



基础设施治理

支持 发展中国家建设 高质量基础设施

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亚洲开发银行

可持续发展和气候变化局

局长兼首席合规官

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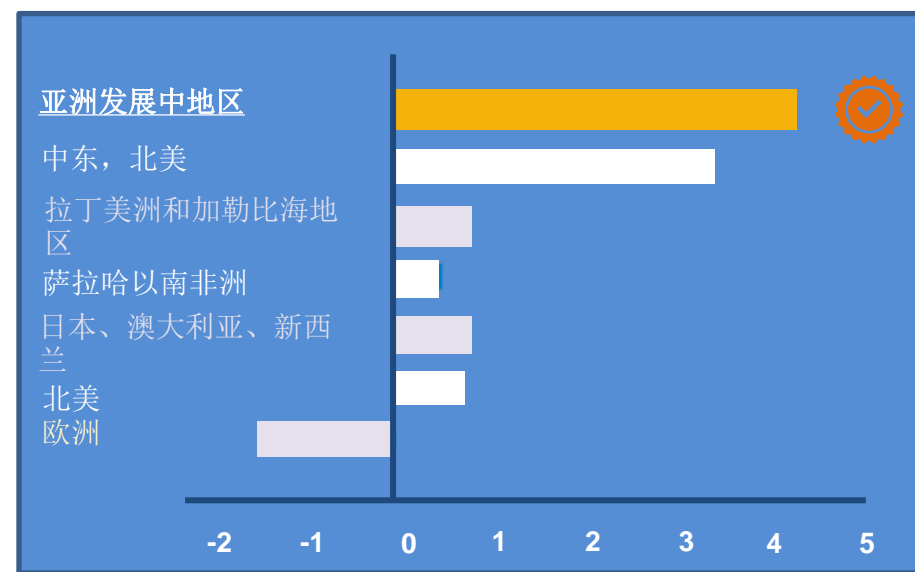


亚太地区的发展挑战



资料来源: ADB. 2020. Asian Development Outlook Update, September 2020.
<https://www.adb.org/publications/asian-development-outlook-2020-update>

图 2: 温室气体（二氧化碳当量）世界各地区年均排放量，1990-2014（%）



资料来源: *Asia's Journey to Prosperity Policy, Market and Technology over 50 years*. Asian Development Bank, 2020.

Note: Includes emissions from land use, land-use change, and forestry.

Source: Author's calculations from World Resources Institute. CAIT Climate Data Explorer.
<http://cait.wri.org> (accessed 26 October 2019).

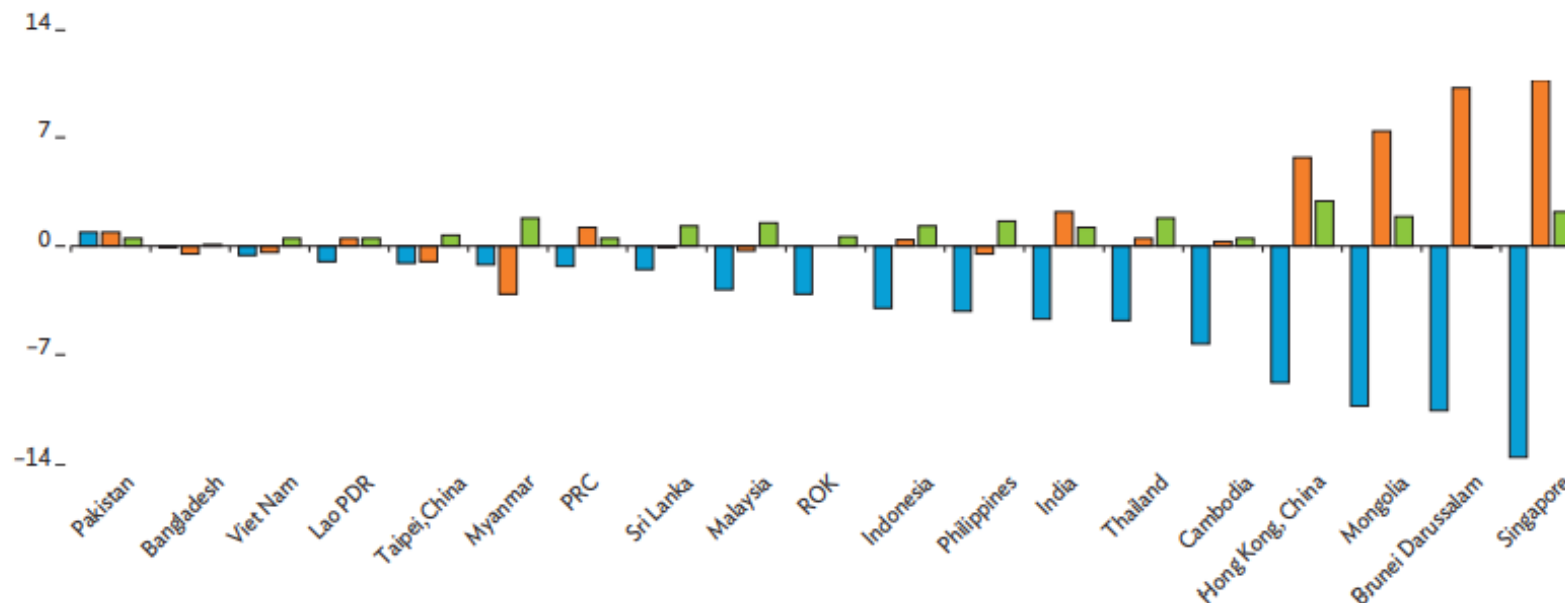
后疫情时代基建投资的财政空间有限

图 3：后疫情时代基建投资的财政空间将会下降

Fiscal policy will remain accommodative in much of the region in 2021; consolidation is expected for 2022 or beyond.

2020
2021
2022

Fiscal balance as % of GDP, change from the previous year



GDP = gross domestic product, Lao PDR = Lao People's Democratic Republic, PRC = People's Republic of China, ROK = Republic of Korea.

Notes: Fiscal impulse is defined as the change in the fiscal balance, expressed as percentage of GDP, from the previous year. Positive changes in the fiscal balance indicate fiscal consolidation; negative changes indicate fiscal expansion. Data for 2021 and 2022 are forecasts.

Sources: FocusEconomics 2021 FocusEconomics Consensus Forecast reports, September; Asian Development Bank estimates

... 亚洲国家政府在现有优先支出项目外采取了广泛的危机应对措施

22.6万亿美元

- (i) 维持增长势头
- (ii) 消除贫困

每年1.5 万亿美元 (2016–2030)

3.4万亿美元

应对气候变化

每年2 千亿美元 (2016–2030)

+ 16.5万亿美元

实现可持续发展目标 (2019–2030)

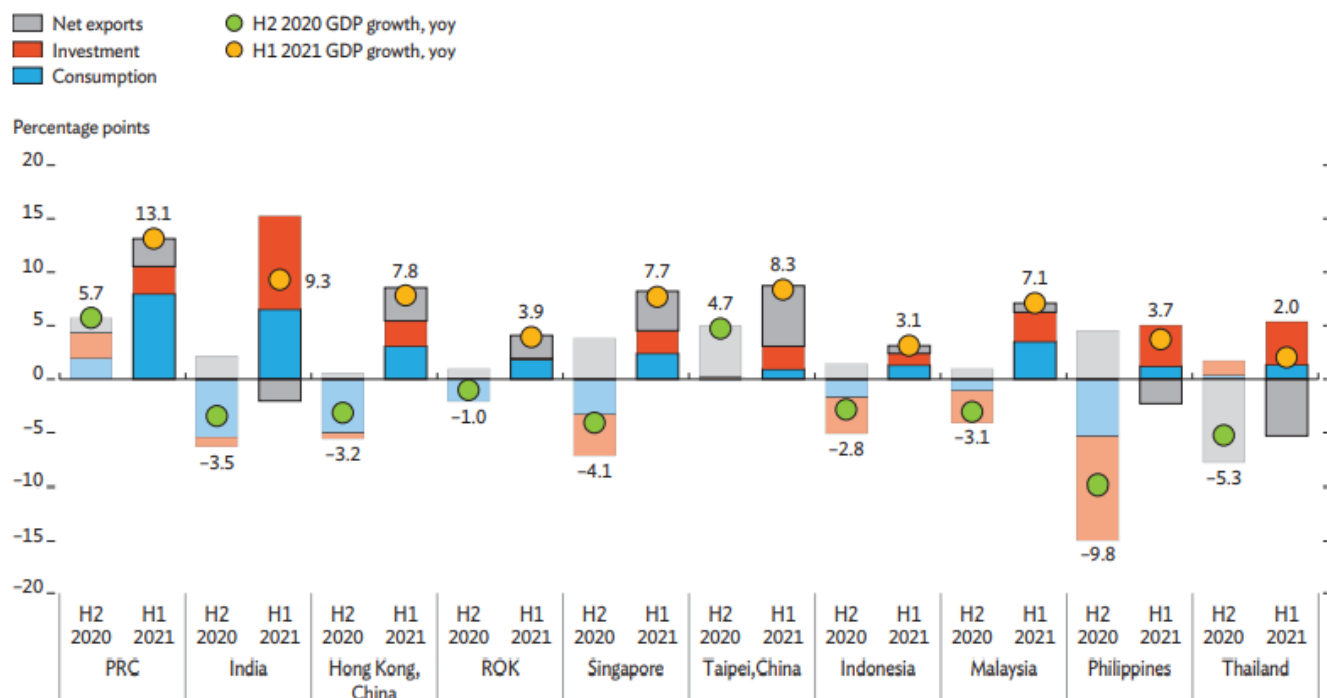


疫情爆发后
对可持续发展目标的新承诺 (2020–2030)

数据来自多个来源，仅供参考

疫情对亚太地区的影响

图 4：疫苗接种和疫情应对做得更好的经济体表现更好

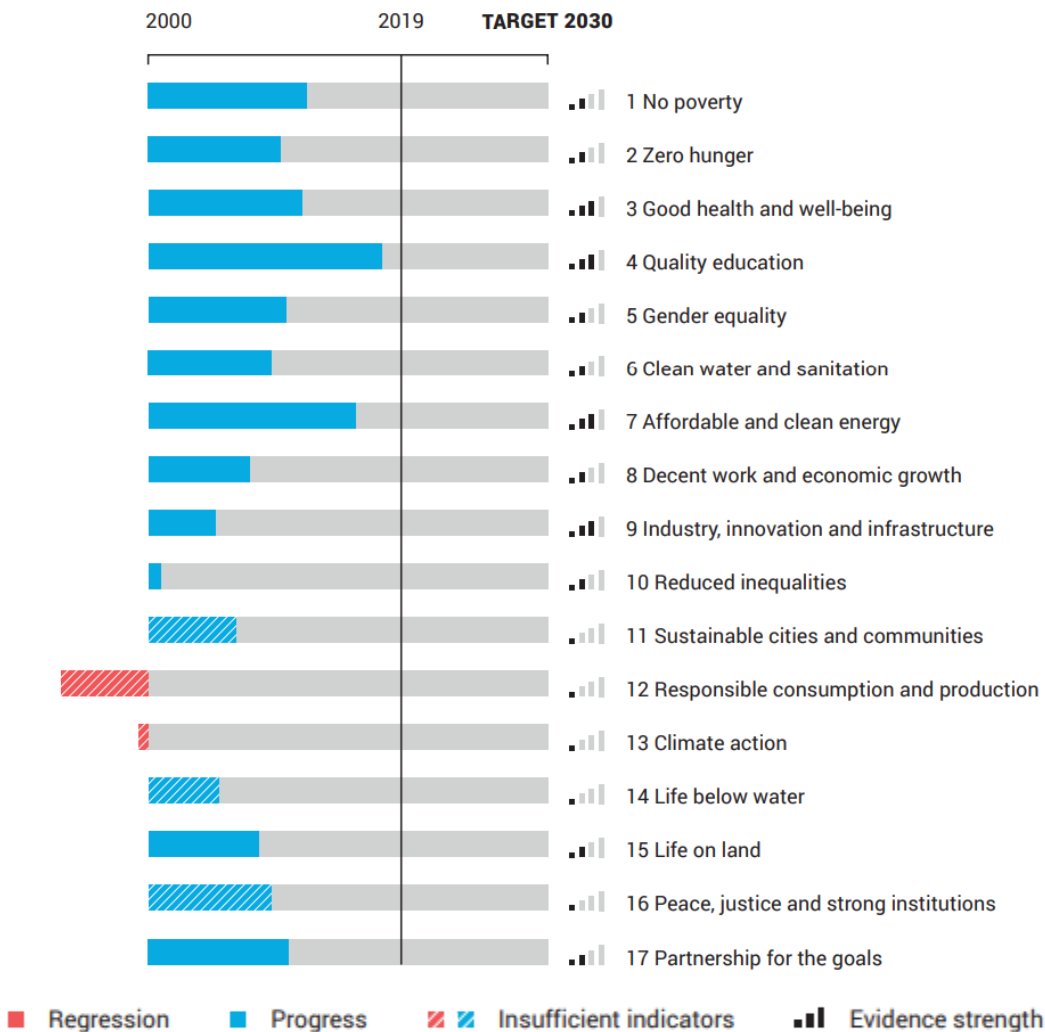


亚洲发展中地区的复苏状况各有不同。疫情应对更好的经济体预计将有更强劲的增长。

资料来源: Asian Development Bank Update September 2021

亚行2021年亚洲发展展望更新，2021年9月
<https://www.adb.org/publications/asian-development-out>

图 5：即使在疫情爆发前，本地区在实现17个可持续发展目标的进展上都不顺利



■ Regression ■ Progress ■ Insufficient indicators ■ Evidence strength

资料来源: United Economic and Social Commissions for Asia and the Pacific 2020. Asia and the Pacific SDG Progress Report 2020.

解读高质量基础设施投资(QII)

QII旨在从三个方面提升基础设施投资的性价比

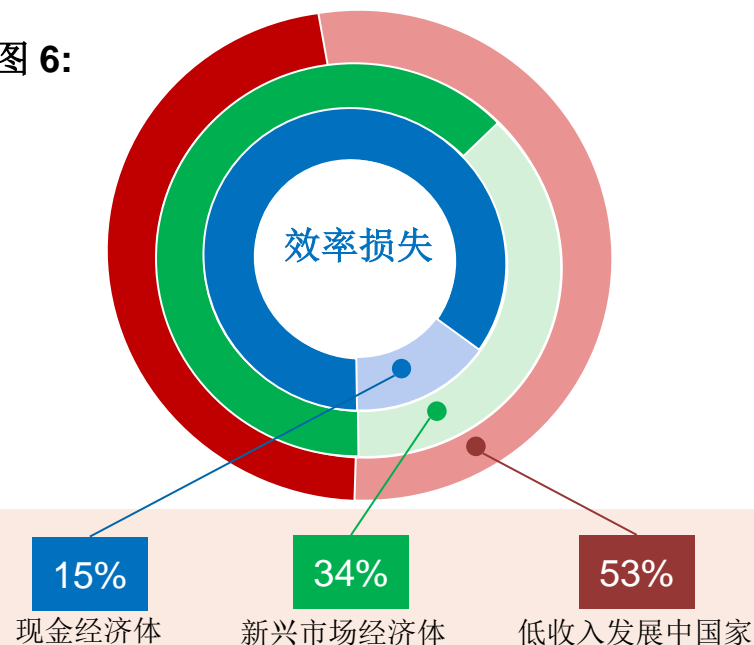
1. 效率

此路不通

各国基础设施支出的资金浪费率高达百分之三十到五十。

(百分比根据与最优效率的差距折算)

图 6:

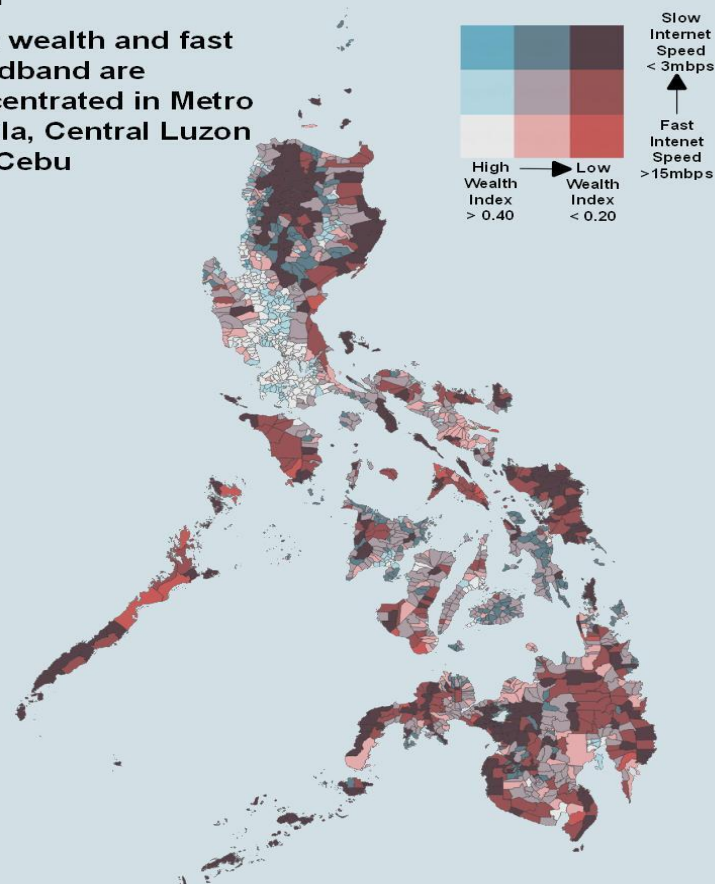


资料来源: IMF. 2020. [Well Spent : How Strong Infrastructure Governance Can End Waste in Public Investment](#). USA.

2. 可及性

图 7:

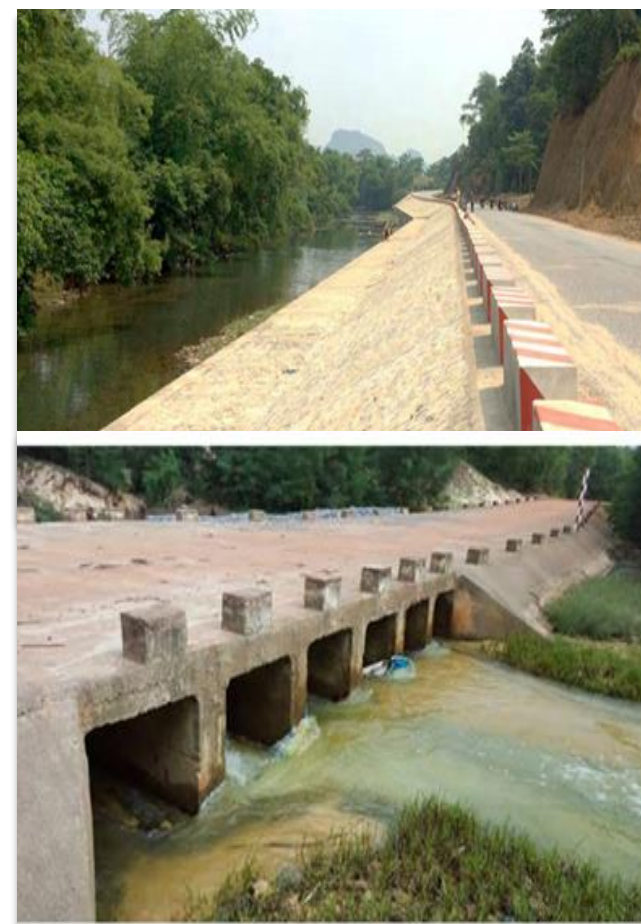
High wealth and fast broadband are concentrated in Metro Manila, Central Luzon and Cebu



Note: Wealth index ranges from 1 (wealthiest) to 0 (poorest). Municipalities with high wealth/fast internet are within the top 25th percentile while municipalities with low wealth/slow internet are within the bottom 75th percentile.
Source: Thinking Machines Data Science and Speedtest by Ookla

3. 可持续性

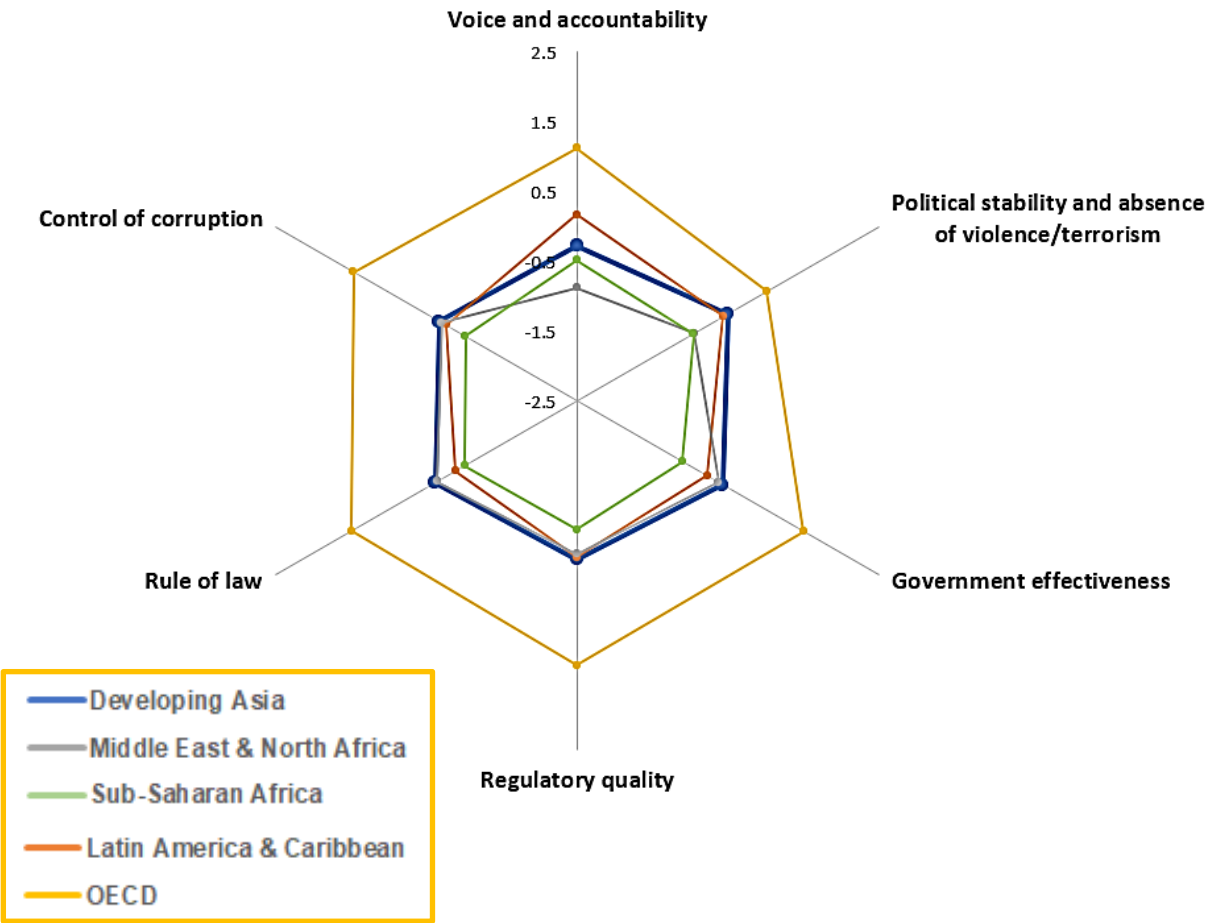
图 8:



亚洲发展中地区的治理挑战

图 9:

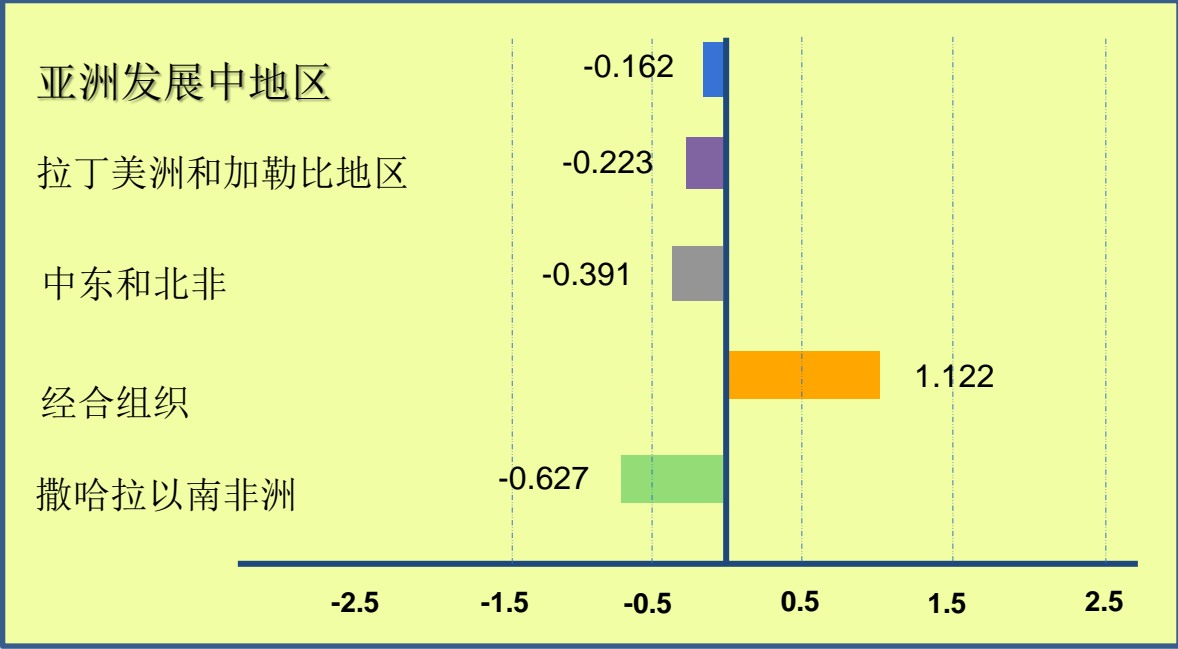
全球治理指数估计，2018



资料来源: (Figures 11,12) The Worldwide Governance Indicators and ADB calculations;
A. Baluga, B. Carrasco. 2020. [The Role of Geography in Shaping Governance Performance.](#)

图 10:

WGI: 治理指数估计，2018

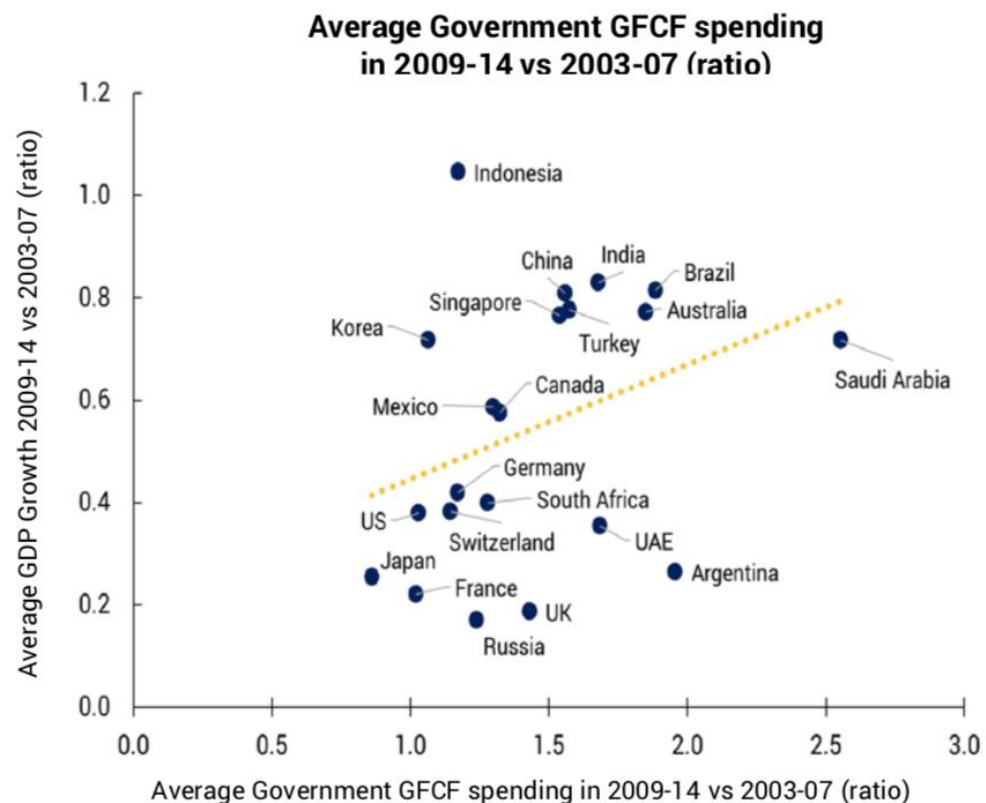


备注：估计值为每个次区域2017年不同治理指标的非加权平均值，这些指标包括表达与问责、政治稳定、政府效能、监管质量、法治和腐败控制。数值范围从-2.5到+2.5，数值越大表明治理越好。

疫情后复苏： 基础设施投资促进经济持续复苏

图 11:

全球金融危机后，增加公共投资的国家增长更好



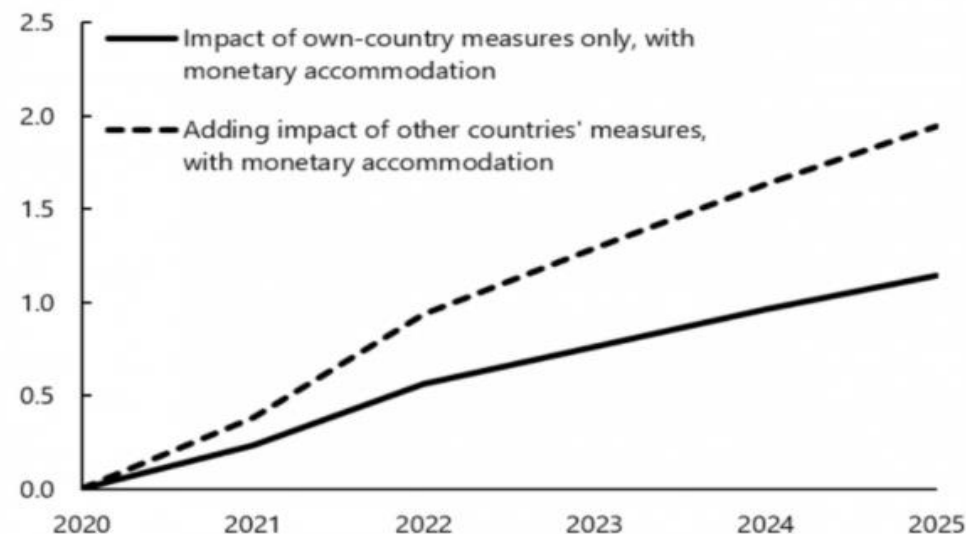
资料来源: Global Infrastructure Hub 2020

图 12:

全球共同推动基础设施投资的影响

A synchronized approach

Global GDP could rise by nearly 2 percent if countries simultaneously invested in high-quality infrastructure improvements.
(percent deviation from baseline)



如果各国同时采取行动，公共基础设施投资会通过贸易连接恢复国内和全球经济增长

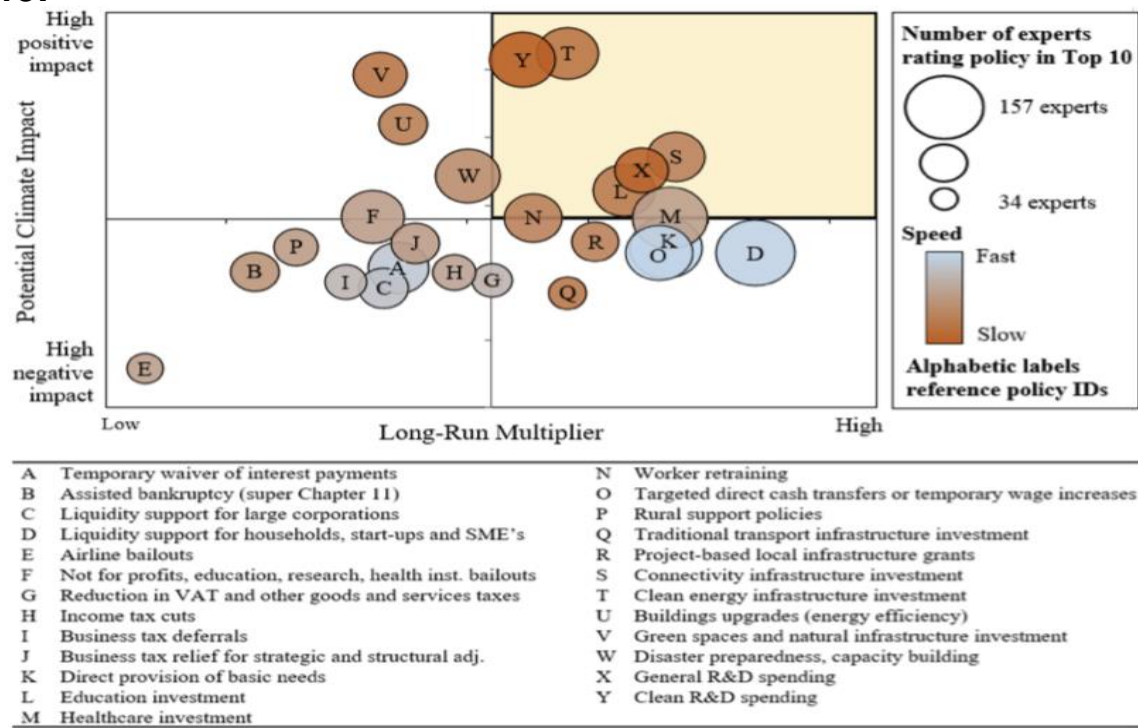
资料来源: IMF: G-20 Surveillance Note, November 2020

亚行和双边/多边机构的作用

展示知识解决方案

1. 在业务运行中体现QII

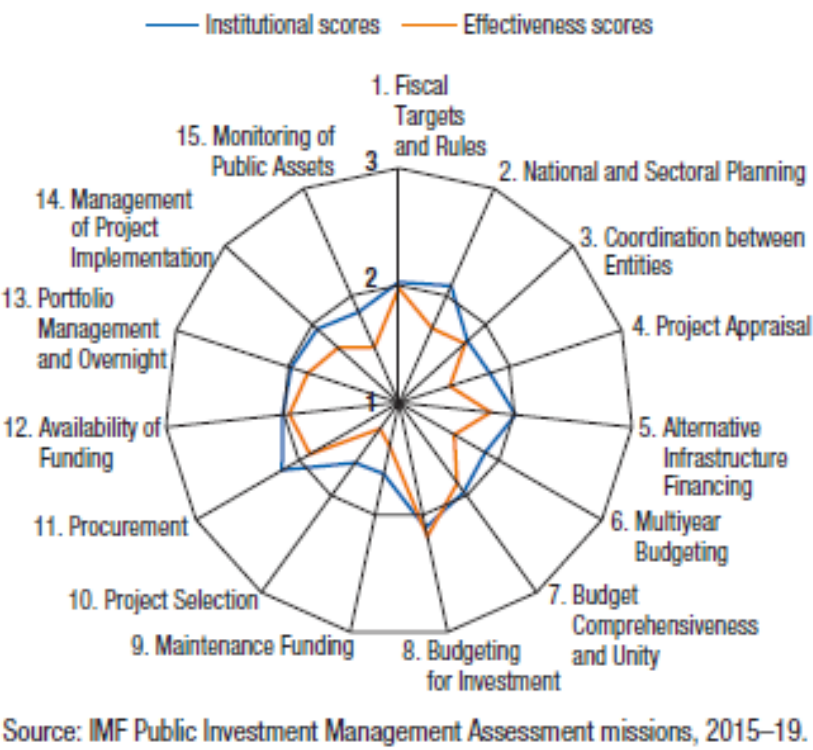
图 13:



新常态下气候投资是保持增长和可持续性的关键

2. 知识产生/发布

图 14:



公共投资的制度优势和有效性

资料来源: Hepburn, C., O'Callaghan, B., Stern, N., Stiglitz, J., and Zenghelis, D. (2020), 'Will COVID-19 fiscal recovery packages accelerate or retard progress on climate change?', Smith School Working Paper 20-02.

G. Schwartz, M. Fouad, T. Hansen, and G. Verdier.2020. [Well Spent : How Strong Infrastructure Governance Can End Waste in Public Investment.](#)

支持在亚太发展中地区建设高质量基础设施

图 15: 通过高质量基础设施投资建设可持续发展基础设施就是要.....



图 16: 亚行业务运行与QII

图例: -- 亚行政策工具/筛选条件 --QII 原则



PPP项目的演变



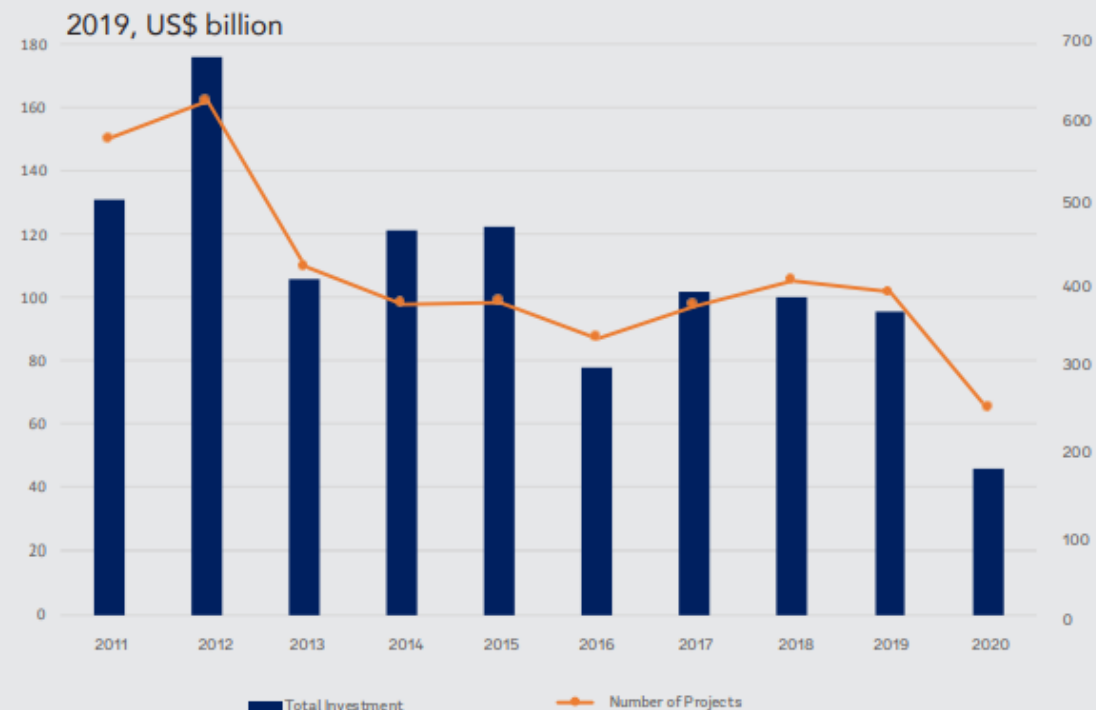
- 2012年以来PPP项目的投资金额和数量呈现下降趋势。
- 对私企来说，PPP项目的相关风险过高且无法预测。
- 政府则认为没有充分实现物有所值。

Reference: Mark Moseley. 2020. Risk Allocation Reform and Creating More Collaborative PPPs. <https://www.adb.org/publications/restoring-confidence-public-private-partnerships>

图 17:

PPI数据库PPP项目汇总数据 2011-2020

Investment commitments in Infrastructure Projects with Private Participation in Emerging Market and Developing Economies (EMDEs), 2011-2020



世行，PPI数据库年报，2020

性价比评估

图 18:

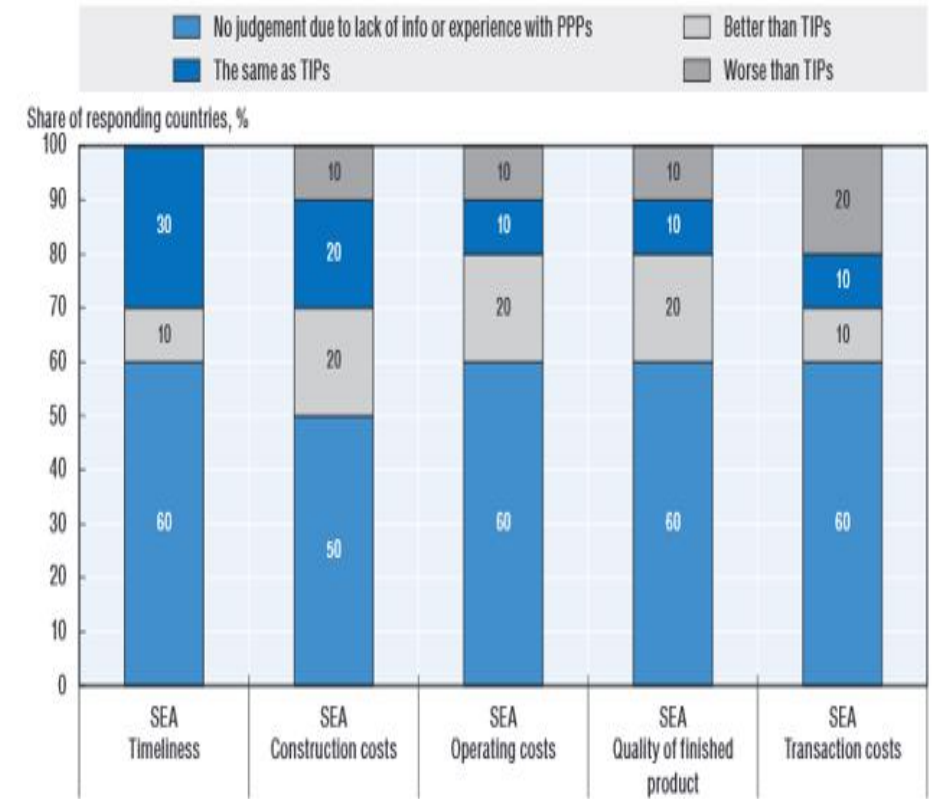
Dedicated PPP units and value for money assessment of PPPs and TIPs, 2018

	Use of public private partnerships	Existence of PPP unit				Use of absolute value for money assessments		
		Dedicated PPP unit reporting to Ministry of Finance	Dedicated PPP units reporting to line ministries	Other PPP unit	No dedicated PPP unit exists in central/federal government	For PPPs	For PPPs	For TIPs
Brunei Darussalam	✓	✓				⊙	⊙	□
Cambodia	✓	✓				⊙	●	●
Indonesia	✓	✓				⊙	●	●
Lao PDR	✓				✓	●	●	●
Malaysia	✓			✓		●	●	●
Myanmar	✓				✓	⊙	⊙	⊙
Philippines	✓		✓			●	●	●
Singapore	✓				✓	⊙	⊙	⊙
Thailand	✓	✓				●	●	●
Viet Nam	✓		✓			●	●	●
SEA Total	10	4	2	1	3			
● Yes, for all projects						5	7	7
⊙ Yes, for those above certain monetary threshold						2	2	2
⊙ Yes, ad hoc basis						3	1	0
○ Yes, other						0	0	0
□ No						0	0	1
Australia	✓		✓			●	●	●
Japan	✓	✓				⊙	●	●
Korea	✓							
New Zealand	✓	✓				●	●	⊙
OECD Total	26	12	8	2	11			
● Yes, for all projects						9	11	9
⊙ Yes, for those above certain monetary threshold						5	4	5
⊙ Yes, ad hoc basis						2	2	1
○ Yes, other						5	3	4
□ No						5	6	5
x Not applicable / survey not answered						0	0	2

Sources: For SEA countries, OECD (2018) Budget Practices and Procedures Survey for Asian Countries. For OECD countries, OECD (2018) Capital Budgeting and Infrastructure Governance Survey.

图 19:

Countries' assessments of PPPs relative to TIPs along various dimensions, 2018



Source: For SEA countries: OECD (2018) Budget Practices and Procedures Survey for Asian Countries.

支持高质量基础设施PPP项目



亚行图片

各国需要提升对传统基础设施和公司合作伙伴关系（PPP）的认识，从上游到下游**贯彻QII原则**

亚行PPP运行计划 2012-2020

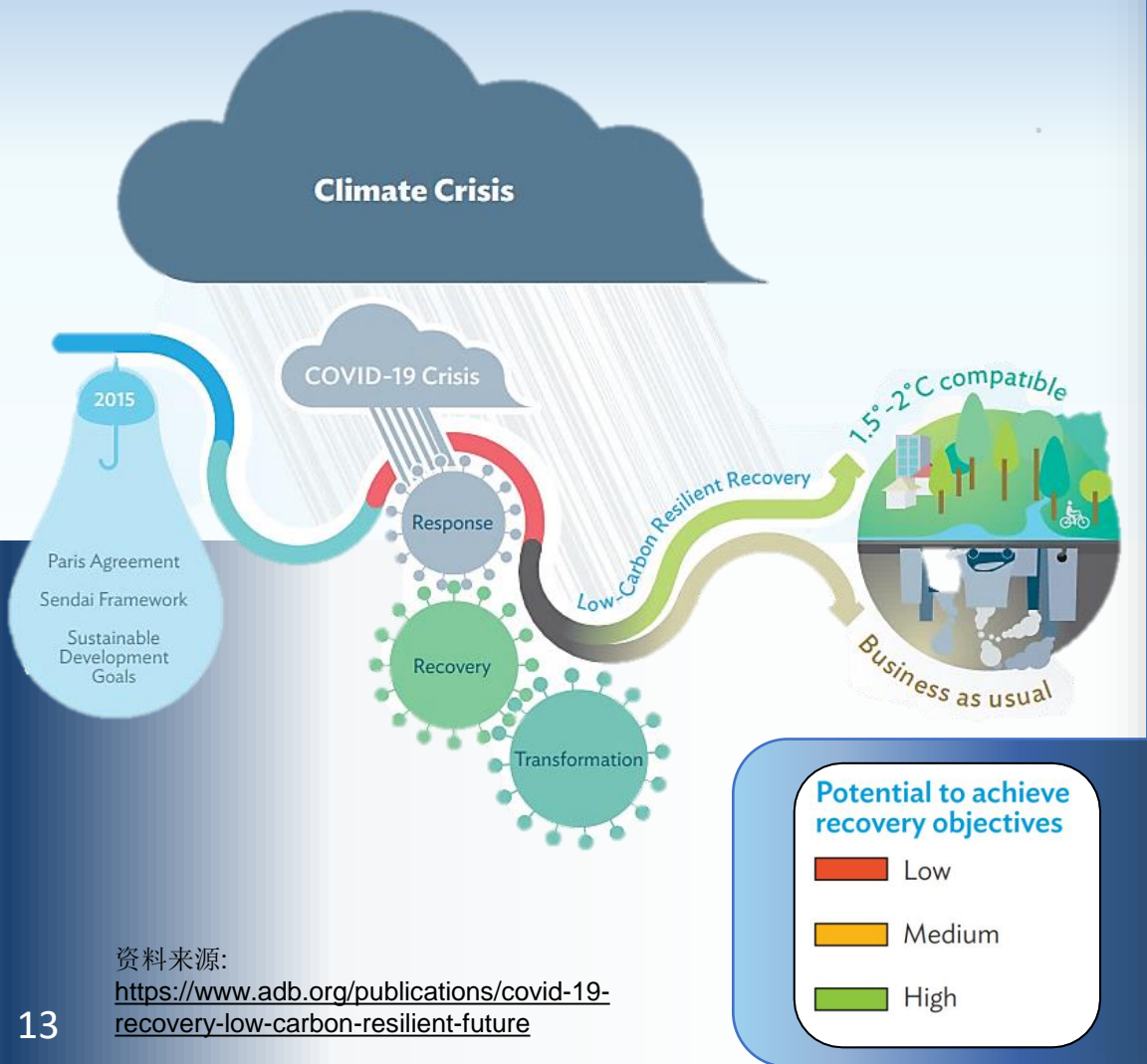
图 20:

Pillar 1	Pillar 2	Pillar 3	Pillar 4
Advocacy and capacity development	Enabling environment	Project development	Project financing
<ul style="list-style-type: none">• Create awareness• Invoke leadership• Identify PPP potential in sector planning and the private sector development agenda• Development capacity of government and ADB staff• Enhance external knowledge management links	<ul style="list-style-type: none">• Develop policy, legal, regulatory, and institutional framework to facilitate, guide, and manage the development of PPPs (country- or sector-specific)	<ul style="list-style-type: none">• Align ADB project cycle to the PPP development process• Assist in the development of pathfinder projects• Provide support (including advisory support) throughout the process up to contract award and/or financial close that can come as expert support, tool kits, funding costs of transaction advisors, or procurement support	<ul style="list-style-type: none">• Provide credit enhancement products, e.g., equity, long-term debt, refinancing subordinate debt, cofinancing, and guarantees• Establish credit guarantee facility• Provide public sector financial support through schemes such as viability gap funding

反馈 / 设计指导

有韧性的复苏干预措施

图 20： 低碳和有韧性的复苏干预措施评估框架



资料来源：
<https://www.adb.org/publications/covid-19-recovery-low-carbon-resilient-future>

复苏措施	新冠疫情复苏措施的要求							
	Short Implementation Timeline	High Employment Intensity	Skills Development	Strong Supply Chain	High Economic Multiplier	Contribution to the Productive Asset Base	Support for Long-Term Transformation	Positive Environmental and Social Outcomes
低碳发展								
投资于低碳（可再生）能源生产和储能基础设施	Medium	High	High	Medium	High	High	High	High
扩大电网并进行现代化改造支持提升可再生能源占比	Medium	High	High	Medium	High	High	High	High
通过公共采购项目为公共建筑购买安装高效电器、灯具和数字装置	High	High	High	High	Medium	High	High	High
在受影响地区奖励住户进行翻新和改造，比如采用低能耗或零能耗措施	High	High	High	Medium	Medium	Medium	High	High
引入绿色税收制度，如碳税，最低碳价（工业）	Low	Low	High	Medium	High	Medium	High	High
规划城市绿色发展/再生和可持续空间（智能城市）	Low	Low	High	Medium	High	High	High	High
发展和扩大激进交通系统（全面普及公共交通/非小汽车出行）	Low	Low	High	Medium	High	High	High	High
气候和灾害韧性								
调整劳动力市场项目支持加强韧性的措施（如水源保持、造林）	High	High	Medium	Low	Medium	Medium	High	High
发展具备气候韧性的农业价值链	Medium	High	High	High	High	High	High	High
投资于保护性基础设施加强韧性（如海岸防护，防洪）	Medium	Medium	Medium	Medium	Medium	Medium	High	High
采取积极的劳动力市场政策和经济刺激政策支持在有韧性的行业创造就业	Medium	High	High	Medium	High	Medium	High	High
通过政策改革提升韧性（如生态系统服务付费计划）	Medium	Medium	Low	Medium	Medium	High	High	High
转变农村粮食和土地利用制度，转向可持续性和有韧性的农业生产	Low	Medium	High	High	High	High	High	High
对风险敏感的土地利用管理	High	Low	High	Medium	Medium	Medium	High	High

关键信息

- 采取“一个亚行”的做法。高质量基础设施需要运用本机构各领域的专业经验和知识，应对复杂和跨领域的治理和发展挑战，制订综合解决方案。
- 将基础设施治理作为**国别合作伙伴战略**的一部分。需要在国别合作伙伴战略层面对基础设施治理进行综合诊断评估，以发挥最大影响。亚行已经具备和基础设施治理对应的一系列工具/筛选条件。
- 更加重视**上游和中游的支持**，改善基础设施治理及加强公共投资管理，包括在中期财政框架中评估并估算气候风险成本的能力。在基础设施全生命周期中实现物有所值需要更加重视上游和中游的制度能力建设，以加强发展中成员体的公共投资效率。





谢谢

Bruno Carrasco
亚洲开发银行
可持续发展和气候变化局
局长兼首席合规官

