

Observations and Suggestions 观察与建议

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The 14th Five-Year Plan of the People's Republic of China —Fostering High-Quality Development 中华人民共和国第十四个五年规划 ——推进高质量发展

ASIAN DEVELOPMENT BANK

ADB

The 14th Five-Year Plan
of the People's Republic of China
—Fostering High-Quality Development
中华人民共和国第十四个五年规划
——推进高质量发展



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Abstract

摘要

- The 14th Five-Year Plan (2021–2025) (the Plan) for National Economic and Social Development of the People's Republic of China (PRC) was approved on March 2021. The Plan highlights high-quality, green development. Building on the achievements of the 13th Plan, it aims to reduce the carbon intensity of the economy and to peak carbon dioxide emissions before 2030. The Plan emphasizes innovation as the core of modern development, relying on the dual circulation strategy as the growth paradigm coupled with reforms to increase living standards.

中华人民共和国（中国）“国民经济和社会发展第十四个五年规划”（“十四五”规划）（2021—2025年）于2021年3月审议通过，强调高质量、绿色发展。基于“十三五”规划取得的成果，“十四五”规划的目标是降低经济的碳强度，并在2030年前达到二氧化碳排放峰值。“十四五”规划强调，创新是现代发展的核心，要依托双循环战略作为增长模式，结合各项改革，提高人们的生活水平。

- In support of inclusive urbanization, the Plan announces reforms to further relax the household registration system (hukou), provide more equal access to public services for migrants, as well as increase labor mobility through cross-region development plans. The Plan also reflects the need to improve the public health system and to develop a long-term elderly care system.

为了支持包容性城市化，“十四五”规划宣布通过改革进一步放宽户籍制度（户口）限制，为流动人口提供更平等的公共服务，同时制定跨区域发展计划，促进劳动力跨区域流动。“十四五”规划还提出，要改善公共卫生系统，发展长期养老体系。

- Key recommendations include continued rebalancing of the economy toward services, to which increased household consumption could contribute. Strengthening household consumption would also increase domestic demand. Better access to quality public health and elderly care, and education would reduce the need for precautionary saving.

主要建议包括继续推动经济再平衡，通过增加居民消费，促进经济向服务业转型。提升居民消费也可拉动内需。改善高质量公共卫生、养老和教育服务，可减少预防性储蓄的需要。

- Carbon dioxide emission reduction plans should be accelerated. With manufacturing expected to keep a stable share in the economy, aiming for peak emissions before 2030 will put enormous pressure on the economy to reach carbon neutrality by 2060.

应加快减少二氧化碳的排放。由于预计制造业占经济的比重将保持稳定，在2030年前实现碳排放达峰的目标将给中国经济在2060年之前达到碳中和带来巨大压力。

- Integrating urban–rural areas and reducing differences between their living standards would require an integrated approach of hukou, land, and social security reforms paired with improved job opportunities and equal access to health care and education in rural areas. Establishing a sustainable

financial framework for an inclusive long-term elderly care system remains a pressing issue as society ages.

城乡地区融合发展和缩小城乡居民生活水平差异, 需要采取户籍、土地和社会保障改革的综合方法, 同时需要改善农村地区就业机会, 提供平等的医疗和教育服务。随着社会老龄化, 为包容性长期养老体系建立可持续财政框架仍然是一个紧迫问题。

I. INTRODUCTION

1. The 14th Five-Year Plan (2021–2025) (the Plan) for National Economic and Social Development of the People's Republic of China (PRC) was approved by the 13th National People's Congress on March 2021. Departing from the emphasis on economic growth and restructuring that was characteristic of the past, the Plan focuses on the sustainability of growth and the quality of life.
2. The Plan envisages renewed efforts to close the urban–rural divide, paves the way to peak carbon dioxide emissions before 2030 and reach carbon neutrality before 2060. These objectives are reinforced by the longer-term perspective of the PRC's Vision 2035, which lays down the path for the country to become a moderately developed country and a global leader in innovation by 2035.
3. The new policy guidelines will be refined in the coming months and implementation blueprints will map out the envisaged reforms. Innovation-driven growth, low-carbon development, deeper social inclusion, and population aging are priorities that deserve attention. Making the right policy choices in these areas is essential for success. This policy note outlines policy recommendations to that end.

II. THE MAIN OBJECTIVES OF THE 14TH FIVE-YEAR PLAN

4. The Plan has 20 quantitative targets, 8 of them binding, under five categories: economic development, innovation, people's well-being, green development, and food and energy security.¹ It is noteworthy that seven targets focus on people's well-being, the highest proportion in any plan. This section highlights the key objectives of the Plan in four main areas.

A. Growth and Innovation

5. **Annual gross domestic product growth targets for the first time.** Deviating from past practice, the Plan does not include a gross domestic product (GDP) growth target for the 5-year period.

¹ The eight binding targets of the Plan are: average years of education of the working-age population up to 11.3 years; reduction in energy consumption per unit of GDP by 13.5% from 2020 level; reduction of carbon dioxide emissions per unit of GDP by 18% from 2020 level; share of days with good air quality in cities at prefecture level and above up to 87.5%; share of surface water at or better than grade III up to 85%; forest coverage rate up to 24.1%; comprehensive grain production capacity (>650 million tons); and comprehensive energy production capacity (>4.6 billion tons of coal equivalent).

Growth targets will be set up annually allowing greater flexibility for policy makers to adjust growth targets to macroeconomic conditions. The country's longer-term development goal of becoming a moderately developed country by 2035 implies doubling the size of the economy by then, which requires an average annual GDP growth of 4.7% over the coming 15 years. Other targets include labor productivity growing faster than GDP, which is important in the context of an aging society with a shrinking labor force.

6. Manufacturing and digitalization gain prominence. The Plan aims to keep the share of manufacturing in GDP stable after a decade of decline. Fiscal incentives, wider access to credit, and more efficient industrial land use are among the tools to support the sector. The digitalization of the economy will continue with the share of the digital economy in GDP set to increase to 10% of GDP by 2025, from 7.8% in 2020. Cloud computing, big data, internet (including internet of things and industrial internet), block chain, artificial intelligence, and virtual and augmented reality will be supported.

7. Innovation at the center of the modernization agenda. A 10-year action plan for basic research and an annual increase in research and development (R&D) spending by at least 7% are at the core of the PRC's initiative to enhance scientific and technological capability. This is expected to unleash indigenous innovation and reduce the country's reliance on foreign inputs, mostly in high-technology manufactured goods. Efforts will focus on aerospace, biotech, neuroscience, artificial intelligence, quantum computing, and semiconductors, where the country expects to become a global leader in the longer term.

B. Dual Circulation

8. A new development paradigm. The Plan introduces a new development concept, the dual circulation paradigm. It targets the expansion of domestic demand through strengthened supply chains supported by industrial policies, indigenous innovation, and increased domestic consumption. This approach envisages less reliance on heavy industries by proposing a new target to increase the share of the strategic emerging industries (i.e., advanced manufacturing, including high-end machinery and equipment, advanced materials, and electric vehicles) from 11.5% of GDP in 2019 to over 17% by 2025. The approach also includes reforms to increase market competition and improve the efficiency of state-owned enterprises (SOEs) through incentive mechanisms and gradually adopting market-based salaries.

C. Environment and Climate Change

9. Toward carbon neutrality. Green development features prominently in the Plan with five of the eight binding targets set in this area. During 2021–2025, energy and carbon intensity are targeted to decline by 13.5% for energy and 18% for carbon intensity per unit of GDP. Other binding targets include increasing (i) the share of days with good air quality in cities up to 87.5% (from 87% in 2020); (ii) the share of surface water at or better than grade III up to 85% (from 83.4% in 2020);

and (iii) forest coverage up to 24.1% (from 23.2% in 2019).² As a nonbinding indicator, the proportion of nonfossil fuels in primary energy consumption is set at 20% from 15% in the previous plan. The Plan promotes low-carbon development and the circular economy with new approaches to transport, energy production, and waste management policies.

D. Urban–Rural Inequalities and Demographic Trends

10. Integrated urban–rural development. In the context of promoting more balanced regional development, the Plan steps up efforts toward an integrated development model to close the urban–rural divide. The Plan stresses the need for a comprehensive rural transformation, including the modernization of the agriculture sector and the promotion of green and smart agriculture, to generate attractive employment and investment opportunities in rural areas. In cities, urbanization, set to rise to 65% by 2025 from about 60% in 2019, will prioritize a more equal access to public services for migrants with links to cross-region development plans. Labor mobility will be fostered by removing hukou (residential permit) restrictions for cities with 3–5 million residents coupled by an increased supply of affordable housing.

11. Better living standards. The Plan outlines actions to increase living standards and access to quality public services, including measures to (i) increase people’s incomes, (ii) boost employment opportunities, (iii) build inclusive high-quality education and health systems, and (iv) enhance the social security system. Out of the seven targets directly related to people’s well-being, three are new: (i) surveyed unemployment rate capped at 5.5%, (ii) certified assistant doctors up to 3.2 per 1,000 population, and (iii) nursery school places for infants under 3 years up to 4.5 per 1,000 population.

III. POLICY RECOMMENDATIONS

12. The Plan presents a unique opportunity to transit toward high-quality development by addressing the social and environmental challenges that have emerged after decades of rapid growth. This transition requires greater efforts to deepen social inclusion in an aging society, and to strengthen the environmental sustainability of the development model. In addition, putting domestic innovation at the core of the development agenda brings new challenges for policy makers as the country develops high technology on its own. Against this background, policy recommendations are proposed.

A. Growth and Innovation

13. Keep the focus on services. The Plan’s focus on manufacturing is aligned with efforts to strengthen domestic innovation capacity in manufacturing and high technology, but this approach could undermine the expansion of the service sector and slow down development. Services play a significant role in improving production efficiency and promoting technical progress and innovation.

² The PRC’s water quality classification system is based on the purpose of use and protection target. Grade III includes water source protection area for centralized drinking water supply, sanctuaries for common species of fish, and swimming zones.

Moreover, the carbon footprint of services production is generally much smaller than that of manufacturers.³ To realize its potential as a source of growth, services should be given prominence in economic planning and a similar status to manufacturing in terms of fiscal incentives, resources allocation, and openness. A larger services sector would absorb labor surpluses from manufacturing and agriculture, and accommodate a significant share of the new workers entering the labor force each year. Furthermore, easing the employment rules for foreign workers as well as tax incentives could support high-value services, especially high-technology and financial services.

14. Upgrade human capital. While the Plan focuses on increasing years of education, tertiary education needs to be expanded as technological upgrading will require less low- and mid-skilled labor, but high-skilled one. The expected increased digitalization of the economy and the improved health and education services will also require upgraded human capital. Learning methods should encourage lifelong learning, creativity, innovation, and fostering problem-solving skills, with incentives at the firm level for the provision of on-the-job training. Promoting the use of English will facilitate the absorption of benefits deriving from technology transfers and innovation (footnote 3).

15. Support innovation. Innovation-driven growth is the key to long-term growth sustainability. Investments in R&D are envisaged in the Plan. In these efforts, it is important to ensure that a larger share of R&D spending is devoted to research, as typically most of the funding has been channeled to development. While public financial support is critical, the private sector can substantially contribute if private equity and venture capital are developed to increase financing options for innovative companies. The participation of universities and private foundations in financing R&D can also support government efforts. Selectivity is also important. The Plan's aim to advance innovation in multiple areas to become less dependent on foreign technology should be targeted for better results. It is recommended to focus on a reduced number of areas of advanced technology, while sourcing globally in others—an approach practiced by most advanced economies.

B. Dual Circulation Paradigm

16. Foster household consumption. To improve domestic demand, household consumption needs strengthening. Improvements in the provisioning of health and education services are needed to reduce precautionary savings—the PRC's gross domestic saving rate remains a world outlier at 44.0% of GDP in 2019. In addition, strengthened redistribution policies such as, for instance, a more progressive taxation system will shift resources to lower-income groups, boosting consumption as their propensity to spend tends to be higher. More affordable housing could support household consumption. Price increases in larger cities have made property unaffordable for the younger generation. However, policies to increase fertility rates and to advance urbanization hinge on affordable living space in cities. Actions to develop affordable housing should be coupled with stricter controls to

³ ADB. 2009. Rebalancing Growth in PRC: Services Sector Development. ADB East Asia Observations and Suggestions Series. No. 2009-7. Manila.

contain speculative purchases, including the introduction of a property tax to rein in speculative real estate investment and provide revenue for local governments to develop affordable housing.

17. Increase economic efficiency. Economic efficiency is vital for the success of the dual circulation paradigm. Improving the efficiency of SOEs remains key given its monopolistic structure. Lowering access barriers and improved enforcement of the antitrust law will help to reduce market concentration, fostering competitiveness. This will result in lower production costs and prices, increasing the affordability and quality of the products and services provided, boost consumption and the role of domestic demand. The increased market liberalization will result in greater private sector participation in the economy, bolstering economic efficiency. Efforts are needed to remove entry barriers in services, mostly in health and education, which are essential to address the challenges of an aging society and the technological upgrading of the economy.

18. Strengthen institutions and capacity to support reforms. The transition to a development model that shifts the focus toward human well-being requires strengthened institutional capacity. This is particularly important at the local level and in lagging regions, where most of the public investments and services to support high-quality development must be delivered. In this context, reforms in central-local government fiscal relations should be advanced. As local governments provide most public education and health care services, their revenue base should be broadened, and their financial management strengthened to ensure adequate public service provisioning.

C. Environment and Climate Change

19. Ambitious environmental targets. Peaking carbon dioxide emissions before 2030 requires more ambitious energy and carbon intensity targets. For instance, a reduction in carbon intensity by 23% from the 2020 level instead of the proposed 18% would increase chances for success. While the Plan does not include a cap on energy consumption, provincial plans could set an ambitious target paired with tighter energy efficiency regulations. Incentives to develop innovative energy efficiency technologies with support from the private sector are critical to reducing energy intensity and should include penalties for industries that fail to meet the benchmark.

20. Foster low-carbon development and the circular economy. To scale-up low-carbon development, more investments in strategic clean and low-carbon technologies (i.e., carbon, capture utilization and storage, and green hydrogen technologies), and more market instruments that treat carbon emission allowances and credits as assets are needed. For instance, the launch of the national pilot for the Emissions Trading System could pave the way for the first carbon emission futures supported by reforms on the co-benefits of reducing greenhouse gas and waste emissions, emission controls enforcement and monitoring, and green technological innovation. Also recommended are improving water and land management for low-carbon cities; and adopting a circular economy blueprint that considers environmental, economic, and social costs across cities and product life cycles.

D. Urban–Rural Inequalities and Demographic Trends

21. **Accelerate rural development.** Creating employment opportunities in rural areas to encourage labor migrants to return, and diversifying income generating activities (i.e., agri-services, ecotourism, and green jobs) to retain people in rural areas are essential to closing the urban–rural divide. Areas of focus could include (i) rural land reform to enable farm upscaling, leasing, and modernization; (ii) actions to increase resilience of agricultural value chains through climate-smart technologies and climate-resilient infrastructure; (iii) fiscal incentives to attract private investments to rural areas and promote the development of micro, small and medium-sized enterprises; (iv) improved quality of and access to public services and skill development programs for returning migrants; and (v) strengthening the management of ecosystems to conserve biodiversity and protect the income of those who depend on natural resources for their livelihood, through nature-based solutions.

22. **Establishing a three-tiered elderly care system.** The Plan stresses the importance of an inclusive long-term elderly care system, which is still in its infancy. The establishment of a functioning three-tiered elderly care system with home-based care as core support, community care as necessary support, and residential care as supplementary support requires attention. Needs are particularly acute in rural areas where home- and community-based care services are underdeveloped. A sustainable financial framework is needed for this to succeed, funded by both public and private sources. Better quality, cost-effective, and more responsive services for elderly care could be achieved by reforming the current input-based subsidy scheme to focus on services and performance. Examples include subsidies for people receiving services (rather than for facilities or number of beds) and vouchers for beneficiaries to choose service providers based on the quality of services.

一、综述

1. 中华人民共和国（中国）“国民经济和社会发展第十四个五年规划”（“十四五”规划）（2021—2025年）于2021年3月由第十三届全国人民代表大会审议通过。“十四五”规划不再像过去那样强调经济增长和结构性调整，而是关注增长的可持续性和人民生活质量。
2. “十四五”规划提出，要继续努力缩小城乡差距，为2030年前二氧化碳排放达到峰值和2060年前实现碳中和铺平道路。这些目标在中国“2035年远景目标”设想的长期愿景中进一步强调。2035年远景目标提出，到2035年，中国将达到中等发达国家水平，并成为全球创新领军人。
3. 新的政策指导方针将在未来几个月得以完善，在实施蓝图中落实改革设想。创新驱动型增长、低碳发展、提高社会包容性和人口老龄化都是值得关注的发展重点。在这些领域做出正确的政策选择是成功的关键。为此，本政策说明提出了一些政策建议。

二、“十四五”规划的主要目标

4. “十四五”规划的目标分为五类：经济发展、创新、民生福祉、绿色发展以及粮食和能源安全，这些量化目标共有20个，其中8个为约束性指标。¹值得注意的是，涉及民生福祉的目标有7项，其占比高于以往任何一个五年规划。本节重点介绍“十四五”规划四个主要领域的关键目标。

A. 增长与创新

5. **首次设定年度GDP增长目标。**与以往不同，“十四五”规划不再设定一个五年的GDP增长预期性目标，而是设定每年的增长目标，使政策制定者能够更灵活地根据宏观经济状况对其进行调整。中国的长期发展目标是到2035年成为中等发达国家，届时经济总量将翻一番，而这需要未来15年的年均GDP增长达到4.7%。其他目标还包括实现劳动生产率增速快于GDP增速，这在社会老龄化和劳动力萎缩的背景下十分重要。
6. **制造业和数字化重要性日益突出。**“十四五”规划提出，要使制造业占GDP的比重在经历了10年下降后保持稳定。为支持制造业发展，可以采取财政激励、拓宽信贷渠道和提高工业用地利用效率等手段。经济数字化将继续发展，数字经济占GDP的比重将从2020年的7.8%提高到2025年的10%。将支持云计算、大数据、互联网（包括物联网和工业互联网）、区块链、人工智能、虚拟现实和增强现实等技术的发展。
7. **创新是现代化议程的核心。**实施基础研究十年行动计划以及每年至少将研发经费增加7%，是中国为提高科技能力而采取的核心举措。预计这些举措将推动自主创新，减少中国对外国产品（主要是高科技制成品）的依赖。中国将重点发展航空航天、生物技术、神经科学、人工智能、量子计算和半导体等领域；从长远来看，中国有望成为这些领域的全球领导者。

¹ “十四五”规划的8个约束性指标分别为：劳动年龄人口的平均受教育年限达到11.3年；单位GDP能耗比2020年降低13.5%；单位GDP二氧化碳排放比2020年降低18%；地级及以上城市空气质量优良天数比率达到87.5%；地表水达到或优于Ⅲ类水体比例达到85%；森林覆盖率达到24.1%；粮食综合生产能力超过6.5亿吨；能源综合生产能力超过46亿吨煤当量。

B. 双循环

8. **新的发展模式。**“十四五”规划提出了“双循环”这一新的发展理念。该理念的目标是：在产业政策、自主创新和扩大国内消费的支持下，加强供应链，扩大国内需求。该发展模式的设想是为减少对重工业的依赖，提出一个新的目标——将战略性新兴产业（即先进制造业，包括高端机械设备、先进材料和电动汽车等）占GDP的比重从2019年的11.5%提高到2025年的17%以上。该发展模式还包括实施改革，通过激励机制和逐步采用市场化薪酬制度，增加市场竞争，提高国有企业的效率。

C. 环境与气候变化

9. **实现碳中和。**“十四五”规划强调绿色发展理念，在8个约束性目标中，有5个涉及绿色生态。在2021—2025年期间，致力于将单位GDP的能源消耗和碳排放强度分别降低13.5%和18%。其他约束性目标包括：（1）城市空气质量优良天数占比达到87.5%（2020年为87%）；（2）地表水达到或优于Ⅲ类水体的比例达到85%（2020年为83.4%）；（3）森林覆盖率达到24.1%（2019年为23.2%）。² 作为一个非约束性指标，非化石能源在一次能源消耗量中的比重将由“十三五”的15%提高到“十四五”的20%。“十四五”规划将通过在交通运输、能源生产和废弃物管理政策等方面采取新方法，促进低碳发展和循环经济发展。

D. 城乡不平衡和人口结构趋势

10. **城乡融合发展。**在促进区域发展更为均衡的背景下，“十四五”规划提出加快构建一体化发展模式，缩小城乡差距。“十四五”规划强调，要全面推进农村转型，包括促进农业现代化，推广绿色智能农业，从而在农村地区创造有吸引力的就业和投资机会。在城市，城镇化水平将从2019年的约60%提高到2025年的65%，通过与跨省区发展计划相协调，优先为外来务工人员提供更平等的公共服务。在300万~500万人口的城市，取消户口这一户籍限制，增加经济适用房供应，以促进劳动力流动。

11. **改善民生福祉。**“十四五”规划概述了旨在提高居民生活水平和提供优质公共服务的行动，包括采取以下举措：（1）提高居民收入；（2）增加就业机会；（3）建立包容性的高质量教育和卫生系统；（4）加强社会保障体系建设。在直接涉及民生福祉的7个目标中，有3个是新目标：（1）城镇调查失业率上限为5.5%；（2）每千人口拥有执业助理医师数达到3.2人；（3）每千人口拥有3岁以下婴幼儿托位数达到4.5个。

三、政策建议

12. “十四五”规划提供了一个独一无二的机遇，通过应对几十年快速增长导致的社会与环境挑战，助力中国迈向高质量发展。为实现这一转型，中国需要付出更大努力，不断增强老龄化社会

² 中国的水质分类制度是基于使用目的和保护目标。Ⅲ类标准包括饮用水集中水源保护区、常见鱼类保护区、游泳区；Ⅳ类标准涉及提供一般工业用水的水体及人类不直接接触的休闲水域；Ⅴ类标准主要适用于提供农业用水和一般景观用水的水体。

的社会包容性，提高发展模式的环境可持续性。此外，随着中国自主发展高科技，将国内创新置于发展议程的核心会使政策制定者面临新的挑战。在此背景下，本报告提出如下政策建议。

A. 增长与创新

13. **重点关注服务业。**“十四五”规划将重点放在制造业，与加强国内制造业和高科技创新能力的努力保持一致，但可能不利于服务业的发展，并减缓发展速度。服务业在提高生产效率、促进技术进步和推动创新方面发挥着重要作用。此外，服务业生产的碳足迹通常显著低于制造业。为发挥服务业作为增长来源的潜力，应将服务业放在经济规划的突出位置，并在财政激励、资源配置和对外开放方面赋予其与制造业类似的地位。扩大服务业规模，将吸收制造业和农业的剩余劳动力，为每年进入劳动力市场的很大一部分新劳动者提供就业。此外，放宽外国劳动者就业规定以及实施税收优惠政策，可促进高价值服务业的发展，特别是在高科技和金融服务领域。

14. **提升人力资本。**虽然“十四五”规划的重点是增加受教育年限，但也需要扩大高等教育规模，因为技术升级需要的是高技能劳动力，而不是中低技能劳动力。预期经济数字化程度的提高以及卫生和教育服务的改善也将要求提升人力资本。学习方法应鼓励终身学习、创造、革新以及培养解决问题的技能，同时，应在公司层面采取奖励措施，提供在职培训。促进使用英语将有助于吸收技术转让和创新所带来的效益。³

15. **支持创新。**创新驱动型增长是实现长期可持续发展的关键。“十四五”规划提出，要加大研发投入。在这些努力中，确保更高比例的研发支出用于研究非常重要，因为大多数资金通常被用于发展。虽然公共财政支持至关重要，但如果能撬动私募股权投资和风险投资，增加创新型企业的融资渠道，私营部门也将能够做出巨大贡献。大学和私人基金会参与资助研发，也可以支持政府的努力。创新领域的选择也非常重要。“十四五”规划致力于在多个领域推动创新，减少对外国技术的依赖，以实现更好的效果。建议将重点放在少数先进科技领域，而在其他领域则进行全球采购——这是大多数发达经济体所采用的方法。

B. 双循环模式

16. **促进居民消费。**要扩大内需，就必须促进居民消费。为此，需要改善卫生和教育服务，减少预防性储蓄——2019年，中国的家庭储蓄占GDP的比率仍高达44.0%，远超世界平均水平。此外，完善再分配政策（如高累进税制）有助于把资源转移到消费倾向往往更高的低收入群体，进而促进消费。加大经济适用房供应可以支持居民消费。大城市房价上涨，导致年轻一代买不起房。然而，旨在提高生育率和推进城市化的政策取决于城市中负担得起的居住空间。需要加大力度开发经济适用房，同时采取更严格的调控措施，遏制投机性购房。在这方面，开征房产税将有助于抑制房地产市场的投机性投资，并为地方政府开发经济适用房提供资金支持。

17. **提高经济效率。**经济效率是双循环模式能否成功的关键。鉴于国有企业的垄断地位，提高效率仍然是关键。降低准入壁垒和加强反垄断执法，将有助于降低市场集中度，促进良性竞争。这将有利于降低生产成本和价格，提高产品和服务的财务可负担性和质量，进而促进消费，增强

³ 中国的水质分类制度是基于使用目的和保护目标。III类标准包括饮用水集中水源保护区、常见鱼类保护区、游泳区；IV类标准涉及提供一般工业用水的水体及人类不直接接触的休闲水域；V类标准主要适用于提供农业用水和一般景观用水的水体。

内需对经济增长的拉动作用。市场自由化程度的提高将促使私营部门更多地参与经济活动，进一步提高经济效率。需要加大力度，消除服务业准入壁垒，特别是在卫生和教育领域，这对解决社会老龄化和经济技术升级的挑战至关重要。

18. 加强制度与能力建设，支持改革。为向注重人民福祉的发展模式过渡，需要加强制度能力。这一点在地方层面和落后地区尤其重要，大多数旨在支持高质量发展的公共投资和服务必须流向地方层面和落后地区。在此背景下，应进一步推进改革，协调中央与地方的财政关系。由于大部分公共教育和医疗卫生服务由地方政府提供，因此需要扩大地方政府的财政收入基础，加强财政管理能力，确保公共服务供给到位。

C. 环境与气候变化

19. 宏大的环保目标。要在2030年前达到二氧化碳排放峰值，需要制定更宏大的能源和碳强度目标。例如，在2020年的基础上将碳强度降低23%，而不是提议的18%，会更有可能实现该目标。虽然“十四五”规划并没有设定能源消费总量的上限，但省级规划可以设定宏大的上限目标，同时实施更严格的能效法规。在私营部门的支持下，加大对创新能效技术的开发力度对降低能源强度至关重要。此外，对未能达到基准要求的工厂和工业，应采用包括处罚在内的奖惩机制。

20. 促进低碳发展和循环经济。要扩大低碳发展规模，就需要加大对战略性清洁与低碳技术（即碳排放、捕集利用和储存技术以及绿色氢技术）的投资，增加将碳排放补贴和信贷视为资产的市场工具。例如，在减少温室气体和废弃物排放、实施排放控制执法与监测以及推动绿色技术创新等具有联动效益的改革支持下，启动全国“碳排放交易系统”试点，可以为开发首个碳排放期货产品铺平道路。此外，还建议打造低碳城市，改善水资源和土地管理，并推广循环经济，降低各城市和产品生命周期的环境、经济和社会成本。

D. 城乡不平衡和人口结构趋势

21. 加快农村发展。在农村地区创造就业机会，鼓励外出务工人员返乡就业，并增加农业以外的创收活动（如农业服务、生态旅游和绿色工作岗位），留住农村地区的人口，这对于缩小城乡差距至关重要。重点领域可包括：（1）推进农村土地改革，促进农业规模化、租赁化和现代化；

（2）采取政策行动，通过气候智能型技术和具有气候韧性的基础设施建设，提高农业价值链的韧性；（3）提供财政激励，吸引民间资本到农村地区投资，促进中小微企业的发展；（4）提高公共服务和技能培训项目的质量和可获得性，为返乡务工人员提供更好的服务；以及（5）加强生态系统治理，以保护生态多样性，并保护那些依靠自然资源谋生者的生计。

22. 建立三级养老服务体系。“十四五”规划强调，由于中国的养老体系建设仍处于发展起步阶段，建设有包容性的长期养老体系十分重要。要加强对构建“以居家养老为基础、社区养老为依托、机构养老为补充”高效三级养老体系的重视。在居家养老和社区养老服务不足的农村地区，这些需求尤其迫切。为满足这些需求，需要建设一个由公共和私营部门提供资金支持的可持续财政框架。通过改革当前基于投入补贴的机制，重点关注服务和绩效，才能提供更高质量、更经济和更能满足社会需求的服务。例如，可向接受服务的人（而不是基于设施或床位数）提供补贴，让受益人根据服务质量选择服务提供者等。

The 14th Five-Year Plan of the People's Republic of China —Fostering High-Quality Development

This policy notes outlines recommendations for the 14th Five-Year Plan (2021–2025) for National Economic and Social Development of the People's Republic of China that highlights high-quality green development. The plan emphasizes innovation as the core of modern development, relying on the dual circulation strategy as the growth paradigm coupled with reforms to increase living standards. Building on the achievements of the 13th Plan, it aims to reduce the carbon intensity of the economy and peak carbon dioxide emissions before 2030. This policy note's recommendations focus on innovation-driven growth, low-carbon development, integration of urban–rural areas with deeper social inclusion, and population aging as priorities.

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中华人民共和国第十四个五年规划——推进高质量发展

中华人民共和国“国民经济和社会发展第十四个五年规划”（“十四五”规划）（2021—2025年）强调高质量、绿色发展，本政策说明对这一规划提出了建议。“十四五”规划强调，创新是现代发展的核心，要依托双循环战略作为增长模式，结合各项改革，提高人们的生活水平。基于“十三五”规划取得的成果，“十四五”规划的目标是降低经济的碳强度，并在2030年之前达到二氧化碳排放峰值。针对创新驱动型增长、低碳发展、城乡融合与提高社会包容度、人口老龄化等重点领域，本政策说明提出了政策建议。

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