

# 中国服务进口报告

# 2018

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# 目录

<b>前言</b> .....	<b>1</b>
<b>一、发展原则与愿景</b> .....	<b>1</b>
(一) 发展原则 .....	1
(二) 发展愿景 .....	2
<b>二、中国服务进口发展情况</b> .....	<b>2</b>
(一) 中国服务业开放稳步推进 .....	2
(二) 中国服务进口发展迅速 .....	3
(三) 中国内向附属机构服务贸易快速发展 .....	6
<b>三、中国对全球服务贸易的贡献</b> .....	<b>8</b>
(一) 中国是全球服务贸易增长的重要贡献者 .....	8
(二) 中国是全球服务贸易自由化的重要推动者 .....	9
(三) 中国是全球服务贸易创新发展的重要探路者 .....	11
<b>四、中国与贸易伙伴互利共赢</b> .....	<b>12</b>
(一) 中国自主要贸易伙伴的服务进口 .....	13
(二) 中国自金砖国家的服务进口 .....	18
(三) 中国自“一带一路”沿线国家的服务进口 .....	21
(四) 中国内地自港澳台地区的服务进口 .....	23

<b>五、中国服务进口多领域并进</b> .....	<b>25</b>
(一) 旅行服务进口 .....	25
(二) 知识产权使用费进口 .....	27
(三) 电信计算机和信息服务进口 .....	28
(四) 专业和管理咨询服务进口 .....	29
(五) 金融服务进口 .....	30
(六) 个人文化和娱乐服务进口 .....	31
<b>六、中国服务进口展望</b> .....	<b>32</b>
(一) 深化服务业对外开放 .....	32
(二) 扩大高质量服务进口 .....	33
(三) 完善服务进口促进体系 .....	34
(四) 营造良好市场环境 .....	35
(五) 深化服务贸易多双边合作 .....	37

## 前言

2001 年中国加入世界贸易组织，这是中国深度参与经济全球化的里程碑，标志着中国服务业对外开放进入历史新阶段。中国坚持平等互利、包容发展，坚守世界贸易组织规则，维护多边贸易体制，公平、公正、平等地对待贸易伙伴。中国重视服务贸易自由化，中国服务进口惠及全球，为贸易伙伴创造了就业岗位，增加了财富价值，拓宽了全球服务市场，促进了全球贸易需求。目前，中国与 250 多个国家和地区有服务贸易往来。在新时代的历史起点上，中国将一如既往地支持贸易自由化和经济全球化，主动向世界开放市场，提供国际化、法治化、便利化的营商环境，用实际行动推动建设开放型世界经济。

当前，中国经济已由高速增长阶段转向高质量发展阶段，发展前景光明。中国市场为全球经济增长创造了巨大空间，提供了强劲动力。从 2012 年起，中国已连续 6 年成为世界第一大出境旅游消费国。2017 年中国游客的消费接近全球旅游总收入的五分之一。预计未来 5 年，出境游将成为中国消费升级的重要方向，规模将达到 7 亿人次，旅行服务进口有望突破 1.4 万亿美元。中国旅行进口将成为推动全球经济稳步增长的重要力量。

中国服务进口既满足了中国人民美好生活需要，促进国内产业结构转型升级，又为全球贸易增长带来新的机遇。2012 年以来，中国服务进口对全球服务进口增长的贡献达 25.8%，累计拉动全球

服务进口增长 4.2 个百分点，是推动全球服务贸易稳定发展的重要动力。目前全球经济格局面临深度变革，贸易保护主义有所抬头，传统增长引擎对经济的拉动作用减弱。在此时期，积极主动扩大服务进口，体现了中国作为一个负责任大国的时代担当，符合世界各国人民的共同利益。

全球服务贸易持续繁荣需要中国市场和中国贡献，中国服务贸易高质量发展离不开世界优质服务供给，中国与世界各国的服务贸易往来需要国家级开放型平台。中国国际进口博览会是全球迄今为止第一个以进口为主题的国家级博览会，是国际贸易发展史上的一大创举。时值 2018 年，中国改革开放 40 周年之际，举办中国国际进口博览会是新时代中国政府推进高水平对外开放的重大决策，是主动向世界开放市场的重大举措。依托中国国际进口博览会，中国服务进口将为全球经济增长提供新动力，为世界带来“中国机遇”。

## 一、发展原则与愿景

### (一) 发展原则

中国服务进口发展服从和服务于国家整体发展战略，坚持创新、协调、绿色、开放、共享的发展原则。

——**创新发展**。深入实施服务贸易创新驱动发展战略，深化体制机制改革，激发创新创造活力，优化营商环境，促进新技术、新领域、新业态、新模式蓬勃发展。

——**协调发展**。坚持服务进口与货物进口协调发展，服务于区域协调发展战略，拓展中国服务进口空间，形成全方位进口格局。

——**绿色发展**。树立绿色发展理念，顺应数字化智能化低碳化趋势，推动服务业领域节能减排，建立绿色服务进口发展体系，提升可持续发展水平。

——**开放发展**。积极推动全球化进程，推动服务贸易自由化发展，反对贸易保护主义，维护多边贸易体制。推进对内对外自主开放，深化服务贸易领域多双边合作。

——**共享发展**。坚持平等互利，坚守世贸组织规则，以满足中国人民日益增长的美好生活需要为出发点，造福世界人民，实现共享共赢。

## **(二) 发展愿景**

中国服务进口致力于满足中国经济高质量发展的生产服务需求，致力于满足中国人民日益增长的美好生活服务需要，为全球贸易增长提供可持续发展动力，增进世界人民福祉，为人类文明进步作出贡献。

## **二、中国服务进口发展情况**

### **(一) 中国服务业开放稳步推进**

**坚决履行服务业开放承诺。**2001年加入世贸组织时，中国在《中华人民共和国加入世界贸易组织议定书》中作出服务贸易渐进开放的承诺。中国在WTO《服务贸易总协定》12大服务贸易部门中，针对9大部门作了服务业开放承诺；在160个服务业分部门中，针对100个分部门做了具体承诺。截至2007年，中国服务贸易领域开放承诺已全部履行完毕。

**积极主动提高服务业开放水平。**中国加大自由贸易试验区对外开放压力测试力度。在交通运输领域，取消铁路旅客运输公司、国际海上运输、国际船舶代理外资限制。在商贸流通领域，取消加油站、粮食收购批发外资限制。在专业服务领域，取消测绘公司须由中方控股的限制。同时，中国积极推进高标准自由贸易区网络建设，已与25个国家和地区达成了17个自由贸易协定。在新签订的自贸协定中，中国对12大服务贸易部门均做出了开放承诺，将承诺的分部门数量提升至120个左右，并在商业、建筑工

程、分销、教育、环境、金融、娱乐文化体育、运输等服务部门做出了进一步开放承诺。此外，中国正在探索与自贸伙伴国以负面清单模式进行服务贸易谈判。

**中国服务业成为全球投资的热土。**中国投资环境不断改善，中国服务业正成为外商投资的新热点。2017年，全国新设立外商投资企业35652家，同比增长27.8%；实际使用外资1310.4亿美元(未含银行、证券、保险领域数据)，同比增长4.0%。服务业实际使用外资954.4亿美元，在全国总量中的比重为72.8%，比2012年的583.8亿美元增长了63.5%。信息传输、软件和信息技术服务业，房地产业，租赁和商务服务业是吸引外资的前三大领域，实际使用外资金额分别为209.2亿美元、168.6亿美元、167.4亿美元，占中国实际使用外资金额的21.9%、17.7%、17.5%。高技术服务业实际使用外资260.7亿美元，同比增长106.4%。其中，环境监测及治理服务、信息服务同比分别增长189.4%、146.5%。

## **(二) 中国服务进口发展迅速**

**中国服务进口增长较快。**2017年中国服务进口总额4675.9亿美元，同比增长3.4%，比1982年增长了230倍。

改革开放初期，中国服务贸易处于起步阶段。1982年中国服务进口20.2亿美元，仅占世界进口的0.4%。2001年中国加入世界贸易组织时，服务进口392.7亿美元，占世界进口的比重上升至2.6%，比1982年增长了18.4倍。加入世贸组织以来，中国积极融入世界经济体系，主动进口全球优质服务。2001-2017年，中国服

务进口增长 11 倍, 年均增长 16.7%, 增速居世界主要经济体首位。2012 年以来, 中国坚持新发展理念, 始终坚持开放发展。在世界贸易增长缓慢的背景下, 中国服务进口占全球服务进口的比重由 2012 年的 6.3% 上升至 2017 年的 9.0%, 世界排名由第 10 位跃升到第 2 位。



图 2-1：中国服务进口额及占世界服务进口比重

中国服务进口规模位列全球第二。2017 年, 全球服务进口前五名国家依次是美国 (5381.1 亿美元)、中国 (4675.9 亿美元)、德国 (3236.5 亿美元)、法国 (2404.7 亿美元)、英国 (2149.5 亿美元)。中国服务进口前五大贸易伙伴依次是中国香港、美国、日本、澳大利亚、加拿大, 服务进口额分别为 892.2 亿美元、870.8 亿美元、329.6 亿美元、269.2 亿美元、231.6 亿美元。

中国服务进口规模远大于出口。2001 年中国服务贸易逆差为 1.0 亿美元, 2012 年扩大至 797.2 亿美元, 增长了近 800 倍, 年均

增长 83.6%。2017 年，中国服务贸易逆差进一步扩大至 2395.0 亿美元，是 2012 年的 3 倍。2017 年中国前五大服务贸易逆差来源地依次是美国、中国香港、澳大利亚、加拿大和日本。据美国方面统计，2007-2017 年，美国对华服务出口额由 131.4 亿美元扩大到 576.3 亿美元，增长了 3.4 倍，而同期美国对世界其他国家和地区的服务出口额增长 1.8 倍，美国对华服务贸易年度顺差扩大 30 倍至 402 亿美元。

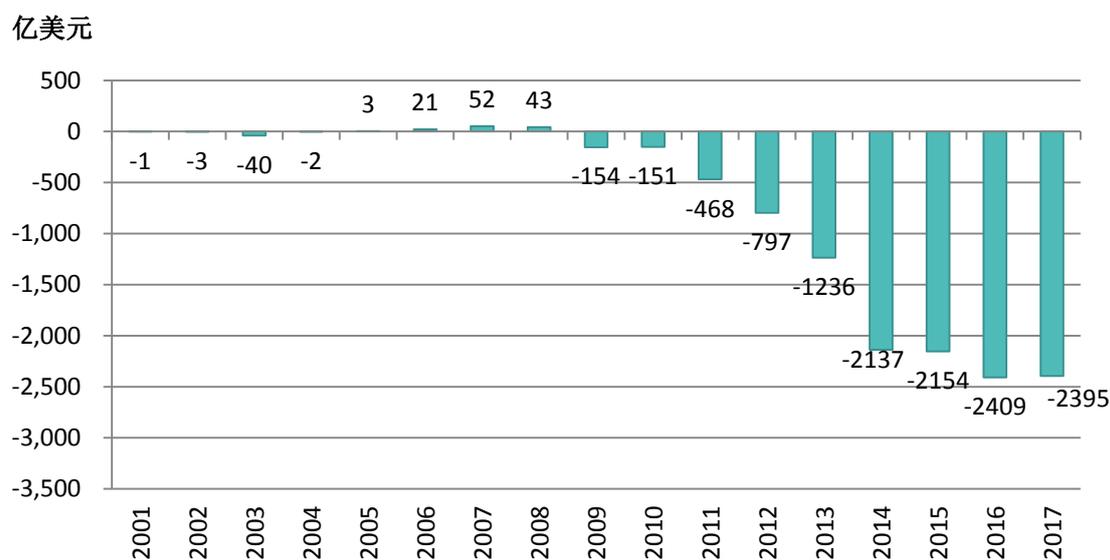


图 2-2：2001-2017 年中国服务贸易差额

**服务进口结构不断优化。** 改革开放以来，中国居民对境外旅游、消费、留学、就医的服务需求持续增加。过去 35 年来，旅行是中国服务进口的第一大领域，2005-2017 年旅行服务进口从 217.6 亿美元增长至 2547.9 亿美元，年均增长率达 22.8%，占中国服务进口总额的比重从 25.9% 上升至 54.5%，占全球旅行服务进口的比重从 3.3% 上升至 19.8%。

随着供给侧结构性改革和经济转型升级的推进，以技术、质量为核心的新兴服务<sup>1</sup>进口持续增长。2017年，传统服务<sup>2</sup>进口3564.8亿美元，增长1.8%；新兴服务进口1111.1亿美元，增长9.0%。传统服务进口占中国服务进口总额的比重为76.2%，新兴服务进口占中国服务进口总额的比重为23.8%。传统服务进口对中国服务进口增长的贡献率为41.0%，新兴服务进口贡献率为59.0%。2012年以来，电信计算机和信息服务增长2.5倍，年均增长28.4%，个人文化和娱乐服务增长3.9倍，年均增长37.3%。

### （三）中国内向附属机构服务贸易快速发展

中国内向附属机构服务贸易<sup>3</sup>无论从服务销售收入、利润总额，还是企业数量、从业人数等关键指标方面均高于外向附属机构服务贸易<sup>4</sup>。2016年，内向附属机构服务贸易企业123520家，实现销售收入8530.4亿美元；实现利润总额1301.7亿美元。2016年末从业人数超过537万人，其中外方人员约占从业人数总额的2.9%。从行业看，销售收入排名前五的行业分别为租赁和商务服务业，房地产业，信息传输、计算机服务和软件业，批发和零售业，交通运输、仓储和邮政业，分别实现销售收入1900.4亿美元、1439.5亿美元、1368.8亿美元、1298.6亿美元和759.3亿美元。从国别（地区）看，销售收入排名前五的国家（地区）为中国香港、日本、

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<sup>1</sup> 新兴服务指扣除运输、旅行、建筑、加工、政府服务的其他服务。

<sup>2</sup> 传统服务指运输、旅行、建筑、加工服务。

<sup>3</sup> 内向附属机构服务贸易企业指在华设立的外商控股50%以上的服务业企业和建筑企业。

<sup>4</sup> 外向附属机构服务贸易企业指中国关境内的企业在另一国或地区设立的拥有50%以上股权的服务业企业和建筑企业。

英属维尔京群岛、新加坡和美国，分别实现销售收入 4782.6 亿美元、719.3 亿美元、608.2 亿美元、430.4 亿美元和 315.7 亿美元。2016 年来自上述五个国家和地区的内向型服务企业销售收入合计 6856.2 亿美元，占内向型服务企业销售收入总额的 80.4%；利润合计 1119.5 亿美元，占内向型服务企业利润总额的 86.0%。

2016 年，外向附属机构服务贸易企业 14945 家，实现销售收入总额 6919.0 亿美元。从行业看，销售收入排名前五的行业为租赁和商务服务业，建筑服务业，批发和零售业，信息传输、软件和信息技术服务业，交通运输、仓储和邮政业，分别实现销售收入 2707.9 亿美元、1576.2 亿美元、916.3 亿美元、338.1 亿美元和 296.7 亿美元；从国别（地区）看，销售收入排名前五的所在国家（地区）为中国香港、新加坡、开曼群岛、英国和英属维尔京群岛，分别实现销售收入 3289.5 亿美元、518.0 亿美元、302.8 亿美元、299.6 亿美元和 199.2 亿美元。上述五个国家和地区投资的外向型服务企业销售收入合计 4609.1 亿美元，占中国外向型服务企业销售收入总额的 66.7%。

2016 年中国内向、外向附属机构服务贸易销售额合计达 15449.4 亿美元，是当年 6616 亿美元的服务进出口总额的 2.3 倍。中国附属机构服务贸易发展呈现分布行业集中、“一带一路”战略带动作用显著等特征。2016 年中国内向附属机构服务贸易与外向附属机构服务贸易的差额（相当于逆差）为 1611.4 亿美元，主要来源于中国香港、日本、美国和德国。

### 三、中国对全球服务贸易的贡献

坚持推动构建人类命运共同体，是新时代坚持和发展中国特色社会主义的基本方略之一，得到国际社会的高度评价和热烈响应。中国服务进口是推动构建人类命运共同体的重要举措。改革开放以来，中国以更开放的眼光和胸襟来应对全球经贸面临的各种挑战，主动扩大服务进口，为全球服务出口创造了巨大市场，为推动世界经济强劲、可持续、平衡、包容增长做出了贡献。

#### （一）中国是全球服务贸易增长的重要贡献者

近年来，服务业已经成为中国经济的主要拉动力。中国人民对于旅游、留学、健康饮食、医疗康复、文化娱乐等生活性服务需求快速增长，对金融、保险、研发设计、信息技术、现代商务服务生产性服务需求与日俱增。

**过去 35 年来**，中国服务进口年均增长 16.8%，分别高出第二名 1.5 个百分点、第三名 5.2 个百分点；中国对全球服务进口增长的贡献为 9.8%，是推动全球服务进口增长的第二大力量。**过去 15 年来**，中国服务进口年均增长 16.6%，远高于 8.1%的世界平均水平；中国对推动全球服务进口增长的贡献达 11.8%，跃居世界首位。**过去 5 年来**，在全球服务进口年均增速仅为 3%的情况下，中国服务进口实现年均 10.7%的增长；中国对全球服务进口增长的贡献达 25.8%，累计拉动全球服务进口增长 4.2 个百分点，是全球服务进口增长的最大贡献者。

中国为促进全球服务贸易复苏做出了重要贡献。2008年金融危机后，全球经济复苏进程曲折，服务贸易深度调整。中国在刺激全球服务市场需求方面发挥了建设性作用。根据世界贸易组织数据测算，2008-2013年，中国对全球服务进口增长的贡献为21.5%，累计拉动全球服务进口增长4.4个百分点，超过美国、日本、欧盟（28国）贡献率的总和。中国市场支撑了许多受危机冲击国家的服务出口。

## （二）中国是全球服务贸易自由化的重要推动者

中国是服务贸易自由化的坚定支持者。中国政府积极倡导以“均衡、普惠、共赢”作为多边贸易体制改革的目标，努力推动建立公平、公正的国际服务贸易新秩序。中国致力于多哈回合贸易谈判取得进展，积极参与WTO框架内所有其他规则制定与市场开放谈判等国际对话和合作机制。中国商签的自由贸易协定均将服务贸易作为协定的重要内容，扩大服务领域开放水平。

中国不仅在参加国际对话和合作机制中积极推动服务贸易自由化，而且在主办的国际活动中同各方一起发出积极信号，支持多边贸易体制。中国主办亚太经合组织第二十二次领导人非正式会议、二十国集团领导人杭州峰会、金砖国家领导人第九次会晤，坚决反对保护主义，努力承担与自身发展水平及国力相适应的国际责任。中国领导人出席“一带一路”国际合作高峰论坛、博鳌亚洲论坛、世界经济论坛等多边会议期间，将服务业开放与服务

贸易作为重要议题，多次阐明支持多边贸易体制、推动建设开放型世界经济的坚定立场。

**中国服务市场开放之门越开越大。**2017年以来，国务院先后发布《关于扩大对外开放积极利用外资若干措施的通知》《关于促进外资增长若干措施的通知》和《关于积极有效利用外资推动经济高质量发展若干措施的通知》，明确服务业重点放宽银行类金融机构、证券公司、证券投资基金管理公司、期货公司、保险机构、保险中介机构外资准入限制，放开会计审计、建筑设计、评级服务等领域外资准入限制，推进电信、互联网、文化、教育、交通运输等领域有序开放，进一步推动服务业领域扩大开放，创造公平竞争环境。

2018年，中国发展改革委和商务部联合发布了《外商投资准入特别管理措施（负面清单）（2018年版）》和《自由贸易试验区外商投资准入特别管理措施（负面清单）（2018年版）》，银保监会制定《关于进一步放宽外资银行市场准入相关事项的通知》《关于放开外资保险经纪公司经营范围的通知》，商务部等部门联合制定《关于扩大进口促进对外贸易平衡发展的意见》等政策措施，不断扩大服务业开放领域，全面落实准入前国民待遇加负面清单管理制度，加强投资促进，提升投资保护水平，更好发挥进口对满足人民群众消费升级需求、加快体制机制创新、推动经济结构升级、提高国际竞争力等方面的积极作用。法治精神、市场意识、开放意识、公平竞争意识和知识产权观念更加深入人心。

### （三）中国是全球服务贸易创新发展的重要探路者

**探索服务贸易创新发展的中国方案。**2016年中国政府批准在天津、上海等15个地区开展服务贸易创新发展试点，在完善服务贸易管理体制、扩大服务业双向开放、培育服务贸易市场主体、创新服务贸易发展模式、提升服务贸易便利化水平等8个方面开展探索、先行先试。两年来，试点工作进展顺利，取得了积极成效，形成了29项经验，培育了一批服务贸易新业态新模式。2017年15个服务贸易创新发展试点地区服务进口2219.6亿美元，占中国服务进口总额的47.9%。作为世界上最大的发展中国家，中国服务贸易创新发展的探索为世界其他发展中国家服务贸易发展提供了可借鉴的案例。2018年中国政府深化服务贸易创新发展试点，深入探索适应服务贸易创新发展的体制机制、政策措施和开放路径，加快优化营商环境，最大限度激发市场活力，打造服务贸易制度创新高地。

**建设面向全球服务的开放功能载体。**2013年中国政府批准设立中国（上海）自由贸易试验区，2015年在推广可复制改革试点经验的同时，设立广东、天津、福建三个自由贸易试验区。2017年，中国政府批准成立辽宁、浙江、河南、湖北、重庆、四川、陕西7个自由贸易试验区。2018年，中国政府决定支持海南全岛建设自由贸易试验区，支持海南逐步探索、稳步推进中国特色自由贸易港建设。设立中国自由贸易试验区为中国服务进口注入了新动力、增添了新活力、拓展了新空间，对促进全球企业开拓中

国服务市场作出了重要贡献。目前，自贸试验区外资准入负面清单经 4 次压减，特别管理措施已由 2013 版的 190 项减少到 2018 版的 45 项。

#### 四、中国与贸易伙伴互利共赢

经济全球化不可逆转，专业化分工合作更加紧密，服务业比以往任何时期都更需要产业链的深度融合和供应链的跨国发展。目前，中国已是全球 120 多个国家和地区的第一大贸易伙伴，与 250 多个国家和地区有服务贸易往来。中国前十大服务进口来源地分别为中国香港、美国、日本、澳大利亚、加拿大、英国、德国、韩国、中国台湾和新加坡，进口服务共计 3398.7 亿美元，占中国服务进口总额的 72.7%。



图 4-1：中国自世界国家和地区的服务进口分布

### （一）中国自主主要贸易伙伴的服务进口

美国是中国第二大服务进口来源地<sup>1</sup>和第一大服务贸易逆差来源地。中美两国服务贸易发展互补性强，你中有我、我中有你。2017年中国自美国服务进口870.8亿美元，同比下降1.5%，占中国服务进口的18.6%。旅行是中美经贸合作和人文交流最活跃、最具潜力的部分。2017年中国游客赴美旅游、留学、就医等旅行支出合计510亿美元，占中国自美国服务进口总额的58.6%，其中赴美游客约300万人次，在美旅游支出高达330亿美元。教育方面，美国是中国学生出境留学第一大目的地，2017年中国在美留学生约42万人，为美国贡献约180亿美元收入。

中国向美国支付知识产权使用费持续增加。据中国有关方面统计，美国是中国第一大版权引进来源国。2012-2016年，中国自美国引进版权近2.8万项。中国向美国支付的知识产权使用费从2011年的34.6亿美元增加至2017年的72亿美元，6年间翻了一番。其中，2017年中国向美国支付的知识产权使用费占中国对外支付总额的四分之一。此外，中国自美国运输服务进口131.4亿美元，比上年增长16.0%，占比15.1%。

据美国经济分析局统计，2016年，美国在华的附属机构实现服务销售收入551.4亿美元，其中专业、科学和技术服务69.9亿美元，信息服务27.4亿美元，金融和保险服务17.6亿美元。中国在美的附属机构实现服务销售收入31.8亿美元，其中金融和保险

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<sup>1</sup> 中国香港为中国内地第一大服务进口来源地。

服务 11.7 亿美元，房地产租赁服务 4.1 亿美元。外向与内向附属机构销售收入的差额（相当于中国逆差）为 519.6 亿美元。

**日本是中国第三大服务进口来源地。**2018 年 3 月，中日韩自贸区谈判举行了第 13 轮谈判，三方先期举行了服务贸易、电信、金融服务、自然人移动、投资、竞争政策、知识产权、电子商务等工作组会议，全面细致地交流了服务贸易管理政策措施。2018 年 5 月，李克强总理访问日本期间，双方签署了《关于加强服务贸易合作的备忘录》，同意成立“双边服务贸易合作机制”，积极促进服务领域互利合作。

2017 年中国自日本服务进口 329.6 亿美元，同比增长 10.5%。其中，旅行服务进口 180.3 亿美元，同比增长 12.5%，占中国自日本服务进口总额的 54.7%。2017 年，中国访日游客达 735.6 万人次，同比增长 15.4%，连续 3 年名列日本海外游客榜首，连续 52 个月实现正增长；在日人均消费 23 万日元，总消费额达 1.7 万亿日元（合 151.8 亿美元），占比近 40%，居各国之首。此外，运输服务进口 49.8 亿美元，同比增长 15.7%，占比 15.1%；知识产权使用费进口 48.1 亿美元，增长 9.7%，占比 14.6%，是第三大服务进口领域；个人文化和娱乐服务增长 57.8%。

**澳大利亚是中国第四大服务进口来源地。**中澳自由贸易协定是中国与主要发达国家签署的首个高水平自由贸易协定，双方在服务领域达成了高水平谈判成果。澳大利亚是世界上首个对中国以负面清单方式作出服务业开放承诺的国家。中澳双方人员往来实现重大突破，澳方同意设立投资便利化机制，专门为中方投资

项下工程和技术人员赴澳签证申请和工作许可办理开通“绿色通道”，促进中国企业在澳从事投资活动。澳方通过“假日工作签证安排”，为中国青年赴澳提供每年 5000 人的假日工作签证，以推动两国青年交往。澳方还向中国特色职业人员（中医师、汉语教师、中餐厨师和武术教练）提供每年 1800 人的入境配额。

澳大利亚是教育服务强国。中方承诺在协定生效一年内，审查、评估并在中国教育部涉外教育监管网上新增在澳大利亚联邦政府招收海外学生院校及课程注册机构（CRICOS）注册的 77 家澳大利亚高等教育机构名单。此项安排将有助于中国留学人员及时获取准确、权威的信息。中澳双方还通过换文形式，决定扩大并深化两国教育服务的进一步合作。澳方欢迎中方教育机构赴澳设立中文国际学校。

中澳双方为“升级”服务贸易开放水平预作安排，同意在中澳自贸协定实施后，在双方商定的时间，以负面清单方式开展服务贸易谈判，推动实现更高层次的双向开放。

2017 年中国自澳大利亚服务进口 269.2 亿美元，同比增长 8.2%。旅行和运输是主要领域，合计占中国自澳大利亚服务进口总额的 96.2%。其中，旅行服务进口 214.4 亿美元，增长 5.6%，占比 79.6%；运输服务进口 44.8 亿美元，增长 26.9%，占比 16.6%。

**加拿大是中国第五大服务进口来源地。**近年来，中加经济贸易关系健康发展，已从单一的商品贸易发展到全方位、跨领域、多元化的贸易，服务与人员的流动日益频繁。2016 年加总理特鲁多访华期间，双方商定 2018 年为中加旅游年，并宣布到 2025 年

实现双向人员往来规模在 2015 年基础上翻一番。中加双边教育服务贸易迅速发展，建立了互派学术团体访问，交换教师、留学生，开展合作研究，联合培养博士生等多种形式的交流与合作关系。截至 2016 年底，中国在加留学生约 17.4 万人。

2017 年中国自加拿大服务进口 231.6 亿美元，同比下降 10.9%。其中，旅行进口 206.9 亿美元，占中国自加拿大服务进口总额的 89.3%，占中国旅行服务进口额的 8.1%。

**英国是中国第六大服务进口来源地。**英国是第一个承认新中国的西方大国，也是率先同中国建立全面战略伙伴关系的国家；是除香港外最大的人民币境外交易中心，也是吸引中国留学生、开办孔子学院最多的欧洲国家。英国还是首个发行人民币国债的西方国家、最早申请加入亚洲基础设施投资银行的西方大国。

中英双方顺应时代潮流，结合两国各自发展阶段和合作需求，共同开启服务贸易合作“黄金时代”。2018 年，双方签署了《关于建立中英服务贸易工作组谅解备忘录》，深化中英“一带一路”项下合作，加强投资政策交流，促进双向投资，扩大服务贸易，深化两国地方和企业合作。

2017 年中国自英国服务进口 214.1 亿美元，同比下降 3.1%，占中国服务进口总额的 4.6%。其中，旅行服务进口 124.9 亿美元，同比下降 1.8%，占中国自英国服务进口总额的 58.3%，居进口领域首位；运输服务进口 26.2 亿美元，增长 11.1%，占比 12.2%；其他商业服务进口 20.6 亿美元，增长 11.0%，占比 9.6%；知识产

权服务费进口 13.1 亿美元，增长 71.9%，占比 6.1%；电信计算机和信息服务进口 16.0 亿美元，下降 49.0%，占比 7.5%。

**德国是中国第七大服务进口来源地。**中德同为经济全球化的坚定支持者和国际自由贸易体系的重要倡导者。中德建交 46 年来，关系发展良好，经贸合作硕果累累。2014 年中德双方发表的《中德合作行动纲要：共塑创新》提出，提升双边贸易中的服务贸易占比，使之成为中德贸易新的增长点，加强两国企业在金融、教育、文化、医疗、养老、建筑、商贸服务、技术、会展等领域合作。两国在知识产权领域的《伙伴关系协议》基础上，继续加强在知识产权保护领域的对话与交流，开展在知识产权立法和司法保护领域的经验交流。

中德双方通过共商、共建、共享，抓住“一带一路”的历史性机遇，促进中德双边服务贸易高质量发展。2017 年以来，中德相关部门签署了《中华人民共和国国家发展和改革委员会与德意志联邦共和国西门子股份公司关于数字化技术应用合作的谅解备忘录》《中华人民共和国科学技术部与德意志联邦共和国教育和研究部关于智能制造科技创新合作联合意向声明》等合作文件，促进双方贸易往来和经济合作。

2017 年中国自德国服务进口 199.4 亿美元，同比增长 14.0%，占中国服务进口总额的 4.3%。其中，知识产权服务费进口 41.7 亿美元，增长 52.4%，占中国自德国服务进口的 20.9%；运输服务进口 47.5 亿美元，增长 15.9%，占比 23.8%；旅行 41.5 亿美元，增长 4.2%，占比 20.8%。

**韩国是中国第八大服务进口来源地。**中韩两国地理相近、经济互补，人员往来密切，彼此互为最大留学生来源地。2015年6月，中韩两国正式签署《中华人民共和国政府和大韩民国政府自由贸易协定》，拓展电子商务、节能环保、金融服务等新兴战略服务领域的合作，共同构建规范、稳定和可预期的框架。2017年12月，中韩两国宣布启动中国-韩国自由贸易协定第二阶段谈判，以负面清单方式开展服务贸易谈判。

2017年中国自韩国服务进口150.6亿美元，同比下降23.3%，占中国服务进口总额的3.2%。其中，旅行进口53.0亿美元，下降44.2%，占比35.2%；运输服务进口49.0亿美元，增长9.8%，占比32.5%；知识产权使用费进口23.5亿美元，下降18.5%，占比15.6%；其他商业服务进口10.8亿美元，下降7.8%，占比7.2%。

## **（二）中国自金砖国家的服务进口**

近年来，金砖国家经济持续发展，经济总量占世界的比重已由2006年的12%上升到2017年的23%，贸易总额占世界的比重从11%上升到16%，成为世界经济发展的重要推动力。金砖五国服务贸易发展迅速，相互之间合作潜力较大。2017年9月，金砖五国领导人在中国厦门举行第九次会晤，通过了《金砖国家领导人厦门宣言》，发布了《金砖国家服务贸易合作路线图》，为金砖国家在旅游、健康医疗服务、音像服务、专业服务、电脑和相关服务、研发服务、商业服务、建筑服务等领域开展合作提供体

制机制保障。2017年，中国自金砖国家服务进口169.2亿美元，占中国进口服务总额的3.6%。

**俄罗斯是中国最大的金砖国家服务进口来源地。**2015年5月，习近平主席与俄罗斯总统普京在莫斯科签署《关于丝绸之路经济带建设和欧亚经济联盟建设对接合作的联合声明》，宣布启动中国与欧亚经济联盟经贸合作方面的协定谈判。2017年7月，习近平主席访俄期间，中俄两国经贸部长共同签署联合声明，宣布启动《欧亚经济伙伴关系协定》联合可研工作。2018年5月，中国与欧亚经济联盟经贸合作协定正式签署，在贸易便利化、知识产权、部门合作及政府采购等多个方面形成制度安排。2018年6月，两国元首签署了《中华人民共和国和俄罗斯联邦联合声明》，提出扩大两国在通信技术、数字经济、教育、文化、卫生、体育、电影、大众传媒、旅游、信息服务等方面的合作与交流。

中俄在服务贸易领域的互利合作不断巩固深化，取得了重大进展。2017年中国自俄罗斯服务进口70.9亿美元，同比增长5.7%，占中国自金砖国家服务进口总额的41.9%。中国自俄罗斯服务进口主要来自于运输、旅行两大领域，分别为55.3亿美元和10.6亿美元，分别占中国自俄罗斯服务进口总额的78.0%和15.0%。建筑、加工服务、个人文化和娱乐服务，分别增长164.0%、86.9%、80.0%。

**印度是中国在南亚最大的服务进口来源地。**中印两国通过金砖国家、东亚峰会、上海合作组织和亚洲太平洋经济合作组织（APEC）等会晤对话机制，成立了服务贸易共同促进委员会，建立了面向双边战略、经济对话、经贸、财金、工商等领域的对话

机制，推动双边服务贸易深度合作，提供有效的协调沟通和交流合作平台。

中印经济合作领域不断拓展，双边服务贸易增长迅速。2017年中国自印度服务进口 20.8 亿美元，同比增长 32.4%，占中国自金砖国家服务进口总额的 12.3%。其中，运输、其他商业服务、旅行三大领域分别进口 11.5 亿美元、4.8 亿美元和 2.2 亿美元，分别占比 55.3%、23.1%和 10.6%；知识产权使用费、电信计算机和信息服务、保险服务分别增长 188.0%、133.2%和 65.1%。

巴西是中国在拉美地区最大的服务进口来源地。中巴关系已成为当今世界最有活力、内涵最丰富的双边关系之一。2017年8月在金砖国家第七次经贸部长会议上，中国与巴西签署了《中华人民共和国商务部与巴西工业外贸和服务部关于服务贸易合作的谅解备忘录（两年行动计划）》，推动中巴在建筑、工程咨询、工程建设、信息技术、银行自动化、旅游、电子商务、文化、中医药等服务贸易领域加强合作，为中国与其他金砖国家的合作树立样板。

2017年中国自巴西服务进口 54.9 亿美元，同比增长 59.6%，占中国自金砖国家服务进口总额的 32.4%。其中，运输服务进口 50.8 亿美元，增长 65%，占比 92.5%；维护和维修服务、建筑、金融服务、个人文化和娱乐服务等领域分别增长 224.1%、84.5%、82.2%、39.3%。

南非是中国在非洲最大的服务进口来源地。中国和南非同为世界主要新兴经济体。中国与南非在运输、金融、旅游等多个领

域互补性强，南非在个人文化和娱乐服务、金融服务、旅行等领域具有出口优势。2014年，中南两国签署《中华人民共和国和南非共和国5-10年合作战略规划2015-2024》。

2017年中国自南非服务进口22.6亿美元，同比增长97.2%，占中国自金砖国家服务进口总额的13.4%。运输服务是第一大服务进口领域，2017年运输服务进口18.4亿美元，增长138.4%，占比81.4%。建筑、个人文化和娱乐服务分别增长335.8%、239.7%。

### （三）中国自“一带一路”沿线国家的服务进口

自2013年提出“一带一路”国家倡议以来，中国与“一带一路”沿线国家服务贸易领域合作进入新阶段。目前，中国已同“一带一路”沿线国家中的13个国家建立自贸区，包括东盟10国、巴基斯坦、格鲁吉亚和马尔代夫；同时，正在与10个“一带一路”沿线国家商建自贸区，包括海合会6国、印度、斯里兰卡、以色列、摩尔多瓦，并与尼泊尔、孟加拉国、蒙古国、巴勒斯坦等4国进行自贸区联合可研。

2017年中国自“一带一路”沿线国家服务进口总计668.7亿美元，同比增长25.1%，占中国服务进口总额的14.3%。前十大进口国家为新加坡、泰国、俄罗斯、马来西亚、越南、阿联酋、印度尼西亚、印度、菲律宾和伊朗。中国自排名前十的“一带一路”国家服务进口总计499.3亿美元，占中国自“一带一路”沿线国家服务进口总额的74.7%。

**新加坡是中国在东盟最大的服务进口来源地。**2008年中新两国签署了《中华人民共和国政府和新加坡共和国政府自由贸易协定》。中新双方在医疗、教育、会计、人员流动等服务贸易领域做出高于世界贸易组织和中国-东盟自贸区《服务贸易协议》的承诺。2015年11月，中新两国签署了《中华人民共和国和新加坡共和国关于建立与时俱进的全方位合作伙伴关系的联合声明》。同期，中新两国启动自贸协定升级谈判，探讨在法律、建筑、金融、速递、环境、交通运输等服务贸易领域进一步开放市场。

中新服务贸易合作发展迅速，成为两国合作新亮点。2017年中国自新加坡服务进口118.1亿美元，同比增长10.1%，居“一带一路”沿线国家首位。其中，旅行、其他商业服务、运输服务进口分别为63.6亿美元、18.9亿美元、16.5亿美元，分别占中国自新加坡服务进口总额的53.9%、16.0%、14.0%，三大领域合计占83.9%。

**泰国是中国在东盟的第二大服务进口来源地。**2012年中泰建立全面战略合作伙伴关系以来，两国关系进入了新的发展阶段，在服务贸易领域展现出更加巨大的合作潜力和更加广阔的合作前景。

2017年中国自泰国服务进口89.9亿美元，同比增长12.2%。其中，旅行服务进口65.3亿美元，增长9.6%，占比72.6%；运输服务进口19.8亿美元，增长23.1%，占比22.0%；加工服务、电信计算机和信息服务进口分别增长823.0%、135.7%。

**马来西亚是中国在东盟的第三大服务进口来源地。**马来西亚在加入世界贸易组织承诺基础上，根据中国-东盟自贸区《服务贸

易协议》，在电信、建筑、教育、金融、医疗、旅游、运输等 8 个服务部门中的 26 个分部门，向中国在内的东盟国家做出市场开放承诺。

2017 年中国自马来西亚服务进口 49.2 亿美元，同比增长 20.8%。其中，旅行、运输两大领域进口额分别为 24.0 亿美元、20.3 亿美元，占比分别为 48.8% 和 41.3%；个人文化和娱乐服务、加工服务分别增长 116.6% 和 81.6%。

阿联酋是中国在阿拉伯国家的第一大服务进口来源地。中国与海合会签署《经济、贸易、投资和技术合作框架协议》，启动中国-海合会自贸区谈判及服务贸易谈判并取得实质性进展。在中国-海合会自贸区协议框架下，中国和阿联酋在高等教育、货币互换、驾照互换、质量检测、专业资格互认等领域达成多个合作协议与谅解备忘录。

2017 年中国自阿联酋服务进口 43.4 亿美元，同比增长 11.5%。旅行、运输、其他商业服务、建筑服务进口分别为 17.8 亿美元、16.7 亿美元、4.5 亿美元、3.8 亿美元，分别占比 41.0%、38.5%、10.4%、8.8%。电信计算机和信息服务进口增长较快，同比增长 41.8%。

#### （四）中国内地自港澳台地区的服务进口

2003 年，中国内地与香港、澳门特区政府分别签署了内地与香港、澳门《关于建立更紧密经贸关系的安排》(CEPA)。2004-2013 年，内地分别与香港、澳门陆续签署了 10 个 CEPA 补充协议，在

货物贸易、服务贸易、经济技术合作等方面以“正面清单”方式逐步扩大对港澳的开放。2015年，中国内地与香港、澳门分别签署了《CEPA 服务贸易协议》，这是内地首个在全境范围内以“准入前国民待遇加负面清单”为主要方式全面开放服务贸易领域的自由贸易协议，标志着内地全境与香港、澳门基本实现服务贸易自由化。2017年，内地与港澳又分别签署了《CEPA 投资协议》和《CEPA 经济技术合作协议》，有力促进了港澳经济繁荣稳定发展和内地改革开放。

2017年，中国内地自香港服务进口 892.2 亿美元，同比增长 1.5%。其中，旅行、其他商业服务、电信计算机和信息服务、运输、知识产权使用费进口分别为 629.3 亿美元、77.6 亿美元、71.4 亿美元、44.0 亿美元、15.5 亿美元，分别占比 70.5%、8.7%、8.0%、4.9%、1.7%；电信计算机和信息服务增长 231.0%。

2017年，中国内地自澳门服务进口 44.4 亿美元，同比下降 27.0%。其中，旅行、运输服务进口分别为 40.8 亿美元、1.4 亿美元，分别占比 91.9%、3.2%；知识产权使用费、电信计算机和信息服务分别增长 266.2%、177.9%。

2010年，中国大陆与台湾签订《海峡两岸经济合作框架协议》（ECFA），成为两岸经贸关系发展的里程碑。2017年中国大陆自台湾服务进口 123.1 亿美元，同比增长 10.9%。其中，运输、旅行、其他商业服务、保险服务进口分别为 49.4 亿美元、47.9 亿美元、12.3 亿美元、3.7 亿美元，分别占比 40.1%、38.9%、10.0%、3.0%，四大领域占比总和达 92.0%；个人文化和娱乐服务增长 45.0%。

## 五、中国服务进口多领域并进

随着中国新一轮高水平对外开放，中国服务业开放走向纵深，重点领域服务进口逐步向高质量发展。

### （一）旅行服务进口

1983年中国普通公民正式获批自费出境，旅行服务进口进入快速发展时期。依照中国开放旅游目的地的先后，中国境外旅游经历了从“港澳游”到“边境游”再到“出国游”的发展阶段。2007年，中美签署《旅游合作谅解备忘录》，之后中国陆续建立了中国-东盟、中国-中东欧、中俄蒙等一系列多双边旅游合作机制，举办了中国-东盟旅游部门会议、首届中国-南亚旅游部长会议以及“一带一路”国家旅游部长圆桌会议等活动，提升了出境游的便利化水平。2010年以来，中国政府逐步对在华外资旅行社开放中国公民出境游业务。目前，持普通护照中国公民可以免签证或落地签前往的国家数量增至68个。

中国旅行服务进口为世界提供了广阔市场。2017年中国旅行服务进口2547.9亿美元，同比下降2.4%。其中，旅游、留学、就医服务进口分别为1862.1亿美元、663.5亿美元、22.3亿美元，分别占比73.1%、26.0%、0.9%。2001-2017年，中国旅行服务进口增长了18.3倍，年均增长20%，占服务进口总额的比重从35.4%增加到54.5%。2012-2017年，中国对世界旅行服务进口增长的贡献为56.3%，居世界第一位。

中国旅游进口为许多国家创造了大量财富和就业。中国已连续六年保持世界第一大出境旅游客源国和消费国地位。近年来，中国出境旅游消费贡献了 1/6 左右的世界旅游业增加值，创造了 1/4 左右的世界旅游业就业机会，对全球国际游客增长贡献超过 10%。2017 年中国公民出境旅游 1.3 亿人次，同比增长 7.0%，中国游客的消费接近全球旅游总收入的 1/5。

2017 年中国是日本、泰国、新加坡、韩国、越南、印度尼西亚、俄罗斯、柬埔寨、马尔代夫、南非的第一大入境旅游客源国，对应的旅行服务进口分别达 180.3 亿美元、65.3 亿美元、63.6 亿美元、53.0 亿美元、28.0 亿美元、17.2 亿美元、10.6 亿美元、5.0 亿美元、3.4 亿美元、1.8 亿美元。

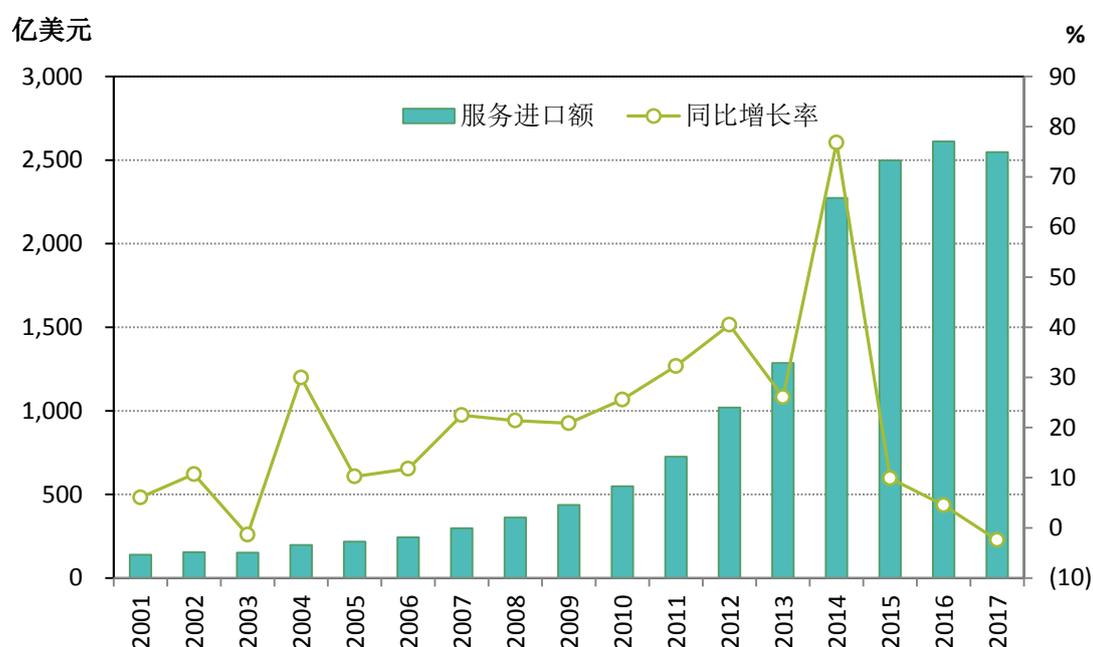


图 5-1：2001-2017 年中国旅行服务进口规模和增速

## （二）知识产权使用费进口

中国始终是知识产权国际规则的重要参与者、积极建设者和坚定维护者。目前，中国已经加入了世界几乎所有主要的知识产权国际公约，与美国、欧盟、加拿大、瑞士、俄罗斯、巴西、日本等国家和地区建立了知识产权工作组或对话机制，并积极参与世界贸易组织、世界知识产权组织、亚太经合组织、国际植物新品种保护联盟等多边平台的知识产权议题讨论。先后与加拿大、日本、美国等 23 个国家和地区的专利审查机构签订了“专利审查高速公路”（PPH）协议，与世界知识产权组织签署了《加强“一带一路”知识产权合作协议及司法交流与合作谅解备忘录》，中国知识产权对外合作交流深入开展。

中国知识产权使用费进口保持增长势头。2001-2017 年，中国知识产权使用费进口规模从 19.4 亿美元增长至 287.4 亿美元，增长近 14 倍。2017 年中国知识产权使用费进口占服务进口总额的 6.1%。中国的知识产权使用费进口主要集中在专利、商标、版权三个领域，前三大进口来源地是美国、日本、德国，进口额分别为 71.4 亿美元、48.1 亿美元、41.7 亿美元。

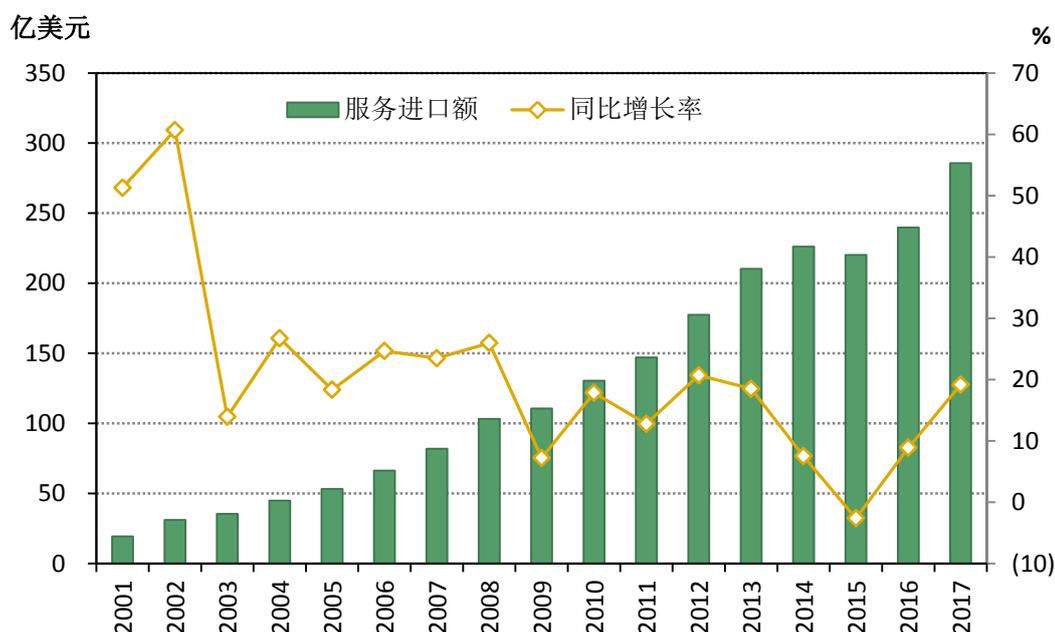


图 5-2：2001-2017 年中国知识产权使用费服务进口规模和增速

### （三）电信计算机和信息服务进口

1985 年中国加入了《国际电信公约》。2001 年 12 月，中国基础电信业正式对外资开放，外商投资经营电信业务主要集中在增值电信业务领域，增值电信业务开放种类呈扩大趋势，外资股权比例不断放宽。截至 2017 年底，获得批准的外商投资电信企业共 87 家，主要提供信息服务、在线数据处理服务及国内呼叫中心服务。外资参股国内电信运营企业及中国电信企业海外上市等都为中国电信服务进口创造了新的增长点。

中国传统制造业的数字化升级和新兴平台经济、共享经济的发展，释放了大量的电信计算机和信息服务进口需求。2001-2017 年，中国电信计算机和信息服务进口从 6.7 亿美元增加至 191.8 亿美元，增长了 28.6 倍。2017 年，中国电信计算机和信息服务进口

同比增长 52.5%，占中国服务进口总额的 4.1%。其中，电信服务进口 18.0 亿美元，同比增长 26.9%；计算机和信息服务进口 173.7 亿美元，同比增长 55.7%。

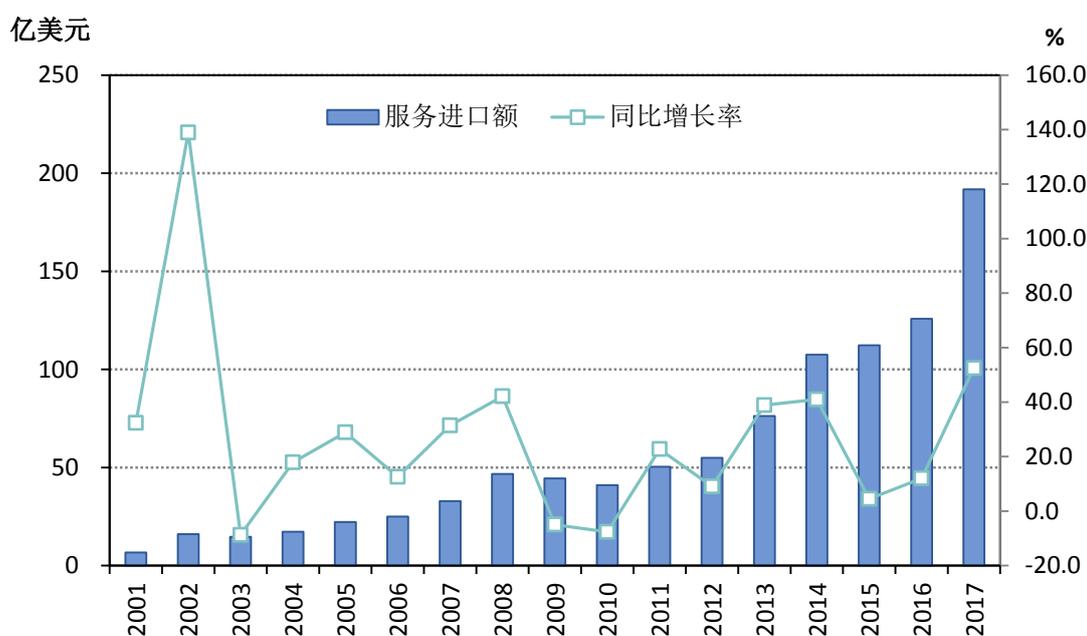


图 5-3：2001-2017 年中国服务进口规模和增速

#### （四）专业和管理咨询服务进口

加入世界贸易组织后，中国大幅开放中国专业和管理咨询服务市场，法律服务、会计服务、审计服务、管理咨询等专业服务需求加速释放。2015-2017 年，中国专业和管理咨询服务进口从 139.4 亿美元增加到 161.8 亿美元，增长了 16%。2017 年，中国专业和管理咨询服务进口同比增长 5.9%，占中国服务进口总额的 3.5%。

## （五）金融服务进口

**中国金融业市场有序开放。**加入世贸组织以来，中国进一步放开了外资银行经营人民币业务的地域和客户对象限制，开放人民币零售业务和银行卡业务，引入境外战略投资者参与国有大型商业银行股份制改造。

**资本项目开放同步提速。**1996年中国宣布实现人民币经常项目可兑换。2005年中国开始实行以市场供求为基础、参考一篮子货币进行调节、有管理的浮动汇率制度，实施合格境外机构投资者（QFII）和合格境内机构投资者（QDII）机制，允许境外央行、国际金融组织、主权财富基金运用人民币投资银行间市场。推出沪港通、深港通和债券通，建立境内外资本市场互联互通机制。2009年中国实施跨境贸易人民币结算试点。2015年人民币加入特别提款权（SDR）货币篮子。截至2018年初，在国际货币基金组织（IMF）资本账户的40项分类中，中国已经全部或部分实现可兑换的项目超过35项。

金融业扩大开放和互联网金融涌现，推动中国居民金融消费加速升级，金融服务进口需求日益增长。2001-2017年，中国金融服务进口从0.8亿美元增长至16.2亿美元，增长了约20倍。

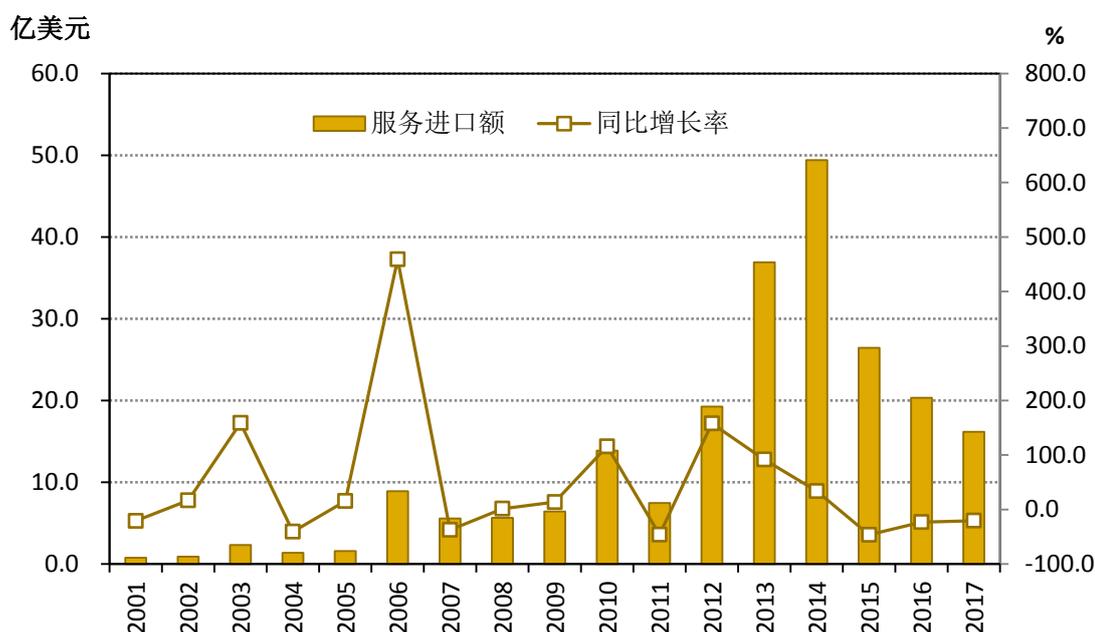


图 5-4：2001-2017 年中国金融服务进口规模和增速

## （六）个人文化和娱乐服务进口

中国坚持文化互鉴理念，加强文化交流。2015 年以来，中国与以色列、韩国、埃及等友好国家签署了开展文化贸易与合作的协议。中国举办了中法文化年、中俄文化年等大型文化交流活动。中国在全世界 30 多个国家设立了中国文化中心。2016 年发布了《“一带一路”文化发展行动计划（2016-2020 年）》，形成了中国文化贸易的双向交流、互联互通、合作共赢的局面。2001-2017 年，中国个人文化和娱乐服务进口从 0.5 亿美元增加到 27.5 亿美元，增长了 55 倍。

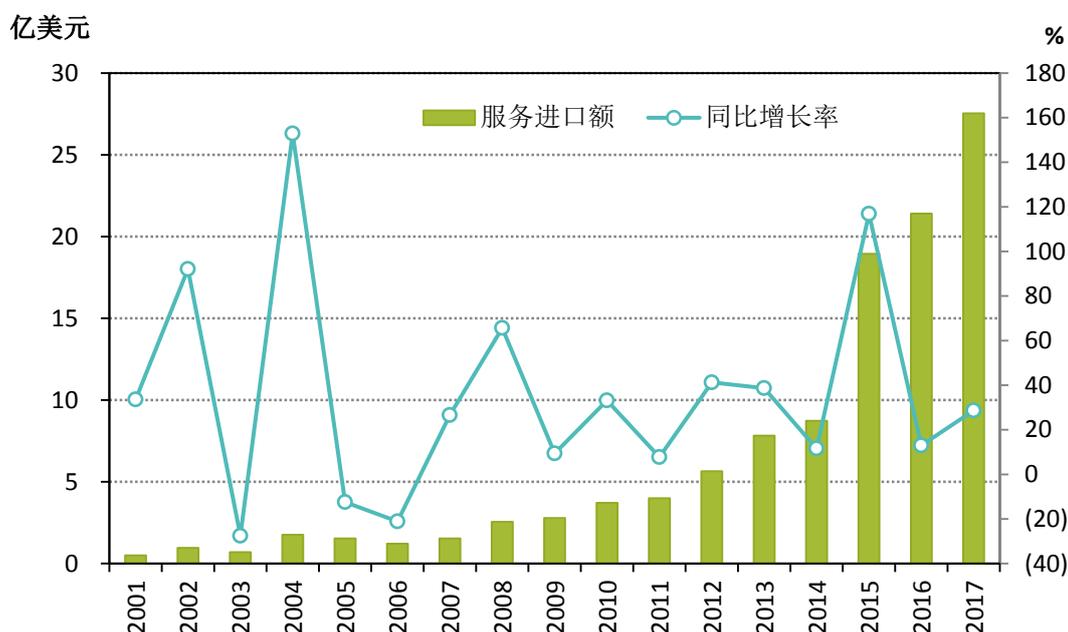


图 5-5：2001-2017 年中国个人文化和娱乐服务进口规模和增速

## 六、中国服务进口展望

优先发展服务贸易是推动中国经济转型升级和向高质量发展的重要举措。服务贸易已成为中国对外贸易发展的新动力和对外开放深化的新引擎。随着服务业的蓬勃发展，中国服务贸易发展的基础更加坚实。2017 年，中国服务业增加值占 GDP 的比重为 51.6%，对经济增长的贡献率为 58.8%。未来，中国仍将按照既定方针和节奏，推动更高水平、更广领域、更大范围的服务业对外开放，中国高质量服务进口市场前景可期。

### （一）深化服务业对外开放

**进一步放宽市场准入限制。**稳步扩大金融业开放，放宽外资金融机构设立限制，扩大外资金融机构在华业务范围，拓宽中外

金融市场合作领域。取消或放宽交通运输、商贸物流、专业服务等领域外资准入限制。放开会计审计、建筑设计、评级服务等领域外资准入限制。推进电信、互联网、文化、教育、交通运输等领域有序开放。探索完善跨境交付、境外消费、自然人移动等模式下服务贸易市场准入制度，逐步放宽或取消限制措施，有序推进对外开放。

**推动区域协调发展。**发挥中国东部地区高质量服务进口的率先引领作用，推动服务进口成为中西部地区开放型经济发展的重要突破口。把经济技术开发区、海关特殊监管区域、高新技术产业开发区、国家旅游度假区等开发区建成服务进口的重要平台和载体。把服务进口作为“一带一路”建设的重要内容，拓宽国际服务合作新空间。

## （二）扩大高质量服务进口

**扩大服务进口是新时代中国自身发展的需要。**作为世界上最大的发展中国家，中国处于经济转型升级和高质量发展的重要时期，对研发设计、节能环保、信息技术、金融保险、第三方物流、商务咨询、品牌建设等生产性服务需求旺盛。中国将全面建成小康社会，居民生活水平不断提高，对健康医疗、文化创意等生活性服务需求快速增长。扩大服务进口有利于推动经济高质量发展，满足人民对美好生活的向往，提高中国人民的幸福感和获得感。

**扩大服务进口是新形势国际贸易发展的需要。**当前全球经济格局面临深度变革，贸易保护、单边主义、零和博弈思维抬头，

全球自由贸易体系面临前所未有挑战。但同时，信息技术发展日新月异，互联网影响广泛而深刻，经济全球化潮流不可逆转。中国以主动开放的姿态融入国际多边贸易体制，以实际行动促进服务贸易自由化、便利化，推动全球服务贸易朝着更加开放、包容、普惠、平衡、共赢的方向发展。中国积极扩大服务进口，为全球服务贸易持续繁荣注入可预期的动能。

当前，中国服务进口与大数据、云计算、人工智能等新技术结合日渐紧密，与数字经济、共享经济、互联网经济等新经济融合日益深入，与制造业、服务业、农业等领域发展日趋协同。预计未来5年，中国服务进口规模累计超过2.5万亿美元，占全球服务进口的比重超过10%，对全球服务进口增长的贡献率在20%以上。其中，出境旅游将达到7亿人次，旅行服务进口有望突破1.4万亿美元，知识产权使用费、电信计算机和信息服务、金融服务、保险服务、个人文化和娱乐服务等新兴服务进口累计将超过7000亿美元。这将为世界各国提供更广阔市场、更充足资本、更丰富产品、更宝贵合作契机，中国发展将是世界的机遇。

### **（三）完善服务进口促进体系**

**打造服务进口促进平台。**中国服务进口将以中国国际进口博览会和中国（北京）国际服务贸易交易会为龙头，充分发挥中国（上海）国际技术进出口交易会、中国国际软件和信息服务交易会、中国国际服务外包交易博览会、中国（深圳）国际文化产业博览交易会、中国（香港）国际服务贸易洽谈会等专业类展会交

易平台的促进作用，打造全球服务产品及服务活动交流、展示、洽谈、交易的重要平台。

**培育市场主体。**积极建设全国性、区域性公共服务平台，提高现有公共服务平台利用效率。鼓励金融机构在风险可控、商业可持续的前提下创新适应服务贸易特点的金融服务。探索建设一批服务贸易境外促进中心和服务贸易线上促进平台。更好发挥贸易促进机构、行业协会的作用。

#### **（四）营造良好市场环境**

**深化创新发展试点。**2018年中国在北京、天津、上海等地区深化服务贸易创新发展试点。充分发挥地方的积极性和创造性，推动在服务贸易管理体制、开放路径、促进机制、政策体系、监管制度、发展模式等方面先行先试，加快优化营商环境，最大限度激发市场活力，打造服务贸易创新发展高地，带动全国服务贸易高质量发展，不断培育“中国服务”核心竞争优势，推动形成全面开放新格局。

**提升便利化水平。**大力发展服务新业态新模式，研究探索对海关特殊监管区域外“两头在外”的研发、设计、检测、维修等服务业态实行保税监管。深入改革通关监管制度，为与展览、维修、研发设计等服务贸易相关的货物进出口提供通关便利。提升跨境交付、自然人移动等方面的便利化水平，完善签证便利政策，健全境外专业人才流动机制，畅通外籍高层次人才来华创新创业

渠道，推动职业资格互认。提升移动支付、消费服务等方面的便利化水平，积极发展入境游。

**创新监管模式。**建立服务贸易重点联系企业运行监测机制，创新事中事后监管举措。探索建立商务、海关、税务、外汇等部门信息共享、协同执法的服务贸易监管体系。全面建立服务贸易市场主体信用记录，纳入全国信用信息共享平台并依法通过国家企业信用信息公示系统、“信用中国”网站向社会公开，实施守信联合激励和失信联合惩戒。探索创新技术贸易管理模式。逐步将有关服务贸易管理事项纳入国际贸易“单一窗口”。

**创造优质投资环境。**加快制定出台《外国投资法》，全面落实外商投资准入前国民待遇加负面清单管理制度，不断修订完善外商投资负面清单，进一步对接国际经贸规则，营造国际化、法治化、便利化的投资环境。修订完善合格境外机构投资者（QFII）和人民币合格境外机构投资者（RQFII）有关规定，建立健全公开透明、操作便利、风险可控的合格境外投资者制度，吸引更多境外长期资金投资境内资本市场。

**加强知识产权保护。**中国强化知识产权创造、保护和运用，培育公平的市场环境，加快专利法、著作权法、标准化法、反垄断法等法律法规修订工作。加强知识产权海关保护执法体系建设，加强“互联网+”、电子商务、大数据等新兴领域和业态知识产权保护制度建设。中国鼓励中外企业开展正常技术交流合作，保护在华外资企业合法知识产权。

**健全统计体系。**完善服务贸易统计监测、运行和分析体系，健全服务贸易统计监测管理信息系统，开展重点联系企业统计数据直报工作，实现系统重要性服务贸易企业直报全覆盖。优化外国附属机构服务贸易统计。建立政府部门信息共享和数据交换机制。

### （五）深化服务贸易多双边合作

推动《区域全面经济伙伴关系协定》谈判，推进亚太自由贸易区建设，逐步构筑立足周边、辐射“一带一路”、面向全球的高标准自由贸易区网络。扩大《中国-东盟全面经济合作框架协议服务贸易协议》成果，进一步推动服务贸易自由化，促进中国-东盟服务贸易合作迈入新台阶。积极推动中日韩自由贸易协定谈判，巩固三国在财政、金融、交通、文化、教育、环境、卫生等领域的交流与合作成果，拓展节能环保、科技创新、高端制造、共享经济、医疗养老等重点领域服务贸易的务实合作。积极推动实施《金砖国家服务贸易合作路线图》；推动上合组织成员国、中国-中东欧国家、中国-东盟、中葡论坛等多边机制下的服务贸易合作。积极构建“一带一路”服务贸易合作网络。

积极拓展服务贸易双边合作，进一步推动与“一带一路”沿线重点国别、主要服务贸易伙伴国、区域和多边合作机制下重点国别商签服务贸易合作备忘录，建立服务贸易双边工作机制。目前，中国已经与新加坡、印度、日本、英国、爱尔兰、德国、芬兰、澳大利亚、巴西、乌拉圭等 10 个国家建立了服务贸易双边工作机制，积极拓展符合中国经济高质量发展和人民美好生活所需

服务的进口来源市场。在双边机制下促进州省合作，增强服务贸易创新发展试点地区与重点服务贸易伙伴往来交流，优化服务进口结构。

# **Report on China's Services Import**

# 2018

**Ministry of Commerce of the People's Republic of China**

**November, 2018**



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## Contents

<b>Foreword .....</b>	<b>III</b>
<b>I. Development Principles and Vision .....</b>	<b>1</b>
1. Development principles.....	1
2. Development vision.....	2
<b>II. China's Services Import Development Situation .....</b>	<b>2</b>
1. Steady progress has been made in opening up China's services sector.....	2
2. China's services import has developed fast .....	4
3. Service affiliates of foreign-based TNCs in China have developed fast .....	7
<b>III. China's Contribution to Global Trade in Services .....</b>	<b>9</b>
1. China is a major contributor to the growth of global trade in services .....	10
2. China is a major promoter of the liberalization in global trade in services ..	11
3. China is an important pathfinder for the innovative development of global trade in services .....	13
<b>IV. Mutually Beneficial Cooperation between China and Its Trading Partners .....</b>	<b>15</b>
1. Services import of China from its main trading partners.....	16
2. Services import from BRICS countries to China.....	23
3. China's services imports from countries along the Belt and Road.....	27
4. Services imports by Chinese mainland from Hong Kong, Macao and Taiwan region.....	30
<b>V. China's Services Import Develops in Various Areas .....</b>	<b>32</b>
1. Import of travel services.....	32

- 2. Import of charges for the use of intellectual property..... 34
- 3. Import of telecommunications, computer and information services ..... 36
- 4. Import of professional and management consulting services ..... 37
- 5. Import of financial services..... 37
- 6. Import of personal, cultural and recreational services ..... 39
  
- VI. Outlook for China’s Services Import..... 40**
- 1. Deepening the opening up of the services sector ..... 41
- 2. Increasing high-quality services imports ..... 42
- 3. Improving the facilitation system for services imports..... 43
- 4. Creating a good business environment ..... 44
- 5. Strengthening the multilateral and bilateral cooperation on trade in services 47

## Foreword

In 2001, China acceded to the World Trade Organization (WTO). This was a milestone in China's integration into economic globalization, marking a new historic stage of opening-up in the services sector. China has been adhering to the principles of equality, mutual benefit and inclusive development, strictly following the rules of the WTO, and treating trading partners on a fair, impartial and equal footing. China attaches great importance to the liberalization of trade in services. China's services import has benefited the world, created jobs for trading partners, increased the value of wealth, broadened the global services market and boosted global trade demand. At present, China has trade relations with more than 250 countries and regions in the services sector. At the historical starting point of a new era, China will continue to support trade liberalization and economic globalization, actively open its market to the world, provide a business environment that is law-based, internationalized and business-friendly, and promote the building of an open world economy with concrete actions.

With a bright development future, China's economy currently has been transitioning from a phase of rapid growth to a stage of high-quality development. The Chinese market has created a huge space for and lent strong impetus to global economic growth. Since 2012, China has been the world's biggest spender on outbound travel for six consecutive years. In 2017, the consumption of Chinese tourists was close to one fifth of the total global travel revenue. It is expected that, in the next five years, outbound travel will become an important direction for China's consumption upgrade with a scale of 700 million person-times, and travel services imports are expected to exceed 1.4

trillion US dollars. China's travel imports will be an important driver of the steady growth of the global economy.

China's services import has not only met the needs of the Chinese people for a better life and facilitated domestic industrial structural transformation and upgrading, but also brought new opportunities for global trade growth. Since 2012, the contribution of China's imports of services to the growth of global services imports has reached 25.8%, accumulatively boosting 4.2% of the growth in global services imports. China's services import constitutes an important driving force for the steady development of global trade in services. At present, the global economic landscape is facing profound changes, trade protectionism is on the rise, and the role of traditional economic drivers and engines has weakened. Against this background, China has lived up to its responsibility as a major country and proactively expanded its services imports, which is in the common interest of the peoples of all countries in the world.

The continued prosperity of global trade in services requires the Chinese market and China's contribution. The high-quality development of China's trade in services is inseparable from the supply of high-quality services in the world, and the trade relations between China and the rest of the world in services require state-level open platforms. The China International Import Expo (CIIE) is the world's first state-level exposition with the theme of import and a major pioneering initiative in the history of international trade. The year 2018 marks the 40<sup>th</sup> anniversary of China's reform and opening up. Hosting the CIIE is an important decision made by the Chinese government in the new era to promote high-level opening-up, and a major policy measure to further open its market to the world. By taking advantage of the CIIE, China's services import will provide new impetus to the global economy and open up the "China Opportunity" to the world.

## **I. Development Principles and Vision**

### **1. Development principles**

The development of China's services import is subject to and serves the national overall development strategy, and adheres to the principles of innovative, coordinated, green, open, and shared development.

—**Innovative development.** China profoundly implements the innovation-driven development strategy in trade in services, deepens institutional reforms, stimulates innovation and creativity, optimizes the business environment, and promotes the vigorous development of new technologies, new fields, new business types and new models.

—**Coordinated development.** China adheres to the coordinated development of services import and goods import, follows regional strategies on coordinated development, expands the space in China for services import, and develops an all-round import model.

—**Green development.** China embraces the concept of green development, follows the trends of digitization, intelligentization and low carbonization, promotes energy conservation and emission reduction in the services sector, establishes a green development system for services import, and enhances the level of sustainable development.

—**Open development.** China actively promotes the globalization process, facilitates the liberalization of trade in services, opposes trade protectionism, and safeguards the multilateral trading system. China also advances both external and internal opening up, and deepens bilateral and multilateral cooperation in trade in services.

—**Shared development.** China remains committed to equality and mutual benefit, strictly follows the rules of the WTO, takes meeting the increasing needs of the Chinese people for a better life as the starting point, does not set a goal of trade surplus, and strives to bring benefits to people around the world and to achieve shared and win-win development.

## **2. Development vision**

China's services import is committed to meeting the production and services needs of China's economy for high-quality development, meeting the increasing services needs of the Chinese people for a better life, providing sustainable development momentum for global trade growth, enhancing the well-being of the people of the world, and contributing to the progress of human civilization.

## **II. China's Services Import Development Situation**

### **1. Steady progress has been made in opening up China's services sector**

**Fulfilling the promise of opening up the services sector.** When acceding to the WTO in 2001, China promised to gradually open up its trade in services in the Protocol on the Accession of the People's Republic of China. China committed to opening up 9 of the 12 services sectors of the General Agreement on Trade in Services (GATS) of the WTO. Among the 160 services sub-sectors, China made specific commitments on 100 of them. By 2007, China had honored all of its commitments on trade in services.

**Proactively improving the opening-up level of the services sector.** China has stepped up its efforts to test the pressure of opening up on pilot free trade

zones. In the field of transport, the restrictions on foreign investment in railway passenger transport companies, international maritime transport and international shipping agents have been removed. In the field of commercial circulation, the restrictions on foreign investment in gas stations and the purchase and wholesales of grains have been lifted. In the field of professional services, the restriction that surveying and mapping companies must be controlled by China has been removed. Meanwhile, China has actively promoted the building of a high standard network of free trade areas, and has signed 17 free trade agreements (FTAs) with 25 countries and regions. In the newly signed FTAs, China has committed to opening up 12 services sectors and approximately 120 sub-sectors, and to further opening up services sectors including commerce, architectural engineering, distribution, education, environment, financial services, entertainment, culture, sports, transport, etc. In addition, China is exploring negotiations on trade in services with its free trade partners in the form of negative list.

**China's services sector has become a hot spot for global investment.**

The investment environment in China continues to improve, and China's services sector is becoming a new hot spot for foreign investment. In 2017, the number of newly founded foreign-invested enterprises (FIEs) in China reached 35,652, registering an increase of 27.8%; the paid-in foreign investment (excluding banking, securities and insurance sectors) was US\$131.04 billion, an increase of 4.0% year on year. The paid-in foreign investment in the services sector was US\$95.44 billion, accounting for 72.8% of the national total and an increase of 63.5% over the US\$58.38 billion in 2012. Information transmission, software and information technology services, the real estate industry, as well as leasing and business services were the top three areas that attracted foreign

investment, and the paid-in foreign investments were US\$20.92 billion, US\$16.86 billion and US\$16.74 billion respectively, accounting for 21.9%, 17.7%, and 17.5% of China's paid-in foreign investment. The paid-in foreign investment in hi-tech services reached US\$26.07 billion, a year-on-year increase of 106.4%. Among it, those in environmental monitoring and governance services and information services increased by 189.4% and 146.5% year on year respectively.

## **2. China's services import has developed fast**

**China's services import has grown faster.** In 2017, China's total services imports was US\$467.59 billion, a year-on-year increase of 3.4% and a 230-fold increase over 1982.

China's trade in services was in its infancy in the early days of reform and opening up. In 1982, China's services imports amounted to US\$2.02 billion, accounting for only 0.4% of the world's imports. When China acceded to the WTO in 2001, its services imports reached US\$39.27 billion, accounting for 2.6% of the world's imports and an increase of 18.4 times compared with 1982, with an average annual growth rate of 16.9%. Since its accession to the WTO, China has actively integrated into the world economic system and taken the initiative to import quality services from around the globe. From 2001 to 2017, China's services imports increased by 11 times, with an average annual growth rate of 16.7% which ranked first among the world's major economies. Since 2012, China has adopted a new vision for development and remained committed to open development. Against the background of slow growth in world trade, the proportion of China's services imports to global services

imports rose from 6.3% in 2012 to 9.0% in 2017, and its world ranking jumped from the 10<sup>th</sup> place to the 2<sup>nd</sup>.

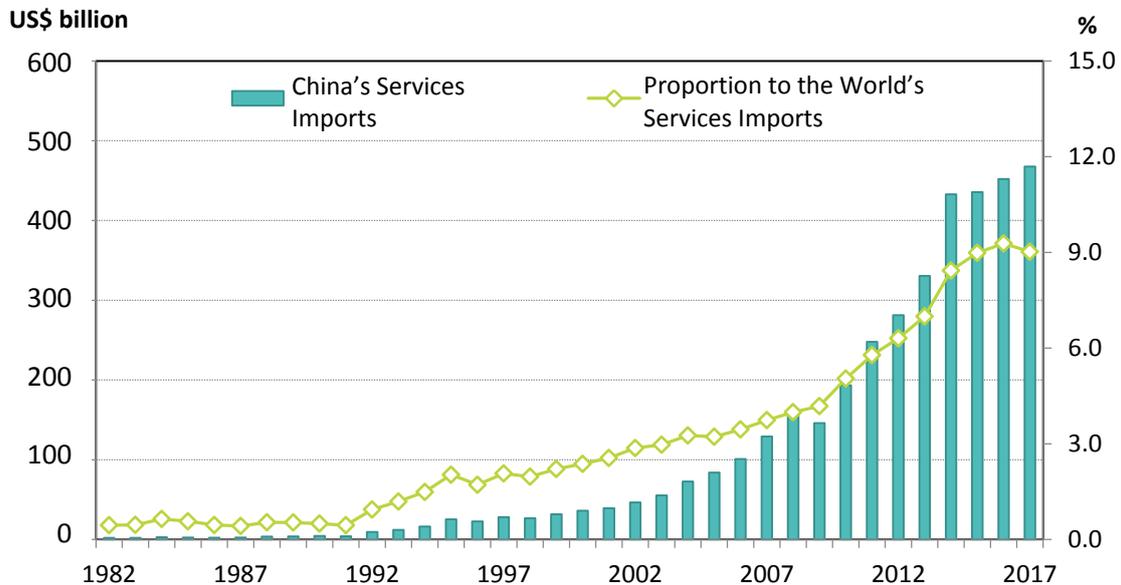


Fig. 2-1: China's Services imports and Proportion to the World's Services imports

**China's services imports rank the second in the world.** In 2017, the top five countries in terms of global services imports were the United States (US\$538.11 billion), China (US\$467.59 billion), Germany (US\$323.65 billion), France (US\$240.47 billion), and the United Kingdom (US\$214.95 billion). China's top five trading partners in terms of services imports were Hong Kong, China, the United States, Japan, Australia and Canada, with services imports of US\$89.22 billion, US\$87.08 billion, US\$32.96 billion, US\$26.92 billion and US\$23.16 billion respectively.

**China's services imports are considerably larger than its services exports.** China's trade deficit in services<sup>1</sup> was US\$100 million in 2001, and expanded to US\$79.72 billion in 2012, an increase of nearly 800 times and an

<sup>1</sup> The total value of services imports minus the total value of services exports is trade deficit in services.

average annual growth rate of 83.6%. In 2017, China's trade deficit in services further increased to US\$239.50 billion, three times that of 2012. In 2017, China's top five sources of trade deficits in services were the United States, Hong Kong, China, Australia, Canada and Japan. According to statistics from the United States, 2007-2017, US services exports to China increased from US\$13.14 billion to US\$57.63 billion, an increase of 3.4 times. In the same period, US services exports to other countries and regions in the world increased by 1.8 times, and the annual trade surplus of the United States in services with China expanded 30 times to US\$40.2 billion.

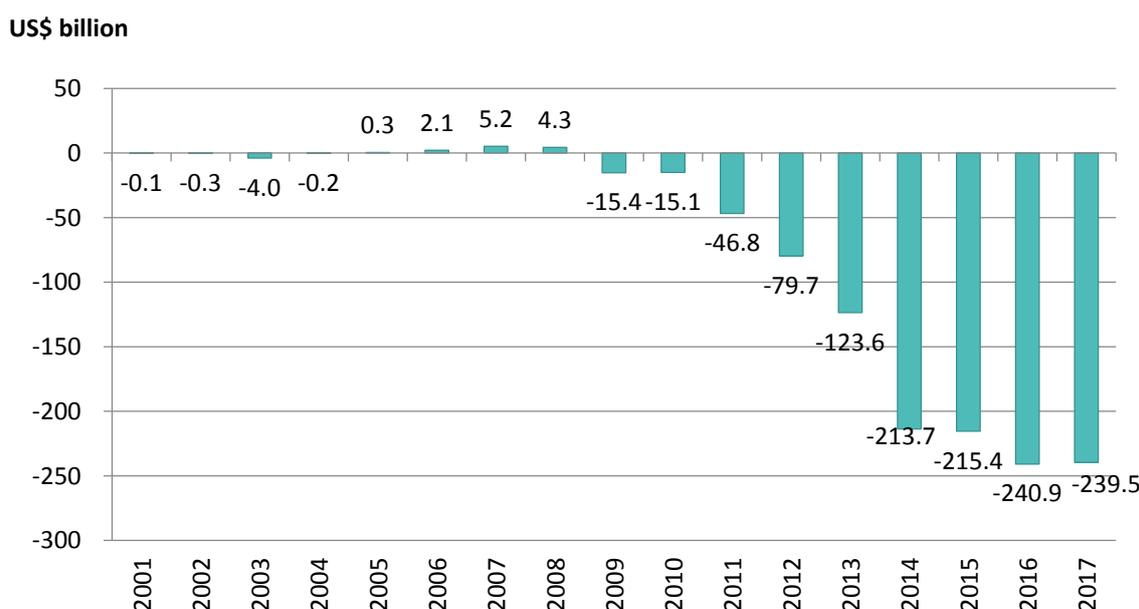


Fig. 2-2: China's Balance of Trade in Services 2001-2017

**The structure of services import has been continuously optimized.** Since the reform and opening up, the Chinese people have increasing demands for outbound travel, consumption, studying abroad and medical services. In the past 35 years, travel has been the largest sector of China's services import. 2005-2017, travel services import increased from US\$21.76 billion to

US\$254.79 billion, with an average annual growth rate of 22.8%. Its proportion in China's total services imports rose from 25.9% to 54.5%, and its share in global travel services imports rose from 3.3% to 19.8%.

With the advancements in supply-side restructuring and economic transformation and upgrading, the import of emerging services<sup>1</sup> with technology and quality as the core continues to grow. In 2017, traditional services<sup>2</sup> imports amounted to US\$356.48 billion, an increase of 1.8%; and emerging services imports were US\$111.11 billion, an increase of 9.0%. The proportion of traditional services imports to China's total services imports was 76.2%, and the proportion of emerging services imports to China's total services imports was 23.8%. The contribution rate of traditional services imports to the growth of China's services imports was 41.0%, and that of emerging services imports was 59.0%. Since 2012, telecommunications, computer and information services have grown 2.5 times, with an average annual growth rate of 28.4%, and personal, cultural and recreational services have grown 3.9 times, with an average annual growth rate of 37.3%.

### **3. Service affiliates of foreign-based TNCs in China have developed fast**

Trade in services of affiliates of foreign-based transnational corporations (TNCs)<sup>3</sup> in China is apparently higher than that of foreign affiliates of Chinese-based TNCs<sup>4</sup> in key indicators including service sales revenue, total

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<sup>1</sup> Emerging services refer to services other than transport, travel, construction, manufacturing services on physical inputs owned by others, and government goods and services.

<sup>2</sup> Traditional services refer to transport, travel, construction, manufacturing services on physical inputs owned by others.

<sup>3</sup> Service affiliates of foreign-based TNCs in China refer to service enterprises and construction enterprises established in China with more than 50% of shares controlled by foreign investors.

<sup>4</sup> Service foreign affiliates of Chinese-based TNCs refer to service enterprises and construction enterprises established in another country or region by enterprises within the customs area of China that control more than 50% of their shares.

profit, number of enterprises and employees. In 2016, there were 123,520 service affiliates of foreign-based TNCs in China, with a sales revenue of US\$853.04 billion and a total profit of US\$130.17 billion. By the end of 2016, the total number of their employees exceeded 5.37 million, of which foreign personnel accounted for 2.9%. The top five sectors in terms of sales revenue were leasing and commercial services (US\$190.04 billion), real estate (US\$143.95 billion), information transmission, computer services and software (US\$136.88 billion), wholesale and retail (US\$129.86 billion), and transport, warehousing and postal services (US\$75.93 billion). The top five countries (regions) in terms of sales revenue were Hong Kong, China (US\$478.26 billion), Japan (US\$71.93 billion), the British Virgin Islands (US\$60.82 billion), Singapore (US\$43.04 billion) and the United States (US\$31.57 billion). In 2016, the sales revenue of affiliates of foreign-based TNCs in China from the above five countries and regions totaled US\$685.62 billion, accounting for 80.4% of the total sales revenue of all the service affiliates of foreign-based TNCs in China; and their profits totaled US\$111.95 billion, accounting for 86.0% of the total profits of all the service affiliates of foreign-based TNCs in China.

In 2016, there were 14,945 service foreign affiliates of Chinese-based TNCs, with a total sales revenue of US\$691.90 billion. The top five sectors in terms of sales revenue were leasing and commercial services (US\$270.79 billion), construction services (US\$157.62 billion), wholesale and retail (US\$91.63 billion), information transmission, software and information technology services (US\$33.81 billion), and transport, warehousing and postal services (US\$29.67 billion). The top five countries (regions) in terms of sales revenue were Hong Kong, China (US\$328.95 billion), Singapore (US\$51.80 billion), Cayman Islands (US\$30.28 billion), the United Kingdom (US\$29.96

billion) and the British Virgin Islands (US\$19.92 billion). The sales revenue of service foreign affiliates of Chinese-based TNCs in the above five countries and regions totaled US\$460.91 billion, accounting for 66.7% of the total sales revenue of all the service foreign affiliates of Chinese-based TNCs.

In 2016, the total sales revenue of service affiliates of foreign-based TNCs in China and service foreign affiliates of Chinese-based TNCs registered US\$1544.94 billion, 2.3 times China's total imports and exports of services (US\$661.6 billion) in 2016. The development of trade in services of China's foreign affiliates and affiliates located in China concentrates in certain sectors and is obviously driven by the Belt and Road Initiative. In 2016, the difference (deficit) between the trade in services of affiliates of foreign-based TNCs in China and that of foreign affiliates of Chinese-based TNCs was US\$161.14 billion, which mainly came from Hong Kong, China, Japan and the United States.

### **III. China's Contribution to Global Trade in Services**

Promoting the building of a community with a shared future for mankind is one aspect of the basic policy that underpins China's endeavors to uphold and develop socialism with Chinese characteristics in the new era, and is highly appraised and widely accepted by the international community. China's services import is an important initiative to promote the building of a community with a shared future for mankind. Since the reform and opening up, China has responded to the challenges faced by global economy and trade with a more open vision and mind, proactively expanded services import, created a huge market for global services export, and contributed to the strong, sustainable, balanced and inclusive growth of the world economy.

## **1. China is a major contributor to the growth of global trade in services**

In recent years, the services sector has become the main driving force for the Chinese economy. The Chinese people's demand for life services such as travel, studying abroad, healthy diet, medical rehabilitation and cultural entertainment is growing rapidly, and the demand for productive services such as financial services, insurance and pension services, research, development and design, information technology, and modern commercial services is on the increase.

**In the past 35 years**, China's services import has grown at an average annual rate of 16.8%, 1.5% higher than the second place and 5.2% higher than the third place; China's contribution to the growth of global services import was 9.8%. China has been the second largest force driving the growth of global services import. **In the past 15 years**, China's services import has grown at an average annual rate of 16.6%, much higher than the world average of 8.1%; and China's contribution to promoting the growth of global services import reached 11.8%, ranking first in the world. **In the past five years**, with the average annual growth rate of global services import being only 3%, China's services import has maintained an average annual growth rate of 10.7%; and China's contribution to the growth of global services import growth has reached 25.8%, resulting in 4.2% of growth in global services import. China has been the biggest contributor to the growth of global services import.

**China has made important contributions to promoting the recovery of global services trade.** Since the 2008 financial crisis, the global economic recovery has been tortuous, and trade in services has gone through in-depth adjustment. China has played a constructive role in stimulating demand in the global services market. Calculating according to the WTO's data, 2008-2013,

China's contribution to the growth of global services imports was 21.5%, which led to a 4.4 percentage points cumulative increase in global services imports, exceeding the combined contribution rates of the United States, Japan, and the European Union (28 countries). The Chinese market has supported the services exports of many countries affected by the crisis. Calculated based on China's international balance of payments and WTO's data, 2008-2013, China's cumulative contribution rates to the growth in services exports of Australia, Korea and Germany were 71.4%, 68.3%, and 21.1% respectively; and the contribution rates to the United States, Canada, Singapore and the United Kingdom were 13.6%, 13.2%, 11.6%, and 10.4% respectively.

## **2. China is a major promoter of the liberalization in global trade in services**

**China is a staunch supporter of the liberalization of trade in services.** The Chinese government actively advocates a “balanced, inclusive and mutually beneficial” multilateral trade system, and strives to establish a fair and equitable new order for international trade in services. China is committed to making progress in the Doha Round of trade negotiations and actively participates in all other international dialogues and cooperation mechanisms such as rulemaking and market-opening negotiations within the WTO framework. Trade in services is an important part of all the FTAs negotiated and signed by China with a view to further open up the services sector.

China not only actively promotes the liberalization of trade in services when participating in international dialogues and cooperation mechanisms, but also joins hands with other parties to send positive signals and support the multilateral trading system while hosting international events. Through hosting

the 22<sup>nd</sup> APEC Economic Leaders' Meeting, the G20 Hangzhou Summit and the 9<sup>th</sup> BRICS Summit, China has joined hands with other parties to resolutely oppose protectionism, and strive to assume international responsibilities that are compatible with one's own level of development and national strength. While attending the multilateral conferences such as the Belt and Road Forum for International Cooperation, the Boao Forum for Asia and the World Economic Forum, Chinese leaders have regarded opening up of the services sector and trade in services as an important issue, and repeatedly clarified its firm stand in supporting the multilateral trading system and promoting the building of an open world economy.

**China's services market is opening wider and wider to the outside world.** Since 2017, the State Council successively issued the Notice on Several Measures for Expanding Opening Up and Vigorously Using Foreign Capital (Guo Fa [2017] No. 5), the Notice on Several Measures for Promoting Growth of Foreign Investment (Guo Fa [2017] No. 39) and the Notice of on Measures for Using Foreign Investment Actively and Effectively to Promote High-Quality Economic Development (Guo Fa [2018] No. 19). Those documents identified that in services, the restrictions on the access of foreign capital to banking financial institutions, securities companies, securities investment fund management companies, futures companies, insurance institutions, and insurance intermediary agencies will be relaxed, the restrictions on the access of foreign capital to accounting, audit, architecture design, rating services and other fields will be removed, and the orderly opening up of telecommunications, the Internet, culture, education, transport and other fields will be advanced so as to further promote the opening up of the service sector and create a level playing field.

In 2018, National Development and Reform Commission of China and the Ministry of Commerce jointly issued the Special Administrative Measures (Negative List) for Foreign Investment Access (2018 Edition) and the Special Administrative Measures (Negative List) for Foreign Investment Access in Pilot Free Trade Zones (2018 Edition), the China Banking and Insurance Regulatory Commission formulated the Notice on Matters concerning Further Relaxing Restrictions on the Market Access of Foreign-Funded Banks and the Notice on Relaxing Restrictions on the Business Scope of Foreign-funded Insurance Brokerage Companies, and the Ministry of Commerce joined hands with other departments to formulate the Opinions on Expanding Imports and Promoting the Balanced Development of Foreign Trade and other policy measures to continue to open more areas, fully implement the administration system of pre-establishment national treatment plus negative list, better promote and protect foreign investment, and give better play to the positive roles of imports in meeting the people's needs for consumption upgrades, accelerating institutional innovation, promoting the upgrading of economic structures and improving international competitiveness. The spirit of the rule of law, market awareness, open awareness, fair competition awareness and the concept of intellectual property are now more deeply rooted in the hearts of the people.

### **3. China is an important pathfinder for the innovative development of global trade in services**

**Exploration into the Chinese program for the innovative development of trade in services.** In 2016, the State Council approved the pilot program on innovative development of trade in services in 15 regions including Tianjin and Shanghai, where exploration and pilot implementation will be conducted in

eight fields such as improving the trade in services management system, expanding the two-way opening up of the services sector, cultivating the subjects of the market of trade in services, innovating the development mode of trade in services, and improving the facilitation of trade in services. In the past two years, the pilots have progressed smoothly with positive results. They have formed 29 pieces of experiences and developed a group of new models and new forms of trade in services. In 2017, the 15 pilot areas for the innovative development of trade in services imported US\$221.96 billion of services, accounting for 47.9% of China's total services imports. As the largest developing country in the world, China's exploration into the innovative development of trade in services provides referential cases for the development of trade in services in other developing countries in the world. In 2018, the Chinese government deepened the pilots on the innovative development of trade in services, thoroughly explored into the institutions, mechanisms, policy measures, and opening paths suitable for the innovative development of trade in services, accelerated the optimization of the business environment and maximized market vitality so as to create a new height for the institutional innovation of trade in services.

**Building open functional carriers for global services.** In 2013, the Chinese government approved the establishment of the China (Shanghai) Pilot Free Trade Zone. While promoting replicable experience of reform pilots, the Chinese government established three pilot free trade zones in Guangdong, Tianjin and Fujian in 2015. In 2017, the Chinese government approved the establishment of seven pilot free trade zones in Liaoning, Zhejiang, Henan, Hubei, Chongqing, Sichuan and Shaanxi. In 2018, the Chinese government decided to support Hainan in building the whole island into a pilot free trade

zone, gradually exploring and steadily promoting the establishment of a free trade port with Chinese characteristics. The establishment of pilot free trade zones in China has injected new impetus into, added new vitality to and expanded new space for China's services import, which made important contributions to promoting global enterprises to explore the Chinese services market. At present, the items and restrictions on the negative list for foreign investment access in pilot free trade zones have been removed or relaxed for four times, and the number of special administrative measures has been reduced from 190 (2013 Edition) to 45 (2018 Edition).

#### **IV. Mutually Beneficial Cooperation between China and Its Trading Partners**

With irreversible economic globalization and ever closer cooperation on the specialized division of labor, the services sector needs deep integration of the industrial chain and transnational development of the supply chain more than ever. Currently, China is the largest trading partner for more than 120 countries and regions across the globe, and has trade relations in services with more than 250 countries and regions. Top ten sources for China's imports of services are Hong Kong, China, the U.S., Japan, Australia, Canada, the U.K., Germany, Republic of Korea, Taiwan, China, and Singapore, with a total value of services imports of US\$339.87 billion, accounting for 72.7% of China's total services import.



Fig. 4-1: Sources for China's imports of services in the world

### 1. Services import of China from its main trading partners

**The U.S. is China's second largest source of services import<sup>1</sup>, and largest source of service trade deficit.** The service trade between China and the U.S., being dependent on each other, is highly complementary. In 2017, China imported US\$87.08 billion worth of service from the U.S., down by 1.5% year on year, accounting for 18.6% of China's total services import. Travel is the most vigorous part with the highest potential regarding the economic and trade cooperation as well as cultural and people-to-people exchanges between China and the U.S. In 2017, Chinese tourists totally spent US\$51 billion on travel, overseas education, and medical industry among others in the U.S., accounting for 58.6% of China's total services import from the U.S. It should be noted that nearly 3 million Chinese traveled to the U.S., with a total travel-related expenditure of US\$33 billion. With regard to education, the U.S. is the largest destination for overseas Chinese students. In 2017, there were 420,000 Chinese students studying in the U.S., contributing a revenue of nearly US\$18 billion to the U.S.

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<sup>1</sup> Hong Kong, China is the largest source for services imports of the Chinese mainland.

There have also been increasing charges for the use of intellectual property paid by China to the U.S. According to Chinese statistics, the U.S. is China's largest source of copyright import. From 2012 to 2016, China has imported approximately 28,000 copyright works from the U.S. The charges for the use of intellectual property paid by China to the U.S. doubled in 6 years, from US\$3.46 billion in 2011 to US\$7.2 billion in 2017. In 2017, the amount of charges for the use of intellectual property paid by China to the U.S. took up a quarter of China's total foreign royalty payment. Furthermore, China imported US\$13.14 billion worth of transport services from the U.S., an increase of 16.0% than the previous year, taking up 15.1%.

According to the statistics of the U.S. Bureau of Economic Analysis, in 2016, the sales revenue in trade in services of affiliates of U.S.-based TNCs in China reached US\$55.14 billion, among which the sales revenue in professional, science and technology services, information services, financial and insurance services registered US\$6.99 billion, US\$2.74 billion, and US\$1.76 billion respectively. The sales revenue in trade in services of affiliates of Chinese-based TNCs in the United State registered US\$3.18 billion, among which the sales revenue in financial and insurance services and the real estate and leasing services reached US\$1.17 billion and US\$410 million respectively. The difference between these two kinds of affiliates (China's deficit) was US\$51.96 billion.

**Japan is China's third largest source of services import.** In March 2018, China-Japan-Republic of Korea free trade area negotiation came to its 13<sup>th</sup> round, before which the three parties held working group meetings about trade in services, telecommunications, financial services, movement of natural persons, investment, competition policy, intercultural property and e-commerce among

others. These three parties have comprehensively exchanged views on administrative policies and measures regarding trade in services in great detail. In May 2018, during Premier Li Keqiang's visit to Japan, the two sides signed the Memorandum of Understanding on Strengthening Cooperation in Trade in Services, and agreed to establish "bilateral trade in services cooperation mechanism" to actively promote mutually beneficial cooperation in the services sector. In 2017, China imported US\$32.96 billion worth of services from Japan, a YoY increase of 10.5%. In particular, travel services import reached US\$18.03 billion, a YoY increase of 12.5, taking up 54.7% of China's total services import from Japan. In 2017, 7.356 million Chinese visited Japan, a YoY increase of 15.4%, realizing 52 consecutive months of increase, and making China the top source of overseas tourists for Japan for 3 consecutive years. Chinese tourists spent an average of JPY 230,000, with a total consumption of JPY 1.7 trillion (approximately US\$15.18 billion), accounting for nearly 40%, and making China the top country. In addition, transport services import reached US\$4.98 billion, a YoY increase of 15.7%, taking up 15.1%; charges for the use of intellectual property import, as the third largest importing area, reached US\$4.81 billion, up by 9.7%, taking up 14.6%; and personal, cultural and recreational services registered an increase of 57.8%.

**Australia is the fourth largest source of services import for China.** China-Australia Free Trade Agreement is the first high-level free trade agreement signed between China and a major developed country. The two parties have concluded high-level negotiation results in trade in services. Australia is the first country in the world committing to opening up its services sector to China with a negative list. People-to-people exchanges between China and Australia have also achieved a major breakthrough. Australia has agreed to

establish an investment facilitation mechanism, and open up “green channels” for engineering and technical personnel under Chinese projects to apply for Australian visas and working permits. These efforts are made to encourage Chinese enterprises to engage in investment activities in Australia. With the Work and Holiday Arrangement, Australia provides 5,000 such visas for Chinese youths to facilitate youth exchanges between the two countries. Australia also provides an entering quota of 1,800 people for special Chinese professionals (traditional Chinese medicine practitioners, Chinese language teachers, Chinese cuisine chefs and martial arts trainers). Australia is also strong in education service. China has committed to, within one year after the agreement takes effect, examining, evaluating and adding the 77 Australian institutions of higher learning registered in the Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS) onto the website of Foreign Education Supervision of the Ministry of Education. This arrangement will be beneficial for overseas Chinese students to gain accurate and authoritative information in time. With an exchange of agreements, China and Australia have decided to further expand and deepen education cooperation. Australia welcomes Chinese educational institutions to set up Chinese International Schools in Australia. Both parties have made pre-arrangement in “upgrading” the opening-up level of trade in services, and agreed to carry out trade in services negotiation by means of a negative list at the agreed time, so as to realize two-way opening-up at a higher level.

In 2017, China imported US\$26.92 billion worth of services from Australia, a YoY increase of 8.2%. Travel and transport took up the larger part, cumulatively accounting for 96.2% of China’s total services import from Australia. Specifically, travel services reached US\$21.44 billion, up by 5.6%,

taking up 79.6%; and transport service reached US\$4.48 billion, up by 26.9%, taking up 16.6%.

**Canada is the fifth largest source of services import for China.** In recent years, the economic and trade relations between China and Canada have enjoyed healthy development. Both countries have witnessed a change from single merchandise trade to an all-round, cross-area and diversified trade with ever-increasing service and personal exchanges. In 2017, China imported US\$23.16 billion worth of services from Canada, a YoY decrease of 10.9%. Of the main importing area, travel import reached US\$20.69 billion, accounting for 89.3% of China's total services import from Canada, and taking up 8.1% of China's total travel services import. In 2016, during Prime Minister Trudeau's visit to China, both parties decided to make 2018 as the China-Canada Travel Year, and announced to double the two-way people-to-people exchanges based on the 2015 level by 2025. China and Canada have also seen rapid development in bilateral trade in services of education. It is illustrated by the diversified exchange and cooperation relationship established between the two countries, such as sending academic groups to each other country, exchanging teachers and students, carrying out joint researches, jointly training doctoral students, etc. By the end of 2016, there had been approximately 174,000 Chinese students studying in Canada.

**The U.K. is the sixth largest source of services import for China.** The U.K. is the first major Western country to recognize the establishment of the People's Republic of China, and among the first countries to create a comprehensive strategic partnership with China. It is the largest RMB offshore trading center after Hong Kong, and has the largest number of overseas Chinese students and Confucius Institutes among all EU countries. The U.K. is also the

first Western country to issue RMB treasury bonds and the first major Western country to apply to join the Asian Infrastructure Development Bank.

China and the U.K. should go with the trends of the times and join hands to usher in a “Golden Era” of cooperation on trade in services, based on the development stage and cooperation demands of each country. In 2018, the two sides signed the Memorandum of Understanding on Establishing China-Britain Trade in Services Working Group, which aimed at deepening China-UK cooperation under the Belt and Road Initiative, strengthening exchanges on investment policies, promoting bilateral investment, expanding trade in services and deepening local and enterprise cooperation between these two countries.

In 2017, China imported US\$21.41 billion worth of service from the U.K., a YoY decrease of 3.1%, accounting for 4.6% of China’s total services import. Of the main importing areas, travel services import reached US\$12.49 billion, a YoY decrease of 1.8%, taking up 58.3% of China’s total services import from the U.K., making this category the largest of all the importing areas; transport services import reached US\$2.62 billion, up by 11.1%, taking up 12.2%; other business services import was US\$2.06 billion, up by 11.0%, taking up 9.6%; charges for the use of intellectual property import reached US\$1.31 billion, up by 71.9%, taking up 6.1%; and telecommunications, computer and information services import reached US\$1.60 billion, down by 49.0%, accounting for 7.5%.

**Germany is the seventh largest source of services import for China.** Both China and Germany are firm supporters of the economic globalization and key advocators of the international free trade system. Since the establishment of diplomatic relations between China and Germany 46 years ago, these two countries have developed a sound relationship, with fruitful results achieved in economic and trade cooperation. In 2014, China and Germany issued the

China-Germany Cooperation Action Plan: Shaping Innovation Together. It has proposed to increase the share of trade in services in bilateral trade, make it a new growth point for the trade between the two countries, and strengthen partnership in finance, education, culture, healthcare, senior care, construction, business services, technology, and exhibition among others. Based on the Partnership Agreement in the field of intellectual property, the two countries should continue to strengthen dialogue and exchanges in intellectual property protection and exchange views on intellectual property legislation and judicial protection.

By seizing the historical opportunities provided by the Belt and Road Initiative, China and Germany have promoted the high-quality development of bilateral trade in services based on the principle of joint discussion, joint construction and shared results. Since 2017, relevant departments of China and Germany have signed a number of cooperation agreements, including the Memorandum of Understanding between the National Development and Reform Commission of the People's Republic of China and the Siemens AG of the Federal Republic of Germany on the Application of Digital Technology, and the Joint Intention Statement between the Ministry of Science and Technology of the People's Republic of China and the Ministry of Education and Research of the Federal Republic of Germany on Intelligent Manufacturing and Technological Innovation Cooperation. In 2017, China imported US\$19.94 billion worth of service from Germany, a YoY increase of 4.3%. Of the main importing areas, charges for the use of intellectual property import reached US\$4.17 billion, up by 52.4%, taking up 20.9% of China's total services import from Germany; transport services import reached US\$4.75 billion, up by 15.9%,

taking up 23.8%; and travel services import reached US\$4.15 billion, up by 4.2%, taking up 20.8%.

**Republic of Korea is the eighth largest source of services import for China.** Being geographically close, China and Republic of Korea are economically complementary with close people-to-people exchanges, as illustrated by the fact that the two are the largest sources of overseas students to each other. In June 2015, the Free Trade Agreement between the People's Republic of China and the Republic of Korea was officially signed. It expands their cooperation in e-commerce, energy conservation, environmental protection, financial services and other emerging and strategic services sectors, which helps to jointly set up a standard, stable and predictable framework. In December 2012, the two countries announced to initiate the second phase of negotiation of China-ROK Free Trade Agreement, and conducted trade in services negotiation by means of drafting a negative list.

In 2017, China imported US\$15.06 billion worth of service from ROK, a YoY decrease of 23.3%, accounting for 3.2% of China's total services import. Of the main importing areas, travel services import reached US\$5.30 billion, down by 44.2%, taking up 35.2%; transport services import reached US\$4.90 billion, up by 9.8%, taking up 32.5%; charges for the use of intellectual property import reached US\$2.35 billion, down by 18.5%, taking up 15.6%; and other business services import reached US\$1.08 billion, down by 7.8%, taking up 7.2%.

## **2. Services import from BRICS countries to China**

In recent years, the BRICS countries have enjoyed continuous economic development. Its share of economic aggregate in the world has increased from

12% in 2016 to 23% in 2017, with their share of total trade volume growing from 11% to 16%. Being important forces for global economic development, the five BRICS countries have experienced rapid development in trade in services, with great potential reserved for cooperation with each other. In September 2017, the Ninth BRICS Summit was held in Xiamen, China. The five state heads attended this summit and adopted the BRICS Leaders Xiamen Declaration and launched the BRICS Trade in Services Cooperation Roadmap. These documents have provided institutional support for carrying out cooperation between the BRICS countries in travel, healthcare, audio-visual services, professional services, computer and related services, research and development services, business services, and construction among other areas. In 2017, China imported US\$16.92 billion worth of service from the BRICS, accounting for 3.6% of China's total services import.

**Russia is the largest source of services import for China among BRICS countries.** In May 2015, Chinese President Xi Jinping and his Russian counterpart signed the Joint Declaration on Docking the Belt Road Economic Belt and Eurasian Economic Union. The two state heads also announced to initiate the negotiation on the agreement regarding the economic and trade cooperation between China and Eurasian Economic Union. In July 2017, during President Xi Jinping's visit to Russia, the trade ministers of China and Russia jointly signed a joint declaration, and announced to initiate the joint feasibility study of Eurasian Economic Partnership Agreement. In May 2018, China officially signed the economic and trade cooperation agreement with the Eurasian Economic Union, which helped to form various institutional arrangements in such areas as trade facilitation, intellectual property, inter-departmental cooperation, and government procurement. In June 2018, the

two state heads signed the Joint Declaration between the People's Republic of China and the Russian Federation. It proposes to expand bilateral cooperation in communication technology, digital economy, education, culture, healthcare, sports, film, mass media, travel and information services among others.

Mutually beneficial cooperation in trade in services between China and Russia have been continuously deepened and strengthened, and major progress has been achieved. In 2017, China imported US\$7.09 billion worth of service from Russia, a YoY increase of 5.7%, accounting for 41.9% of China's total services import from BRICS countries. Transport and travel services are the two major areas for China to import from Russia, registering US\$5.53 billion and US\$1.06 billion, taking up 78.0% and 15.0% respectively. Imports of construction, manufacturing services on physical inputs owned by others as well as personal, cultural and recreational services experienced an increase of 164.0%, 86.9% and 80.0% respectively.

**India is the largest source of services import for China in South Asia.** With the meeting and dialogue mechanisms such as BRICS, East Asia Summit, SCO, APEC, China and India have set up the Joint Trade in Services Promotion Committee. Dialogue mechanisms on various areas have also been established, focusing on such areas as bilateral strategies, economic dialogue, economy and trade, finance, and industry and commerce. All the efforts have promoted in-depth bilateral cooperation in trade in services, and provided a platform for effective coordination, exchanges and collaboration.

The areas of economic cooperation between China and India have also been expanding, with rapid growth in trade in services. In 2017, China imported US\$2.08 billion worth of service from India, a YoY increase of 32.4%, accounting for 12.3% of China's total services import from the BRICS. Of the

three major areas, Imports of transport services, other business services and travel services reached US\$1.15 billion, US\$480 million, and US\$220 million, taking up 55.3%, 23.1% and 10.6% respectively; imports of charges for the use of intellectual property services, telecommunications, computer and information services, and insurance and pension services achieved an increase of 188.0%, 133.2% and 65.1% respectively.

**Brazil is the largest source of services import for China in Latin America.** China-Brazil ties have become one of the most vigorous bilateral relations with the richest connotations in the world. In August 2017, during the seventh meeting of the BRICS trade ministers, China and Brazil signed the Memorandum of Understanding on Cooperation in Trade in Services between the Ministry of Commerce of the People's Republic of China and the Ministry of Industry, Foreign Trade and Services of Brazil (Two-year Action Plan). It pushes the cooperation between China and Brazil in construction, engineering consulting, engineering construction, information technology, bank automation, travel, e-commerce, culture, traditional Chinese medicine and other services sectors. This has served as an exemplar of the cooperation between China and other BRICS countries.

In 2017, China imported US\$5.49 billion worth of service from Brazil, a YoY increase of 59.6%, accounting for 32.4% of China's total import from the BRICS. Of the main importing areas, transport services import reached US\$5.08 billion, up by 65%, taking up 92.5%; and imports of maintenance and repair services, construction, financial services as well as personal, cultural and recreational services achieved an increase of 224.1%, 84.5%, 82.2% and 39.3% respectively.

**South Africa is China's largest source of services import in Africa.**

Both China and South Africa are major emerging economies in the world. The two are highly complementary in various areas including transport, financial services and travel. South Africa has an exporting advantage in personal, cultural and recreational services, financial services and travel among others. In 2014, China and South Africa signed the 5-10 Year Strategic Programme on Cooperation between the People's Republic of China and the Republic of South Africa from 2015 to 2024.

In 2017, China imported US\$2.26 billion worth of services from South Africa, a YoY increase of 97.2%, accounting for 13.4% of China's total services import from the BRICS. Transport services imports took the largest share of China's services imports from South Africa, registering US\$1.84 billion in 2017, an increase of 138.4%, taking up 81.4%. Imports of construction services, and personal, cultural and recreational services achieved an increase of 335.8% and 239.7% respectively.

**3. China's services imports from countries along the Belt and Road**

Since the proposal of the Belt and Road Initiative in 2013, China and the countries along the Belt and Road have entered into a new stage with regard to trade in services. At present, China has established free trade areas with 13 countries along the Belt and Road, including all ASEAN members, Pakistan, Georgia and Maldives. In the meanwhile, China is communicating with 10 countries along the Belt and Road in establishing free trades zones, including 6 Gulf Cooperation Council (GCC) members, India, Sri Lanka, Israel and Moldova. China is also engaged in joint feasibility study of free trade areas with 4 other countries namely Nepal, Bangladesh, Mongolia and Palestine.

In 2017, China imported a total of US\$66.87 billion worth of service from the countries along the Belt and Road, a YoY increase of 25.1%, accounting for 14.3% of China's total services import. Top ten countries where China imported services are Singapore, Thailand, Russia, Malaysia, Vietnam, United Arab Emirates, Indonesia, India, the Philippines and Iran. China cumulatively imported US\$49.93 billion worth of service from the above ten countries, taking up 74.7% of China's total services imports from the countries along the Belt and Road.

**Singapore is the largest source of services import of China in ASEAN.**

In 2008, China and Singapore signed the Free Trade Agreement between the Government of the People's Republic of China and the Government of the Republic of Singapore. Both countries have made higher commitments in services sectors including healthcare, education, accounting, and personnel exchanges than those made in the WTO and the China-ASEAN Free Trade Area Agreement on Trade in Services. In November 2015, China and Singapore signed the Joint Statement between the People's Republic of China and the Republic of Singapore on the Establishment of an All-Round Cooperative Partnership Progressing with the Times. In the same period, China and Singapore initiated negotiations on upgrading their free trade agreement, and discussed further opening up in the market of legislation, construction, financial services, express delivery, environment, transport, and other services sectors.

China and Singapore have witnessed the rapid development of their cooperation in trade in services, which has become the new highlight of cooperation between the two countries. In 2017, China imported US\$11.81 billion worth of service from Singapore, a YoY increase of 10.1%, making Singapore the top country along the Belt and Road in this respect. Of the main

importing areas, Imports of travel, other business services and transport reached US\$6.36 billion, US\$1.89 billion and US\$1.65 billion respectively, taking up 53.9%, 16.0% and 14.0% of China's total services import from Singapore, accounting for 83.9% cumulatively.

**Thailand is the second largest source of services import for China in ASEAN.** Since the establishment of the comprehensive strategic partnership between China and Thailand in 2012, the relationship between the two countries has entered a new stage of development. Both countries have experienced greater cooperation potential and broader cooperation prospects in trade in services. In 2017, China imported US\$8.99 billion worth of services from Thailand, a YoY increase of 12.2%. Of the main importing areas, travel services import reached US\$6.53 billion, up by 9.6%, taking up 72.6%; transport services import reached US\$1.98 billion, up by 23.1%, taking up 22.0%; imports of manufacturing services on physical inputs owned by others as well as telecommunications, computer and information services increased by 823.0% and 135.7% respectively.

**Malaysia is the third largest source of services import for China in ASEAN.** Based on its WTO accession commitments, Malaysia has committed to opening its markets to China and other ASEAN countries in 26 sub-sectors of the 8 services sectors including telecommunications, construction, education, financial services, healthcare, travel and transport. Such an agreement is also based on the China-ASEAN Free Trade Area Agreement on Trade in Services.

In 2017, China imported US\$4.92 billion worth of service from Malaysia, a YoY increase of 20.8%. Of the two main importing areas, travel and transport services imports reached US\$2.40 billion and US\$2.03 billion, accounting for 48.8% and 41.3% respectively; and imports of personal, cultural and

recreational services and manufacturing services on physical inputs owned by others saw an increase of 116.6% and 81.6% respectively.

**The UAE is the largest source of services import for China in the Arab world.** China and the GCC have signed the Framework Agreement on Economic, Trade, Investment and Technical Cooperation. Both parties have initiated China-GCC free trade area negotiation and trade in services negotiation, and substantial progress has been achieved. Under the framework of China-GCC Free Trade Area Agreement, China and the UAE have reached several cooperation agreements and memorandums of understanding in higher education, currency swap, driving license exchange, quality inspection, and mutual recognition of professional qualifications.

In 2017, China imported US\$4.34 billion worth of service from the UAE, a YoY increase of 11.5%. Imports of travel, transport, other business services and construction reached US\$1.78 billion, US\$1.67 billion, US\$450 million and US\$380 million, taking up 41.0%, 38.5%, 10.4% and 8.8% respectively. Imports of telecommunications, computer and information services grew rapidly, with a YoY increase of 41.8%.

#### **4. Services imports by Chinese mainland from Hong Kong, Macao and Taiwan region**

In 2003, the Chinese mainland and the Hong Kong and Macao SAR governments respectively signed the Closer Economic Partnership Agreement (CEPA) between the mainland and Hong Kong and Macao. From 2004 to 2013, the mainland successively signed 10 CEPA supplemental agreements with Hong Kong and Macao respectively to gradually expand opening-up to Hong Kong and Macao by means of “positive list” in trade in goods and services, economic

and technological cooperation, etc. In 2015, the Chinese mainland concluded the CEPA Trade in Services Agreement with Hong Kong and Macao respectively. It is the first free trade agreement signed by the mainland to comprehensively open up its services sectors within China's territory with "pre-entry national treatment plus negative list" as the main method. This agreement marks basically full liberalization of trade in services between the Chinese mainland, Hong Kong and Macao. In 2017, the mainland concluded the CEPA Investment Agreement and the CEPA Economic and Technical Cooperation Agreement with Hong Kong and Macao respectively. These documents have effectively promoted the prosperous and stable economic development in Hong Kong and Macao and the reform and opening up in the mainland.

In 2017, the Chinese mainland imported US\$89.22 billion worth of service from Hong Kong, a YoY increase of 1.5%. Of the main importing areas, imports of travel, other business services, telecommunications, computer and information services, transport, and charges for the use of intellectual property reached US\$62.93 billion, US\$7.76 billion, US\$7.14 billion, US\$4.4 billion, and US\$1.55 billion, taking up 70.5% and 8.7%, 8.0%, 4.9% and 1.7% respectively; imports of telecommunications, computer and information services grew by 231.0%.

In 2017, the Chinese mainland imported US\$4.44 billion worth of services from Macao, a YoY decrease of 27.0%. Of the main importing areas, the imports of travel and transport services reached US\$4.08 billion and US\$140 million, taking up 91.9% and 3.2% respectively; and imports of charges for the use of intellectual property, as well as telecommunications, computer and information services had an increase of 266.2% and 177.9% respectively.

In 2010, the Chinese mainland and Taiwan signed the Cross-strait Economic Cooperation Framework Agreement (ECFA), which became a milestone in the development of the cross-strait economic and trade relations. In 2017, the Chinese mainland imported US\$12.31 billion worth of service from Taiwan, a YoY increase of 10.9%. Of the main importing areas, imports of transport, travel, other business services and insurance and pension services reached US\$4.94 billion, US\$4.79 billion, US\$1.23 billion and US\$370 million, taking up 40.1%, 38.9%, 10.0% and 3.0% respectively, and cumulatively accounting for 92.0%; and imports of personal, cultural and recreational services saw an increase of 45.0%.

## **V. China's Services Import Develops in Various Areas**

With China's new round of high-level opening up to the outside world, the services sector in China is experiencing a deeper opening up. Services imports in key areas are gradually turning to high-quality development.

### **1. Import of travel services**

Since ordinary Chinese citizens were officially approved to take outbound tours at their own expense in 1983, China's travel services import has entered a period of rapid development. According to the order of China's open travel destinations, outbound travel in China has experienced from "Hong Kong and Macao tour" to "border tour", and to "overseas travel". In 2007, China and the U.S. signed the Memorandum of Understanding on Travel Cooperation. Since then, China has successively established a series of multi-bilateral travel cooperation mechanisms with ASEAN, Central and Eastern Europe, as well as Russia and Mongolia. China has also held the China-ASEAN Travel

Department Meeting, the First China-South Asia Travel Ministers' Meeting and the Belt and Road Travel Ministers' Roundtable among others. These events have further facilitated outbound travel. Since 2010, the Chinese government has gradually opened up Chinese citizens' outbound travel business to foreign travel agencies in China. At present, the number of countries that provide visa-free or visa-on-arrival policies for Chinese citizens with ordinary passports has increased to 68.

**China's travel services import provides a broad market for the world.**

In 2017, China imported US\$254.79 billion worth of travel services, a YoY decrease of 2.4%. Of the main importing areas, services imports in travel, overseas education and healthcare reached US\$186.21 billion, US\$66.35 billion and US\$2.23 billion, accounting for 73.1%, 26.0% and 0.9% respectively. From 2001 to 2017, China's travel services import experienced an 18.3-fold increase, with an average annual growth rate of 20%; and its share in total services import had increased from 35.4% to 54.5%. From 2012 to 2017, China contributed 56.3% of growth to global travel services imports, ranking the first in the world.

China's travel services import has created considerable wealth and employment for many countries. China has been the world's largest source of outbound tourists and largest outbound travel consumer for six consecutive years. In recent years, for the travel industry in the world, China's outbound travel consumption has contributed about 1/6 of the added-value, created about a quarter of job opportunities, and contributed more than 10% to international tourist growth. In 2017, Chinese citizens made 130 million times of outbound travel, a YoY increase of 7.0%, with the consumption by Chinese tourists close to 1/5 of the total global travel revenue. In 2017, China is the largest inbound tourist source for Japan, Thailand, Singapore, ROK, Vietnam, Indonesia, Russia,

Cambodia, Maldives and South Africa, with the corresponding imports of travel services registering US\$18.03 billion, US\$6.53 billion, US\$6.36 billion, US\$5.30 billion, US\$2.80 billion, US\$1.72 billion, US\$1.06 billion, US\$500 million, US\$340 million and US\$180 million respectively. While the world shares the dividend thanks to the development of China's travel import, China will also share the overall dividend of the world's travel development and become an important engine of travel growth in the world.

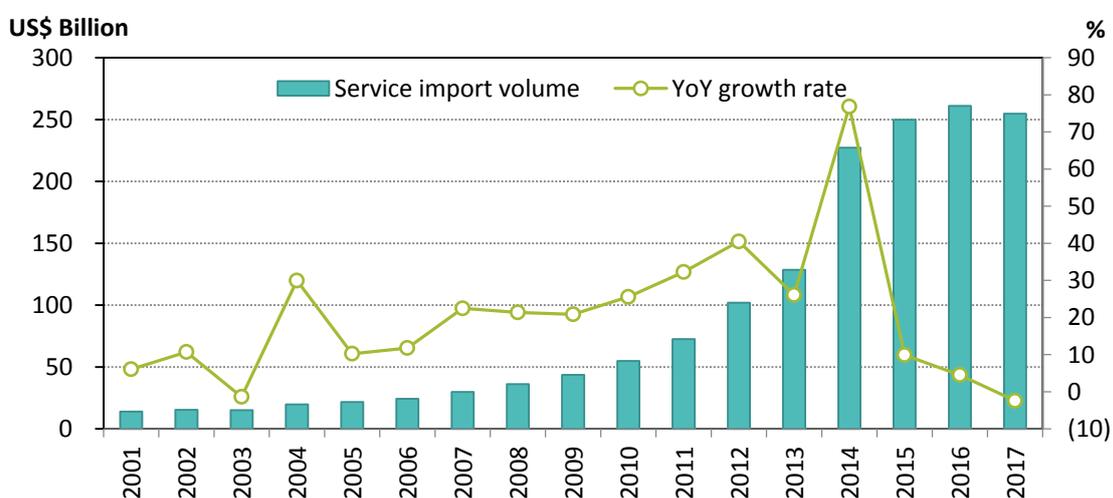


Figure 5-1: Scale and growth rate of China's travel services import from 2001 to 2017

## 2. Import of charges for the use of intellectual property

China has always been an important player in, active builder and firm defender of international intellectual property rules. At present, China has joined almost all major international intellectual property conventions. It has established intellectual property working groups or dialogue mechanisms with the U.S., the EU, Canada, Switzerland, Russia, Brazil, Japan and other countries and regions. Further, China is actively engaged in discussions on intellectual property issues through multilateral platforms such as the WTO, WIPO, APEC and UPOV. It has signed the Patent Prosecution Highway (PPH) agreement with

the patent prosecution agencies of 23 countries and regions including Canada, Japan and the U.S., and signed the Memorandum of Understanding on Strengthening Intellectual Property Cooperation Agreement and Judicial Exchange and Cooperation under the Belt and Road Initiative with WIPO. All these efforts are collectively a vivid demonstration of the in-depth foreign cooperation and communication of China's intellectual property.

**China's charges for the use of intellectual property import continues to maintain a strong momentum.** From 2001 to 2017, China's imports of charges for the use of intellectual property had increased from US\$1.94 billion to US\$28.74 billion, an increase of nearly 14 folds. In 2017, China's import of charges for the use of intellectual property accounted for 6.1% of its total services import. Main areas of China's charges for the use of intellectual property import fall in patents, trademarks and copyrights. Top three sources for China's imports of charges for the use of intellectual property were the U.S. (US\$7.14 billion), Japan (US\$4.81 billion) and Germany (US\$4.17 billion).

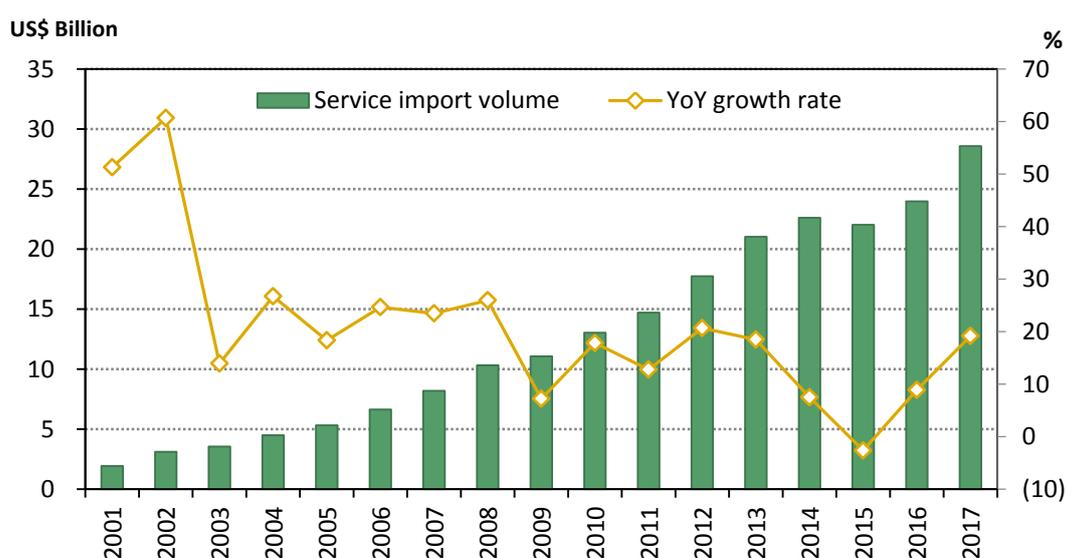


Figure 5-2: Scale and growth rate of China's imports of charges for the use of intellectual property services from 2001 to 2017

### **3. Import of telecommunications, computer and information services**

China joined the International Telecommunication Convention in 1985. In December 2001, China officially opened its basic telecommunication industry to foreign investment. Foreign-invested telecommunications projects mainly concentrated on value-added telecommunication businesses, in which more categories have been opened up and restrictions on the proportion of foreign equity have continuously been relaxed. By the end of 2017, a total of 87 foreign-invested telecommunication companies were approved, mainly providing information services, online data processing services and domestic call center services. New growth points for China's telecommunications services import are created thanks both to foreign capital in domestic telecommunication operators and overseas listings of Chinese telecommunication companies.

Because of the digital upgrade of traditional manufacturing industry and the development of the emerging platform economy and shared economy in China, considerable demand for importing telecommunications, computer and information services is released. From 2001 to 2017, China's import of telecommunications, computer and information services had increased from US\$670 million to US\$19.18 billion, a 28.6-fold increase. In 2017, services import in such an area saw a YoY increase of 52.5%, accounting for 4.1% of China's total services import. Of the main importing areas, telecommunications services import reached US\$1.80 billion, a YoY increase of 26.9%; computer and information services import reached US\$17.37 billion, a YoY increase of 55.7%.

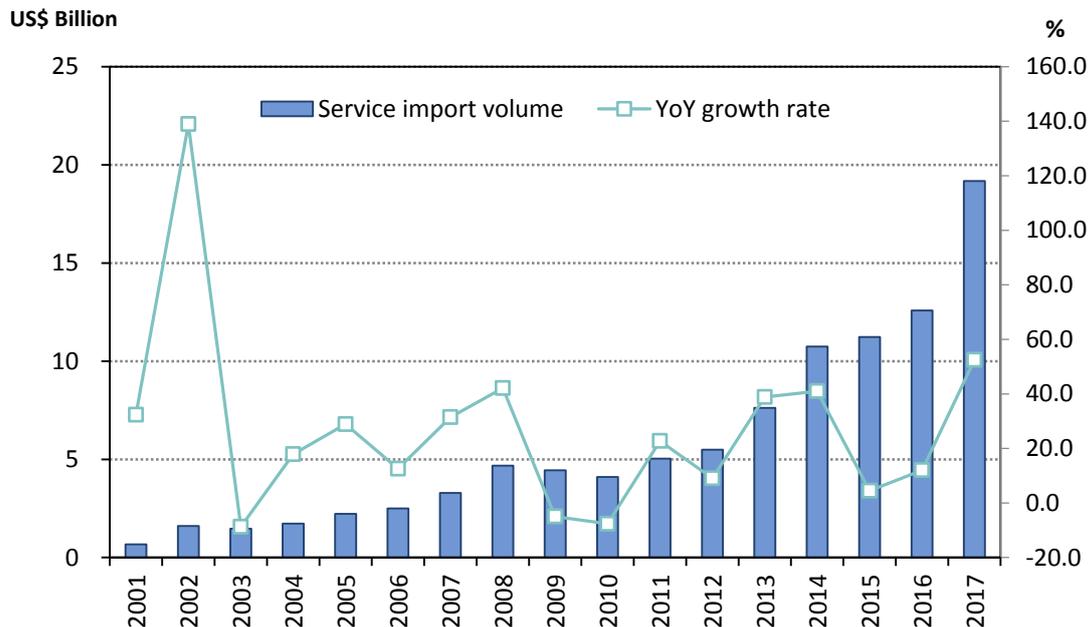


Figure 5-3: Scale and growth rate of China's imports of telecommunications, computer and information services from 2001 to 2017

#### 4. Import of professional and management consulting services

Since the accession to the WTO, China has implemented the principles of the most favored nation and national treatment in professional and management consulting services. It has also significantly opened up its professional and management consulting services market, and accelerated the release of demand for professional services in legal affairs, accounting, auditing and management consulting. From 2015 to 2017, China's imports of professional and management consulting services had increased from US\$13.94 billion to US\$16.18 billion, an increase of 16%. In 2017, China's professional and management consulting services import saw a YoY increase of 5.9%, accounting for 3.5% of China's total services import.

#### 5. Import of financial services

##### **China boasts an orderly opening-up of the financial industry market.**

Since its accession to the WTO, China has further relaxed restrictions on the

geographical locations and target customers for foreign banks to operate RMB business. It has also opened RMB retail and bank card businesses, and introduced overseas strategic investors to participate in the shareholding system transformation of large state-owned commercial banks. By the end of 2016, there had already been banks from 14 countries and regions setting up branches in China, with 1,031 foreign-funded banks established, including 37 wholly foreign-owned banks and 145 branches and sub-branches of foreign banks.

**The opening up of capital account is accelerated at the same time.** In 1996, China announced the convertibility of RMB current account. In 2005, China established a managed floating exchange rate system that is based on market supply and demand and is adjusted with reference to a basket of currencies, implemented the Qualified Foreign Institutional Investor (QFII) and Qualified Domestic Institutional Investor (QDII) schemes, and allowed foreign central banks, international financial organizations, and sovereign wealth funds to invest in the interbank market with RMB. Efforts were also made to launch the Shanghai-Hong Kong Stock Connect, Shenzhen-Hong Kong Stock Connect and Bond Connect, and establish an interconnection mechanism for domestic and foreign capital markets. In 2009, China implemented a pilot program of RMB settlement of cross-border trade. In 2015, RMB was included in the Special Drawing Rights (SDR) currency basket. As of early 2018, China has realized convertibility or partial convertibility for more than 35 in 40 items of the capital account of the IMF

The further opening-up of China's financial sector and the emergence of Internet finance have promoted an accelerated upgrading of financial consumption of Chinese residents, and there is an increasing demand for financial services import. From 2001 to 2017, China's financial services import

had increased from US\$800 million to US\$1.62 billion, a nearly 20-fold increase.

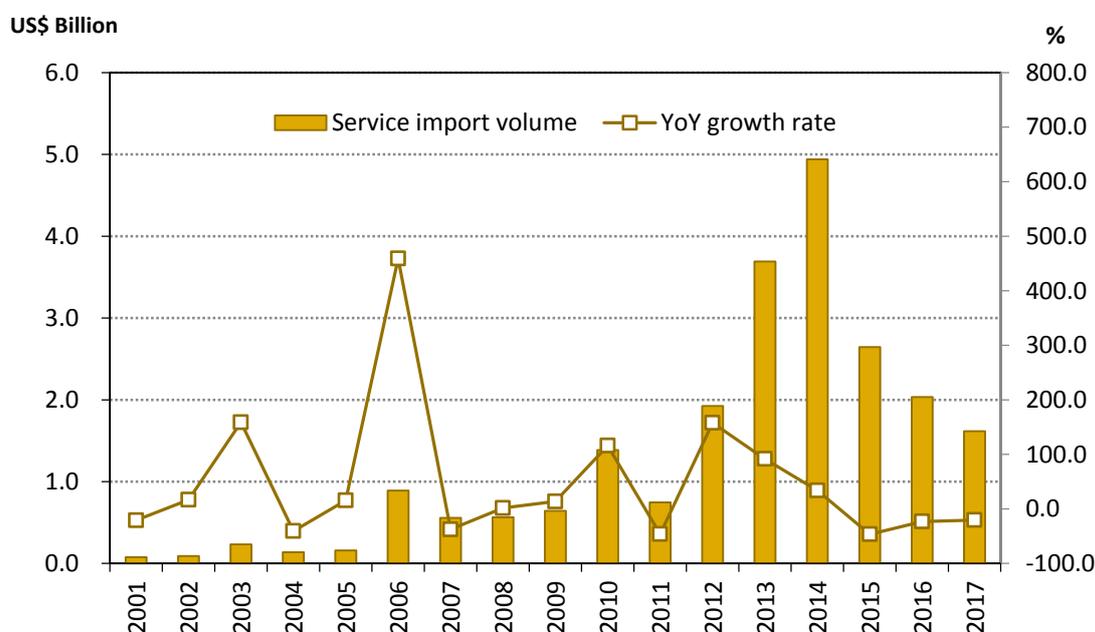


Figure 5-4: Scale and growth rate of China's imports of financial services from 2001 to 2017

## 6. Import of personal, cultural and recreational services

China adheres to the concept of mutual learning on culture, and strengthens cultural exchanges. Since 2015, China has signed agreements with Israel, ROK, Egypt and other countries with friendly communication to carry out cultural trade and cooperation. China has hosted large-scale cultural exchange activities such as the China-French Culture Year and China-Russia Culture Year. China has established Chinese cultural centers in more than 30 countries worldwide. In 2016, China released the Action Plan for Belt and Road Cultural Development (2016-2020), and created a situation where China had two-way exchanges, interconnections and win-win cooperation in cultural trade. From 2001 to 2017, China's import of personal, cultural and recreational services had increased from US\$500 million to US\$2.75 billion, a 55-fold increase.

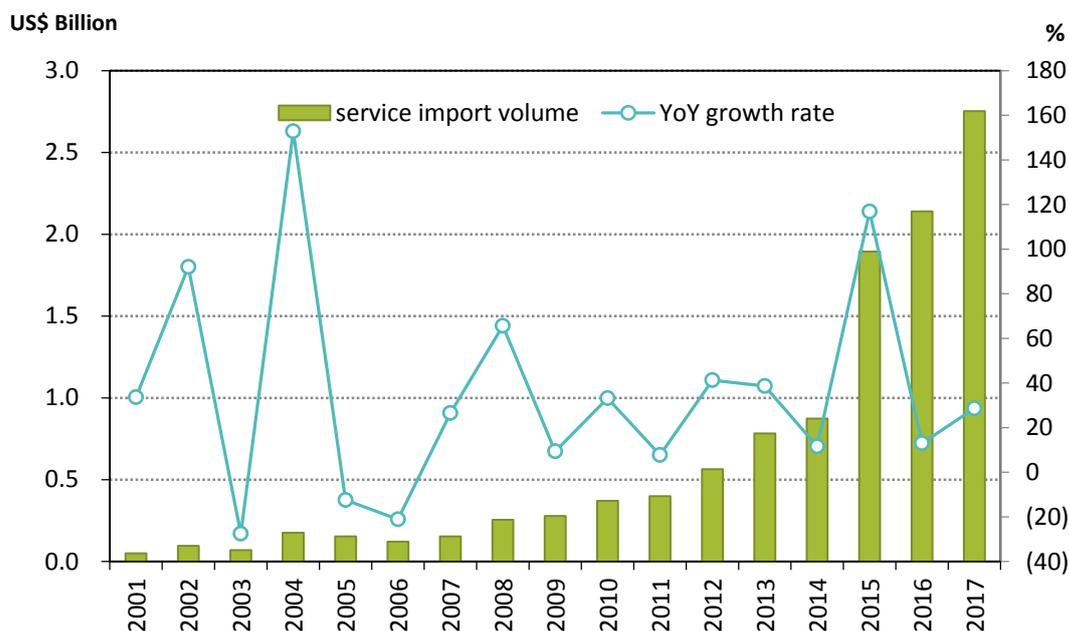


Figure 5-5: Scale and growth rate of China's imports of personal, cultural and recreational services from 2001 to 2017

## VI. Outlook for China's Services Import

Giving priority to the development of trade in services is a significant initiative to promote the transformation and upgrading of China's economy as well as its high-quality development. Trade in services has become China's new impetus to develop its foreign trade and new engine of opening up wider to the outside world. With the vigorous development of the services sector, China's trade in services enjoys a more solid foundation for development. In 2017, the share of the value added of China's services sector in GDP was 51.6%, and it accounted for 58.8% of economic expansion. Opening up has become the primary force driving the rapid development of China's services import from small to large. In the future, China will, by following established guidelines and rhythms, push forward the opening up to broader fields and a higher level. China's market for high-quality services import has a promising future.

## **1. Deepening the opening up of the services sector**

**Further easing market access.** China will steadily liberalize its financial sector, relax restrictions on the establishment of foreign financial institutions in China, expand their business scope, and broaden areas of cooperation between Chinese and foreign financial markets. The restrictions on the access of foreign investment in transport, trade logistics, professional services and other fields will be canceled or relaxed. The restrictions on the access of foreign capital to accounting, audit, architecture design, rating services and other fields will be removed. The orderly opening up of telecommunications, the Internet, culture, education, transport and other fields will be advanced. Market access systems of trade in services in the modes of cross-border delivery, overseas consumption, and movement of natural persons will be explored and improved, the restrictions will be gradually eased or lifted, and opening up will be advanced in an orderly manner.

**Promoting coordinated regional development.** The leading role of the high-quality services imports in the eastern region of China will be brought into play, and services import will be promoted to become an important breakthrough in the development of open economy in central and western regions. The development zones such as economic and technological development zones, special customs supervision areas, high-tech industrial development zones and national holiday resorts will be built into important platforms and carriers for services import. Services import will be regarded as an important part of the Belt and Road Initiative, and new space will be expanded for international services cooperation.

## **2. Increasing high-quality services imports**

**Increasing services imports serves China's own development needs in the new era.** As the largest developing country in the world, China is in an important period of economic transformation and upgrading and high-quality development, and has strong demand for research, development and designing, energy conservation and environmental protection, information technology, finance and insurance, third-party logistics, business consulting, branding and other productive services. China will finish building a moderately prosperous society in all respects, the living standards of its residents will continue to improve, and the demand for life services such as healthcare and cultural creativity will grow rapidly. Increasing service imports is conducive to promoting high-quality economic development, satisfying people's yearning for a better life, and improving the Chinese people's sense of well-being and gain.

**Expanding services imports serves international trade development needs under new situations.** At present, the global economic landscape is facing profound changes, trade protectionism and unilateralism are on the rise, zero-sum game ideology is emerging, and the global free trade system is facing unprecedented challenges. However, at the same time, the development of information technology is changing with each passing day, the Internet has wide and profound impacts, and the trend of economic globalization is irreversible. China has integrated into the international multilateral trading system with a proactive and open attitude, promoted the liberalization and facilitation of trade in services through practical actions, and make global trade in services more open, inclusive, balanced and win-win with benefits to all. China is actively increasing its services imports, striving to benefit the world's enterprises and

people, and injecting predictable momentum into the continuous prosperity of global trade in services.

At present, China's services import is increasingly combined with new technologies such as big data, cloud computing and artificial intelligence, increasingly integrated with the digital economy, the sharing economy, and the Internet economy and other new economies, and is increasingly synergistic with the development of manufacturing, services, agriculture and other sectors. In the next five years, China's cumulative services imports are expected to exceed US\$2.5 trillion, accounting for more than 10% of global services imports, and contributing more than 20% to the growth in global services imports. Chinese tourists will make over 700 million outbound visits, the imports of travel services are expected to exceed US\$1.4 trillion, and the cumulative imports of emerging services such as charges for the use of intellectual property, telecommunications, computer and information services, financial services, insurance and pension services, and personal, cultural and recreational services will exceed US\$700 billion. All this means a bigger market, more capital, a greater variety of products and more valuable cooperation opportunities for countries around the world. China's development will be an opportunity for the world.

### **3. Improving the facilitation system for services imports**

**Building platforms facilitating services imports.** An important platform for the exchange, display, negotiation and trading of global service products and service activities will be built for China's services import, with the China International Import Expo and the China Beijing International Fair for Trade in Services as the flagships, and the catalytic roles of the China (Shanghai)

International Technology Fair, the China International Software & Information Service Fair, the China Sourcing Summit, the China (Shenzhen) International Cultural Industries Fair, the China (Hong Kong) International Service Trade Fair and other professional exhibition trading platforms being brought into play.

**Cultivating market entities.** Nationwide and regional public service platforms will be actively built, and the utilization efficiency of the existing public service platforms will be improved. Financial institutions are encouraged to innovate financial services that are adapted to the characteristics of trade in services under the premise of controllable risks and commercial sustainability. China will explore the construction of a number of overseas promotion centers and online promotion platforms for trade in services, and give better play to the trade promotion roles of trade promotion agencies and trade associations.

#### **4. Creating a good business environment**

**Deepening the pilots on innovative development.** Giving priority to the development of trade in services is an important measure to promote China's economic transformation, upgrading and high-quality development. In 2018, China deepened the pilots on the innovative development of trade in services in Beijing, Tianjin, Shanghai and other regions. The enthusiasm and creativity of various regions will be brought into full play. Exploration and pilot implementation will be promoted in the management system of trade in services, the pathway of opening-up, the promotion mechanism, the policy system, the regulatory system, and development modes. The optimization of the business environment will be sped up, the market vitality will be maximized, and new heights will be created for the innovative development of trade in services. The high-quality development of trade in services nationwide will be driven, and the

core competitive advantages of “China Service” will be continuously cultivated so as to promote the formation of a new pattern of comprehensive opening up.

**Improving facilitation.** China will vigorously develop new types and modes in the services sector, study and explore the implementation of bond supervision on services for the mode of raw materials and sales market in the international market including research and development, design, testing and maintenance that are carried outside the special customs supervision areas. The reform of the customs clearance supervision system will be deepened to facilitate the customs clearance of the import and export of goods related to trade in services such as exhibitions, maintenance, research, development and designing. China will enhance the facilitation of cross-border delivery and movement of natural persons, improve the visa facilitation policy and the flow mechanism of overseas professional talents, smooth the channels for high-level foreign talents to engage in innovation and start businesses in China, and facilitate the mutual recognition of professional qualifications. The facilitation of mobile payment and consumer services will be improved, and inbound travel will be actively developed.

**Innovation in regulatory modes.** China will establish an operation monitoring mechanism for key contact enterprises in trade in services, and conduct innovation in interim and ex-post regulation measures. The establishment of supervision systems over trade in services for the information sharing and collaborative law enforcement between commerce, customs, taxation and foreign exchange departments will be explored. The credit records of the market entities of trade in services will be comprehensively established, incorporated into the national credit information sharing platform, and made open to the public through the National Enterprise Credit Information Publicity

System and the website of “Credit China” according to law, and joint incentive for honesty and joint punishment for dishonesty will be implemented. China will explore innovation in the management mode of trade in technology, and relevant management issues over trade in services will be gradually incorporated into the China International Trade Single Window.

**Creating a high-quality investment environment.** China will speed up the formulation and promulgation of the Law on Foreign Investment, fully implement the administration system of pre-establishment national treatment plus negative list, constantly revise and improve the negative list of foreign investment access, further align its policies with international economic and trade rules, and create an internationalized, legalized and convenient investment environment. The rules relating to Qualified Foreign Institutional Investors (QFII) and RMB Qualified Foreign Institutional Investors (RQFII) will be revised and improved, and a qualified foreign investor system that is open, transparent, easy to operate and risk-controllable will be established and improved, so as to attract more long-term overseas funds to be invested in domestic capital markets.

**Strengthening intellectual property protection.** China will strengthen the creation, protection and application of intellectual property, foster a fair market environment, and speed up the revision of laws and regulations such as the Patent Law, the Copyright Law, the Standardization Law and the Anti-monopoly Law. The construction of the law enforcement system for the customs protection of intellectual property rights will be strengthened, and the construction of intellectual property protection systems in emerging sectors and types of operation such as “Internet +”, e-commerce and big data will be enhanced. China encourages both Chinese and foreign enterprises to carry out

normal technological exchanges and cooperation and protect the legitimate intellectual property rights of foreign-funded enterprises in China.

**Improving the statistical system.** China will perfect the monitoring, operation and analysis systems of the statistics of trade in services, improve the monitoring and management information system of the statistics of trade in services, carry out direct reporting of the statistical data of key contact enterprises, and realize the full coverage of direct reporting of systemically important services trade enterprises. The statistics of trade in services of foreign affiliates will be optimized. Information sharing and data exchange mechanisms of government departments will be established.

### **5. Strengthening the multilateral and bilateral cooperation on trade in services**

China will promote the negotiations over the Regional Comprehensive Economic Partnership, accelerate the building of Free Trade Area of Asia-Pacific, and gradually build a high standard network of free trade areas which focuses on the neighboring areas, radiates across the Belt and Road countries and opens to the world. The results of the Agreement on Trade in Services of the Framework Agreement on Comprehensive Economic Co-operation between China and ASEAN will be amplified and the liberalization of trade in services will be further promoted so as to bring China-ASEAN cooperation on trade in services to a new high. China will actively promote the negotiations over the China-Japan-Korea Free Trade Agreement, consolidate the exchanges and cooperation achievements between the three countries in financial services, transport, culture, education, environment, health and other fields, and expand pragmatic cooperation on trade

in services in energy conservation and environmental protection, technological innovation, high-end manufacturing, sharing economy, healthcare and provision for the aged and other important areas. China will actively promote the implementation of the BRICS Trade in Services Cooperation Roadmap, and the cooperation on trade in services under multilateral mechanisms such as SCO member states, China-Central and Eastern European countries, China-ASEAN, China-Portugal Forum. A Belt and Road cooperation network for trade in services will be actively developed.

China will actively expand bilateral cooperation on trade in services, further promote the negotiations on the signing of cooperation memorandums on trade in services with key countries along the Belt and Road, major partners over trade in services, and key countries under regional and multilateral cooperation mechanisms, and establish bilateral working mechanisms on trade in services. At present, China has established bilateral working mechanisms on trade in services with 10 countries including Singapore, India, Japan, the United Kingdom, Ireland, Germany, Finland, Australia, Brazil and Uruguay, and is actively expanding import source markets of services that meet China's high-quality economic development needs and Chinese people's demand for a better life. Under bilateral mechanisms, China will promote state-province cooperation, enhance the exchanges between the regions where pilots on the innovative development of trade in services are carried out and key partners on trade in services, and optimize the structures of services imports.