Figure 13, most surveyed economists agreed on China's innovation-led growth

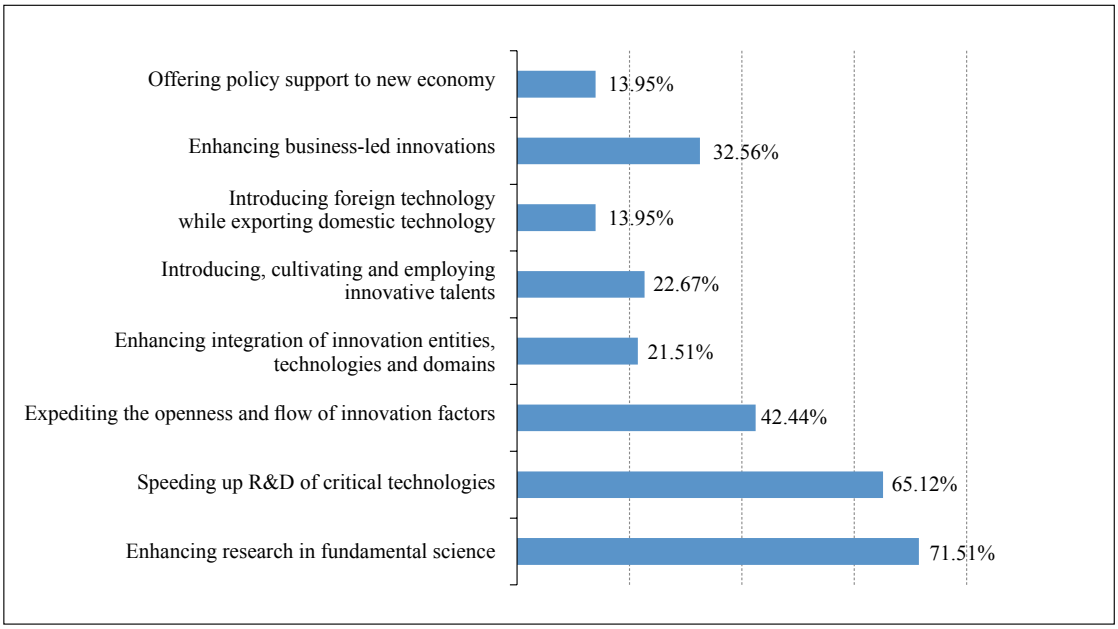

Figure 13: Priorities of Innovation-Led Growth during the 14th Five-Year Plan Period Identified by Economists

Note: Each participant may select no more than three answers.

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此外，选择“深化政企分开和国企改革，改善营商环境”“发挥金融扶持，鼓励新兴产业与中小企业发展”“推进高水平对外开放，共建‘一带一路’”“促进制造业与服务业深度融合”的经济学人占比分别为36.05%、36.05%、26.74%、12.21%。这些政策措施也是“十四五”时期中国经济高质量发展所必不可少的。

（二）加强前沿基础科学研究、加快关键技术自主攻关是中国创新驱动的重点

如图13所示，调查结果表明，经济学人对中国创新驱动重点任务的看法比较集中，认为应“加强前沿基础科学研究”“加快重大领域关键技术自主攻关”的经济学人分别占比71.51%、65.12%。这与前文经济学人对“自主创新能力不足”“‘卡脖子’技术封锁力度加大”的担忧相呼应。面对新一轮科技革命的蓬勃兴起，一些基本科学问题孕育重点突破，政府需要从创新环境、人才培养、国家科技计划原创导向、企业自主创新等方式入手，大力支持从0到1的原创性成果，充分发挥基础研究对科技创新的源头供给和引领作用，提升原始创新能力。面对“技术冷战”长期持续的可能性，发挥举国体制优势，加快重大领域关键技术自主攻关，突破关键技术瓶颈，助力中国经济社会发展。

此外，有42.44%的经济学人认为政府应加速创新要素开放流通，32.56%的经济学人认为应强化企业在技术创新中的主体地位。调查结果说明进一步深化科技管理体制改革势在必行。政府应进一步完善科技成果转化和收益分配机制，以市场需求为导向促进科技成果转化，以价值为导向实施成果转化激励，引导各种创新要素得到有序流动与融合共享，确保科技成果转化落地顺畅；发挥市场对技术研发、路线选择及各类创新要素配置的决定性作用，在关键环节以关键共生技术、前沿引领技术、现代工程技术、颠覆性技术的创新等为

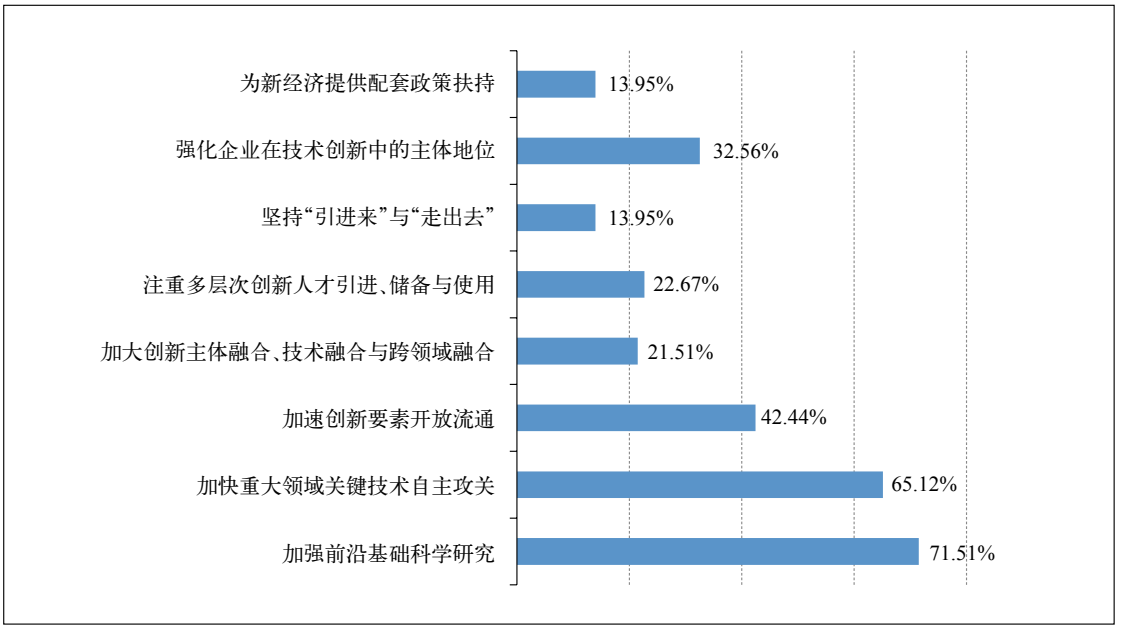

图13：经济学人对“十四五”时期中国创新驱动重点任务的判断

注：每位参与者选择不超过三项。

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priorities. Of the respondents, 71.51% and 65.12% identified "fundamental research in cutting-edge science" and "critical technology R&D" as key priorities for innovation-led growth. This is consistent with the concerns over "lack of homegrown innovations" and "technology blockade." The new technology revolution calls for breakthrough in fundamental science. The government should support original research by encouraging innovation, training talents, and promoting scientific research. With a "technology cold war" looming large, China should speed up the development of critical technologies under the state-led model.

Of the respondents, 42.44% considered that the government should accelerate the openness and flow of innovation factors, and 32.56% of the respondents considered that businesses should play a bigger role in technology innovation. The result of our survey highlights the need to further reform the administrative system for scientific and technological research. The government should improve and incentivize the translation and revenue distribution of R&D results based on market demand, and guide the flow, integration and sharing of innovation factors. Enterprises should be encouraged to enhance R&D, focusing on generic, frontier, engineering, and disruptive technologies.

Of the surveyed economists, 22.67%, 21.51%, 13.95% and 13.95%, respectively, identified that they believed "introducing, cultivating and employing innovative talents," "integrating innovation entities, technologies and sectors," "introducing foreign technology while exporting domestic technology," and "offering policy support to the new economy" should be the government's top priorities for economic development. These policy initiatives will expedite China's innovation-led growth during the 14th Five-Year Plan period.

5.3 Equal Access to Basic Public Services: A Priority for Enhancing Public Welfare

As shown in Figure 14, close to 70% of the economists believed that with respect to public welfare, the Chinese government should give the highest priority to equal access to basic public services during the 14th Five-Year Plan period. After the poverty reduction programs during the 13th Five-Year Plan

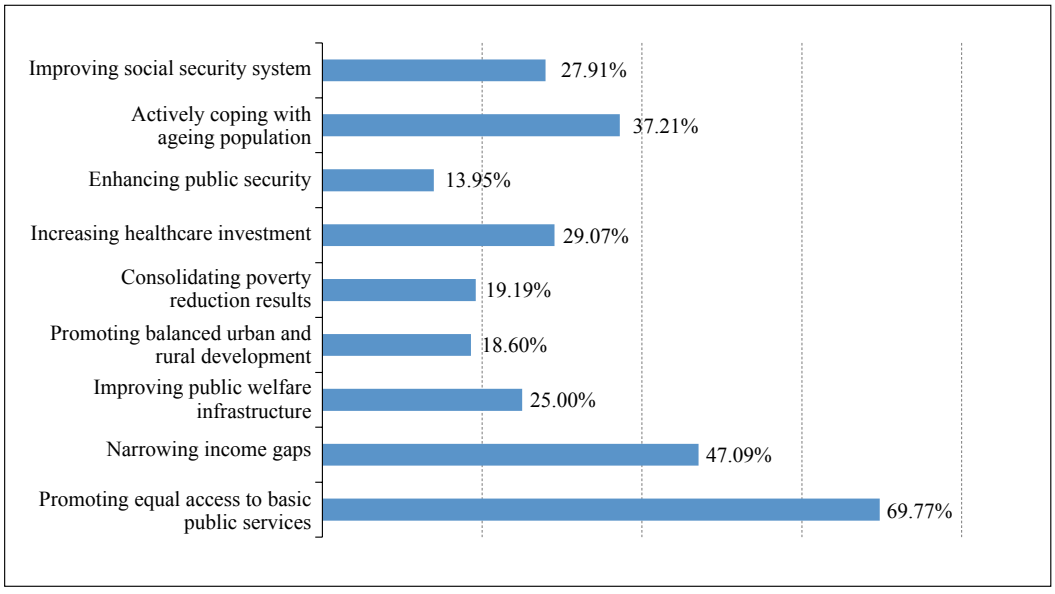

Figure 14: Priorities for Public Welfare during the 14th Five-Year Plan Period Identified by Economists

Note: Each participant may select no more than three answers.

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突破口，引导企业加强研发攻关与应用推广。

此外，选择“注重多层次创新人才引进、储备与使用”“加大创新主体融合、技术融合与跨领域融合”“坚持‘引进来’与‘走出去’”“为新经济提供配套政策扶持”的经济学人占比分别为22.67%、21.51%、13.95%、13.95%。这些举措对“十四五”时期中国创新驱动也起到促进作用。

（三）基本公共服务均等化是中国增进民生福祉的重要任务

如图14所示，调查结果显示，接近七成的经济学人认为“十四五”时期政府在增进民生福祉上最需要促进基本公共服务均等化。继“十三五”时期脱贫攻坚是最大的民生福祉后，中国已基本满足人民对物质文化的需求，社会发展中的不平衡不充分问题日益突出，而教育、医疗、住房等基本公共服务均等化是人民对美好生活向往的重要内容，是建设社会主义现代化国家的应有之义，对于促进社会公平正义、增进人民福祉、增强全体人民在共建共享发展中的获得感都具有十分重要的意义。因此，“十四五”时期，政府应进一步完善国家基本公共服务体系，统筹各区域各层级公共资源，推进均衡配置和优化整合；加大基本公共服务投入力度，向贫困地区、薄弱环节、重点人群倾斜，让更广泛的居民能够充分而公平地分享发展成果，切实提升居民生活幸福感和获得感。

对于“十四五”时期政府改善民生的措施，选择“缩小收入差距”的经济学人占比高达47.09%。当下，中国贫富收入差距在扩大(Piketty et al., 2017)。2020年中国即将在现行贫困标准下消除绝对贫困，但相对贫困依然存在，缩小收入差距将成为中国未来减贫的重要攻坚方向。因此，“十四五”时期，政府应深化收入分配改革，规范初次分配，加大再分配调节力度，扩大中等收入者比重，健全扶贫济困的社会保障兜底机制。

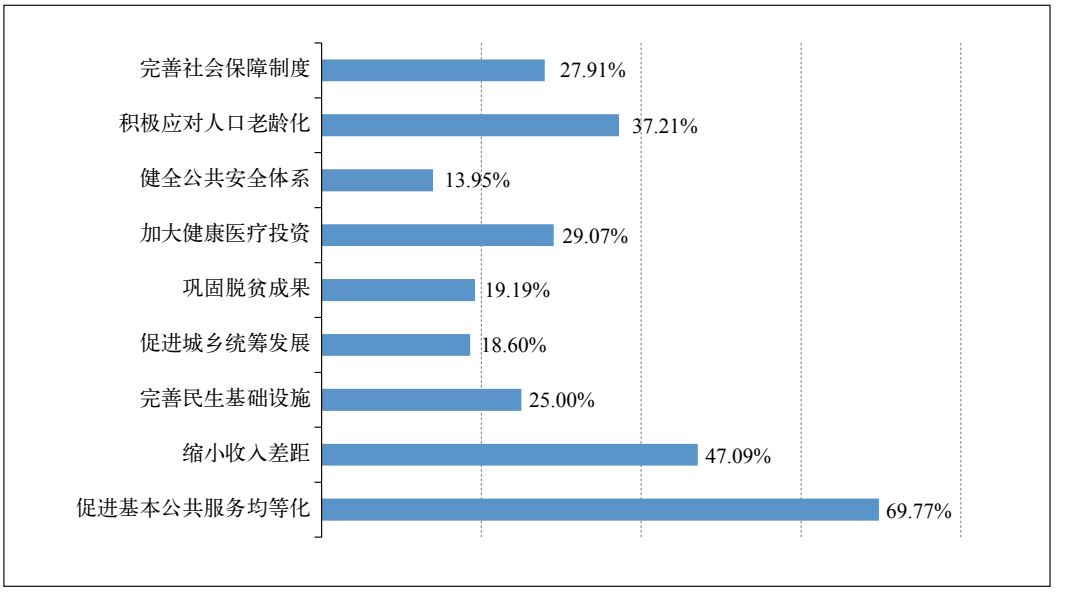

图14：经济学人对“十四五”时期中国增进民生福祉重点任务的判断

注：每位参与者选择不超过三项。

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period, the Chinese people have seen their basic material and cultural needs satisfied. Yet imbalanced and insufficient development presents increasingly prominent challenges. Equal access to basic public services such as education, healthcare and housing represents an important aspect of people's aspiration for a better life. During the 14th Five-Year Plan period, the Chinese government should further improve the basic national public service system, coordinate access to public resources in all regions and at all levels, and promote balanced resource allocation, focusing on poor regions and key target groups. Development should benefit more people, and increase their sense of happiness and gain.

Of the surveyed economists, 47.09% identified "narrowing income gaps" as the top priority for improving public welfare during the 14th Five-Year Plan period. Income gaps in China keep yawning (Piketty *et al*., 2017). By 2020, China is expected to eradicate absolute poverty by the current poverty line. Yet the existence of relative poverty highlights the priority to curb income gaps. During the 14th Five-Year Plan period, the Chinese government should further reform income distribution, regulate primary income distribution, expand the share of the middle-income group, and enhance social protection for the poor.

Of the surveyed economists, 37.21%selected "proactive response to an ageing society." During the 14th Five-Year Plan period, the rising share of an ageing population will pose public welfare challenges. We advise the government to improve public services such as maternal and children's healthcare, and gradually raise the retirement age to make up for the labor shortage. Furthermore, the government should establish a sound elderly care system, train caregivers and managers, and integrate healthcare with elderly care services.

5.4 Green Consumption, Production, Distribution, Innovation and Finance: Key Trends for Environmental Protection

As shown in Figure 15, 62.21% of the surveyed economists considered that the Chinese government

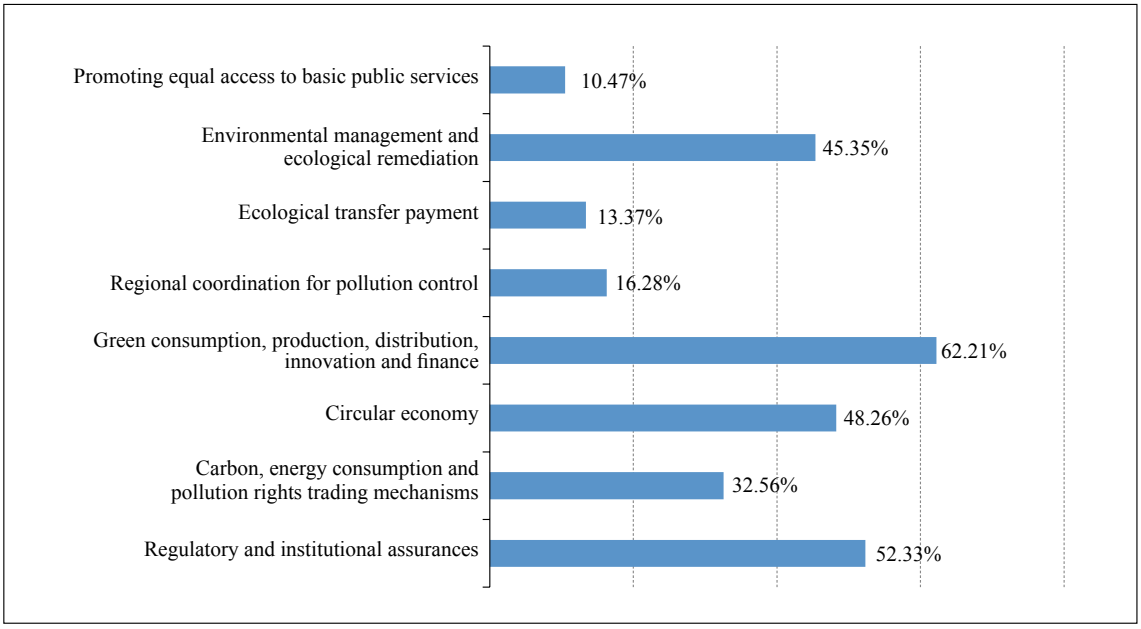

Figure 15: Environmental Protection Priorities for the 14th Five-Year Plan Period Identified by Economists

Note: Each participant may select no more than three answers.

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此外，选择“积极应对人口老龄化”的经济学人占比达到37.21%。这表明人口老龄化已成为“十四五”时期关乎民生的大事。因此，一方面，政府需要完善妇幼保健、托幼等公共服务体系，鼓励生育，并实施渐进式延迟退休年龄政策，弥补劳动力缺口；另一方面，政府应建立健全养老服务体系，加强专业化养老服务护理人员和管理人才队伍建设，推动医疗卫生和养老服务结合，真正实现“老有所养”。

（四）包括消费、生产、流通、创新和金融在内的全方位绿色发展是中国生态环境保护的重要方向

如图15所示，调查结果显示，有62.21%的经济学人认为“十四五”时期中国政府在生态环境保护方面应加强包括消费、生产、流通、创新和金融在内的全方位绿色发展。绿色发展包括但不限于传统生产领域节能减排和资源高效利用，同时还包括绿色消费、绿色流通、绿色创新和绿色金融。因此，完善全方位的绿色经济体系是中国生态环境保护的重要方向。尤其是新型城镇化建设使得居民消费增长空间依然很大，绿色消费也是中国生态文明建设的应有之义。“十四五”时期，中国应从与资源能源节约和环境质量改善密切相关的绿色产品供给、垃圾分类回收、公共交通设施建设、节能环保建筑、技术创新及其金融扶持等多角度入手，加强顶层设计，提升公众环保意识，全方位推进绿色发展。

有52.33%的经济学人认为中国政府应强化法律法规制度保障。保护生态环境必须依靠法治，这样才能真正让制度成为刚性的约束和不可触碰的高压线。因此，政府应进一步完善生态文明制度的法律保障，在顶层制度层面逐步形成完整的更具有法规功能的相关条例和实施细则；同时，加强相关严格执法的法治机制，

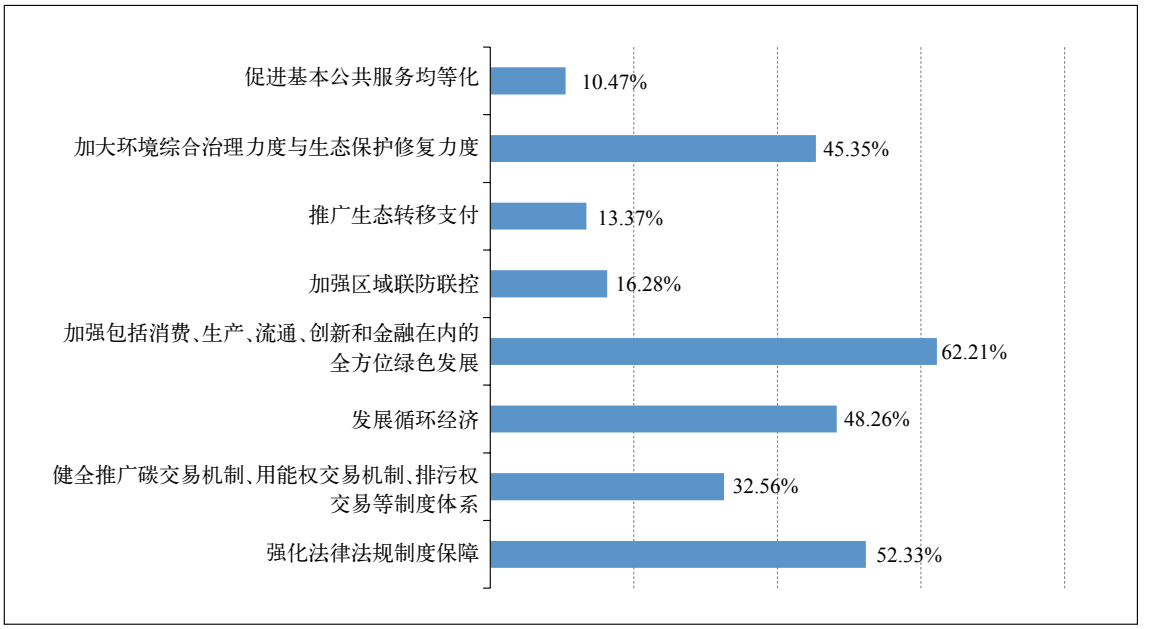

图15：经济学人对“十四五”时期中国生态环境保护重点任务的判断

注：每位参与者选择不超过三项。

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should enhance all-around green development during the 14th Five-Year Plan period, including green consumption, production, distribution, innovation and finance. The concept of green development encompasses energy conservation, emissions abatement, and resource efficiency in consumption, distribution, innovation, and finance. In protecting the environment, China should strive to create a green economy in all respects. Notably, new urbanization will unlock great consumer potentials, and green consumption is a key aspect of China's ecological civilization. During the 14th Five-Year Plan period, China should enhance top-down design, raise public environmental awareness, and advance green development on all fronts, focusing on the supply of green products, sorted waste recycling, public transportation, energy-efficient buildings, innovation, and financial support.

Of the surveyed economists, 52.33% maintained that the Chinese government should enhance regulatory and institutional assurances. The rule of law is essential for implementing environmental protection practices. The government should further improve legal assurances for ecological civilization and develop complete regulatory rules. In addition, law enforcement and legal systems should be enhanced to achieve ecological civilization. Of the economists, 48.26%, 45.35%, 32.56% and 16.28%, respectively, identified "circular economy," "environmental management and ecological remediation," "carbon, energy consumption, and pollution rights trading mechanisms," and "regional coordination for pollution control" as key elements of China's ecological civilization

6. Conclusion

The 14th Five-Year Plan period is vital to China's transition from a moderately prosperous society to achieving socialist modernization. It also marks an historic intersection between the "two centennial goals." The *China Economist* conducted a questionnaire survey on China's socio-economic development during the 13th Five-Year Plan period and the outlook for the 14th Five-Year Plan period. Results reveal the following consensus among most economists:

(i) China achieved remarkable socio-economic development during the 13th Five-Year Plan period - most notably in economic development, environmental protection, innovation-led growth, and public welfare. Specific achievements include:

Economic development: Industry-ICT integration and the emergence of a new economy;

Innovation-led growth: Mass entrepreneurship, mass innovation, and growing strength in cutting-edge R&D capabilities;

Environmental protection: Significant progress was made in green production and air and water pollution abatement;

Public welfare: Poverty reduction efforts achieved the most progress.

(ii) Opportunities co-exist with challenges for China's socio-economic development during the 14th Five-Year Plan period. According to the economists, China's biggest opportunity lies in the technology dividends led by the new industrial revolution, and the gravest threats stem from domestic financial debt risk and an external backlash against globalization. Nevertheless, significant economies of scale and booming emerging industries will underpin China's economic resiliency and unrivaled advantages compared with developed countries and other developing countries. China has the capabilities, conditions, and confidence to keep its economic growth within a reasonable range.

(iii) Surveyed economists held a generally optimistic view about China's socio-economic development during the 14th Five-Year Plan period. Most surveyed economists estimated China's annual average growth to be no less than 5% from 2021 to 2025. Despite uncertainties, China is hopeful to join the ranks of high-income countries during the 14th Five-Year Plan period. In certain domains, China is poised to reach or exceed the levels of developed countries. Overall, surveyed economists felt sanguine about China's socio-economic development during the 14th Five-Year Plan period.

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确保生态文明制度体系能够真正落地。此外，选择“发展循环经济”“加大环境综合治理力度与生态保护修复力度”“健全推广碳交易机制、用能权交易机制、排污权交易等制度体系”“加强区域联防联控”的经济学人占比分别为48.26%、45.35%、32.56%、16.28%，表明这些措施也是中国生态文明制度体系中必不可少的组成部分。

六、研究结论

“十四五”时期是中国由全面建成小康社会向基本实现社会主义现代化迈进的关键时期，也是“两个一百年”奋斗目标的历史交汇期。为了解经济学家们关于中国经济社会发展“十三五”时期回顾与“十四五”时期展望的看法，《中国经济学人》就此展开了问卷调查。结果显示，大部分经济学人主要有以下几点共识：

第一，“十三五”时期中国经济社会发展取得了显著成就。总体来看，经济发展、生态环境保护、创新驱动和民生福祉成绩最为突出。具体而言，在经济发展领域，表现为工业化与信息化融合发展和新经济快速成长；在创新驱动领域，表现为大众创业万众创新和高精尖技术研发实力增强；在生态环境保护领域，绿色生产、大气污染和水污染治理等方面成效明显；在增进民生福祉领域，脱贫攻坚成绩最为突出。

第二，“十四五”时期中国经济社会发展机遇与挑战并存，且韧性强。在经济学人看来，中国面临的最大机遇是以新工业革命为代表的技术红利；最为严峻的内外部挑战分别是金融债务风险和“逆全球化”思潮抬头。尽管如此，中国经济发展韧性十足，主要来自经济超大规模性优势和新兴产业的快速发展，具有发达国家和其他发展中国家无法超越的优势，中国有能力、有条件、有信心将经济增长保持在合理区间内。

第三，“十四五”时期中国经济社会发展形势预判总体乐观。经济学人普遍认为2021~2025年中国年均增速在5%及以上；中国迈入高收入国家行列虽具有不确定性，但希望更大；中国部分领域将达到或超过发达国家水平，有望进一步缩短两者间硬实力和软实力差距。因此，总体上，经济学人对“十四五”时期中国经济社会发展充满信心。

第四，“十四五”时期中国经济社会发展的重点任务需要进一步明确。具体而言，在经济发展领域，中国政府应抢抓新工业革命机遇，加快产业转型升级，推进产业智能化、自动化、高端化；着力培育壮大实体经济，增强经济抗风险能力；发挥超大规模经济体优势，持续挖掘内需潜力。在创新领域，中国政府应着重加强前沿基础科学研究，发挥举国体制优势，加快关键技术自主攻关。在增进民生福祉领域，中国政府应着重促进基本公共服务均等化，优化配置各区域各层级公众资源，注重基本公共服务向贫困地区重点人群倾斜。在生态环境保护领域，推进包括消费、生产、流通、创新和金融在内的全方位绿色发展是政府工作的重要方向。

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(iv) China's socio-economic development priorities for the 14th Five-Year Plan should be further identified. With respect to economic development, the Chinese government should seize the opportunity of the new industrial revolution to speed up industrial transition, focusing on smart, automated, and high-end industries. Efforts should be devoted to strengthening the real economy and its risk resiliency. China should continue to promote its economies of scale and unlock domestic consumption potentials. With respect to innovations, we advise the Chinese government to ramp up research in fundamental science and expedite the development of critical technologies under the state-led model. With respect to public welfare, we advise the Chinese government to increase equal access to basic public services, optimize the allocation of public resources in all regions and at all levels, and offer more basic public services to key target groups in poor regions. With respect to environmental protection, the Chinese government should strive to promote green consumption, production, distribution, innovation, and finance.

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