

中国海外投资背后的故事

China overseas: looking beyond the headlines



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“中外对话”的主要业务是其独特的完全双语网站，它通过发表精辟、原创的中外文章、评论和分析，促进世界理解中国崛起带来的全球性生态环境影响，进而共同寻求公平可行的全球环境问题解决之道。

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Alongside a bi-monthly journal, *chinadialogue*'s primary vehicle is our website (<http://www.chinadialogue.org.cn>), a unique bilingual platform which promotes a global understanding of the environmental impact of China's rise by publishing informed articles, commentaries and analysis by writers from inside and outside of China. We aim to inform, educate, and contribute to building a global consensus on fair and workable solutions.

chinadialogue also organises annual press awards in conjunction with the Guardian, Netease New Media Center and Renmin University's School of Environment and Natural Resources and School of Journalism and Communication.

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beyond the headlines

中国海外
投资背后
的故事



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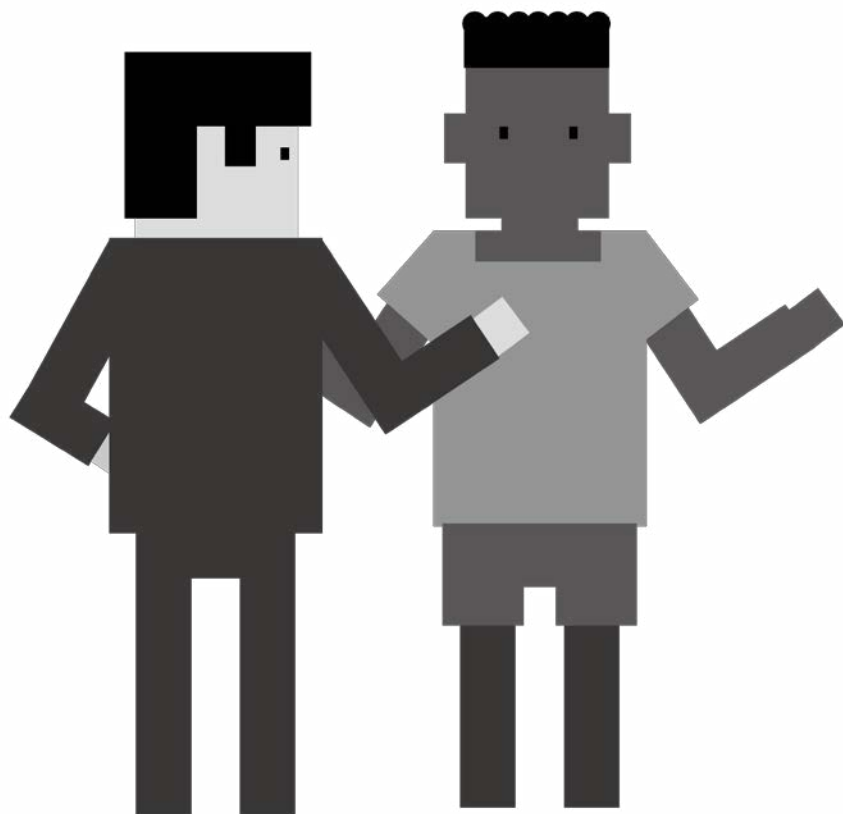
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- 中国争论 -

THE BIGGER PICTURE



中国形象：中资企业的海外投资困局

在海外投资的中资企业越来越关注企业社会责任，但是却不知从何入手。

黄泓翔

“帮我看看有没有什么项目，有没有什么快钱好赚，赚一把就走的那种。”

知道我常去非洲和拉美，许多手握资金的中国人这么问我。

今天中国海外投资在非洲拉美等地影响巨大，但这种不考虑“长期”、“可持续”的思维方式，却在环境和社会方面造成种种问题。

一位朋友告诉我：“我的亲戚前些年去非洲，暴富了，开始不肯说在做什么，后来透露说是做木材生意。”大多数中国人在非洲的木材生意涉及走私。他们故意利用当地的监管漏洞，让当地人人为其非法砍木材，再通过行贿海关运回中国。他们并不在乎非洲森林的消失和这个生意是否可持续，只关心中国木材价格的走向。

当与当地的矛盾累积到一定程度，环境冲突就会爆发并产生经济后果，这是许多中国企业不曾预料到的。

2012年，中国驻厄瓜多尔大使馆遭遇当地环保组织、土著人组织、妇女组织的冲击，之后不久，厄瓜多

尔发生全国规模的反矿大游行。我正好在那前后于厄瓜多尔调研，亲历了事件的始末：

中资企业 ECISA 当时准备在厄瓜多尔开发该国历史上第一个大型露天铜矿。公司认为该项目是中央政府支持的，便忽略了当地民间组织的声音，轻视环境保护。一些中国公司职员告诉我：“土著人保守、愚昧，不懂得矿业开采给经济发展带来的价值。”但中国人并不了解，在厄瓜多尔，土著人有自己的价值观，且牢记西方石油公司漏油事件给他们带来的沉痛灾难；他们更不了解，在许多发展中国家，民间的声音也很重要。

当地一家环保组织负责人对我说：“总统与公司签订了协议又如何？我们一定会继续努力，不让这个矿业项目成功开采。”他们曾经试图与中方对话，但是中方并没有给予积极回应，导致他们最终采取“占领大使馆”的方法。在许多中方人员心里，NGO（非政府组织）类似于“反政府组织”，或者干脆就是西方反华势力支持的“走狗”，因此不愿意与他们对话。国际

NGO“全球见证”在刚果金也有同样的遭遇：他们向几乎所有中方机构请求沟通，却得不到任何对话机会。

很多当地 NGO 告诉我，无论在环境影响还是社会影响方面，中资企业都不是当地最差的。然而，中资企业在履行企业社会责任方面，却显得笨手笨脚。

首钢秘铁便是这样一个例子。1990年代进入秘鲁的首钢堪称“中国走出去”的先驱，然而二十年来，它一直被剧烈的劳工冲突困扰，并因为罢工遭受大量经济损失。根据美国学者阿莫斯研究，无论是工资还是工作条件，首钢都并不比秘鲁的其他外企平均水平差，然而无论劳工冲突还是企业负面形象，首钢都非常突出的。

他们的思维与沟通方式，是其中一个重要病因。“我们花了很多钱在报纸上宣传，但是别人不信。”首钢一位工作人员告诉我。但他不知道，他们需要的不是“宣传”，而是“沟通”。

“我们曾接受纽约时报采访，后来发现他们不按我们说的写，我们

就不接受他们采访了。”他说。他们认为外媒“怀有恶意”。他们也许没意识到，不接受采访意味着自己在报道中的失语，是企业能采取的最糟的回应方式。

他们认为当地人不知感恩，“除了交税，我们给政府捐了那么多钱修大楼，当地人却不感激我们。”他这样对我说。他们不明白，交税并不是企业得到尊敬的充分理由，而捐钱给政府更不会得到当地人太多感激，尤其在沟通方式不当的情况下。企业社会责任，必须真正做到当地人的心里。

越来越多的中资企业开始关注企业社会责任，这是中国海外投资近年来最重大的变化。其实，企业社会责任是可以改变中国海外投资困局的银子弹。在西方的海外投资发展历程中已经证明了，它能有效地减少企业在非洲、拉美面对的环境与社会冲突，能够树立企业的正面形象，也能够帮助企业更好地了解当地，与当地对话，融入当地，最终实现与当地的共同可持续发展。

只可惜，大多数中资企业意识到需要做企业社会责任项目，却不知道怎样做。一边轻视环境保护，一



越来越多的中资企业开始关注企业社会责任

边搞植树；劳工关系差，却给政府修大楼；企业员工一边购买象牙制品，企业一边给环保组织捐钱且大搞捐赠仪式。

不过，在最近三年里，逐渐有一些中国企业和外交官在努力尝试改变。比方说，2014年，中航国际在肯尼亚第一次尝试实行大型、长期的、企业社会责任项目：为期6个月的非洲职业技能挑战赛。通过给当地青年进行技术培训，该项目致力于解决非洲青年失业的严峻挑战。这个项目培训更多合格的技术工人，

也努力解决中国企业在非洲缺乏高质量当地劳工的问题。好的企业社会责任项目，绝不是“赚钱回报社会”的慈善模式，而是将企业的发展与当地发展结合。中航国际在项目中采取了开放的态度，积极在媒体发言，与中国和国际NGO进行开放性的合作。

黄泓翔，自2011年开始作为南方周末等中外媒体特约撰稿人赴拉丁美洲，2014年4月在肯尼亚建立了非洲第一家关注中国海外投资的中国NGO组织中南屋（China House）

Chinese companies stuck in image crisis overseas

Many Chinese companies operating abroad realise they need to improve their image, but have no idea how to do it

Huang Hongxiang

See if there are any opportunities there, some quick money to be made, nothing long-term – this is what I often hear from Chinese people with spare capital when they find out I am travelling to Africa and Latin America.

Chinese investments are having a major impact on these continents. But by ignoring the “long-term” and the “sustainable”, the investors are creating environmental and social problems.

One friend told me: “A relative of mine went to Africa a few years back and got rich. He didn’t want to say what he was doing at first, then he told us it was the timber trade.”

When Chinese people deal in timber in Africa, smuggling is often involved. Lax regulation means they can get locals to fell trees illegally, then bribe customs officials to ship the wood back home. They don’t care if African forests are disappearing, or if the trade is sustainable – their sole concern is the price of timber in China.

But what Chinese firms fail to anticipate is the environmental conflicts that eventually break out with locals, and their financial consequences.

In 2012 the Chinese embassy in Ecuador was attacked by local environmental, indigenous and women’s groups. Not long after there were nationwide marches against mining. I was in Ecuador at the time and saw what happened.

Chinese firm ECSA was preparing to start the country’s first large open-pit copper mine and believed it had the support of the Ecuadorean government. But it ignored the views of local civil society and failed to take environmental protection seriously. Some Chinese workers told me that the indigenous people were “conservative” and “ignorant”;

that they didn’t understand the value of mining for economic development. But what the Chinese didn’t understand was that the indigenous people of Ecuador have their own set of values and a strong memory of the disastrous oil leaks when Western companies went drilling for oil. Nor do they realise that in many developing nations public opinion actually matters.

The head of one local environmental group said to me: “So what if the president signed a deal with the company? We’re going to continue working to stop the mine.” The group tried to talk to the Chinese firm, but to no avail. In the end, their frustration led to the occupation of the Chinese embassy. Many Chinese see NGOs as anti-government, or a front for Western anti-Chinese forces, and are unwilling to talk to them. International NGO Global Witness had a similar experience in the Democratic Republic of Congo: they attempted to open communication with almost all Chinese organisations there, but were given no chance for dialogue.

Failing communication

Many local NGOs tell me that Chinese firms are not actually the worst when it comes to environmental and social impacts. But they are clumsy at implementing corporate social responsibility (CSR).

Shougang Steel’s operations in Peru provide one example. A pioneer in Chinese overseas investment, Shougang set up in Peru in the 1990s. But for 20 years the company has been dogged by labour disputes, and strikes

have caused financial losses. Research by US academic Amos Irwin found that wages and working conditions at Shougang are by no means worse than at other foreign companies, but Shougang has suffered more from labour disputes and bad publicity.

One major cause of this is how the companies think and communicate: “We spend a lot on newspaper advertising, but nobody believes us,” one Shougang employee told me. What he doesn’t realise is that the company does not need to advertise – it needs to communicate.

“We were interviewed by the New York Times once, but they didn’t write what we said. So we don’t do interviews with them anymore,” he continued. Chinese companies regard the foreign media as hostile, not realising that refusing interviews means reports will be written without their input, and that this is the worst possible way of responding.

Often, they regard the locals as ungrateful too, lamenting the fact that communities don’t thank them for the tax they pay or the buildings built with company donations to government coffers. They do not understand that paying tax isn’t enough for a company to earn respect, or that giving money to the government won’t earn the gratitude of the people – particularly when they’re not communicating appropriately. Corporate social responsibility needs to take the feelings of the locals into account.

More and more Chinese companies are paying attention to CSR. This has been an important change in how they work overseas in the last few years and could help to solve the difficulties they face. The experiences of Western firms investing overseas show that CSR can reduce conflict

over environmental and social issues and create a positive corporate image. It can also help the company to better understand the areas it works in, to communicate and integrate, and ultimately to develop sustainably as a part of the region.

Unfortunately many Chinese firms have realised they need to undertake CSR, but have no idea how. They don’t take environmental protection seriously, but then plant some trees. Labour relations are bad, so they build new offices for the government. Their employees buy ivory products, and the company holds grand ceremonies to announce donations to environmental groups.

The last three years have seen some Chinese companies and diplomats try to change this. For example, aviation company AVIC International started its first major long-term CSR project in Kenya this year with the six-month Africa Tech Challenge. The project, which aims to help reduce Africa’s youth unemployment problem, gives technical training to young people, in turn helping Chinese firms that struggle to find qualified staff locally. AVIC International has also been open about the project, discussing it in local media and working with both Chinese and international NGOs.

Good CSR isn’t just making charitable donations with a portion of your profits. It is about linking local development with the development of your firm. ☺

Huang Hongxiang has reported on the environmental and social issues faced by Chinese companies overseas since 2011. In 2014, he launched China House, Africa’s first NGO focused on Chinese investments in the continent.

中国对外投资风险不应由企业独自承担

全球环境研究所执行主任金嘉满建议，中国应结合“走出去”战略，建立新的对外援助体制，支持研究、咨询和民间机构走出去，一起规避海外投资风险。

刘琴

有媒体报道，目前中国对外投资企业中，70% 亏损。在今后 10 年间，中国对外投资将有一半亏损。

中外对话就中资企业如何规避海外投资风险话题，专访全球环境研究所 (GEI) 执行主任金嘉满。全球环境研究所重点关注和研究中国海外企业投资过程中对环境的影响，是一家率先在海外运营项目的中国本土民间组织。

金嘉满告诉中外对话，中资企业海外投资屡屡受挫表明，中国“走出去”战略应当升级。中国目前所开展的海外投资，“走出去”的主要是企业，实际上企业除了承担很大的经济风险，也同时因为是国家项目，必须承担政治、社会风险，有时不仅自身利益受挫，甚至使国家形象受损。因此，中国应当实施立体的、多层次和多方位的“走出去”战略，中国的政府部门、科研机构、还有 NGO 等也应该和企业一起“走出去”，将国家对外援助与“走出去”战略紧密结合起来。

中外对话：中国企业海外投资失败的几率很大，中国“走出去”战略是否需要调整？

金嘉满：自 2001 实施以来，中国“走出去”战略到底怎么走，分几步走，至今看不清楚中国政府的实施战略和步骤，只是推着企业“走出去”，科研机构、第三方研究机构等几乎都还没有动作。在“走出去”过程中，必然会遇到很多问题，有些问题单靠企业不能解决。比如中国电力投资集团在缅甸的密松水电项目最终被叫停，亏损 30 多亿美元。其实这个项目在投资前几年，政治风险就有显露，但企业不敏感，还是把国内的一套带到缅甸，以为搞定政府要员，项目就能开展，结果缅甸政权变更，以顺听民意为由，造成中国企业 30 多亿美元打了水漂。

不仅是缅甸，中国现有投资所深入的亚非拉国家和地区，有些国家一旦从军政府统治转向民主化或出现国内政治局势动荡，其国内的

政治波动就会导致对华政策摇摆，进而影响中国海外投资。对于这些地区所面临的投资风险，不能单靠一个企业去承担，而应该考虑由研究部门、专业人员来承担大量的的研究工作，把风险告诉企业，把规避风险的方式方法告诉企业。

不管是水利、采矿，还是农业种植，对于行业投资，中国都应该有一个整体研究，告诉企业全球市场是什么样，哪个行业会有机遇，什么文化适合于或者不能融于当地发展。

中外对话：您建议将政府对外援助与“走出去”战略紧密结合，为什么？

金嘉满：对外投资前期需要做很多的前期工作，才可以了解当地中国有什么样的风险，也才可以找到规避风险的方式方法。世界上有很多国家都有国家自己的援助署，在国家需要有战略考虑的地方，甚至开发投资之前都会设计一批援助项

目,为以后具有国家战略意义的经济项目实施打好基础,如关于政治的、人权的、行业技术的、社区的等等。

中国的国家投资有很多是具有战略意义的,需要有很多研究工作走在前面,所以建议中国也要成立“援助署”,涉及和实施一些有战略方向的研究,将对外援助与“走出去”战略紧密结合起来。

目前,中国的对外援助常常局限于政府层面,受援国民众对援助项目了解很少。有时候中国出了钱,受援国民众还不知道是谁给的。原因是,国家项目设计人的目标,不能只靠企业来完成。比如,援助某国的沼气项目,中国仅仅派个技术队去,但援助沼气项目不仅仅是一个建设沼气的技术问题,它往往承载着可再生能源的发展、气候变化问题,还有贫困地区用能、建立邻国友好关系等等目标,仅靠一个沼气施工队是不容易实现目标的。

在“走出去”战略大背景下,中国应更多地考虑改变援助理念,创新援助方式,使外援计划真正为国家全球战略服务,以减少海外投资的政治、社会、环境甚至经济风险。

中国目前的对外援助财政支出规模较小,与中国现今的对外投资规模和国际地位不相符。中国对外投资在2003年到2012年的10年间年均增速达到41.6%,成为世界第三大对外投资国。但在同一时期,中国的对外援助的平均年增长率为12.74%,与对外投资的增幅、资金

量及中国的国际地位相比,有很大差距。以2011年为例,对外援助财政支出约合24.46亿美元,仅占当年国民总收入(GNI)的0.03%;相较之下,美国2011年的对外官方援助支出307.45亿美元,占当年GNI(国民总收入)的0.2%。

在制定对外投资与对外援助法律和制度建设过程中,需要考虑通过立法或建立规章制度,规范和约束中国资本的海外投资中的环境行为。使“走出去”企业在海外的行为,有法可依,规避一些不良的、有损国家形象的行为。

中外对话: GEI为什么想到关注中国企业海外投资的环境表现,而不是关注国内企业?作为NGO,怎么说服中国政府部门和企业认可你们的工作?

金嘉满: 中国企业海外投资行为代表中国形象,所受到的关注和压力比在国内要大,更有动力使企业来承担保护环境和社会责任,所以我们希望先从关注中国企业的海外行为开始,再反过来帮助中国企业把国内的问题解决好。

NGO要想发挥更大作用,就要主动参与到政府制定管理政策的决策过程中去。如何参与政府决策?NGO需要找准自己的定位,知道什么是自己能做的,什么是自己做不了的。首先,要站在一个全球的角度观察问题,发现舆论的焦点,找到问题的所在,比政府提前大约两年的

时间来研究考虑问题;其次,调查研究问题,向政府部门反映问题,与政府一起认识问题;最后,NGO与政府商量一起制定解决方案,促使问题解决。

比如说,从2004年起,中国从东南亚和南美洲进口木材遭到国际社会谴责。GEI多次跟国家林业局交流信息,商讨解决问题的方法。2006年,经国家林业局高层批准,和商务部联合出台了《中国企业境外可持续森林培育指南》。GEI参与了编制、修改和发布,完成了推动政府制定政策的工作。

2007年,国际上对中国企业在海外的资源型开发项目,包括矿业、水电项目实施过程中的生态影响有很多议论。GEI意识到,企业“走出去”后,一定要注意开发项目对环境的影响,我们就找商务部、环保部,商讨解决的办法来规范企业的环境行为,规避投资风险。

实际上中国企业不是不想做好,但它们“走出去”还很年轻,经验不足,所以承担的风险很大,它们也希望NGO能提供信息,帮助解决问题。NGO可以为企业走出去“打前站”,并在企业项目实施过程中将发现的问题告知企业,给他们提建议。我们看到,在“走出去”战略中,NGO的力量是不可替代的、非常重要的一部分。☺

刘琴, 中外对话北京办公室编辑

How NGOs can help Chinese firms do better overseas

Chinese firms overseas need help to develop risk analysis and reputation management, says Jin Jiaman, head of the first Chinese NGO to operate abroad

Liu Qin

Chinadialogue (CD): There's a high failure rate when it comes to overseas investments by Chinese firms. Reports suggest as many as 70% of ventures suffer losses. Does policy need to change?

Jin Jiaman, Executive Director of Global Environment Institute (Jin): Since 2001 we've only seen the government push businesses to invest overseas, with no sign of any encouragement for scientific or research institutions to do the same. But overseas investment is bound to involve problems, which the businesses themselves may not be able to resolve.

For example in Burma the China Power Investment Corporation was ordered to halt construction of the Myitsone dam, resulting in losses of US\$3 billion. The political risks there were clear in the years before construction started, but the company continued to operate just as it does in China: get government chiefs on side, and all will be well. Then a new government more responsive to public opinion came in, and US\$3 billion was lost.

And it's not just Burma. Chinese companies are heavily involved in the rest of Asia, Africa and Latin America. When military governments are replaced with democracy, or during political turmoil, policies towards China can change, and that affects China's investments. Those risks should not be borne solely by corporations. Research institutes and specialists should be involved in much of preparatory work, informing companies of the risks and how to avoid them.

It doesn't matter if it is hydropower, mining, or agriculture. China should have a research process telling companies the state of global markets, where the opportunities are, what kind of cultures will be more receptive.

CD: You want to see overseas aid brought into this process. Why?

Jin: A lot of preliminary work is required in overseas investment to understand what kinds of risks are present in the host nation and how to avoid them. Many countries have overseas aid offices, designing programmes for regions where they have strategic interests. Such work lays the foundation for investments in line with national interests across the fields of politics, human rights, technology and social initiatives.

Many of China's overseas investments are of strategic significance and require significant research. So we suggest China establishes an overseas aid office to design and carry out such research, linking overseas aid and investment.

Currently China's overseas aid is restricted to the political level; there's little understanding of how to design aid to help the people. Sometimes China donates money and the locals don't actually know where it has come from. This is because it's only the companies that set the targets. For example, when funding a methane gas scheme in one country, China sent technicians. But it wasn't just a technical project – it touched on sustainable development, climate change, energy for poverty-stricken regions, building good

relations with our neighbours. Those aren't things that a team of engineers can achieve.

China should consider changing how it thinks about overseas aid and innovating in how that aid is delivered, in order to ensure that it truly serves our global strategy and reduces the political, social, environmental and even financial risks of investing overseas.

China's overseas aid budget is currently smaller than it should be considering the size of our overseas investments and our international standing. Between 2003 and 2012, our outward-bound investments increased by 41% a year on average, and we became the world's third largest overseas investor. But in the same period our overseas aid budget grew by just 12.7% a year. When you compare overseas investment and overseas aid there's a huge difference in the rates of growth, the absolute amounts and our international standing. In 2011 we spent US\$2.4 billion on overseas aid, a mere 0.03% of our gross national income (GNI). Compare this with the US, which spent US\$30.7 billion, or 0.2% of GNI.

We need to think about how to constrain the environmental impacts of Chinese firms overseas when drafting legislation and establishing systems for overseas aid and overseas investment. We should have the legal tools to prevent actions that cause harm and damage China's international image.

CD: Why does GEI focus on what Chinese firms do overseas, rather than at home? As an NGO, how do you persuade the Chinese government to take your work seriously?

Jin: Chinese firms overseas are part of China's international image, so they get more attention and pressure than they do at home. It makes them more motivated to live up to their environmental and social responsibilities, so we aim to start overseas, then bring those experiences back home, to help companies deal with domestic problems.

If NGOs want to play a more important role, they need to get involved in government decision-making. How to do that? NGOs need to find their position, to know what they can and can't achieve. First, we identify what the focus of debate is and where the problem is, taking a global perspective. We start looking into this maybe two years before the government does. Then, we start researching the problem



GEI has advocated for sustainable timber use in SE Asia to protect forests

and giving that information to the government, forming a joint understanding, so we can jointly consider designing a solution to resolve the problem.

For example, China has faced international criticism over imports of timber from South-East Asia and South America since 2004. We talked to the State Forestry Administration (SFA) several times, and discussed possible solutions. In 2006, SFA and the Ministry of Commerce published guidelines on sustainable timber use for Chinese firms overseas. GEI was involved in the drafting, editing and publication of those guidelines, successfully pushing government to issue new policy.

In 2007, there was a lot of discussion internationally about the resource-driven nature of China's overseas investment, and the environmental impacts of mining and hydropower schemes. GEI saw that Chinese companies were going to have to pay attention to the environmental impact of their operations, so we worked with the Ministry of Commerce and the Ministry of Environmental Protection to find a way to regulate the environmental behaviour of those firms and reduce investment risks.

It's not that Chinese firms don't want to do well. They just don't have enough experience of working overseas, so the risks are greater. They hope to see NGOs providing them with information and helping to resolve problems. NGOs can act as advance parties for the companies and inform them of problems arising during their operations, making suggestions for resolution. We've seen that NGOs are an essential and irreplaceable part of overseas investments. ↻

Liu Qin is associate editor in chinadialogue's Beijing office.

中国海外投资最大障碍是当地社会不稳定

对中国海外投资有众多批评。但商务部研究员梅新育力挺中国企业，认为中国对外投资成绩和优势明显，面临的主要问题，是当地投资环境不稳定。中国政府需加强对企业海外利益的保护。

徐楠 / 张春

梅新育是商务部国际经济合作研究院研究员，中外对话就中国海外投资现状和困境对他进行了专访。

中国对外投资得益于本国资源消费市场

中外对话：您如何评估中国对外投资情况？

梅新育：中国的对外投资行为分为两种形式，一种是承包工程，一种是直接投资。总体而言，中国企业的技术和管理标准都较高，两种路线都取得了较好的成绩，对外投资发展基本正常，但不排除一些非理性的投资行为，需要国家宏观上加以引导。

中国是建筑业规模最大的国家，2010年又成为海外工程承包量全球最大的国家。2011年，中国企业在海外承包工程合同额已经达到1400亿美元，2012年增长10%达到1565亿美元。

而中国海外产业的发展对东道国也有很大帮助。很多发展中国家基础设施太差，中国的工程设施和技术人员全部配套，可以使东道国少花至少一半的成本，而中国带去的技术力量，也同时给东道国做了部分规划工作。

直接投资，在打开市场、提高对外贸易收益、获取资源方面起了相当的正面作用，但是也有部分投资是失误的。如资源直接投资前几年占比较高，达20%左右，是对外直接投资第三大产业门类，单个项目的规模一般较大。但很多在经济上是不合算的。主要原因是，海外投资应该走反周期投资路线，就是在牛市少投资，熊市再收购，这样价格比较合理；但很多投资都是顺周期投资，在高位买进。一些企业可能会因此破产。

即便如此，对外投资是中国经济增长的客观需求。在国内的经济增速和产能上来以后，如果不向外扩张，就无法维持速度增长并解决

产能过剩问题。对大企业来说，它们的规模很大，需要将业务分散在不同的国家和市场，以此来平抑收入波动。

面对中国这个世界最大的资源消费市场，他国也需要通过中国的投资来巩固中国消费市场，同时解决资本和出口问题。

投资环境不稳定是投资失败重要原因

中外对话：中国对外投资在国外面临什么样的风险和困难？拉美、非洲、东南亚这几个主要的投资目标区域，分别有哪些特定的挑战？

梅新育：比较大的一个风险，是东道国多变的政治因素。很多投资因此打了水漂。

外蒙古是一个比较典型的例子。外蒙有大型的煤矿，但是没有技术、资本和能力开发，就请邀请外资企业。

2012年，中铝集团与蒙古国

ETT 公司签订煤炭长期贸易协议，中铝提供 3.5 亿美元贷款，ETT 公司以货抵资，按照协议价卖给中国。但同年蒙古政府换届，ETT 公司高层换血，协议签订的当年，他们没有按照合同发给中国足够的煤炭量，只给了协议量的一半。2013 年 1 月，蒙古单方面毁约，要求提高煤炭价格。2014 年，对华煤炭销售全面停止。中铝的前期投资就很难收回来了。

蒙古自己的损失其实更大。他们对自己的市场地位没有认识，对中国更不了解。中国的煤炭价格在 2012 年开始下跌，他们在中国煤炭价格下跌半年后废除合同。现在就是开采出来，也没法卖了。

加拿大投资方在蒙古也有类似遭遇。加拿大投资蒙古世界级的铜矿，目标市场是中国。该铜矿曾因对投资方收税太高，导致停产一年多。中间又恰逢世界铜矿价钱下跌。蒙古自身和投资方都遭受严重损失，而投资方对这种损失是很难控制的。

此外，在法制不完善、经济不稳定的一些国家，中国公司也会面临当地政府不合理的经济补偿要求或过高的罚款等。例如中石油在中非国家乍得开采石油，被开出 12 亿美元的破坏环境罚款。

长期来看，东南亚的环境会比较和谐一点，因为文化差异较小，容易交流，主要的障碍是欧美政治势力。在非洲和拉美，则是当地自身的问题，他们根深蒂固的文化传统和社会习惯难以改变，项目落地和进行中会有很多的冲突，而动荡的政

局和社会环境也威胁着投资收益。

东道国应自己解决政治问题

中外对话：最近一两年来，媒体热议中国海外投资项目在环境、用工、社区关系方面不负责任，在非良政国家依靠不正当方式取得项目，您认为这些是不是中国海外投资面临的最大问题？

梅新育：这些是问题，但不是企业首要考虑的。商业有商业的规则，政治问题应该分开来说。

环境争议，是东道国自己要解决的政治问题，应定下高环境标准，提高执行力，以保护好环境。企业有社会责任，但是不能指望企业来完成环保工作。

用工方面，中国企业有技术熟练的员工，有利于提高生产效率。打个比方，中国在尼日利亚修建一个港口，用自己带去的工人，需要投资 2 亿元，历时两年完成；如果用当地工人，则需要 10 年，花费 10 亿元。你说政府愿意用哪个呢？政府也希望最低投入，取得最高效率和质量。

对中国企业来说，自己带过去的员工，需要解决吃住和出行等各种问题，工资是中国国内工人三倍左右；请一个中国工人，相当于请 15 个当地劳动力。即便这样，中国企业还要用中国工人，说明用中国工人的综合成本还是更合算。所以，问题在于当地的工人应该如何提升

水平，去满足用工的标准。这些都是市场选择的结果。

对于社区关系，我认为保持距离是必要的。第一语言不通，第二接触更多可能摩擦越多；第三，大家的文化习俗不同，中国的习惯可能会给当地社会生活产生一定的影响。

还有一个很重要的方面，中国企业投资的地方，大部分是不太稳定和安全的，少接触也可以保护自己的工人。

至于你提到的不正当方式取得项目，这不是投资者可以决定的。企业事实上是去适应当地的游戏规则。何况，那些曾经是欧美殖民地的地方，其延续几百年的政治习惯，是西方国家塑造的，游戏规则也是他们定的。这是个政治问题，指望外国企业去解决是不可能也不合理的。

解决这些问题，需要东道国设定一些基本的标准，来规范企业的投资行为。

中外对话：您认为中国的对外投资政策和策略是否有必要做出调整？

梅新育：有两点需要调整。一是需要放松市场管制，给市场更自由的发展空间。二是改进对海外投资的保护，通过双边或是多边协议来实现。极端情况下，不排除使用武力保护中国公司的财产。☺

徐楠，中外对话北京办公室副总编

张春，中外对话北京办公室编辑

Social instability main threat to China overseas

Political and social instability muddies operating environments for China's overseas investments, so host governments should do more to guarantee stability, argues Mei Xinyu, a researcher at the Ministry of Commerce

Xu Nan / Zhang Chun

Mei Xinyu is a researcher at the Ministry of Commerce's Chinese Academy of International Trade and Economic Cooperation.

Chinadialogue (CD): How would you evaluate China's overseas investments?

Mei Xinyu (Mei): China's overseas investments take two forms. One is project contracting, the other direct investments.

China's construction industry is the world's biggest, and in 2010 it became the world's biggest overseas contractor. In 2011, Chinese firms signed engineering contracts overseas worth US\$140 billion. In 2012, that rose by more than 10% to US\$156.5 billion.

Generally speaking, Chinese firms have high technical and management skills and their overseas investments have developed in a regular way. But there has been some bad investment behaviour, which the government should do more about at the macro-level.

Chinese business expansion is hugely helpful to the host nations. Many developing countries have very poor infrastructure, something that Chinese engineers and technicians can often provide at half the cost, or less, than host nations could manage. China also has the technical ability to carry out some of the work of planning the infrastructure.

Direct investment plays a positive role in opening up markets, increasing profits from overseas trade, and acquir-

ing resources, but in some cases there have been mistakes.

For example, direct investment in the resources sector has been high in recent years, at about 20%, the third largest sector, and individual projects tend to be quite large. But many of these do not make financial sense. Overseas investments should be counter-cyclical: invest less in a bull market, then buy in a bear market. That way you get a better price. But many investors buy high, and so some firms may go bust.

Regardless, overseas investment is a requirement for China's economic growth. Outwards expansion is now the only way to maintain the speed of economic growth and use up excess production capacity. China's big companies also need to spread their operations across different coun-



China's investments in oil and other minerals are essential to maintain domestic economic growth

tries and markets to balance fluctuations in income.

China is the world's biggest resource market. Other countries need Chinese investment in order to guarantee their share of the Chinese market, and also to resolve their capital and export issues.

CD: What risks and problems do China's overseas investments face?

Mei: One of the bigger risks is unstable political circumstances in the host nation. This has caused many investments to fail.

A classic example is Mongolia. It has large coal mines, but lacks the technology and capital to develop them, so it welcomes foreign investment.

In 2012 Chalco signed a long-term coal sales agreement with Mongolia's ETT. Chalco provided a US\$350m loan. ETT was to repay the loan by supplying coal at an agreed price. But that same year ETT executives were replaced after a change of government, and the company failed to provide the agreed quantity of coal – only half was delivered. In January 2013, Mongolia reneged on the agreement, demanding a higher price for its coal. Last year coal sales to China were stopped outright. Chalco is unlikely to earn back its original investment.

Mongolia has also lost out. It failed to understand its role in the market, and understands China even less. The price of coal in China started to drop in 2012, and half a year later Mongolia tore up the contract. Even if they start mining again they won't be able to sell it.

Canadian investors have run into a similar problem. Canada invested in a world-class copper mine in Mongolia, intending to sell the output to China. But high taxes meant production halted for a year. And during that year world copper prices plummeted. This meant huge losses for both the investor and Mongolia itself. It's hard for investors to control these kinds of losses.

Also, in countries where the rule of law and economic

stability are lacking, Chinese companies have faced unreasonable demands for compensation or fines from the local government. For example the China National Petroleum Corporation was fined US\$1.2 billion for damaging the environment in the central African nation of Chad.

Over the long-term, things have been better in South-East Asia as cultural differences are less significant, and communication is easier. The main obstacle is political pressure from the US and Europe. In Africa and Latin America the problems are more local: there are deeply rooted cultural and social traditions that won't change easily and that means conflicts arise as projects start and progress. Turbulent political and social circumstances also threaten investor interests.

CD: In the last year or two, there's been a debate in Chinese media about failings in environmental protection, use of local workers, and community relations; and also improper methods being used to win projects in poorly-run countries. Is that the biggest problem facing Chinese firms investing overseas?

Mei: These are issues, but shouldn't be major concerns for the companies. Business runs by its own rules, and political issues should be considered separately.

Environmental disputes are a political matter for the host nation to resolve through higher environmental standards and tougher enforcement. Companies do have social responsibilities, but you can't expect them to do the job of protecting the environment.

When it comes to labour, Chinese firms have experienced technical staff who can help increase efficiency. In Nigeria, for example, China built a port using its own staff. It cost 200 million yuan and took two years. It would have taken a decade and one billion yuan using local staff. Which is the government going to choose? The government wants to spend as little as possible and get both efficiency and quality.

“ Environmental disputes are a political matter for the host nation to resolve through higher environmental standards and tougher enforcement. ”

Chinese firms that take their staff overseas have to cover living and travel expenses, and pay salaries three times higher than those they pay at home. One Chinese employee costs 15 times as much as a local. Even so, companies choose to use Chinese workers because overall costs are still lower.

The question is how to improve the standards of the local workforce so they can do the job.

On community relations, I think it's necessary to maintain a distance. One, there's no shared language; two, more contact can mean more friction; three, there are cultural differences and Chinese habits may impact on the life of the local community.

There's another more important issue: the places China invests in are usually not stable or safe. Less contact can protect Chinese workers.

As for winning project contracts via improper methods, that's not something investors can solve. Companies adapt to the local rules. And anyway, the political traditions of the former European and US colonies were created by

Western countries; they set the rules of the game. It's a political matter, and it's unreasonable and unrealistic to expect foreign companies to resolve it.

If these problems are to be solved the host nation needs to set some basic standards to regulate investment.

CD: Is there a need for changes to China's overseas investment policies and strategy?

Mei: Two changes are needed. First, relax market controls, so the market can develop more freely. Second, improve protection of overseas investments through bilateral or multilateral agreements. And in extreme cases, do not rule out the use of force to protect the assets of Chinese companies. ↻

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为什么中国必须提高海外投资环境标准？

中国银行监管机构必须执行绿色信贷政策，要求资金提供者在借款流程中加入环境保障措施

米歇尔·陈

2012年，中国矿业企业科里安特资源公司（Ecuacorriente）与厄瓜多尔政府签订协议，在地球上最美丽、生物多样性最丰富的地区之一开采铜矿。米拉多铜矿位于云雾缭绕的厄瓜多尔康德尔高地，当地社区和环保组织担心铜矿项目会对当地水资源、生物多样性以及当地原住民的生活造成不良影响，因此自开采协议签订后，这里就成为众多抗议、诉讼和抵制活动的对象。

米拉多铜矿仅仅是众多引起强烈争议的外国直接投资中的一例——也恰好体现了鼓励中国企业走向世界的中国外交政策的一个不良副作用。2001年正式出台的“走出去”政策很大程度上是为了保证中国有安全的渠道获取自然资源，以推动经济的持续增长。在这种情况下，中国过去十年中几乎对地球每个角落都投入了大量的资金，欧洲、东南亚、北美、拉丁美洲、甚至南极洲都有中国投资的足迹。如今，中国对外发展项目投资的总额已经超过了世界银行。

不过，虽然“走出去”政策在某种程度上刺激了中国海外投资的迅猛增长，但中国的另外一项政策——

绿色信贷指引——或许可以确保中国的海外投资承担起环保责任。绿色信贷指引（以下简称“指引”）2012年由中国银行监管部门发布，要求中国银行在对企业和项目贷款时考虑环境和社会风险，并在项目未能减轻重大环境风险（例如污染、健康损害、安全风险、人口转移安置、甚至气候变化）时中断或撤回贷款。指引特别要求中国银行在对海外贷款中确保借款人遵守国际规范。

这样看来，绿色信贷指引是世界上最先进的银行贷款环境责任规范文件。相比之下，美国和欧洲政府在要求银行对其贷款的环境影响负责方面几乎没有任何作为，也没有在解决其跨国企业海外经营过程中造成的社会和环境方面做出太多努力。

但是在绿色信贷指引推出两周周年纪念（2月24日）即将到来之际，围绕米拉多铜矿等海外项目的争议仍未停止——这个令人失望的事实似乎暗示着指引并未得到有效的实施。厄瓜多尔的民间社团已经告诉来自中国的潜在贷款人，铜矿项目会造成严重的环境和社会问题。具体包括破坏当地的水资源质量，引发大范围的水体和土壤污染，并

造成至少三种两栖类动物和爬行类动物灭绝。这样的项目显然与国际规范不符，因此违反了绿色信贷指引的要求。此外，上述团体指出，铜矿项目已经违反了厄瓜多尔地方和国家层面的有关法律法规，这也是与绿色信贷指引的要求相悖的。遗憾的是，没有任何迹象表明中国的银行或者监管机构采取了任何措施。

保证贷款项目符合绿色信贷指引的规定当然并不容易。中国的借款人，尤其是资源采掘类企业，在开发海外资产方面是“后来者”，因此不得不大量进入环境、社会、政治风险高的项目。中国银行在建立有效的环境和社会风险管理体系方面还有很长路要走。作为中国银行监管机构的中国银行业监督管理委员会并没有一个部门负责监督各家银行执行指引的情况，中国银行对海外项目贷款的合规情况更无人过问。如果中国要改善其在国际舞台上的声誉、发掘其作为可持续信贷领导者的潜力，就必须认真对待绿色信贷指引的要求。☺

米歇尔·陈，地球之友经济政策总监

Why China must strengthen environmental standards

Chinese banking regulators must implement a green finance policy that requires Chinese lenders to incorporate environmental safeguards into their lending process

Michelle Chan

In 2012, a Chinese-owned mining company, Ecuacorriente, signed a deal with the Ecuadorean government to develop a copper mine in one of the most biodiverse and beautiful places on Earth. Located in Ecuador's misty Condor Highlands, the Mirador mine has since been the target of protests, lawsuits, and resistance from communities and organisations concerned about the mine's impacts on water, biodiversity and indigenous peoples.

El Mirador is just one example of a foreign direct investment that has attracted intense controversy - an unwelcome side effect of a Chinese foreign policy that encouraged Chinese companies to "go global." Rolled out in 2001, the "Going Out" policy is largely geared towards ensuring that China secures access to the natural resources needed to fuel its continued economic growth. As a result, over the last decade, China has poured investment into nearly all corners of the Earth, from Europe, Southeast Asia, North America, Latin America, to even Antarctica. Today, China exceeds the World Bank as a provider of finance for development projects around the world.

But while the Going Out policy may have spurred a boom in Chinese overseas investment, another Chinese policy -- the Green Credit Directive -- may have the power to make sure those investments are environmentally responsible. Released by Chinese banking regulators in 2012, the Green Credit Directive requires Chinese banks to consider environmental and social risks when lending



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The Green Credit Directive requires Chinese banks to ensure that their overseas projects follow international environmental norms

to companies and projects, and to halt or suspend financing when major environmental hazards (such as pollution, health, safety, resettlement, and even climate change) go unmitigated. In particular, the Directive requires Chinese banks, in their overseas lending, to ensure that borrowers abide by international norms.

As such, the Green Credit Directive is one of the world's most progressive environmental banking regulations. In comparison, governments in the United States and Europe have done virtually nothing to hold banks responsible for the environmental impacts of their lending. Nor have these

governments done much to address the overseas social and environmental impacts of their multinational corporations.

But as the second anniversary of the Green Credit Directive approaches (on February 24), controversies such as the ones surrounding the Mirador project continue unabated - a disappointing sign that the Directive is not being implemented. In Ecuador, civil society groups actually informed potential Chinese lenders about the severe environmental and social problems the mine would cause. They detailed how the mine would devastate the region's water quality, trigger widespread water and soil pollution, and lead to the extinction of at least three amphibious and reptilian species.

Such impacts are clearly out of line with international norms, and therefore violate the Green Credit Directive. In addition, the groups pointed out how the mine has already violated Ecuadorean local and national laws, another breach of the Green Credit Directive. Unfortunately, there has been

no indication that Chinese banks or regulators have acted.

Ensuring compliance with the Green Credit Directive is certainly no easy task. Chinese borrowers, such as resource extraction companies, are "late to the game" when it comes to developing international assets, and are loading up on environmentally, socially and politically risky projects. Chinese banks still have a long way to go in developing robust environmental and social risk management systems. And the China Banking Regulatory Commission, China's banking regulator, does not have a department charged with overseeing compliance with the Directive, particularly overseas. However, if China is to improve its reputation as a global actor, and fulfill its potential as a leader in sustainable finance, it will need to take the Green Credit Directive seriously. ↻

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中国对外援助： “不干涉原则”渐行渐远？

中国和其他金砖国家加大了对发展中国家的投资，这一举动对传统援助模式意味着什么？

陈韵楠

2014年7月，金砖五国（巴西、俄罗斯、印度、中国和南非）在年度峰会上宣布建立备受期待的金砖国家开发银行。这一多边倡议完全由南部国家发起，并被普遍看作是西方主导的世界银行和国际货币基金组织的竞争对手。

新开发银行的启动资金共10亿美元，由五国平均出资。该银行重点解决发展中国家基础设施建设资金不足的问题，同时还将建立一个应急储备安排（CRA），为南部国家应对金融危机提供紧急流动资金。

银行的建立反映了金砖五国在开发性金融与合作领域不断扩大的作用和金融影响力。银行总部设在上海则彰显了中国的重要地位。中国经历了30年的经济繁荣，从贸易盈余中积累了大量投资资本，现如今与其他金砖国家一道积极寻找投资发展中国家的途径。

这一诉求受到实际需求推动的部分影响，发展中国家需要石油、矿产和燃料支撑国内经济的持续发展；而中国在非洲、亚洲和拉丁美

洲不断增长的影响力也是中国“走出去”战略的一部分，旨在推动中国跨国公司和国有企业的扩张和国际化发展。

中国和非洲大陆的关系在过去十年变得十分密切。双方令人瞩目的地缘政治关系和经济关系既在政治层面上不断加深——三年一度的中非合作论坛（FOCAC）高官会为双方领导人提供了交流的机会，又在经济层面上得到支持——双方在投资、基础设施建设、贸易、开发援助上的投入高达数十亿。大量的中国工人进入非洲大陆，使当地的中国人口不断增多；而中国媒体平台（如CCTV非洲频道和肯尼亚的中国广播频道）的不断发展表明中国的文化影响力也在不断提升。

今年早些时候中国政府发布的一份对外援助白皮书表明，目前中国对外援助的一半以上资金放在非洲。中国已经为非洲国家提供了近900亿元人民币的对外援助，主要包括无息贷款、优惠贷款、高负债贫穷国家债务减免、特惠关税和其他

援助金等。

与发达国家传统的援助模式相比，中国的开发型合作项目并不强调无私奉献的原则。相反，中国和巴西、印度以及南非将援助订立在“南南合作”的传统框架下；“南南合作”起始于上世纪50年代，强调技术合作和知识传递，而不是经济援助；强调互利共赢，而不是无私奉献。

援助金、项目和贷款通常只是中国投资计划中的一个分支。中方通常以采掘设备、公共基础设施（公路、政府大楼、医院等）或其他项目换取自然资源，从而取得回报。这些项目的大部分资金又与中国承包商绑定，从而使中国企业和跨国公司受惠。尽管中国的援助违背了经合组织的原则，但是它提出的“双赢”理念还是在一定程度上为自己赢得了发展合作伙伴的美誉，就是说中国在政治平等的基础上提供帮助，而不像西方国家“援助国-受援助国”式的帮助。

中国在非洲的经济活动刺激了非洲的经济发展，提振了非洲的经

与发达国家传统的援助模式相比，中国的开发型合作项目强调技术合作和知识传递，而不是经济援助；强调互利共赢，而不是无私奉献。

济信心。一方面，中国在公路、铁道和公共建筑等硬环境上的投资帮助吸引了中国和其他国家来非洲投资；另一方面，中国在安哥拉和尼日利亚等资源丰富的国家采取“资源换资产”的投资模式，使得这些国家有能力开发此前无法开发的矿藏资源，并从出口这些资源中获利。

而更微妙的是，中国在非洲的存在改变了发展中国家和西方援助国之间的关系。中国等其他新投资国的出现，无疑改变了发展中国家和西方国家谈判时的权力平衡，使西方国家不得不更加重视非洲。2014年8月，奥巴马主持了美非领导人峰会，峰会效仿中非合作论坛高官会的模式，表明美国重新开始重视与非洲的合作。

然而，中国的援助和投资活动在政治上备受争议。对非洲自然资源的开发饱受诟病，指责包括活动不够透明、规划阶段缺乏协商与咨询以及缺乏对环境影响的评估等。而指责之声在石油、矿产资源和水

力发电领域尤为突出，其中对水力发电的批评主要是因为中国参与了苏丹、埃塞俄比亚和其他非洲国家骨干坝的建设。

中资企业的用工标准和劳资纠纷在赞比亚等国也引起了争议。在消费需求刺激下出现的非法采伐和偷猎行为，也损害了中国在非洲的形象。

以上的争议也引起了中国的反思。中国越来越重视自己在非洲的公共形象，并密切注意提升在非洲的软实力。现在，许多开展海外投资的国企面临着比国内更严格的劳动法和环境法；但由于活跃于海外的中国企业数量庞大、性质形态多样，从私企到跨国公司不计其数，给法律法规的管理和施行造成了不小的困难。

“无条件援助”和“互不干涉内政”作为中国外交政策和对外援助的基本原则，也引发了不小的争议，并有可能变得越来越难以执行，尤其是对非洲最脆弱的国家。2007年

苏丹危机考验了中国坚持不干涉别国内政的承诺，这个曾经备受吹捧的原则却在当时引起了大众的强烈抨击。中国在非洲的长期投资使它有必要保证后者高效、稳定的运行；这就是说中国在当地进行各项活动时，需要关心当地的管理以及国家与社会之间的关系。另外，中国国内的低碳革新和投资为塑造非洲可持续发展提供了机会和资源。

一直以来，中国和其他新兴发展中国家的崛起，对整个发展中国家增强国际影响力和国际地位有着深刻的政治影响。但随着这些国家经济实力不断增强，南南合作的模式逐渐受到限制，不干涉别国内政的原则也越来越难以维系。随着中国的援助和发展计划不断成熟，一些项目难保不会和西方的发展模式重合。

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China's non-interventionist aid stance on the way out

China, along with the other BRICS, has ramped up its investment in developing countries. What will this mean for its model of aid and development?

Chen Yunnan

In July, the five BRICS – Brazil, Russia, India, China and South Africa - came together at their annual summit to announce the establishment of a new, hotly anticipated BRICS development bank, a multilateral initiative led entirely led by Southern countries and widely seen as a competitor to the Western dominated World Bank and IMF.

With start-up capital of US\$1 billion, funded equally from the five partners, the New Development Bank is to focus on addressing the infrastructure funding deficit in the developing world, as well as a Contingency Reserve Arrangement (CRA), which would provide emergency liquidity for Southern governments for future financial crises.

The bank's establishment reflects the growing role – and financial clout – of the BRICS in development finance and development cooperation, and its headquarters in Shanghai demonstrates the weight of China in particular. Having sustained a 30-year economic boom and amassed a war-chest of capital from its trade surplus, China, along with the other BRICS, is increasingly seeking avenues for investment in the developing world.

Part of this is driven by the pragmatic need for oil, minerals and fuel to sustain domestic economic growth; however China's growing role in Africa, Asia and Latin America is also part of a "Going Out" strategy to expand and internationalise Chinese multinational firms and State-Owned Enterprises (SOEs).

China's engagement with the African continent has intensified in the last 10 years. This salient geopolitical and economic relationship is politically embedded through the



The growing presence of China and other rising powers in development has been a political boon for the leverage and power of developing countries

triennial FOCAC (Forum for China-Africa Cooperation) high-level meetings between Chinese and African heads of state, and backed by billions in investment, infrastructure, trade volumes, and development aid. Mass migration of workers has led to a rising Chinese population on the continent, while development of new Chinese media platforms, including a CCTV Africa channel and Chinese radio channels in Kenya and other parts of East Africa, point to a growing cultural presence.

A new White Paper on Foreign Aid released by the Chinese government earlier in 2014 shows that China now channels over 50% of its aid to Africa. China has provided nearly 90 billion yuan in foreign assistance to African countries, consisting largely of interest-free loans, concessional loans, and debt relief to high-indebted poor countries

(HIPC), as well as preferential tariff agreements and some grants.

In contrast to the principles of the traditional, developed-country aid model, China does not claim altruistic principles in its development cooperation projects. Rather, along with Brazil, India and South Africa, China frames its aid under a tradition of 'South-South Cooperation' dating back to the 1950s, which emphasises technical cooperation and knowledge transfer over financial aid, and principles of mutual benefit and reciprocity over altruism.

Grants, projects and loans are usually one branch of a package of investments which sees benefits for China, usually in the form of natural resources, exchanged for extractive equipment, public infrastructure such as roads, government buildings and hospitals, or other projects. Much of the funding for such projects is also tied to Chinese contractors, benefitting China's own enterprises and multinationals. Despite the tied nature of Chinese aid, which contravenes OECD principles, the rhetoric of 'win-win' has gained China some credibility as a development partner, that offers aid on a more politically equal platform than the Western donor-recipient model of relationship.

China's economic engagement has boosted growth and economic confidence in much of Africa. Hard investment in roads, railways and state buildings have helped to attract foreign investment from Chinese sources and elsewhere, and the resource-for-equity model that China has adopted in resource-rich states such as Angola and Nigeria have allowed countries to access previously unexploitable mineral resources and export to their advantage.

More subtly, China's presence has altered the dynamics between developing countries and Western donors. The presence of alternative investors has shifted the balance of power for developing nations negotiating with the West, as well as pushing Africa up Western priority lists. Obama's recent US-Africa leaders' summit in August 2014, which follows the model of China's high-level FOCAC forums, is an explicit demonstration of a new US regard for Africa.

However, China's aid and investment activities have been politically controversial. Its forays into African natural resources have been criticised for their lack of transparency and consultation in the planning process and environmental impact assessment. This is particularly the case in the oil

and minerals sector, as well hydropower, where China has been involved in the construction of key dams in Sudan, Ethiopia and other regions across Africa.

Labour standards and labour disputes in Chinese-run firms have also proved controversial in countries such as Zambia. And illegal logging and poaching, driven by Chinese consumer demands, have also damaged China's image in Africa.

Such controversies have had an impact back home: China is increasingly conscious of its public image in Africa, and keen to build up its soft power. Many Chinese SOEs now face tougher labour and environmental regulations overseas than they do at home. However, the diversity and sheer number of Chinese actors abroad, from individual entrepreneurs to multinationals, makes control and enforcement of such regulations a struggle.

Non-conditionality and non-interference, as foundational principles in China's foreign aid and foreign policy, have been particularly controversial, and may be increasingly unsustainable, especially for Africa's most fragile states. The Sudanese crisis in 2007 tested China's commitment to non-interference, and created a public relations backlash for a principle previously touted as benign. China's long-term investments in the continent give it a vested interest in ensuring effective, stable states. This means it will need to care about issues of governance and state-society relations in the countries in which it operates. Moreover, domestic low-carbon innovation and investment give it the opportunity and resources to shape Africa's sustainable development.

The growing presence of China and other rising powers in development has been a political boon for the leverage and power of developing countries. But as these rising powers become ever stronger economically, the credibility of the South-South Cooperation model is strained, and non-interference increasingly unfeasible. As China's aid and development programmes grow, some convergence with the Western development model may be unavoidable.



Yunnan Chen is a PhD researcher at Johns Hopkins SAIS. She was previously part of the Rising Powers in International Development programme at the Institute of Development Studies.

中国海外投资为何不讨人喜欢？

海外投资法律顾问李治国指出，中国应该从日本早期海外投资的失败中吸取教训，调整现有战略。

张春

为中国企业提供对外投资法律咨询的李治国律师认为，中国企业获取资源的目的性太强、商业经营文化不足，是在东道国不受欢迎的原因，也是投资失败的主要原因。

2014年8月中，澳洲新晋议员、矿业大亨克莱尔·帕尔默在参加澳洲电视台的时事辩论直播节目中爆粗口，就与中国投资方的不和发表辱华言论，一时舆论哗然。

据媒体报道，双方争议的焦点，是中国在澳洲最大的投资项目、克莱尔·帕尔默名下的“西澳铁矿石项目”。中国投资企业“中信泰富”在这个项目上，给出了澳洲财经媒体评论为“非凡”的条件，高额的开采费，承担港口、公路、海水淡化、发电站等基础设施建设，且建成归后者所有。有媒体评论这是“一个商人一生中难得的机遇”。不过该项目进度严重滞后，实际投入超预算5倍，中国投资方“中信泰富”损失惨重。

这位议员已为他的言行正式向中国驻澳大利亚使馆大使发函致歉。但显然，中国公司的大方在这里并没有赢得相应的尊重。类似情况在

中国其他海外投资项目中也不少见。中国企业为何不讨人喜欢？

中外对话：中国的企业在海外是什么样的形象？

李治国：当前中国企业在海外投资的方式让东道国不太舒服，主要是获取资源的目的性太强。媒体广泛报道的问题，比如中国企业在东道国的环境污染、社区关系不好、不用当地工人等，都是中国企业介入方式不合适的表现。

这个和日本刚刚开始对外投资的时候很像，现在日本已经改变策略，而且做得很好。这是一个国家开始向外发展时避免不了的发展阶段，中国能做的是尽力缩短这个阶段，同时整体表现不要太糟糕。

当然，还有一些负面形象是媒体片面的报道造成的。例如中外对话2014年8月底发布了一篇关于智利铜矿开采的文章（参见P61），作者说为了中国的铜矿需求加剧了智利的的环境污染，这个是不全面的。铜矿是运往中国了，但是最终被生产加工企业（包括在中国的外商投资企业）

制成成品，再将成品卖往他国，一部分利润是欧美国家的企业拿走了，全球的消费者都从中受益。中国只是中间生产环节，也是环境污染的受害者。

中外对话：中国企业海外投资失败的主要原因是什么？是否因为自身不足？如果是，这些不足主要表现在哪些方面？

李治国：原因有很多。自身不足是很大一方面，这个主要体现在商业经营的文化不够成熟，包括境外项目运作经验、投资理念和策略、方式等。

例如，在法律问题上，有些国企的法务或法律顾问都有很好的法律意识，也会给决策者提供完善的法律意见。但做决策的领导，可能不会考虑或少有考虑法律的问题，还是国内那一套，靠关系和个人意志做事情。另外，前面提到的，目的性太强的投资方式，会给双方后续合作造成很大的障碍。

中国的对外投资，这样失败的比例占30%左右。

除此之外,还有一些是对对方的条件不加辨识地接受造成的。例如矿业投资,很多企业在投资前不聘请当地的地质专业顾问提供专业意见,待投资后进行勘探,才发现没有开采的价值。这就是策略和经验的问题了。就是说,该付的学费(付给中介机构费用)没有付,而是以项目失败的代价交学费。

在对境外的条件不了解的情况下,需要聘请财务顾问、税务顾问、环境顾问、法律顾问等,甚至人力资源顾问。例如,一个项目盲目投资几亿,失败了。如果聘请了中介顾问,需要支付一定的顾问费(如1000万,因项目而不同),就会知道项目应该怎么去操作,能不能投资。既培训了团队,也一定程度上规避了风险。这个学费是值得付的。

当然,中国之前的投资方式和国企企业的资金充足也有关系。中央启动“走出去”战略,也是一种政治上的需求,纳入政绩考核,所以投资冲动很大,缺少细致的考虑。

中外对话: 是否有成功的案例?您怎么看待这样的经验?

李治国: 有,例如中钢集团在澳洲的“恰那”项目是成功的,这也是一个以矿石供应为主的项目,矿山的运营介入少,只做前期投资,是目前为止中国在澳洲的矿产投资项目中唯一成功在产且有大量矿石运回中国的项目。

在非洲赞比亚,中国有色集团投资的铜矿项目,做铜矿的开采、冶炼、加工,在中资企业中是不错的。中色有在当地发展的长期规划,

包括当地的社区建设、水电和就业等,配套的基础设施做得都非常到位。从矿业角度看,在非洲是比较成功的案例。

我个人是倾向于这种全产业链的投资,就是说要把一部分的就业、税收回回馈给当地,不能只拿原料。除了原材料出售之外,东道国也希望收获一部分的附加值,只有这样,才能得到企业、社区和当地政府的认可。

从企业自身来说,这种也是更可持续的。如果只是拿原料,开采完就走人,换一届政府完全可能不让你开了。你有下游产业链在这里,矿产不卖你了,那产业链下游的加工、制造的工人就全部失业了。所以政府会更加审慎地看待这个问题。

中外对话: 中国海外投资的战略和策略是否需要调整?怎样才能减少投资失败的可能性?

李治国: 可能需要做一些政策设计上的调整。一个是鼓励机制,如果中国当前这种鼓励“走出去”的机制不变的话,还是一味去寻求占有、寻求控股,要想成功会比较困难。

另一个是国企的投资路线。国企都有一根政绩的弦,这个对投资的限制比较大。领导只有5年任期,他很难去投资一些需要5年以上才会见效的大型矿产勘探类的项目,但恰恰是勘探项目的后劲儿是最大的。

要减少投资失败,分两方面来说。在东道国,第一最起码法律上要合规,就是遵守当地的法律法规。中国企业在投资美国等发达国家时,会请外部律师团队,尽量避免违反当地法律。但是在发展中国家或不

发达国家会做得差一些。

第二,决策机制要改变。投资前期一些问题是需要综合考虑的。有些项目是因为基建、基础设施不到位,如没有铁路,没有港口,运量会受到限制;如果自己建设,原本一个亿的投资,成本可能要翻10倍,投资回报周期也会加长,就不是一个企业可以单独承担的。各种成本要考虑进来。

这都是需要学习的,之前的投资方式代价太高了。国有大企业普遍损失很大,而且失败比例高于民企。民企用的是自己的钱,会更加谨慎一些。

其他国家的投资者在做境外投资时,也有失败的,但更多的是经济因素决定的。例如大宗商品价格的阶段性波动,导致成本收不回来,很少因为内部决策机制、人员经验、中介顾问不到位等因素失败。

从中国企业自身来说,还要克服一些弊病。例如,中国的企业,成功的经验可以拿出分享,但是失败的案例就不提了。但是,恰恰是失败的案例是最有价值的、最应该学习和研究的。

再一个,不要盲目跟风。前几年的投资失败,很大的一个问题是盲目跟风,很多项目是两个中国企业在掐架,造成了很大的损失。企业要考虑自己的实际的情况,需要出去才出去,不是别人出去我就要出去。



李治国,美国查德本派克律师事务所律师,为企业提供海外投资的法律咨询,主要关注能源、可再生能源、矿产和基础建设方向

张春,中外对话北京办公室编辑

Why does no one like Chinese companies overseas?

China must learn from Japan's earlier failings if it wants to overcome hostility to its overseas investments, says Edwin Lee, a lawyer and overseas investment consultant

Zhang Chun

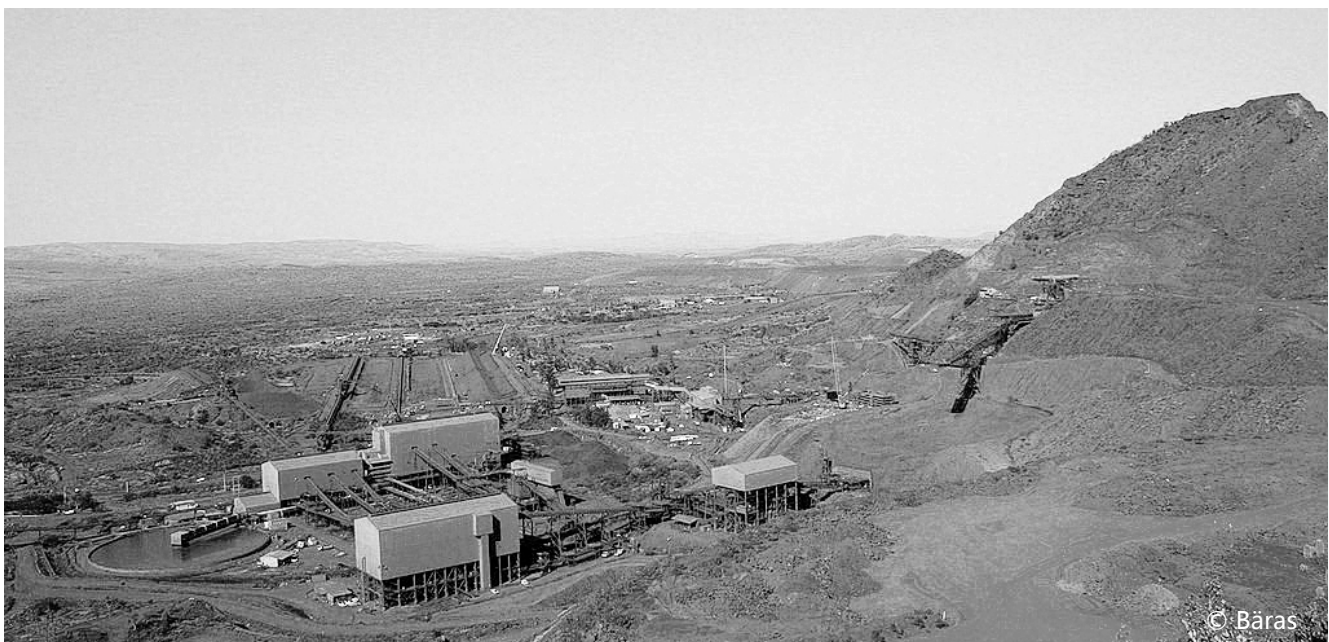
Australia's mining tycoon and newly elected Member of Parliament Clive Palmer caused outrage when he referred to a Chinese company he is in dispute with as "mongrels" on live TV.

The dispute centres on China's largest Australian investment, Palmer's iron-ore mine in Western Australia. Chinese investor CITIC Pacific offered what Australian financial media described as "extraordinary" concessions: agreeing to pay high mining fees and cover the cost of building ports, roads, desalination plants and power stations, which would then be owned by Palmer's company, Mineralogy.

This was described by the Financial Times as "the business opportunity of a lifetime". But progress on the project has been badly delayed and spending has gone five times over budget. CITIC Pacific has suffered significant losses.

Palmer wrote a letter to the Chinese embassy in Australia apologising for his remarks. But it is clear the Chinese firm's offer did not earn the respect it should have. This is a phenomenon seen in many of China's overseas investments.

chinadialogue spoke to Edwin Lee, a lawyer and overseas investment consultant, to find out why no one likes Chinese companies.



Iron Ore mine at Tom Price, Western Australia

Zhang Chun (ZC): What image do Chinese companies have overseas?

Edwin Lee (EL): The main aspect of Chinese overseas investment today that makes host nations nervous is too strong a focus on obtaining resources. The issues reported in the media – pollution, poor community relations, a failure to use local labour – are all results of Chinese companies taking an unsuitable approach.

This is very similar to when Japan started investing overseas. But now Japan has changed its strategy, to good effect. It's a stage that can't be avoided when countries start to expand overseas. All China can do is make sure it's as short a stage as possible, and that overall the country doesn't look too bad.

Of course, some of the bad publicity is a result of biased reporting in the media. For example in late August chinadialogue published an article on copper mining in Chile (see page 63), in which the author said that China's demand for copper was causing increased pollution there. That's not the whole story. The copper ore is being exported to China, but it ultimately gets processed into finished products by manufacturers, some of which are foreign firms operating in China, and shipped to third countries. Part of the profits goes to European and US firms, and consumers worldwide benefit. China is just a part of the chain, and what's more it also suffers from the resulting pollution.

ZC: What causes China's overseas investments to fail? Are the companies not good enough? If not, in what way?

EL: There are a lot of reasons, and the failings of the companies are a big part of it. Mainly it's a lack of experience in doing business: in overseas operations, and in investment concepts, strategies and methods.

Take legal issues as an example. In some countries lawyers or consultants are able to provide the legal knowledge that decision-makers need. But those decision-makers often ignore legal matters or give them little thought. They stick to the usual Chinese methods, relying on relationships and personalities. Also, as I mentioned, too much focus on their own aims will create major problems for later cooperation.

About 30% of China's overseas investments fail in this manner.

Another problem is companies blindly accepting what they are told by overseas partners. For example, in mining,

many companies fail to employ local geologists to provide expert advice – they wait until the investment is complete, then discover there's nothing worth mining. That's a problem with procedures and experience. Costs that should be paid to third parties aren't, and as a result the investment fails.

When you don't know how things work overseas you need financial consultants, tax consultants, environmental consultants, legal consultants, even HR consultants. You could blindly invest hundreds of millions of yuan and have your project fail. But employ consultants and you pay set costs, maybe 10 million yuan depending on the project, and you'll know what you should be doing, and whether you should invest or not. Even if you train your own people, you can avoid a certain amount of risk. It's worth the cost.

Of course, how China invests is tied up with the fact that state-owned enterprises have plenty of cash on hand. The government started encouraging firms to expand overseas, so there was a political demand there, it was part of how government officials were assessed. That meant there was a strong motivation to invest, but not much careful consideration.

ZC: Are there any successful case studies? What's your view of those experiences?

EL: There are. Sinosteel's Channar project in Australia, which again is about supply of ore, is one example. Sinosteel isn't much involved in the running of the mine, it just made the initial investments. So far it is the only Chinese mining investment in Australia which has successfully gone into production and brought large quantities of ore back to China.

In Zambia, the China Non-ferrous Metal Mining Group has a project mining, refining and processing copper, and it's done very well for a Chinese company. It has plans for developing long-term in the area, including community-building, hydropower, employment, and it has built very good infrastructure. For the African mining sector, it's quite a success.

Personally I prefer that kind of investment, where some of the jobs and taxes stay local, rather than just exporting the raw materials. The host nations don't just want to sell the raw materials, they want some of the added value, and that's the only way to keep the company, the government and the local community happy.

And for the company this is more sustainable. If you

just take the raw materials it's very easy for a new administration to halt your operations. If you have an industrial chain in place then cutting off your supply of raw materials means employees in the processing and manufacturing operations lose their jobs, which means the government will be more cautious.

ZC: Are changes to China's overseas investment strategy and policy needed? How can we reduce the chances of failure?

EL: Some changes to policy design may be needed. One is incentive mechanisms. If the current system of encouraging overseas expansion doesn't change and we continue seeking only ownership and control, it'll be harder to succeed.

Another issue is the approach taken by state-owned enterprises. Officials in charge of SOEs are subject to evaluations, and are only in their posts for five years. That means they are unlikely to undertake large-scale prospecting projects which take longer than five years to come to fruition. Those projects only pay off after a certain length of time.

In terms of reducing failures, there are two aspects to consider.

First, in the host nation, at the very least you need to be in compliance, you need to follow the local laws and regulations. When Chinese firms invest in the US and other developed nations they bring in lawyers to make sure they don't break local law. But in developing or undeveloped nations they don't do so well.

Second, decision-making mechanisms need to change. There needs to be a more comprehensive examination of various issues at a very early stage. For example, out-

put from some projects is restricted as the infrastructure isn't in place: there's no railway or no port. If you build those yourself what was meant to be a 100 million yuan investment could cost 10 times as much and the return on investment takes much longer. It's not something a single company can undertake alone. All the different costs need to be considered.

This all needs to be learned. Investment approaches up to now have been too costly. SOEs have often suffered large losses, and are more likely to fail than private firms. Private firms are spending their own money and so are more cautious.

Investors from other countries also fail when working overseas, but more often due to economic factors – for example, because fluctuations in commodity prices mean costs can't be recovered – rather than due to internal decision-making processes, lack of experience or a failure to use consultants.

Chinese companies do have some failures to address. For example, they tend to share their successes, but never mention any failures. But it's the failures which are most valuable and most worth learning from.

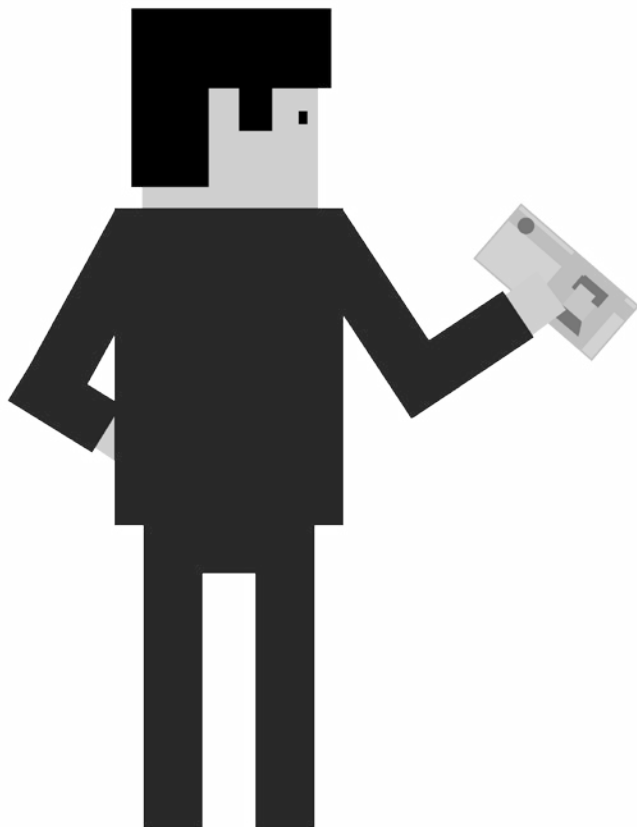
One more: don't jump on bandwagons. That's a major reason for investment failures in recent years. Often two Chinese firms are competing for the same project and that creates a lot of losses. Companies need to be realistic and only expand overseas when they actually need to, rather than just following others. ☺

Edwin Lee is an associate at Chadbourne & Parke LLP. He provides legal consulting services for overseas investment, primarily in the energy, renewables, mining and infrastructure industries.

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- 中国影响 -

CHINA'S REACH



中国与拉美—— 矿石与投资的是是非非

中国在非洲的影响力已经人尽皆知，但其在拉丁美洲的重要地位却很少对外宣传。

大卫·希尔

中国对矿产资源的巨大需求已经成为推动拉丁美洲发展的一支重要力量。在不到二十年的时间内，中国已然变成拉美经济活动中的一个“主角”。

但是，这个巨大的需求（加上中国贷款和在众多产业中无处不在的中国公司）引起了人们的担心，认为它们会造成严重的社会和环境的影响并且发展失衡影响未来的发展。

“十五年前，中国在拉美国家的贸易和投资根本微不足道，但在过去五年里它就成了该地区所有国家的第一、第二或者第三大贸易伙伴。”墨西哥国立自治大学的安立奎·杜塞尔·彼得斯如是说。

热潮的中心——秘鲁、智利

中国在拉丁美洲影响最大的地方莫过于秘鲁了，这里悠久的采矿历史和来自中国的移民让其格外具有吸引力。根据秘鲁商会会长的说法，今年7月份已确认的价值70亿美元的拉斯邦巴斯铜矿收购方案意

味着中方已经控制了秘鲁三分之一的采矿业。等到明年拉斯邦巴斯投产的时候，每年的产铜量有望达到40万吨，其中一半是中国的订单。

与此类似，中国石油天然气股份有限公司（中石油下属的一家上市公司）对巴西国家石油公司资产的收购，意味着秘鲁五个规模最大的石油生产特许权中四个都有中石油的股份。

“拉斯邦巴斯如今属于一家中国企业，如果他们再获得廷塔亚铜矿的话，整个南安第斯就全归中国人的了。”国际地球权益组织秘鲁分部的西莫纳·瓦尔纳尔斯说。

中国和秘鲁间的贸易也发展得很快。2009年两国签署了自贸协议，秘鲁成为继智利之后中国在拉美的第二个自贸伙伴。从2003年到2008年，秘鲁的人均GDP平均增长率超过8%，2009年到2012年只有不到6%。根据世界银行的统计，在此期间货物和服务出口占到秘鲁GDP的四分之一以上，秘鲁太平洋大学的阿兰·法尔列则指出中国自2011年

以来一直是秘鲁最大的贸易伙伴。

南加州大学的卡罗尔·怀斯说：“秘鲁和智利大量地向中国出售大宗商品，铁矿石、铜、鱼肉……这个量对它们来说非常巨大，秘鲁绝对是最大的受益者。”

据怀斯表示，中拉贸易主要集中在五个国家：秘鲁、智利、阿根廷、哥伦比亚和巴西。2009年中国超过美国成为巴西最大的贸易伙伴，其中出口量占前三位的分别为大豆、石油和铁矿石。

主要伙伴

但是，中国在拉美贸易中日益凸显的地位引起了严重的关切。除非政府能够发展其他产业来平衡采矿热，不然人们很担心不公平交易（尤其与墨西哥）和未来可能出现的贫困问题。通过吸引外国投资到制造业，中国壮大了目前的经济实力，同时勇于冒着被拒的风险坚持要求潜在投资者进行技术转移。

杜塞尔·彼得斯说：“拉美国家



中国在拉美掀矿产和基建热潮，活动人士则担心由此引发的社会和环境问题

把原材料送到中国，再从中国购买制成品。从中期或长期来说，这不是一种可持续的做法，中国人最清楚这一点了，中国从来都不会接受这种贸易关系。”

另外一个日趋激化的问题是，中国与拉美各国贸易关系在紧密程度上存在差异。中国社会科学院学者张勇在最近的一篇论文中指出，墨西哥、厄瓜多尔、帕拉圭、以及“大多数中美洲和加勒比国家”对华出口额仍然相对较小。

基础设施建设是另一个可以大展拳脚的阵地，中国企业在拉美雄心勃勃的大型工程和计划层出不穷。一个典型的例子就是香港尼加拉瓜运河开发投资有限公司（HKND）计划修建一条横贯尼加拉瓜的运河，从该国的西部太平洋沿岸一直通到东边的加勒比海岸，用来增进全球

海上贸易。2013年6月这条运河的建设得到批准，项目总长172英里，是巴拿马运河的3倍，它将穿过中美洲最大的湖泊——尼加拉瓜湖。

另外一个具有说服力的例子是中国企业打算建设一条横贯南美洲的铁路，这条铁路将从秘鲁的太平洋沿岸一直通到巴西的大西洋沿岸。据新华社7月份的报道，巴西总统罗塞夫称将“与中国和秘鲁合作完成令人满意的工程”。

基础设施金融

中国企业还参与了其他基础设施工程。据法新社报道，继六月举办的“77国集团+中国峰会”结束后，玻利维亚圣克鲁斯地区商会会长表示，中国对玻利维亚“工业化项目”很感兴趣，项目耗资约为420亿美

元。去年中国葛洲坝集团（CGGC）赢得了阿根廷的两个水电站建设合同。据非政府组织“国际河流”中国项目总监孟方桦说，目前中国企业在拉美承建的大坝有24座。

中国在为拉美提供贷款方面发挥着越来越重要的作用，有时是至关重要的，尤其在全球金融危机的背景下。据波士顿大学学者阿莫斯·埃尔文和凯文·盖拉赫说，2005年到2013年间，中国的银行机构向拉美和加勒比国家提供了超过1000亿美元的贷款，其中超过半数都贷给了委内瑞拉，阿根廷、巴西和厄瓜多尔则分列贷款额的第二、三、四位。

埃尔文说：“中国贷款的主要作用之一就是它为这些国家提供了其他的融资渠道，可以不再仅仅依靠世界银行，美洲开发银行，或者是西方商业银行。厄瓜多尔在这一点上

体现得尤其明显，该国主权债务违约导致信用评级直线下跌，吓跑了所有其他外国借贷者。尽管如此，它仍然能从中国拿到贷款。”

中国国有银行还把巨额贷款直接发放给在国外经营的中国国有企业。埃尔文和盖拉赫估计，2002年以来这类贷款总额达到1400亿美元，其中80%都流向了石油和采矿部门。

投资海啸

杜塞尔·彼得斯说：“与贸易关系相比，中国在拉美投资的历史要短得多，掀起了双方第二波新经济关系的浪潮。经济危机之后，中国用这样一种海啸似的方式输出资本。过去两三年中，中国海外直接投资已经占到世界第三位。”

中国各大银行金融机构如今已经将它们所扮演的角色提升到了另一个层次。上月召开的金砖国家峰会上成立了“金砖国家开发银行”，总部设在上海，初始核定资本为1000亿美元。该银行将为金砖国家和其他“发展中”国家的“基础设施和可持续发展项目”提供资金。应急储备安排初始资金规模为1000亿美元，用来在发生国际收支问题时帮助各国渡过难关。

但是，某些产业部门非常担心中国日益扩大的参与会对拉美社会、环境、甚至国家主权构成影响。一

部分原因基于任何投资或工程都会引发人们的忧虑，另一部分原因则是由于中国自身环境不佳、劳动条件恶劣、缺乏透明度和问责机制。

一些中国企业已经买入了一些争议特别大的项目，其中包括秘鲁两个最具争议，同时也是两个规模最大的石油开采权项目。这些项目污染严重，已经导致四个不同的流域出现“环境危机”。此外，还包括马尔科纳铜矿、白河铜钼矿和特罗莫克铜矿等项目。

白河铜钼矿之前的业主经历了数千人的抗议、酷刑折磨、杀戮以及一场打到英国最高法院的官司，但以紫金矿业为首的财团还是毫无顾忌地买下了它。收购特罗莫克铜矿的中铝集团则在安置移民的问题上遇到了难题，起因就是该公司打算将5000多人的莫罗科查镇整体搬迁。

尽管一些镇民对于中铝的搬迁安排态度积极，但另一些人却远没有这么友善。据万卡约大主教办公室的丹尼尔·阿尔瓦雷兹·托伦提诺说，选择的新镇址完全不合适，新房子太小，会影响儿童的健康，大约120户人家拒绝搬迁，如今他们发现自己很可能被抛弃了。今年3月政府因环境问题命令中铝停止运营。8月6日，莫罗科查的民间组织FADDIM提起了两桩针对中铝集团和秘鲁能源矿业部的诉讼。

阿尔瓦雷兹·托伦提诺说：“仍

然居住在莫罗科查镇老城的人对中铝十分抵触。”

原住民权利

与此同时，邻国厄瓜多尔最声名狼藉的采矿项目——米拉多铜矿也在两家中国国营企业的控制之下。中石油计划勘探开采的新石油区块则位于亚马逊雨林深处世界闻名的亚苏尼国家公园内。

这些项目已经受到了来自厄瓜多尔国内外的批评，并且原住民组织克丘亚族联合会（ECUARUNARI）也对此提起诉讼。此外，厄瓜多尔最近还进行了一次争议巨大的石油开采权拍卖，原本21项开采权项目最终只拍出了3项，其中两项都是被中国企业安第斯石油公司购得。

这两项被称为“79号区块”和“83号区块”的开采权均与亚马逊河流域的原住民萨帕拉人的领地重合。今年早些时候，萨帕拉族的首领科勒瓦尔·路易兹和格洛里亚·乌施瓜曾游说联合国表示拒绝在他们的土地上进行石油开采。

他们在信中写道：“我们族人的生存正处于严重危险之中。无论在各级众议院、参议院还是原住民宣言中，我们都已表明不希望在我们的领地上进行任何石油开采之类的采掘活动。”

国际河流组织的孟方桦指出，中国企业“连别人嗤之以鼻的项目也会接手”，并且举了洪都拉斯帕图卡大坝的例子。根据设在华盛顿的非政府组织“权利与资源行动”成员安迪·怀特的说法，中国企业在社会和环境治理上的标准较低。

“经济危机之后，中国用一种海啸似的方式输出资本。过去两三年中，中国海外直接投资已经占到世界第三位。”

他还说：“中国公民影响决策者或者与其合作的渠道和方式都非常少。”

绿色金融规则

但另一些人认为，中国银行贷款业务相关法规要比西方更为严格。两年前中国颁布了《绿色信贷指引》（简称 GCD，一项要求银行在决定发放贷款时把社会环境影响考虑在内的政府法规），尽管对于其落实情况见仁见智，但一些人认为它超越了西方的绿色金融模式。

“GCD 设置了一个很高的门槛，”厄瓜多尔经济与社会权利中心（CDES）的宝丽娜·加宗如是说，不过她也指出落实是另外一回事。

她说：“中国的银行和拉美的许多国家有两件事是一样的：它们的环境法规都很完备，但执行和监督体系却非常薄弱。中国在厄瓜多尔的投资规模很大，但迄今为止他们给这个国家的环境带来的都是悲剧。”

相比于其他地区，中国企业在厄瓜多尔的经营活动引起了人们更多的关切。除了在亚马逊地区进行采矿和石油开采，中国企业如今还参与了一系列水电大坝工程，并且计划在太平洋沿岸建一座炼油厂。

中国的银行机构为厄瓜多尔提供了大量贷款，以至于某些人认为厄瓜多尔国家债务已经失控，国家主权也已经受到威胁。该国公民社会正在做出回击，采取了诸如游说中国银行机构、诉诸法律、发行有关中国海外贷款和投资社会环境影响相关规定的小册子、向美洲国家间人权委员会等国际组织投诉等一系列措施。

国际地球权益组织的瓦尔纳斯说：“中国企业的问题在于它们不太关心人权，尽管他们在环境问题的讨论也很多。这就是厄瓜多尔那些反对米拉多铜矿项目的人在给美洲国家间人权委员会的投诉中的感受。”

但另外一些人的看法要积极得

多，或者对于中国和非中国企业间的差别说得轻描淡写。

“无论从长期还是短期影响来说，在秘鲁我们只看到一个案例，即经营马尔科纳铜矿的首钢，这个糟糕的案例简直是众所周知。首钢的案例中存在很严重的用工问题，但在环境和社会劳动条件等方面，他们与秘鲁其他企业并无二致。”

华盛顿智库“美洲对话”的玛格丽特·迈尔斯则认为，中国企业已经经历了一个“真正的学习过程”。虽然首钢是一场“灾难”，但中铝在特罗莫克却“做得很好”。

她说：“如果颁布了法规和标准，中国企业就倾向于遵守；如果没有，企业就会用尽各种办法追求自己的最大利益。这并不只是针对中国企业，无数跨国公司都是这么干的。”

大卫·希尔，南美自由撰稿人

China and Latin America: Which way now?

China's impact in Africa is now well known but its importance in Latin America remains less publicised

David Hill

China's voracious appetite for minerals has been a key driver of Latin American growth, transforming it in less than two decades into a major player in the region.

However, Chinese-run mines – combined with Chinese loans and ever-greater involvement of Chinese companies in other sectors such as infrastructure – are sparking fears about the social and environmental impacts, and whether unequal economic development might cause future problems.

“Fifteen years ago China didn't appear in Latin American countries' statistics regarding trade and investment, but over the last five years it has become the first, second or third trading partner of practically all countries in the region,” says Enrique Dussel Peters, from Mexico's National Autonomous University.

Nowhere has China's impact in Latin America been as great as in Peru, whose long history of mining and Chinese immigration makes it particularly attractive.

Minmetals' acquisition of Las Bambas – a US\$7 billion deal confirmed in July - means Chinese interests now control one third of Peru's mining sector, according to the president of Peru's Chamber of Commerce. When Las Bambas starts production next year, it is expected to generate some 400,000 tonnes of copper per annum – half destined for China.

Similarly, the acquisition of assets from Petrobras by PetroChina, a listed company controlled by Chinese state firm CNPC, means CNPC will be involved in four out of Peru's five biggest-producing oil concessions.

“Las Bambas is now owned by a company from China,

and if they take a [financial] interest in Tintaya the southern Andes could go Chinese,” says Ximena Warnaars, from Earthrights International in Peru.

Trade between China and Peru has blossomed too; they signed a trade agreement in 2009 – China's second in Latin America, after Chile.

Between 2003 and 2008 Peru's per capita GDP growth averaged more than 8%, and just under 6% between 2009 and 2012. According to the World Bank, the export of goods and services accounted for more than a quarter of Peru's GDP during those years, and China, argues researcher Alan Fairlie at Peru's Pacific University, has been Peru's biggest trade partner since 2011.

“Peru, along with Chile, has been selling commodities to China hand-over-fist,” says Carol Wise, from the University of Southern California. “Iron ore, copper, fish-meal. . . It has been huge for them. Peru has benefited absolutely the most.”

According to Wise, Chinese-Latin American trade is concentrated in five countries: Peru, Chile, Argentina, Colombia and Brazil. In 2009 China overtook the USA to become Brazil's biggest partner – with soy, oil and iron ore the top three exports.

Dominant partner

However, China's growing prominence in the region's trade raises serious concerns. Worries include unequal exchanges – with Mexico in particular – and possible future poverty traps, unless governments balance the minerals boom by

developing other industries.

China's current economic strength was achieved by attracting foreign investment into the manufacturing sector, whilst braving rejection by insisting on technology transfer from would-be investors.

"Latin America sends raw materials to China and in return buys manufactured goods," says Dussel Peters. "This isn't sustainable in the medium- or long-term, and the people who know this best are the Chinese. They'd never accept this kind of trading relationship themselves."

Another simmering issue is that trade ties are unevenly spread across the region. Exports from Mexico, Ecuador, Paraguay and "most central American and Caribbean countries" to China remain comparatively tiny, states Yong Zhang, from the Chinese Academy of Social Sciences, in a recent academic paper.

Infrastructure construction is another sector seeing a rise in ambitious, large-scale projects and plans by Chinese interests in Latin America.

One emblematic example is the Hong Kong-based HKND Group's plans to build a canal cutting through Nicaragua, running from its western Pacific Ocean coast to its eastern Caribbean Sea coast, in order to cater for a projected rise in global maritime trade. A route for the 172-mile canal was approved in June 2013: it is set to pass through Central America's biggest lake, Lake Nicaragua, and to be three times the length of the Panama Canal.

Another potent example is Chinese companies' interest in building a railway all the way across South America from Peru's Pacific Coast to Brazil's Atlantic Coast. Brazil's president Dilma Rousseff pledged to "work together with China and Peru to build this project into a satisfactory one," according to Xinhua in July.

Infrastructure finance

Chinese companies are also directly involved in, or linked to, other kinds of infrastructure projects.

Following the "G77+China" summit in June the president of Bolivia's Santa Cruz region's Chamber of Commerce was reported by AFP saying that China is interested in "industrialization projects" in Bolivia costing an estimated US\$42 billion. Last year a consortium led by China Gezhouba Group Corporation (CGGC) won a contract to build two hydroelectric dams in Argentina.

Chinese companies are now associated with 24 dam projects across Latin America, according to Beijing-based

Grace Mang, the China Program Director at NGO International Rivers.

China has also found itself playing an increasingly important – and in some cases vital – role providing loans to the region, especially since the global financial crisis. Chinese banks lent more than US\$100 billion to Latin American and Caribbean governments and companies between 2005 and 2013, according to Boston University researchers Amos Irwin and Kevin Gallagher, with more than half going to Venezuela. Argentina, Brazil and Ecuador held second, third and fourth places.

"One of the major things about China's funding is that it acts as an alternative source, not just to the World Bank or the Inter-American Development Bank, but Western commercial banks too," says Irwin. "This is especially clear in Ecuador where they showed investors they could get by with Chinese lending even after they defaulted on their sovereign debt, causing their credit rating to plummet and scaring off all other foreign lenders."

Chinese state-owned banks are also loaning billions directly to Chinese state-owned companies operating abroad. Irwin and Gallagher estimate that such loans could total US\$140 billion since 2002, roughly 80% of them channeled to the oil and mining sectors.

Investment tsunami

"This is much more recent than the trade ties and is a second wave in the new economic relationship between Latin America and China," says Dussel Peters. "Since the economic crisis, China has been exporting capital in such a manner that in the last two or three years it has become the third major source of overseas foreign direct investment."

Chinese banks are now set to take their financing role to yet another level. Last month the BRICS summit agreed to establish a US\$100 billion "New Development Bank" headquartered in Shanghai to finance "infrastructure and sustainable development projects" in BRICS and other "developing" countries, as well as a reserve pool of a US\$100 billion, called a "Contingent Reserve Arrangement", to tide countries over in case of balance of payments problems.

However, there is considerable concern among certain sectors about the potential impacts of China's growing presence – on Latin American society, the environment, even national sovereignty. Partly this is because any investment or project is viewed as cause for concern, and partly because of China's domestic environmental record, labour

conditions, and lack of transparency and accountability.

Some Chinese companies have already bought into particularly controversial projects. In Peru these include the two most contentious – and two of the biggest-producing – oil concessions where serious contamination has led to “environmental emergencies” being declared in four different river basins, and mines like Marcona, Rio Blanco and Toromocho.

Rio Blanco was bought by a consortium led by Zijin Mining despite several years of unrest under the previous owner that saw protests by thousands of people, torture, killings and a UK High Court case.

At Toromocho, run by state-owned Chinalco, tension flared over attempts to relocate an entire town, Morococha, of almost 5,000 people. While some are positive about how Chinalco has handled the move, others are much less so. According to Daniel Alvarez Tolentino, from the Office of the Archbishop of Huancayo, the new site chosen for the town is totally inappropriate, the new houses are too small and are affecting children’s health, and about 120 families have refused to move and now find themselves largely abandoned.

In March the government ordered Chinalco to stop operating following concerns about environmental impacts, and on 6 August two lawsuits were filed against the company and the Ministry of Energy and Mines by Morococha grassroots organization FADDIM.

“There’s a complete rejection of Chinalco by the people who continue living at Old Morococha,” says Alvarez Tolentino.

Indigenous rights

Meanwhile, across the border in Ecuador two Chinese state-run companies now control the country’s most notorious mining project, Mirador, and CNPC is slated to exploit new oil concessions in the world-famous Yasuni National Park deep in the Amazon rainforest – operations that have met with national and international condemnation and a lawsuit

filed by indigenous organization ECUARUNARI.

In addition, in Ecuador’s recent, controversial auction of what was initially intended to be 21 new oil concessions bids were received on only three – two by Chinese company Andes Petroleum. Both these concessions, called “Block 79” and “Block 83”, overlap territory belonging to the indigenous Sapara (or Zápara) people in the Amazon. Earlier this year Sapara leaders Klever Ruiz and Gloria Ushigua lobbied the United Nations rejecting oil operations in their land.

“The existence of our people is in grave danger,” they wrote. “We have resolved in multiple assemblies, congresses, and indigenous declarations that we don’t want extractive industry like oil exploitation in our territory.”

International Rivers’ Mang acknowledges that Chinese firms “have been getting into projects otherwise spurned by others” and cites the Patuca dams in Honduras as examples. According to Andy White, from the NGO Rights and Resources Initiative based in Washington, Chinese companies have lower standards for social and environmental governance.

“Citizens have very little access to, and far fewer means to influence, corporate decision makers,” he adds.

Green finance rules

However, others argue that the regulations binding Chinese banks when making loans set higher standards than their Western contemporaries. Although there is mixed evidence it is being complied with since it was adopted two years ago, China’s “Green Credit Directive” (GCD) – a government regulation requiring banks to consider socio-environmental impacts before making loans – is thought by some to exceed Western green finance models.

“The GCD sets a very high bar,” says Paulina Garzon, from Ecuador’s Centre for Economic and Social Rights (CDES), although she points out that putting it into practice is another matter.

“Two things that Chinese banks and many countries in

“ Since the economic crisis, China has been exporting capital in such a manner that in the last two or three years it has become the third major source of overseas foreign direct investment. ”

Latin America have in common are that their environmental regulations are OK, but the implementation and supervision systems are very weak,” she says. “Chinese investments in Ecuador are massive, and so far they promise to be environmentally tragic for the country.”

The impact of Chinese operations in Ecuador has arguably generated more concern than anywhere else. In addition to mining and exploiting oil in the Amazon, Chinese companies are now involved in a series of hydroelectric dam projects, and proposals to build an oil refinery on the Pacific Coast. Chinese banks have lent so much money that some argue the national debt is out of control and Ecuador’s sovereignty is under threat.

Ecuadorian civil society is fighting back, adopting strategies such as lobbying Chinese banks, taking legal action, publishing a manual on socio-environmental regulations for Chinese loans and investment abroad, and appealing to international institutions like the Inter-American Commission on Human Rights.

“The problem with Chinese firms is they don’t care much about human rights, although they are more open to talking about the environment,” says Warnars, from EarthRights International. “That’s what communities against Mirador

in Ecuador understood in a complaint they made to the [Inter-American] Commission.”

But others are much more positive, or play down differences between Chinese and non-Chinese companies. “In terms of long or short-term impact in Peru we only have one case to look at – Shougang [the company running the Marcona mine] – and that case is known for being really terrible,” says Irwin. “There are definitely enormous labour problems, but in terms of the environmental and social working conditions they are very similar to other companies in Peru.”

According to Margaret Myers, from the Inter-American Dialogue think tank in Washington, Chinese companies have been through a “real learning process” – Shougang was a “disaster” but Chinalco has done a “very good job” with Toromocho.

“When regulations and standards are upheld Chinese firms tend to abide by them,” she says. “When they’re not, then there’s leeway for firms to do whatever is in their best interests. This isn’t exclusive of Chinese firms. You see that in plenty of multinationals.” ↻

David Hill is a freelance journalist based in South America.

中国开发拉美的清洁能源

拉美尚未开发的风能及太阳能资源可为中国提供新的机遇，但拉美国家可再生能源政策的欠缺恐成为发展之路上的绊脚石。

卡米妮亚·拉慧慈

中国主席习近平在 2014 年 7 月到访阿根廷，视察中国在阿工程的进展情况。其中包括两个位于巴塔哥尼亚地区，总价值 47 亿美元的水力发电站。这是中国元首 10 年来首次国事访问阿根廷，因而显得尤为重要。

阿根廷豪尔赫·赛贝尼克省大坝发电量有望达到 174 万千瓦，几乎占到阿根廷目前发电总量的 6%，将能满足当地约 10% 的电力需求。

2013 年 8 月，由中国葛洲坝集团公司 (CGGC) 和阿根廷 Electroingenieria SA 组成的财团竞标成功，与阿根廷政府签订了大型水电站项目合同。根据合同，双方将共同建设、运营和维护发电站。众所周知，中国葛洲坝集团公司 (CGGC) 是 2008 年竣工的全球最大的水力发电项目——三峡大坝的承建方。

阿根廷尚未开发的太阳能和风能给中国带来了许多机会。尽管与周边国家相比，阿根廷(和委内瑞拉)的可再生能源利用率最低，但阿根



2013 年，中国在风能、太阳能和其他可再生能源的投资达到 563 亿美元，超过整个欧盟的投资总额

廷政府却雄心勃勃地希望到 2016 年将可再生能源的电力供给从 2012 年的 2% 提高到 8%；并计划到 2020 年将太阳能发电量提高到 330 万千瓦。

2001 年经济危机爆发，阿根廷因债务违约而被国际信贷市场拒之门外，中国的银行却施以援手，为阿

根廷公司提供了低息且几乎不带附加条件的长期贷款。

中国英利集团是全球最大的太阳能电池板制造商，也是 2014 年巴西世界杯唯一的可再生能源赞助商。这不仅反映出中国清洁能源行业对进军南美市场抱有浓厚兴趣，也反

映了其不断扩大的全球影响力。

根据 21 世纪可再生能源政策网络 (REN21) 最新发布的全球现状报告显示,中国在可再生能源领域的投资远超其他国家;2013 年,中国在风能、太阳能、以及其他可再生能源项目上的投资超过欧盟,达到 563 亿美元。

巨大的市场等待着中国

对于中国公司而言,拉丁美洲和加勒比地区 (LAC) 拥有建设水力、风能和太阳能设施的绝佳环境。根据泛美开发银行的资料显示,自 2007 年以来,该地区有 19 个国家制定了可再生能源发展目标,并通过税收、能源补贴以及其他扶持性政策来推动可再生能源市场的发展。

银行数据还显示,该地区可再生能源装机容量从 2006 年的 1130 万千瓦猛增至 2012 年的 2660 万千瓦;2012 年产能增长 330 万千瓦,其中巴西占比达 62%。

英利集团国际销售部副总裁杰弗里·巴奈特说:“拉丁美洲目前是最具潜力,最为重要的新兴市场之一。许多市场因素结合到一起,推动该地区许多国家可再生能源产业的发展。这些因素包括高额的电价,充足的太阳能资源,以及政府的扶持性政策等。”

对于中国的太阳能公司来说,巴西东北部和智利北部的阿塔卡马沙漠地区是尤为重要的大市场。这

两个地区位于全世界太阳辐射最强的地区,也就是人们所说的“阳光地带”。中国天华阳光集团承诺投资 9 亿美元,在阿塔卡马沙漠地区兴建 30 万千瓦的光伏发电系统。

DNV GL 集团下属新加坡清洁技术中心 (CTC) 的高级顾问大卫·富布鲁克表示,“太阳能仍然是一项新兴技术,目前在这项技术领域位居前列的国家和企业,未来很有可能会保持其领先地位。……所以,中国或任何一个将太阳能纳入其产业政策并重点开发的国家,都不能忽视拉丁美洲,更何况拉丁美洲不同于欧洲或美国,其电力发展还远不完善。”

中国企业在拉丁美洲的水力发电和太阳能领域发展迅猛。国际河流组织 (一个监督全球大坝建设的北美组织) 的数据显示,目前中国企业在该地区共参与建设 22 个水力发电项目,其中 3 个已竣工,7 个正在建设,12 个正在计划中。

2014 年 3 月,英利集团表示,他们利用太阳能发电系统,每年可为巴西供电 150 万千瓦时,相当于 6000 个巴西人一年的用电量。

中国太阳能组件制造商尚德集团,将向墨西哥提供 13.2 万块太阳能电池板,用以建造拉丁美洲最大的太阳能光伏方阵。3 万千瓦的光环太阳能发电厂就建在南下加利福尼亚州的拉巴斯。

富布鲁克表示,“中国大规模投资建设太阳能发电项目大大降低了

太阳能发电成本,提高了发电性能,从而刺激全球消费者的需求,尤其是电费较高、或供电受限地区消费者的需求,如偏远地区的农村人口或拉美国家的城市贫困人口。”

树立品牌

然而,也有人担心,拉丁美洲国家缺乏针对可再生能源的长远政策,这可能导致中国不断增长的能源投资放缓。

玛格丽特·迈尔斯举了一个例子:“巴西缺乏综合的国家政策来指导太阳能发电和并网问题,因而限制了相关项目的发展。”她是美国政策分析机构美洲国家对话组织 (Inter-American Dialogue) 中拉关系研究室主任。

巴西虽然阳光充足,但主要依靠水力发电,而且目前还不具备光伏电池 (将太阳能转换成电能的电子设备) 的生产能力。

富布鲁克还表示,中国在拉美能源市场投资所面临的另一个挑战是树立品牌、保证质量。中国太阳能电池板能效低下的传言仍在四处流散。“中国企业有着世界上最优秀的领导人。在他们的带领下,中国企业正在快速完善,但要获得市场的认可还有待时日。”

卡米妮亚·拉慧慈,阿根廷记者,报道内容涵盖中国在拉美外交政策等议题

China develops Latin America's clean energy

Untapped wind and solar resources provide opportunities for China, but lack of national policies on renewables in some countries may be an obstacle

Kamilia Lahrichi

China's president Xi Jinping landed in Argentina in July to monitor – among other projects – the progress of two hydroelectric plants worth US\$4.7 billion in Patagonia. His 2014 trip was all the more significant as it was the first state visit by a Chinese president to the country in 10 years.

The Jorge Cepernic dams are expected to generate 1,740 megawatts (MW) of electricity, almost 6% of Argentina's current production capacity. They will would supply roughly 10% of local power demand.

In August 2013, the Argentine government awarded a contract to a consortium led by China Gezhouba Group Corporation (CGGC) to build the hydroelectric dams with Argentina's Electroingenieria SA. Under the deal, both sides work together in the construction, operation and maintenance of the plants. CGGC is known for the construction of the Three Gorges Dam, the world's biggest hydroelectric project, completed in 2008 in China.

Argentina's untapped solar and wind resources provide plentiful opportunities for China. Although Argentina currently has the least renewable energy in the region (along with Venezuela), the government aspires to get 8% of Argentina's power from renewables by 2016 – up from 2% in 2012. It also aims to generate 3.3 gigawatts (GW) of solar power by 2020.

While international credit markets have shunned Argentina since it defaulted on its bonds in the 2001 economic crisis, Chinese banks have offered long-term loans to Argentinian companies at relatively low interest rates and with few policy conditions.

Yingli Solar, a Chinese company and the world's largest solar panel manufacturer, was the only renewables company to sponsor the 2014 World Cup in Brazil, reflecting both the growing interest of China's clean-energy industry in South America and its increased global clout.

China, the world's leading investor in renewable energy, spent US\$56.3 billion on wind, solar and other renewable projects in 2013, according to the latest global status report from the *Renewable Energy Policy Network for the 21st Century* (REN21). It invested more in renewable energy that year than the entire European Union.

A big market for Chinese renewables

Latin America and the Caribbean (LAC) is a unique environment for Chinese companies to build hydropower, wind and solar facilities. Since 2007, 19 countries of the region have introduced renewable energy targets, tax incentives, feed-in tariffs and other government-sponsored policies to boost the renewable energy market, according to the *Inter-American Development Bank*.

Installed renewable capacity in the region jumped from 11.3GW in 2006 to 26.6GW in 2012, says the bank. In 2012, the region increased its renewable capacity to 3.3GW, with Brazil contributing 62% of the total.

“Latin America is one of the highest potential, most important emerging markets today. Market factors are aligning to catalyse the growth of the industry in many parts of LAC, including high electricity prices, strong solar

resources, and government policies and regulations that support the market's growth," says Jeffrey Barnett, vice president of international sales at Yingli Solar.

Northeastern Brazil and the Atacama desert in Chile, in particular, are large markets for Chinese solar companies. They lie in what has been called the "sunbelt" due to some of the world's highest levels of solar radiation. China Sky Solar has pledged to invest US\$900 million to build 300MW of PV generating capacity in the Atacama desert.

"Solar is still an emerging technology, firms and countries which establish strong positions now may be hard to dislodge in the future. [...] So, China, or any country with an industrial policy to nurture solar as a major industry, cannot afford to overlook Latin America, especially as electrification is far from complete, unlike say Europe or the United States," says David Fullbrook, senior consultant with DNV GL Energy's Clean Technology Centre in Singapore.

Chinese businesses are making leaps forward in hydropower and solar energy in Latin America. Chinese companies have worked so far on 22 hydropower projects in the region, according to International Rivers, a North American watchdog monitoring dam building around the world. Three are completed, seven are under construction and 12 are under consideration.

In terms of solar energy, Yingli Solar said in March 2014 it expected to generate more than 1,500 megawatt hours (MWh) of electricity annually in Brazil. This is equivalent to the annual electricity consumption of about 6,000 Brazilians.

In Mexico, the Chinese solar module manufacturer Suntech will supply 132,000 solar panels for the construction of the largest solar PV array in Latin America. The 30MW Aura Solar plant is located in La Paz, Baja California Sur.

"The scale of China's interests in solar is helping to accelerate cost reductions and performance improvements which will fuel demand globally, particularly from consumers facing high grid-power bills or struggling with limited electricity supplies such as people in remote villages or the urban poor of Latin America," says Fullbrook.

Building brands

However, there are also fears a lack of far-reaching national policies on renewable energy in Latin America could slow China's growing investment in energy.

Margaret Myers, director of the China and Latin America programme at Inter-American Dialogue, a US-based center for policy analysis, offers one example: "The absence of a comprehensive national policy for solar energy generation and grid integration in Brazil has [meant] limited projects in this field."

Despite high levels of sunshine, Brazil mainly relies on hydropower to generate energy and it does not yet produce PV cells – the electrical device that converts the energy of light into electricity.

Another challenge for China's investment in Latin American energy markets is building brands and delivering quality, says Fullbrook. Myths about the lack of efficiency of Chinese solar panels persist, for example. "Chinese firms are improving fast with the leaders among the world's best, but it may still take time to convince the market," he says.



Kamilia Lahrchi is an Argentina-based multimedia journalist covering China's policy in Latin America.

谁来喂饱中国的猪？ 全球农业格局的变迁及影响

新希望集团和中粮等新一代中国企业正在努力满足中国日益增长的肉食需求，并由此对美国的主导地位发起挑战。

汤姆·莱维特

他曾经被称为中国最富裕的养鸡专业户，但如今的刘永好和当初在四川农村养鸡时已是天差地别。

刘永好已经身家数十亿，由他一手创办的新希望集团已成长为中国最大的饲料生产企业。刘永好在过去三十年中的发展正是中国农产品企业快速崛起的一个缩影。

新希望集团也一直都是美国大豆和玉米需求的主要推动者，这些粮食作为饲料用来满足中国迅速发展的养殖业。正是这一高涨的势头让中国超过加拿大成为美国最大的农产品进口国。

根据美国农业部（USDA）的数据，2013年美国向中国出口价值130亿美元的大豆和10亿美元的玉米。其中，大豆占2013年中国大豆进口总量的40%，而玉米在2010年到2012年占中国玉米进口总量中的比例高达97%。

预计未来三十五年，中国在全球农产品进口增量中的占比将超过40%。

“随着世界大多数饲料作物都变成了中国的猪饲料……我们正在走向一个新的时代，”荷兰社会科学研



世界大多数饲料作物都变成了中国的猪饲料

究院（ISS）的农业综合企业学者明迪·施奈德说。

中国农业综合企业的崛起

但是，中国新农产品巨头的崛起靠的并不只是不断增加美国商品进口。如果想要进口更多的粮食，中国就要加强对生产和分配环节的掌控，这是完全可以理解的。

刘永好的新希望集团正是众多入选企业之一（即中国所说的“龙头企业”）。这些企业在国家的支持下走出

去，以提高自身在全球的影响力。

这一趋势开始于2008年，标志就是中国国有粮食贸易企业中粮集团（COFCO）收购了美国猪肉生产巨头史密斯菲尔德公司5%的股权。但真正引人瞩目的，还是去年史密斯菲尔德被中国最大的肉制品生产商——双汇集团以47亿美元的价格收购。

作为对美国企业并购中国民族企业（如2009年美国泰森食品公司收购了中国肉禽加工企业——山东新昌集团60%的股权）的逆袭，中国企业如今开始挑战美国农产品巨头

(如 ADM、嘉吉和孟山都) 存在已久的霸权地位。

战斗在南美

尽管史密斯菲尔德收购案和美国对华猪肉出口猛增(2014年初同比增长44%)成为媒体关注的焦点,但实际上,南美洲各大宗商品出口国才是中国挑战美国农产品巨头的主战场。

美国农业综合企业在巴西和巴拉圭等南美国家长期占据主导地位,但这一格局正在迅速改变。去年,无论是大豆还是其他农产品,中国均超过欧盟成为南美主要农产品生产国——巴西最大的买家。

今年早些时候,中粮集团收购了在巴西拥有巨大利益的两家农产品贸易企业——来宝集团和 Nidera 公司,这让中国的农产品巨头们迅速在该国获得了立足点。而且,以 15 亿美元买下来宝集团还捎带着让中粮集团控制了巴拉圭的第四大粮食贸易企业——该国 96% 的大豆都供出口。

美国华盛顿皮吉声大学(the University of Puget Sound)的一位全球农业综合企业专家艾米莉·佩尼说:“在我看来,这就是一场真正的大翻盘,提高了中国农业综合企业在巴西与其他农产品公司的竞争力,这标志着战略上的转变,即从寻求与较小的巴西企业实地合作来建立起自己的基础设施,到直接购买现成的市场准入路径,就像史密斯菲

尔德收购案所做的那样。”

包括刘永好的新希望集团在内的企业都在寻求进口更多的玉米用作动物饲料,因此上述转变还会加速。世界银行预测,到 2030 年中国进口玉米在总消费中的比例将从目前的 2% 增加到 15%。

直到最近,美国一直都是最大的对华粮食出口国。2010-2012 年,其玉米出口占中国玉米进口总量的 97%。但是,为了减少对美国玉米的依赖,扩大本国农产品企业的影响,中国最近与巴西签署了一项意在提振新希望集团及中粮和北大荒集团等主要国有粮食贸易企业的供应协议。

但对美国农业综合企业来说这却是一个双重打击,因为在过去一年中中国反复拒收来自美国的货物,声明其中含有未经批准的转基因玉米。嘉吉公司今年早些时候承认,造成该公司盈利下降 28% 的原因主要是中国拒收其玉米产品。

施奈德解释说:“就大豆而言,美国农产品巨头在南美和中国都牢牢掌握着控制权,而且扎根很深。但玉米就不一样了,新希望集团等中国企业随时都会成为主要贸易商。”她又补充说:“一场巨大的政治经济转变正在实时发生,嘉吉公司等巨头还没有被取代,但它们的霸权正遭到挑战。”

对雨林的破坏

中国影响的到来,将让巴西有

能力夺取美国在全球玉米生产和出口中的主导地位。但是,这可能会以牺牲生物多样性丰富的草地、湿地和森林为代价,尤其是在最新的农业开垦区——Matopiba 地区。

“玉米将成为巴西农业格局中的下一个主要因素,”佩尼说。

她还说:“玉米对水和肥料的需求都比大豆多得多,因此种植面积的扩大将给巴西农业部门带来真正重大的变化,同时还会带来巨大的环境影响。可以想见,在巴西不断扩大的玉米生产面积和那些努力限制森林破坏的人们之间将有一场‘恶战’。”

迄今,中国的农产品部门还没有对这些问题表现出关切。尽管中国是世界最大的大豆进口国,但却没有要求进口大豆进行可持续生产或认证。而且与嘉吉公司和其他美国企业不同,中国的农产品公司并未参加“负责任大豆圆桌会议”。该会议成员都自愿承诺不购买新毁林地生产的大豆。

绿色和平组织巴西分部的森林活动家罗慕洛·巴蒂斯塔担心情况会朝着更坏的方向发展。他说:“与任何商品一样,玉米种植面积的增加也受市场调节。如果供不应求、金钱回报很高的话,环境就会遭到破坏。同样的情况其他单一作物也会发生。如此一来,大片的森林和草原会被变成玉米地。”

汤姆·莱维特, 中外对话伦敦办公室执行编辑

Who will feed China's pigs? And why it matters

A new generation of Chinese companies like the New Hope Group and COFCO are challenging the dominance of US agribusiness as they seek to meet China's growing demand for food

Tom Levitt

He's been called China's richest chicken farmer, but Liu Yonghao has come a long way from his days breeding birds in rural Sichuan province.

As the billionaire founder of the New Hope Group, China's largest producer of animal feed, Liu's rise over the past three decades mirrors the rapid growth of the country's agri-food corporations.

His company has been at the forefront of a boom in demand for Brazilian and US soy and maize, used to feed China's burgeoning livestock sector.

It's a boom that helped China overtake Canada as the biggest importer of US agricultural produce, with a whopping US\$13 billion-worth of soy and US\$1 billion of maize exported from the US to China in 2013, according to the US Department of Agriculture (USDA). That same year also saw China overtake the EU as the largest purchaser of agricultural commodities from Brazil.

Over the next three and a half decades, China is expected to account for more than 40% of the global rise in demand for agri-food imports.

"We're heading towards a new era...as the majority of the world's feed crops are destined for China's pigs," says Mindi Schneider, an agribusiness researcher at the International Institute of Social Studies in the Netherlands.

The rise of China's agribusiness

However, the story of China's new agri-food giants is not just about booming imports of Brazilian and US feed crops. If it is to import significantly more food, China understand-

ably wants greater control over its production and distribution too.

Liu's New Hope Group are among a select group of companies – so-called "dragon-head enterprises" – given state support to go out and boost their global presence.

The trend started back in 2008 when state-owned grain trader COFCO bought a 5% stake in US pork giant Smithfield, but really caught public attention when Smithfield was then taken over by WH Group, one of China's biggest pork producers, for US\$4.7 billion last year.

In a reversal of US firms buying into China's domestic sector – such as Tyson's purchase of a major stake in the poultry producer Xinchang in 2009 – Chinese firms are now looking to challenge the long-standing hegemony of US agri-food giants like ADM, Cargill and Monsanto.

The battle in South America

Although the Smithfield deal and the rise in pork exports to China – up 44% year-on-year at the beginning of 2014 – has garnered a lot of media attention, the battleground in China's emerging challenge to US giants is South American commodity-exporting countries.

In countries like Brazil and Paraguay, US agribusinesses have long dominated. But that's changing fast.

COFCO's takeover of two grain traders with major interests in Brazil, Noble Group and Nidera, earlier this year has enabled China's agri-food giants quickly to gain a foothold in the country. The US\$1.5 billion deal to buy Noble, incidentally, also gave COFCO control of the fourth

largest grain trader in Paraguay, where 96% of soybeans are exported.

“To me it could be a real game-changer helping Chinese agribusiness become more competitive with other agri-food companies in Brazil,” says Emeile Peine, a global agribusiness specialist at the University of Puget Sound, Washington. “It signals a shift in strategy away from saying OK we’re going to partner with smaller Brazilian companies on the ground to try to establish our own infrastructure to saying we’re just going to purchase our way into the market – like what happened with Smithfield.”

And it’s a shift that could be accelerated as companies including Liu’s New Hope Group look to import more corn for use as animal feed. The World Bank forecasts maize imports will rise from 2% to 15% of China’s total consumption by 2030.

Until recently, the US has been the main exporter to China, accounting for 97% of its maize imports between 2010-12. However, in an effort to reduce this dependency and boost the influence of its own agri-food corporations, China has recently signed a supply agreement with Brazil, giving a deliberate boost to companies like the New Hope Group and the major state grain traders COFCO and Beidahuang.

It’s been a double blow for US agribusiness, with China also repeatedly rejecting shipments over the past year claiming they contain an unapproved GM corn. Cargill admitted a 28% drop in its earnings earlier in 2014 was largely down to China’s corn rejections.

“Unlike soy, where US agri-food giants took a firm control and are deeply embedded both in South America and China, in corn Chinese firms like the New Hope Group are poised to be key traders,” explains Schneider. “A major political economic shift is happening in real time. Cargill and co are not being displaced but their supremacy is being challenged,” she adds.

Destroying the rainforest

The arrival of Chinese influence could enable Brazil to usurp US dominance of global corn production and

“
Over the next 35 years, China is expected to account for more than 40% of the global rise in demand for agri-food imports.
”

exports. However it may come at the expense of Brazil’s richly biodiverse grasslands, wetlands and forests, particularly in the newer farming frontiers of the Matopiba region.

“Corn is going to be the next big factor in the Brazilian agricultural scene,” says Peine.

“It’s much more water and nutrient intensive than soy, so its expansion could be a real important moment of change in the Brazilian agricultural industry, with major environmental implications. It’s going to be a real struggle between expanding production area in Brazil and people who are trying to limit deforestation,” she adds.

China’s agri-food sector has, so far, shown little concern about such issues. Despite being the largest soy importer in the world, the nation does not require any of its soy imports to be sustainably produced or certified. And unlike Cargill and other American companies, Chinese agri-food corporations are absent from the Round Table on Responsible Soy, for which members voluntarily commit to not purchasing soybeans from newly deforested land.

Forest campaigner at Greenpeace Brazil, Romulo Batista, fears the worst: “As usually happens with every commodity, it is the market that will regulate the increase in areas planted with this crop. If the demand is greater than the supply and the financial returns are high we can expect the same environmental damage usually seen in other monocultures, with new areas of forests and savannas converted into cornfields.”

Tom Levitt is managing editor in chinadialogue's London office.

中国企业在非洲大打出手

在全球发展中国家的工程承包市场上，巨无霸的中国国企的主要对手往往是另一家巨无霸的中国国企。他们陷于无序竞争中。

胡剑龙

艾萨克是乌干达东北部靠近肯尼亚的边境城市托罗罗（Tororo）的执业律师。2014年8月28日，在镇上一家酒店的草坪上，他道出自己的疑惑：这些以“C”开头的企业，听说都是中国的国企，为什么会为抢项目不惜大打出手？

“他们每一天都在吵架。”（they are fighting, fighting everyday）。他的双手在空中划动了两次。“他们”是两家中国国企：中国港湾和中国土木。

乌干达最有名的杂志之一《独立》（The Independent），2014年8月刊的封面报道就是中国港湾和中国土木的丑闻，标题《80亿美元铁路合同乱象》。

2012年1月，中国土木与乌干达交通部签署框架性协议，以17.5亿美元的价格，获得该国一个铁路项目。但是，项目尚未启动，另一家中国央企在私底下报出了一个更低的价格：12.5亿美元。2013年4月，乌干达政府撕毁之前的框架合作协议，转而与中国港湾签署了一份新协议。

2014年7月，中国土木起诉乌



当地时间2014年4月13日上午8时，由中国中铁承建的埃塞俄比亚轻轨工程四电专业施工迎来了一个重大工序节点，埃塞轻轨“电气化第一杆”顺利完成了组立

干达交通部部长，并取得阶段性胜利，这个铁路项目因此引发了乌干达政坛的一场小规模危机。乌干达总统穆塞韦尼在7月25日举行了一场紧急会议，面对自己的内阁成员，他对该项目的混乱表示十分恼火。

中国企业在乌干达的无序竞争，让我这位在曾经从事腐败调查报道的记者大开眼界。而艾萨克的问题让人尴尬，如何解释中国国企的行

为边界，显然是个相当深奥的话题。我只能简单的敷衍他：国企也是企业，他们也要利润啊。

乌干达现有铁路是1900年设计的一米宽的窄轨铁路，最重只能承载15吨货物，时速为40公里，且由于年久失修，目前时速仅为15公里。而处于争议中的项目，则是东非铁路网的一部分，通过它连接卢旺达和刚果（金）以及南苏丹与肯尼亚。

竣工之后，乌干达将是东非铁路的枢纽，而它也是中国新一届政府野心勃勃的非洲基础设施投资计划的一部分。

东非铁路整体规划从蒙巴萨出发经内罗毕到乌干达。从乌干达分为两路，一路向北到南苏丹，另一路向南从乌干达首都坎帕拉到卢旺达，经布隆迪最终到达坦桑尼亚。规划全长 2700 公里，预计总造价 250 亿美元。

2014 年 5 月份，当李克强总理访问非洲时，出席了蒙内铁路（蒙巴萨到内罗毕）铁路项目中肯共同融资协议签字仪式。中国媒体乐观地表示，铁路的建设将把中国的资金、技术、标准、装备制造和管理经验带入非洲。

而中国媒体未报道的另一面则是，在李克强抵达之前，为争夺蒙内项目，另两家中国国企中国路桥和中国铁建，几乎每天都在当地的主流媒体上轮流抹黑对手。

东非铁路项目只是冰山一角。2010 年，中国成为海外工程承包量全球最大的国家。2011 年，中国企业在海外承包工程合同额达到 1565 亿美元。

如果从另一个角度来解释这个数据，全球工程承包市场，尤其是在

发展中国家，中国企业面临的对手其实就是他们的同胞，特别是几家巨无霸的中国国企。

2013 年 11 月，当我在赞比亚南部省的一个火电站工地采访时，乙方中国电建的一位项目经理告诉我，他们在 2011 年与赞比亚能源部签署了开复伊拉峡水电站的开发协议。但是，另一家中国企业介入后，赞比亚政府宣布，重新对该项目招标。这也意味着，中国电建所有的前期工作都打了水漂。

水电项目则是另一个重灾区。由于多年的过度开发，中国的水电资源已经日渐枯竭，大批水电建筑企业面临痛苦的转型。同样是在赞比亚，中国水电十一局赞比亚公司一位不愿具名的副总透露，海外业务对利润率的贡献已经达到 50%—60%，如果在这块市场稍有闪失，公司将面临亏损。

更重要的是，类似于水电十一局这样的国有企业，历史包袱沉重，员工动辄上万，养活这些职工，意味着他们必须尽一切可能在国外多拿项目。此外，虽然是国有企业，国资委每年对监管的国企也有经营指标的考核，国企负责人为了自己的数据上更好看，也必须拿到更多项目。

恶性竞争的魔咒就此形成。

2014 年 8 月底，在乌干达首都坎帕拉，一位中国水利电力对外公司的中层说：“不管三七二十一，拿到项目再说。现在很多公司的报价，我们都知道，根本是做不下来的。那怎么样？只能层层转包，一点点的抠。”

理论上讲，中国驻外使馆的经参处负责中资企业的利益协调。但是，无论从人手，还是积极性，至少在非洲大部分地区，经参处在这类角色上，可有可无。此外，中国工程对外承包商会名义上也有监管的权利。事实上，我从相关渠道了解到，这家与商务部关系密切的民间机构，对会员企业之间的恶性竞争亦十分头痛，但无能无力。从行政级别上，它只是正局级，而下属的会员企业，比如中国三峡，便是副部级的国企。在等级森严的官僚体系里，中国工程对外承包商会也只是个小角色。

乌干达由于有丰富的水电资源，成为中国企业的新战场。而残酷的竞争、不择手段的互相诋毁，让内部人也觉得目前的格局不可持续。一位在乌干达的中国记者曾对我感叹：“他们甚至找到我，说能不能把几家水电企业拉到一起，好好坐下来谈谈，说这样下去不行。”

胡剑龙，《南方周末》记者

China's firms battle each other in Africa

Chinese state-owned enterprises bidding for contracts in Africa often find their rival is another giant Chinese state firm

Hu Jianlong

Issac is a lawyer in the northern Uganda border town of Tororo, near Kenya. His question, put to me on a hotel lawn is: “Why are all these companies with names beginning with ‘C’”— he’d heard they’re from China— “fighting so hard?”

“They are fighting, fighting, every day,” he says. The two firms deadlocked over a cross-border rail contract are China Harbour Engineering Company and China Civil Engineering Construction Corporation. Their ugly saga has mushroomed from a spoiler bid, then a cancelled contract,

into a lawsuit against the government.

Issac’s puzzlement is shared at the highest levels. At an emergency cabinet meeting in July, Uganda’s President Yoweri Museveni expressed outrage at the confusion over the project.

I used to report on corruption, but even I found the unruly competition between Chinese firms in Uganda eye-opening. It’s an awkward moment, and it’s difficult to explain to Issac the way Chinese companies are behaving. I do my best: business is business, and they want profits.



© John Hanson

Chinese firms are battling to upgrade Uganda's ageing railway network, which dates back to 1900

Twisting battle

Things began normally enough when China Civil Engineering signed a framework agreement with the Ugandan transportation ministry in January 2012, after clinching a railway contract with a \$1.75 billion tender. But before work started another Chinese firm undercut it, at \$1.25 billion. In April 2013 the Ugandan government tore up the framework agreement and signed a new deal with rival China Harbour Engineering.

In July 2014, China Civil Engineering took Uganda's transportation minister to court, winning an initial victory and causing a minor crisis for the government. President Museveni expressed his displeasure in an emergency cabinet meeting on July 25.

At least seven African countries are depending on the new rail link, so the family feud between Chinese firms was being played out in front of Uganda's neighbours.

Uganda will be the network hub of the East African Rail Network, which will link Uganda to Kenya, Tanzania, Rwanda, Burundi, Democratic Republic of Congo and South Sudan. The project forms part of the Chinese administration's ambitious plans for investing in infrastructure construction in Africa.

Uganda's existing railways were designed in 1900: one-meter-wide narrow-gauge tracks, which can carry loads of no more than 15 tonnes at a maximum speed of 40 kilometers per hour. Years of neglect have reduced maximum speeds even further, to 15kph.

The rail link will run from Mombasa through Nairobi and on into Uganda, where it will split into two lines; one running north into South Sudan, the other south from the Ugandan capital Kampala onto Rwanda, through Burundi, and finally onto Tanzania. The 2,700 kilometers of track are expected to cost \$25 billion.

Bad reputation

During his visit to Africa in May, Chinese premier Li

Keqiang attended a signing ceremony for a Sino-Kenyan funding agreement for the railway's Mombasa to Nairobi stretch. The project would, the Chinese media happily reported, bring Chinese funds, technology, standards, manufacturing and management experience to Africa.

What the Chinese media did not mention was that prior to Li's arrival two other Chinese state-owned companies, China Road and Bridge Corp. and China Railway Construction Corp., had been attacking each other in the local media on an almost daily basis.

The East African railway scheme is just the tip of the iceberg. In 2010, China became the world's biggest overseas contractor. In 2012, the value of overseas construction contracts undertaken by Chinese firms reached \$156.5 billion.

But this also means that when competing for projects, particularly in developing nations, Chinese firms are facing other Chinese firms. Often, competitors are drawn from a small number of Chinese state enterprise giants.

An air of scandal surrounds Chinese firms' projects. Uganda's two best investigative magazines published major reports on Chinese companies in their August editions.

The Whisper reported that a company based in Tibet was under police investigation, suspected of having fraudulently acquired a Ugandan copper mine. The Independent's cover story featured the two firms Issac mentioned, under the heading "Chaos over \$8 billion rail contract."

Scramble for hydropower deals

Hydropower is another fraught area. In November last year, I visited a power plant being built in southern Zambia. A project manager from the China Power Construction Corp. told me that they had signed a deal with the Zambian government to restore the hydropower facility at Kafue Gorge. But a different Chinese firm then intervened and the government announced it would restart the tendering process—meaning all of his company's work up to that date was wasted.

Overdevelopment in China means dam builders are suffering from a lack of business. A vice-president with

“
When competing for projects, particularly in developing nations,
Chinese firms are facing other Chinese firms.
”

the Zambian subsidiary of Sinohydro Bureau 11 Co told me that 50-60% of the company's profits now come from overseas, and any problems in foreign markets could cause the firm to collapse.

Equally important, Sinohydro and similar companies carry historical burdens: huge workforces that need to be paid. This means they need to get as many overseas contracts as possible. And although they are commercial enterprises, the State-owned Assets Supervision and Administration Commission sets annual targets, and company bosses need to win work if they are to look good.

And so competition becomes unruly. In Kampala in late August a mid-ranking official with a Chinese hydropower company told me that "everyone just wants the contracts, no matter what. We all know that a lot of projects can't be done at the tendered price. So what happens? They get subcontracted out bit by bit, with a cut taken."

In theory the commercial affairs office at the local Chinese embassy is responsible for coordinating the interests of Chinese firms. But it may not be able to do so, or may not wish to do so; in Africa, it often does not undertake this role.

The China International Contractors' Association, a body with close links to the Ministry of Commerce, in theory has regulatory powers. But I have learned that though troubled by unruly competition among its members, it is powerless to act. In China's political hierarchy, it is a bureau-level organization. Its members, such as the Three Gorges Group, are of vice-ministerial level. Within the government bureaucracy such rankings matter, so the Association is only a minor player.

Uganda's potential for hydropower development (located in Africa's Great Lakes region, and the source of the Nile) has made it a new battlefield for Chinese firms. But bitter competition and mutual vilification have left company insiders feeling that the present set up is unsustainable. "They've even asked me if I can get several hydropower firms together and sit them down and explain that things can't go on like this," complained one Chinese journalist in Uganda, who did not wish to name those involved. ↻

Hu Jianlong is a journalist with Southern Weekly.

中国在中亚的能源足迹

中国的战略性投资使其在中亚地区取代了俄罗斯，成为该地区能源版图的主导者。

克里斯·理哥顿

塔吉克斯坦 Danghra 镇的居民似乎并不知道，有一批中国工人正在镇外不远处的经济特区建造炼油厂，但即便知道，他们对此也没有多少发言权。Danghra 镇位于总统埃莫马利·拉赫蒙的政治中心，工作机会不多，是共和国中仅有的几处依靠镇民出国打工赚外币维持发展的地方。这样一个城镇是中国战略投资的理想场所。

炼油厂未来将由持股 90% 的山东东营合力公司运营。目前，这里还只是一堆堆的建筑材料，但到 2016 年建成后，炼油厂每年将为塔吉克斯坦提供超过 100 万吨的汽油和柴油，使塔摆脱对俄罗斯汽油产品的依赖。

在能源匮乏的吉尔吉斯斯坦，一座规模相似的中国炼油厂已经在工业城卡拉巴尔塔建成；而在托克马克，一家规模相对较小的姐妹炼油厂也正在紧张建设中。这两个炼油厂所需的原油将由中国在哈萨克斯坦（吉尔吉斯斯坦强大的北部邻国）的油田提供。而塔吉克斯坦炼油厂所需原油未来将由本国油田提供：

作为为数不多的几家公司之一，中国石油天然气总公司正在塔吉克斯坦的西南地区对尚未开发的大型油田进行勘探。

这几家炼油厂年产量总计将达到 250 万吨，但也不过是中国石油需求的一个零头。根据石油巨头中石化的估计，明年起，中国石油年需求量将达到 5.5 亿吨。去年，中国通过管道从哈萨克斯坦进口大量原油，而这些新建炼油厂仅能精炼其中的六分之一。它们存在的目的主要是为了满足塔吉克斯坦和吉尔吉斯斯坦少之又少的消费需求，从而证明了中国政府在处理地区能源问题上的高明手段。一方面，吉塔两国经济发展面临挑战，政治局势十分脆弱；另一方面，两国都与中国新疆地区接壤，能够将其西方地区的原油不断地输送到新疆。所以，中国伸出援手助邻国解决能源安全问题，实在是双赢之举。

虽然这些交易投资总额不到 10 亿美元，但却是中国积极参与中亚石油市场的一个证明。真正的重头

戏是中国与石油大国哈萨克斯坦和天然气大国土库曼斯坦签订的价值数十亿美元的合作。

中国—中亚新关系

早在苏联时期，中亚就是公认的能源富饶之地。而该地区最大的两个油气田则是在苏联解体后发现的。2000 年哈萨克斯坦里海地区发现的卡沙干大油田是 30 年以来发现的最大油田。2007 年，人们对土库曼斯坦 Galkynysh 天然气田进行了独立审计。审计结果一下子把这个人口 500 万的中亚强国推到世界排名前四的天然气大国的位置，人均探明储量仅次于卡塔尔。除了解决新疆面临的安全威胁以外，这两项新的发现加上业已可观的石油储量，成为中国政府与中亚国家建立新关系的有力动机。

哈萨克斯坦和土库曼斯坦两国在与中国建立能源联系上所面临的问题是运输。两国曾是苏联的一部分。苏联当时强调自给自足，基础设施建设

均为满足内部需求。因此，两国独立时，所有的油气管道都指向莫斯科。后来，中国解决了这一问题。2005年，中哈原油管道一期工程开工，目前已全部竣工；2008年，中土天然气管道竣工，耗时仅18个月。

中哈管道和中土管道的路线并不单一。中哈原油管道共分几期建设，线路尽可能“四通八达”，甚至有一条线路可能通往南部的吉尔吉斯斯坦和卡拉巴尔塔炼油厂。目前通向哈萨克斯坦西部油田的中哈管道，极有可能在卡沙干大油田投入开采后，与之联通。中石油去年购买了价值50亿美元的卡沙干油田股份。中土天然气管道大规模扩建的潜力更大。中方为管道建设提供低息贷款，中国公司负责建设施工。目前管道的A线、B线和C线已经建成，正通过乌兹别克斯坦和哈萨克斯坦向东部输气；D线由中国、乌兹别克斯坦、塔吉克斯坦、吉尔吉斯斯坦四方协议建设，不出意外的话，将于2016年竣工。届时，中国每年将通过D线从土库曼进口多达650亿立方米的天然气。同时，中国还在酝酿另一条绕塔吉克斯坦和阿富汗而行的支线，这足以证明中国政府为实现能源供给多样化所做出的努力。

土库曼斯坦其他的跨国油气管道项目（连接南亚的欧盟纳布科计划和TAPI计划）进展缓慢。但幸运的是，中国政府公开承诺将增加天然气消费（目前仅占能源消费总量的5%），降低煤炭等高碳燃料的消费。一名西方学者把土库曼斯坦称作“中国的附庸国”，而这一附庸国无疑拥有了一个终身顾客。

给俄罗斯留个位置

去年上海合作组织（简称SCO，该组织成员国包括除土库曼斯坦以外的所有中亚国家）峰会召开前夕，中国国家主席习近平对中亚地区进行了短暂访问，并与各国签订了数百亿美元的石油和天然气协议。这一举措表明中国正积极地参与到中亚能源市场中来。鉴于SCO的成员国还包括俄罗斯，习近平主席的这次出访成为地区媒体和分析人士炒作的绝佳机会。他们宣称中国政府正在取代克林姆林宫成为该地区具有主导影响力的地区外国家。

中国全面涉足中亚能源市场无疑阻碍了俄罗斯巩固其中亚影响的努力。吉尔吉斯斯坦和塔吉克斯坦的炼油厂可能把俄罗斯关在两国汽油市场的门外，至少也会使俄罗斯沦落到为中国炼油厂提供原油的羞耻境地。在成为中国的能源枢纽之前，土库曼斯坦主要为俄罗斯提供廉价的天然气，而俄罗斯再将天然气转手高价出售给欧洲，从中赚取利润。如今，这一买卖已难再维系，俄土两国关系也陷入冰点。哈萨克斯坦仍然是俄罗斯的重要伙伴，它将自己定位成平衡中俄在中亚地区利益的支点。但是，与俄罗斯相比，哈萨克斯坦和其他中亚国家显然更热衷于习近平主席提出的丝绸之路经济带。丝绸之路经济带是一个大型投资项目，旨在通过投资建设西欧亚大陆交通枢纽和其他基础设施，将新疆和中亚地区与欧洲连接起来。

中亚机会丰富，但同时危机四伏，这一点中国并没有忘记。哈萨克斯坦和乌兹别克斯坦的独裁者及其家族靠丰富的能源积累了大量财富，中国决策者无法准确预测一旦这些年迈的统治者退出政治舞台，这两个国家将会发生什么变化。再有，费尔干纳盆地位于吉尔吉斯斯坦、塔吉克斯坦和乌兹别克斯坦三国的交界地带，人口结构复杂，动荡不安，给周围地区带来了很大的安全隐患。另外，阿富汗国内的动荡与暴力也可能“外溢”到中亚。虽然上诉危机有被夸大的嫌疑，但却真实地存在着，而中国的油气管道刚好位于这一区域。

上述危机使中俄双方5月21日签订的协议看起来合情合理。协议规定，中国每年将从俄罗斯进口380亿立方米天然气。这份价值400亿美元的协议是在俄罗斯入侵克里米亚、引起轩然大波后签署的，所以人们有理由相信，与俄罗斯相比，协议对中国更为有利。合作谈判已经进行了很多年，是莫斯科孤立无援的外交局势加速了协议的签署。而对中国而言，这个协议不过是其西方能源战略中的一桩大买卖而已，未来中国还将与中亚国家和俄罗斯签署更多更大的协议。最让克林姆林宫难堪的是，在中国眼中，俄罗斯既不是不可或缺的伙伴，也不是强劲的对手，它只不过是日渐复杂的欧亚能源安全版图中的一块而已。

克里斯·理哥顿，吉尔吉斯斯坦首都比什凯克自由撰稿人，全球之声中亚编辑

China's energy footprint in Central Asia

China's strategic investments have allowed it to replace Russia as the main player in the region's energy politics

Chris Rickleton

The residents of Dangahra, Tajikistan, don't seem to know much about the oil refinery Chinese workers are building in a Special Economic Zone just outside their town, but if they did, they probably wouldn't have much to say. Dangahra is firmly rooted in Tajik president Emomali Rakhmon's political heartland, and one of the few places in a republic dependent on wages sent back from workers abroad where jobs are being created for locals. It is an ideal place for China to nestle such a strategic investment.

The facility, which will be operated by 90% stakeholder Dongying Heli Investment and Development, is just piles of building materials at the moment, but when it is completed

in 2016 it will aim to supply the domestic market with over 1 million tonnes of petrol and diesel annually, breaking Tajikistan's dependence on Russian-refined fuel products.

Another Chinese refinery of similar scale has already been built in Kara-Balta, an industrial city in energy-poor Kyrgyzstan, and a smaller sister facility is being built in Tokmak, another Kyrgyz city. Crude for these two may eventually come from China's oil fields in Kyrgyzstan's northern neighbour, Kazakhstan, while Tajikistan's refinery could one day be supplied by Tajik crude: China National Petroleum Company is one of several companies exploring major, untapped oil reserves in the republic's south-west.



Tajikistan's major untapped oil reserves are being explored by Chinese companies

These refineries, with a combined capacity of about 2.5 million tonnes, are almost loose change in the context of China's own demand for oil - roughly 550 million tonnes per year as of next year according to major Chinese oil company Sinopec's estimations - and will process around a sixth of what China imported via pipeline from Kazakhstan last year. The fact that they will exist largely to satisfy the fairly tiny domestic consumption of the two countries is proof of Beijing's strategic and nuanced approach to regional energy questions. Kyrgyzstan and Tajikistan are both economically challenged and politically fragile states bordering China's Xinjiang region, and will play a growing role in the transit of energy to that region from countries further west. Offering them a helping hand in their own battle for energy security is likely to be mutually advantageous.

Although these deals are worth less than US\$1 billion (6 billion yuan) in total investments, they are part of the greater narrative of China's increasing involvement in Central Asian hydrocarbons. The big stories are the contracts worth tens of billions of dollars with oil-rich Kazakhstan and gas-rich Turkmenistan.

Growing relationships

While Central Asia was regarded as an energy-abundant region even in Soviet times, two of its greatest finds occurred after the Republics became independent. The Kashagan oil field in Kazakhstan's portion of the Caspian sea, discovered in 2000, is the biggest crude find in over three decades. The results of an independent audit of the Galkynysh gas field in Turkmenistan in 2007, meanwhile, catapulted the 5 million-strong Central Asian state into the top four gas-rich countries in the world, making it second only to Qatar in proven gas wealth per capita. These two discoveries, in addition to the significant pre-existing hydrocarbon reserves in both countries gave Beijing a strong incentive to develop ties with Central Asian states based on factors other than

the perceived security threat the region posed to Xinjiang.

The problem that both Kazakhstan and Turkmenistan faced in developing energy links with China was transportation. Having been part of a Soviet state that stressed self-sufficiency over infrastructural links to the outside world, all pipelines pointed in the direction of Moscow at independence. China has since solved that problem by constructing the China-Kazakhstan pipeline, the first stage of which was inaugurated in 2005, and the China-Turkmenistan gas pipeline, built in record time - 18 months - in 2008.

Neither of these pipelines follow a single trajectory. The China-Kazakhstan pipeline has been built in several stages with further 'spurs' possible, perhaps even one moving south towards Kyrgyzstan and the Kara-Balta refinery. Currently connected to more modest, but still significant, oil fields in western Kazakhstan, it will link up with Kashagan - in which CNPC secured a US\$5 billion stake last year - after that field comes on line in the near future. The Chinese-Turkmen gas network offers even more potential for dizzying expansion. Built by Chinese companies with cheap Chinese credit it will encompass lines A, B and C, already transporting gas east through Uzbekistan and Kazakhstan, and Line D, agreed upon by China, Uzbekistan, Tajikistan and Kyrgyzstan. This fourth line will take Chinese imports of Turkmen gas up to 65 billion cubic metres per year upon its expected completion in 2016. That China is mulling another offshoot that will skirt through Tajikistan and Afghanistan testifies to the extent to which Beijing is prepared to go to diversify supply routes.

Happily for Turkmenistan, which has waited as other transnational pipeline projects - namely the EU-planned Nabucco project and the TAPI project linking the country to South Asia - make slow progress, Beijing has openly committed to increasing the 5% share of its overall energy consumption occupied by natural gas against more carbon-intensive fuels such as coal. Turkmenistan, referred to by one prominent Western scholar on Central Asia as a "de facto Chinese client state", now has a customer for life.

Kyrgyzstan and Tajikistan are both economically challenged and politically fragile states bordering China's Xinjiang region, and will play a growing role in the transit of energy to that region from countries further west.

Finding a place for Moscow

The extent of Chinese involvement in Central Asian energy was made apparent in the run-up to last year's summit of the Shanghai Cooperation Organization (SCO), an body that includes all the Central Asian countries bar Turkmenistan. When Chinese president Xi Jinping signed oil and gas deals worth tens of billions of dollars during a whistle-stop tour of the region. Given that the SCO also includes Russia, the event offered the perfect opportunity for regionally focused media and analysts to announce Beijing's usurpation of the Kremlin as the dominant external actor in the region.

Certainly China's full-scale intervention in local energy markets has hamstrung Russia's bid to cement its influence in the Central Asia. The refineries in Kyrgyzstan and Tajikistan could shut Russia out of the domestic oil markets of those countries, or, at minimum, reduce it to the humiliating role of supplying Chinese refineries with crude. Before being transformed into a Chinese energy hub, Turkmenistan mostly supplied Russia with gas at knockdown prices, which Moscow subsequently re-exported to Europe at a profit. Now that trade is dying a death, and Russian-Turkmen relations are frosty. Kazakhstan remains a key partner to Russia and has positioned itself as a kind of fulcrum to balance Russian and Chinese interests in the region. But Kazakhstan, along with the other countries in Central Asia is demonstrably keener than Russia is on Xi Jinping's Silk Road Economic Belt, a ratcheted-up programme of Chinese investment in transport links and other infrastructure that will connect Xinjiang and the region to Europe through western Eurasia.

Still, China has not forgotten that Central Asia is loaded with risk as well as opportunity. Chinese policy-makers cannot accurately predict what may happen in Kazakhstan or Uzbekistan once ageing dictators whose families have allegedly amassed fortunes on the back of resource wealth exit the regional scene. The security threats posed to the region by the demographically stretched and occasionally volatile Fergana Valley shared by Kyrgyzstan, Tajikistan and Uzbekistan on the one hand, and potential 'spillover' violence from unstable Afghanistan on the other, may both have been exaggerated, but they are there - and so are China's pipelines.

All of this made the May 21 deal to bring 38 billion cubic metres of gas from Russia to China annually a logical step for Beijing. Signed following the international fallout from Russia's invasion of the Crimea it is assumed that the terms of the estimated US\$40 billion (240 billion yuan) deal were more favourable to China than Russia, Moscow's diplomatic isolation speeding up the conclusion of an agreement that was years in the making. Yet in the context of China's westward energy gambit this deal is just another big deal to be followed by potentially bigger ones with the Central Asian states and Russia. What may be most galling for the Kremlin is the idea that China views it neither as an indispensable partner nor as a regional rival of any note, but simply a piece in its increasingly complex and interdependent Eurasian energy security jigsaw. ↻

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中铝国内频频污染 国外被评典范

中国环保专家认为，中铝在中国环保记录不良，但被秘鲁誉为“外国投资的最佳范例”，表明企业环保表现如何，关键要看所在国如何立法和执法。

刘琴

大型央企中国铝业公司一面在国内被曝大肆排污，一面被赞誉为走出去的“最佳范例”。环保专家告诉中外对话，同一个企业在不同国家的环保表现截然不同，根源在于投资接受国立法和执法差别大。中铝秘鲁铜矿投资的成功也表明，中国企业在海外经历了先期的不适应后，已经有了解决环境问题的能力。

中国国家主席习近平7月拉美之行期间，秘鲁驻华大使贡萨洛·古铁雷斯赞扬中铝是“外国对秘鲁投资的最佳范例”，称赞中铝公司执行较高的环境保护标准，并承担企业社会责任，“希望这笔投资能为中国及其他国家投资者树立一个典范。”

中铝在秘鲁获得的赞誉是经得起考验的，而非秘鲁当局对中国作为其主要海外投资者的谄媚。新华网报道，2007年，中国铝业公司收购秘鲁矿业公司，获得了地处秘鲁高原地区特罗莫克的千万吨级世界特大型铜矿。该铜矿拥有当量铜金属资源量约1200万吨，约占中国国内铜资源总量的19%。

但在国内，中铝被曝大肆排污。

新华网报道说，近年来中铝在国内不止一次违规排污。在广西，中铝参与投资的广西华银铝业治理排泥库泄漏。当地村民们说，泥浆泄漏使得房子不能住，水不能喝，连庄稼都种不了。当地最近一次泥浆泄漏处理事故的直接费用超过800万元，而华银铝业只被罚10万元。类似泄漏事件还发生在山西、兰州等地。

企业表现取决于所在国执法力度

中铝在国内与国外的表现差异，让环保人士思考该如何缩小其国内外的环保差异。中国政法大学教授王灿发对中外对话说：“企业重视不重视环保，关键在投资接受国的立法和执法情况。”他说，任何企业都趋利避害，投资接受国如果立法和执法严格，企业就不敢轻易违法。但现在中国投资的大部分发展中国家，环境立法不健全，甚至有许多腐败，令一些中国企业也像在国内一样，不重视环保。一些发达国家的投资者，来了中国也有不守法的例子。

王灿发说，由于秘鲁国内立法和执法较严，中铝不敢有侥幸心理。相反，在国内，由于中国的执法力度不强，一些有影响力的大企业通过各种方式逃避监管，即使造成污染也不承担责任，从而导致中国出现严格立法、普遍违法、选择执法的现象。

中国政法大学污染受害者法律帮助中心诉讼部部长刘湘认为，所在国的执法力度决定了企业的环保行为。

刘湘说，最近修订的环保法被称为史上最严环保法，其实中国原来的环保法也很严格，但执法力度不够，企业违法排污往往交点罚款了事，很少有停产的。

2014年6月，中国环保部开出史上最大罚单，包括华电和大唐在内的19家企业因脱硫设施存在突出问题，被罚脱硫电价款或追缴排污费合计4.1亿元。罚单开出后，环保部门采取哪些纠正措施，无从知晓。部分被罚企业反馈迟缓。华电集团表示，将尽快整改，但还没有具体措施。大唐集团方面则表示，目前还不

清楚具体情况。

中铝到了秘鲁，即使小心谨慎，还是因一次意外污染事件，2014年3月底被秘鲁当局叫停。之后，中铝快速升级了铜矿环保系统，半个月后恢复生产。中铝起先认为，这次污染事件并不严重。人民网也报道称“中铝此次发生的问题相对来说不算大”。

但秘鲁环保部门并不这样看。秘鲁环境监管局巡查处处长德里亚·莫拉莱斯女士告诉新华社记者，这次检查出的问题在环保方面是严重的。监管局人员发现中铝没有按规定安装污水收集及处理系统。

莫拉莱斯说，在该公司两个废料的废料中发现了明显的、高浓度的酸液，废水的PH值分别达到4.8和3.25，而这些污水被排放到附近的两个湖中，其中一个湖处于一个野生动物保护区内。

公众环境研究中心主任马军告诉中外对话，公众环境研究中心“污染地图”上还留有中铝多条污染记录，他希望中铝公司能够快速反应，把国外好的做法运用到国内，尽快将污染记录除去。

中外对话记者查询“污染地图”看到，最新的一条环境监管记录，即2014年6月10日对中铝中州矿业公司出具的行政处罚决定书称，一个10万吨矿山开采项目主体工程完工后，未经环境保护行政主管部门批准，擅自投入试（开采）生产。

“污染地图”收集了中国近10

万家企业的排污数据，供公众免费查阅。企业经过整改、排放达标后，才可以从“污染地图”除名。

马军认为，中国企业在国内环保表现不佳，是因为环保部门管理不严、执法不力，另外诉讼困难，地方政府因为利益关系而对企业实施特殊保护。

马军说，中铝投资秘鲁的成功案例说明，中国企业走出去后，在经历了挫折、锻炼和先期的不适应后，已经有能力把环境问题解决好。

漠视环评害了企业

在谈到中铝成功案例可借鉴之处时，刘湘告诉中外对话，他从来没听说过哪个企业花这么多时间和财力来做一个环评，“中铝花一千万美元来做环评，中国建设三峡的环评也不一定花这么多钱。”

全球环境研究所项目协调员任鹏告诉中外对话：“中铝花了两年时间，请了专门的团队，花一千万美元做了环境报告。”

研究中国采矿业国际化问题的香港城市大学亚洲与国际学系助理教授 Ruben Gonzalez -Vicente 也向中外对话证实，中铝所做的环评标准在当地采矿业中是最高的。

据第一财经日报报道，中铝拿到这个项目经受了近乎苛刻的考验：单政府审批一项，前后需要拿到的当地政府授予的“环境与社会影响

评价”在内的许可就超过270项。

刘湘说，在他所遇到的环境诉讼中，有很多是因为环评不到位造成的。企业也不愿意出事故，但事故频出，有许多并不是企业自身的问题，“当初环评如果做得好，很多问题能够避免。”

马军认为，在中国，企业普遍认为环评花时间、花钱，不值得，会影响投资的效率，所以环评先天不足，环评造假时有发生。

全球环境研究所(GEI)执行主任金嘉满告诉中外对话，中国国内的环评走过场，有的还没做环评，项目就上马了，最后交点罚款了事。但在国外就不行，环评报告哪一点没做到位，就有可能被叫停，企业损失惨重，所以中铝在秘鲁要花巨资做环评，不敢马虎。

王灿发说，像中铝这样做得好的，回来后应当把好的做法在中国推广，“但目前中国还没有看到有推广的成功例子。”

王灿发说，中国的环保法治在加强，中国海外公司应当将国外环保的经验带回国内，也应当将中国环保法律的要求带到环境立法尚不发达的国家。国外发展中国家的环境立法也越来越严，严格按先进的立法做环保，等到他们的立法严格起来时，中国企业就不会被淘汰。☞

刘琴，中外对话北京办公室编辑

Chalco: praised overseas but a major polluter at home

Chinese state-owned aluminum group Chalco has a poor environmental record in China, yet it's praised as a model overseas investor in Peru

Liu Qin

Giant state-owned aluminium group Chalco has been exposed as a large-scale polluter in China, yet praised as a model of environmentally diligent overseas investment in Peru. Environmental experts told *chinadialogue* that such stark differences in the performance of one company rest on differences in legislation and enforcement in the countries it operates in.

However, the success of Chalco's copper mining operations in Peru shows that, after a difficult period of acclimatisation, Chinese firms are now able to deal with environmental concerns thoroughly and swiftly.

During Chinese president Xi Jinping's July tour of Latin America, the Peruvian ambassador to China, Mr Gonzalo Gutierrez, praised Chalco as a model for overseas investment, citing its high environmental standards and sense of social responsibility: "I hope this will set an example for investors from China and elsewhere."

The praise was hard-earned, representing more than mere routine flattery of a major investor. Chalco purchased Peru Copper in 2007, acquiring the huge Toromocho copper mine on the Altiplano plateau. It paid to move an entire town of 5,000 people to a safer site five miles away from toxic waste dumps left by Peru Copper, and spent heavily on environmental assessments. Toromocho mine boasts 12 million tonnes of copper — 19% of China's total domestic copper deposits, according to Xinhua.

But at home Chalco has been exposed as a large-scale polluter, with Xinhua having reported on more than one case.

It is an investor in Guangxi Huayin Aluminium, where a sludge storage pond leaked. Locals in the southwestern

province complained the leak forced them out of their homes, made water undrinkable and prevented planting of crops. Clean-up after the latest incident cost in excess of 8 million yuan, while Huayin was fined only 100,000 yuan. Similar cases have occurred in Chalco subsidiaries in Shanxi and Lanzhou in north China.

Local enforcement holds the key

The discrepancy has left China's environmentalists wondering how to close the gap. Wang Canfa, a professor at the China University of Politics and Law (CUPL), told *chinadialogue* that "the legislation and enforcement of the host nation determines how seriously companies treat environmental protection." Although all companies prefer profit over loss, they will not dare break strict laws, strictly enforced, he adds. But China currently invests mostly in developing nations where environmental laws are lacking and corruption may be a problem. The result: some Chinese firms ignore environmental issues, as they do at home. There are similar examples of foreign companies investing in China and breaking the law, says Wang.

In his view, Peru has good environmental laws and enforces them so Chalco does not take chances there. But in China, where enforcement is lax, some major firms find ways to avoid regulation and shirk responsibility for pollution. Although China has strict laws, they are selectively enforced and commonly broken.

How strongly environmental laws are enforced in the host nation will determine a company's environmental per-



The launch of operations at the Toromocho copper mine in Peru

formance, says Liu Xiang, head of litigation at the CUPL-based Center for Legal Assistance to Pollution Victims.

China's recently revised environmental protection law is its toughest yet – but it was already tough, just not adequately enforced, says Liu. Companies have usually been able to pay small fines if they were caught polluting, and closures have been rare. However, there are promising signs of tighter enforcement.

Tougher stance

In June, the Ministry of Environmental Protection (MEP) handed out its biggest fines yet, with 19 firms fined a total of 410 million yuan for not properly using sulphur scrubbing equipment. Those punished included two huge power generation groups, Huadian and Datang. Fines covered the cost of electricity saved by scrimping on scrubbers, and compensation for the resulting pollution. But there is no word on what follow-up action the MEP is taking, and the response from some companies has been sluggish. Huadian Group promised to make quick changes, but did not specify what they would be. Datang Group said it was unclear about the actual situation.

Despite Chalco's cautious approach in Peru, a toxic spillage in March led the authorities to order a halt to production. Chalco quickly upgraded its environmental protection

equipment, and back in operation two weeks later. Chalco initially said the incident was not serious; Chinese media site People.com.cn described it as “relatively minor.”

The Peruvian environmental authorities disagreed. The head of the Peruvian environmental monitoring bureau's supervision and investigation office, Delia Morales, told Xinhua that the problem identified was a serious environmental protection issue. Investigators found that Chalco had not installed the required waste water collection and treatment systems. Ms Morales explained that the bureau found strongly acidic liquids in two waste stores, with PH values of 4.8 and 3.25. Those liquids were being discharged into two nearby lakes, one in a wildlife reserve.

Ma Jun, director of the Institute for Public and Environmental Affairs (IPE), told *chinadialogue* that the IPE's pollution database includes a number of records of home-grown pollution by Chalco. He hopes to see the company apply its overseas approach and clean up its record.

IPE's pollution database shows the most recent incident for Chalco was on June 10, 2014: A judgment against Chalco Zhongzhou Mining found the company had started operations at a mine without obtaining the necessary environmental approvals.

The IPE's data allows the public to check records of pollution by almost 100,000 Chinese companies. If those firms want to be removed they must first clean up their act

and meet environmental standards.

According to Ma, the poor environmental performance of Chinese firms at home is due to weak enforcement by the authorities; the difficulties of bringing lawsuits; and protection by local governments who share the firm's interests. But he added that Chalco's success in Peru showed that after a period of setbacks, learning and acclimatisation Chinese companies are becoming better at dealing with environmental issues.

Enlightened self-interest

As to what can be learned from Chalco's success, Liu told *chinadialogue* he had never heard of a Chinese company spending so much time and money on environmental impact assessment: "Chalco spent \$10 million, perhaps more than was spent on environmental impact assessment for the Three Gorges Dam." A specialist team spent two years on the assessment, said Ren Peng, project coordinator at the NGO Global Environment Institute (GEI).

Ruben Gonzalez-Vincente, an assistant professor at the City University of Hong Kong's Department of Asian and International Studies who studies the overseas operations of Chinese mining firms, confirmed that the standards of Chalco's environmental impact assessment were the highest of any Peruvian mining firm.

According to a report from the *China Business News*, Chalco went through an almost tortuous process to get the go-ahead for the project: government approval alone required the obtaining of over 270 separate permits from local authorities, including environmental and social impact reports.

Liu Xiang said that many of the cases of environmental litigation he has dealt with are caused by failures in the environmental assessment process. Companies do not want to suffer from environmental incidents, and often those cases are not the fault of the company itself: "Many problems can be avoided if the environmental impact assessments are done properly in the first place," he says.

Ma Jun thinks that in China companies regard such assessments as a waste of time and money which will reduce their return on investment. So the system has inherent failings and reports are often faked.

Jin Jiaman, director of GEI, said that in China environmental impact assessments are carried out for appearance's sake only, or simply not carried out and small fines incurred as a result. But overseas any problem with the assessment can result in the project being halted and the company incurring huge losses, so Chalco spent heavily rather than take any chances.

Wang believes companies such as Chalco that do well overseas should import their practices back to China. "But so far there are no successful examples of that happening." Wang added that with China's enforcement of environmental rules strengthening, companies should also use China's latest standards in nations with poor environmental laws. And environmental laws in developing nations are getting tougher – if firms work to higher standards initially they won't be left behind when the law catches up. ↻

Liu Qin is associate editor in chinadialogue's Beijing office.

中俄国内核问题是否会抑制其出口雄心？

中国有望挑战俄罗斯最大核能输出国的地位。

安东尼·弗洛加特 / 迈克尔·施奈德

中国和俄罗斯的在建核电站数量超过世界总数的一半。目前全球66个在建反应堆中，27个在中国，10个在俄罗斯。中俄的核电活动不仅限于国内，两国均在其他国家积极开展核电站的融资、建设以及核技术的出口活动。尽管表面上看来中俄的产业十分强大、充满活力，实际上中俄全球扩展的雄心正在遭受来自经济、产业和社会问题的诸多威胁。

相对而言，尽管中国还是民用核工业领域中的“新丁”（世纪之交时中国投入运转的反应堆只有3座），但近年来发展十分迅速。2013年，中国运转的反应堆数量已达到21座（仅占全国发电量的2%），2014年又启动了两座新反应堆。

中国计划新建大量的核电站，到2030年预计将投入运行的核能发电能力提高到2亿千瓦，到2050年达到4至5亿千瓦。中国核能行业协会理事长（CNEA）张华祝在今年4月表示，中国的短期目标是到2020年，拥有已运行的核电装机容量

达到5800万千瓦，在建容量3000万千瓦。

实现这一短期目标将是一个巨大的成就。但实际上这比2011年国务院研究室提出的目标要少1200万千瓦，比之前一年相关部门官员提出的1.3亿千瓦的目标更是大幅度减少。这表明中国国内出现了巨大问题，限制了核电站的建设进度，同时也影响了核工业在海外的活动。

国内遇挫

2011年3月日本福岛核事故后，中国暂停新建核电项目（直至2012年10月才重启）能够部分解释核电站建设目标下调的原因。实际上，从2011年3月以来，中国新开工的反应堆仅有7座，之前仅2010年一年就有10座。即便在禁令取消后，内陆地区核电项目建设也没能再续辉煌，部分原因在于公众对安全问题的巨大关切。人们担心发生重大事故时，依靠河水不足以冷却反应堆。恐怕至少到当前的“十二五”规划结

束前不会再开工新建内陆核电站了。

与此同时，反核抗议活动也产生了一定影响。据媒体报道，2013年7月中国南部广东省爆发的示威游行直接导致鹤山核燃料加工厂项目夭折。人们日益广泛提高的环境意识让核工业项目的批准手续更加严格，2012年国家核安全局（NNSA）宣布，“环评报告中没有编制公众参与章节的项目，国家核安全局将不予受理”。

究竟公众的反对和新的审批手续对中国核电部署的速度和规模会产生何种程度的影响，答案恐怕只有在下一个五年规划（2016-2020）

“ 尽管迄今为止中国核工业一直把注意力放在国内市场上，中国也在不断拓展技术出口，努力成为战略投资者。 ”

期间才能明确。但是，核电计划面临建设延期已经是不争的事实。28 个在建项目中有 21 个项目的工期延长了几个月到两年不等，包括欧洲压水堆（EPR）和日/美的 AP1000 等最先进的外国反应堆。

2009 年 11 月泰山-1EPR 反应堆开工时，原定于 2014 年 3 月投入发电。如今这个时间已经推迟到 2015 年 6 月，据说延期的原因之一就是步履维艰的欧洲同类项目造成的连锁反应。芬兰的奥尔基洛托-3 反应堆和法国的弗拉芒维尔-3 反应堆如今都至少延期 5 到 7 年，使得中国无法依靠其获得测试和论证结果。截至 2013 年底，三门核电站 1 号机组的第一个 AP1000 反应堆（2009 年 3 月开工）的建设也比预定工期落后了至少两年，超支 20%。这一工程阶段的延期主要归咎于西屋公司不熟悉中国的法规。

海外雄心

尽管迄今为止中国核工业一直把注意力放在国内市场上，中国也在不断拓展技术出口，努力成为战略投资者。因此，中国核工业的交付能力也更加引起全球的瞩目。

中核集团（CNNC）在巴基斯坦查沙马的两座 34 万千瓦的反应堆是迄今中国最大的海外核工业项目，另外中巴两国还签署了位于卡拉奇的两座 100 万千瓦反应堆的合同，其中包括 65 亿美元的贷款。

据近期的报道，2014 年 7 月中国核电工程有限公司与加拿大的坎杜能源公司签署了在罗马尼亚切尔纳沃德建设两座反应堆的协议。同月，中国与阿根廷签约，中核集团将按照另一项为坎杜能源公司建设反应堆的长期融资协议，提供相关产

品和服务。

最后一项、同时也是最惊人的一笔交易是中国广核集团英国分公司和中核集团将在英国的辛克利 C 角项目中占有 30-40% 的份额，这个造价 160 亿英镑的项目计划建造两座 EPR 反应堆，目前正在等待欧盟委员会的项目批准。用该项目主要建设者法国阿海珐公司的话说，这一合同将“赋予中国广核集团和中核集团在英国积累经验的机会，并将有助于实现其长远目标，确立其在英国核电开发领域的地位”。

俄罗斯的类型遭遇

俄罗斯的核工业也出现新一波的信心爆棚。俄罗斯在努力扩大国内核电生产能力（2013 年核电占总发电量的 17.5%）的同时，也在试图通过以资金为后盾出口反应堆来扩



2009年11月泰山-1EPR反应堆开工时，原定于今年3月投入发电。如今这个时间已经推迟到2015年6月

大其全球影响力。

目前，全球在建或计划建设的反应堆中有俄罗斯参与的共有 30 座左右，这让俄罗斯成为迄今最大的核出口国。在欧洲，俄罗斯参与了匈牙利、芬兰、白俄罗斯等国的反应堆建设或投标。俄罗斯还积极参与了土耳其的一个核电项目，同时在中国投入运行和在建的反应堆各有两个。此外，孟加拉、印度和越南等其他亚洲国家也打算采用俄罗斯的反应堆。

然而，和中国一样，俄罗斯核工业在海外的繁荣掩盖了脆弱的国内状况。目前俄罗斯标明在建的反应堆有 10 座，但其中 3 座早在上世纪 80 年代就开工了，其它所有项目要么暂停，要么工期落后了至少两年。实际上，其中有两座是发电量仅为 3.2 万千瓦的小型“浮动反应堆”。这两座小反应堆于 2009 年 2 月下单，本来应该于 2012 年底交付给客户，但如今要等到 2016 年下半年才能开工。最近的新项目——2012 年 2 月开工的波罗的海 -1 反应堆目前已经停工。

和中国一样，俄罗斯的新核电

发展目标也在持续下调。2006 年 9 月，俄罗斯国家原子能公司宣布的目标是，到 2020 年核电要占全国总发电量的 23%，发电能力达到 4400 万千瓦，相当于 2014 年的 2 倍。到了 2012 年 7 月，这一目标缩减到了 3050 万千瓦。要达到这一目标，只要完成目前在建的 10 个反应堆就够了。

与公民社会及环境运动的其他方面一样，反核活动也已成为俄罗斯当局近年来的治理目标。2012 年，俄罗斯国家杜马通过一项法律，要求接受海外资金并参与“政治活动”的非政府组织都登记为“外籍机构”，必须进行额外报告并聘请专门人员处理更多与政府有关的事宜。接着，俄司法部于 2014 年 6 月开始单方面将一些组织宣布为“外籍机构”，其中包括俄罗斯最早的环境团体之一——“生态防卫”组织。对此，司法部给出的原因之一就是该组织反对波罗的海核电站建设。

国内重重的挑战不仅并未影响俄罗斯的核工业，甚至在某种程度上还成为其继续推进核技术出口的一个动因。但是，这些项目中有多少能够竣工还是个未知数。俄罗斯经

济在 2008 到 2009 年的经济危机中曾遭受重创，乌克兰冲突更令其财政和政治境况雪上加霜。比如，俄计划在乌克兰赫梅利尼茨基建造的两座反应堆很可能会因紧张的政治局势而取消。

毫无疑问，中俄两国的国内市场规模和核技术出口雄心将使它们成为最重要的两个核工业大国。但是，两国核工业发展参数和法规都与其目标出口国大相径庭，包括金融法规、公众参与和审批程序的独立性以及电力市场。

尽管极为有利的融资条件在短期内有助于核技术出口，但从中长期看，要想全面参与到竞争激烈、规模有限的全球市场中的话，中俄两国还需加大国内改革力度、提高透明度。⁹

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本文是在《2014 年世界核工业发展报告》的材料基础上写成的，本文的两位作者是该报告的主要执笔人。

Don't get excited about Chinese nuclear exports yet

China hopes to challenge Russia's position as the world's biggest exporter of nuclear power

Antony Froggatt / Mycle Schneider

China and Russia are building over half of the nuclear power plants under construction in the world. Of 66 reactor projects under way globally, 27 are in China and 10 in Russia. The activity doesn't stop at home: both countries are very active in financing, building or attempting to sell their nuclear technologies to other countries. While on the surface they have strong and vibrant industries, the two dominant nuclear players are also experiencing economic, industrial and societal problems which threaten to dampen their global ambitions.

While China is relatively new to the civil nuclear industry – at the turn of the century it had only three operational units – the sector has grown rapidly in recent years. In 2013, there were 21 operational reactors, although still only providing 2% of the country's electricity, and in 2014 two additional reactors came on line.

The state has hugely ambitious targets for construction of new nuclear power plants. By 2030, it wants 200 gigawatts of nuclear capacity up and running, and 400-500 gigawatts by 2050. In the shorter-term, it is aiming for 58 gigawatts of operational capacity and a further 30 gigawatts under construction by 2020, head of the China Nuclear Energy Association (CNEA) Zhang Huazhu said in April this year.

Fulfilling this short-term objective would be a remarkable achievement. However, it is 12 gigawatts below the target recommended by the State Council Research Office (SCRO) in 2011, and a very significant reduction on the prediction of 130 gigawatts suggested by officials the year before that. This decline points to significant issues at home that are working to constrain the construction timetable – and has implications for the industry's activities abroad.

Setbacks at home

The suspension of new nuclear construction following Japan's Fukushima disaster in March 2011, which was only lifted in October 2012, partly explains the reduction in ambition. In fact, since March 2011, construction has started on only seven new reactors in China compared to 10 in 2010 alone. While the ban has been lifted, construction inland has not resumed in part due to public concern over the safety implications of the ability to cool the reactor in the event of a major accident at sites dependent upon river water. No construction is expected to take place on new inland nuclear power plants at least until the end of the current five-year plan.

“While China has so far focused its attention on the domestic market it is increasingly attempting to export technology and become a strategic investor.”

Anti-nuclear protests are also having an impact – following demonstrations in Guangdong province, south China, in July 2013, plans for a fuel fabrication facility were dropped, according to press reports. And increased environmental awareness more widely is leading to a shake-up of the licensing process. The National Nuclear Safety Administration (NNSA) announced in 2012 that “if the environmental impact report does not have a public participation chapter, NNSA would not accept the report”.

The degree to which public opposition and new licensing processes affect the rate and scale of the deployment of nuclear power in China will probably only become clear during the next five-year plan (2016-2020). What is already evident, however, is the extent of the construction delays already facing the programme: 21 of 28 of the projects are experiencing holdups ranging from a few months to two years including for the most advanced foreign reactors, the French built European Pressurized Water Reactors (EPR) and the Japanese/American AP1000.

When construction of the Taishan-1 reactor started in November 2009, the EPR was due to be operational by March this year. The launch date is now June 2015. One of the reasons cited for such delays is the knock-on effects from beleaguered projects in Europe – namely at Olkiluoto-3 in Finland and Flamanville-3 in France, both of which are now at least five and seven years behind schedule – leading to an inability to rely on testing and qualification results. By the end of 2013, the construction at the first of AP1000 at Sanmen unit 1, which had begun in March 2009, was at least two years behind schedule and 20% over budget. The delays in completing the engineering stage have been blamed on Westinghouse’s unfamiliarity with Chinese regulations.

Overseas ambitions

While China has so far focused its attention on the domestic market it is increasingly attempting to export technology and become a strategic investor. Its ability to deliver is therefore taking on a greater global significance.

The largest sale to date has been to Pakistan, where China National Nuclear Corporation (CNNC) is constructing two 340-megawatt reactors at Chashama and has a contract for two further 1,000-megawatt reactors at Karachi, a deal which includes a US\$6.5 billion loan.

More recently, in July 2014, China Nuclear Power Engineering Co (CNPEC) is said to have struck a deal with the

Canadian company CANDU Energy, for the completion of two reactors at the Cernavoda power plant in Romania. In the same month, China and Argentina signed an agreement that would see CNNC provide goods and services, under a long-term financing agreement for another CANDU reactor.

Finally, and most striking, in the UK China General Nuclear Power Group (CGN) and CNNC have taken a 30-40% share of the proposed £16 billion Hinkley Point C project for the construction of two EPR reactors, which are awaiting approval from the European Commission. This deal will, it is said by the project’s main constructor, France’s AREVA, “give CGN and CNNC the opportunity to gain experience in the UK and will support their long term objective of becoming established nuclear developers in the UK.

Russian parallels

In Russia, too, there is a new confidence emanating from the nuclear industry. The country is seeking to increase its domestic production (in 2013, 17.5% of the country’s electricity came from nuclear) as well as its global influence, through the export of reactors backed by financing.

In total, around 30 Russia-linked reactors are under construction or planned globally, which makes Russia by far the largest international nuclear exporter. In Europe, the country is involved in construction or bidding for projects in Hungary, Finland and Belarus. Russia is also actively engaged in a project in Turkey, while two of its reactors are in operation in China and another two under construction. Elsewhere in Asia, there are proposals for Russian reactors in Bangladesh, India and Vietnam.

But, also like China’s case, the buzz abroad may conceal a more fragile industry at home. Russia has 10 reactors listed as under construction. But three of these were started in the 1980s, while all of the others are either currently suspended or running at least two years late. Two are, in fact, “floating reactors”, small 32-megawatt units. Ordered in February 2009, they were expected to be delivered to the customer at the end of 2012, but are now forecast to start up in late 2016. At the most recent new project, the Baltic-1 unit, where construction started in February 2012, work has now stopped.

As in China targets for the deployment of new units have continually been downgraded. In September 2006, Rosatom announced a target for nuclear power to provide 23%

of electricity by 2020 and the operation of 44 gigawatts of capacity – twice as much as in 2014. By July 2012, this had been scaled back to suggest that there would be 30.5 gigawatts of nuclear in 2020. This will require just the completion of the 10 reactors currently under construction.

As with other sectors of civil society and the environmental movement, anti-nuclear activists have been targeted by the Russian administration in recent months and years. In 2012 the Russian Duma adopted a law which required NGOs receiving funding from overseas and engaged in “political activities” to register as “foreign agents”, which requires additional reporting and the hiring of specialist staff to cope with the increased bureaucracy. Then, in June 2014, the Ministry of Justice began unilaterally to declare organisations as “foreign agents”, including Ecodefense, one of Russia’s oldest environmental campaign groups. One of the reasons given by the Ministry of Justice for this was Ecodefense’s opposition to the Baltic nuclear power plant.

Despite, and in some ways because of these domestic challenges, the Russian industry is pushing ahead with its export ambitions. But it remains uncertain how many of these projects will actually be completed successfully. Russia’s economy was badly hit by the 2008-09 economic crisis and the Ukraine conflict is taking an additional toll

on its financial and political situation. Two Russian reactors scheduled to be built at Khmelnytsky in Ukraine, for example, may well be derailed by political tensions.

Without doubt China and Russia are potentially the two most important countries for the nuclear industry given the scale of their domestic markets and export ambitions. However, both are developing their nuclear sectors under quite different parameters and regulations than those experienced in many countries to which they are seeking to export, including financial regulation, public participation and independence of the licensing process and the electricity market.

While extremely favourable financial terms might in the short-term facilitate nuclear sales, in the medium- to longer-term, full access to a highly competitive and limited global market will require much greater domestic reform and transparency. ↻

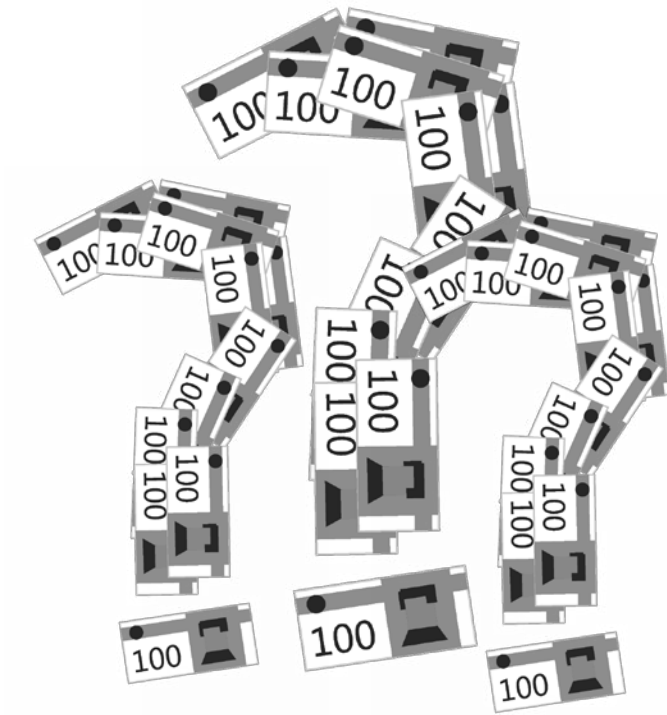
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This article is based on material from the World Nuclear Industry Status Report 2014. The writers are the report’s lead authors.

-中国焦虑-

LOCAL ANXIETIES



中国铜矿需求加剧 智利环境污染问题

智利精炼高规格铜满足中国需求，给严重干旱的北方地区带来压力

卡米妮亚·拉慧慈

走近丘基卡马塔铜矿旁的“鬼城”，风从耳边呼啸而过。“鬼城”位于智力的阿塔卡马沙漠，海拔约2800米；城中空置的房屋和店铺都悬挂着“禁止入内”的标识，街边的警示牌也都写着前路已封。

这里曾居住着25,000名在附近丘基卡马塔铜矿（全世界最大的露天铜矿）工作的工人。然而2008年2月，住在这里的最后一家人也搬走了。采矿给这一地区带来了严重的污染，已不再适于居住。因此，智利国家铜业公司（CODELCO）（智利最大的公司和铜生产商）将员工和家属迁到了17公里以外的沙漠绿城——卡拉马。

“鬼城”的贸易仍旧活跃

城虽然空了，但铜矿还在全力运行。这座铜矿是CODELCO公司的重要组成部分。为满足公司最大客户——中国不断严苛的要求，整个公司都在开足马力地生产。

公司的口号是“发展CODELCO，兴旺智利”。公司（直接或间接）雇佣

员工67,000人，铜矿储量7700万吨，占全球储量的20%，位居世界之首。公司还声称其产量占全球铜产量的10%，总计约7.97亿吨。

“但这还不足以满足客户的需求，中国需要高质量的铜”，CODELCO的代表人迭戈·干地亚如是说。他还表示：“中国制造平板电脑、手机、相机等高科技产品需要优质的铜纤维；因此，生产中国客户需要的铜更加费时费力。”

中国对纯铜的大量需求也给智利的环境带来了不小的压力，这是因为智利采用高污染的生产方式来制造受热捧的高规格铜。铜矿石从丘基卡马塔铜矿开采出来后，需要在摄氏200度的高温下进行冶炼，

从而将铜与硫化物和氧化物分离并提纯。经过提纯的铜或被整块地运往中国，或被放入模具中，氧化成高密度的黑色粉末。

冶炼过程释放出大量矿物元素、颗粒物质和硫氧化物，造成环境污染并损害健康。“冶炼严重污染空气”，干地亚在“鬼城”的图书馆里给我们解释提纯过程时说道。而阿塔卡马沙漠上的大风又加剧了污染。大风吹起地表的颗粒物质，使提纯过程中释放的有毒气体四处弥散。

采矿带来的影响

卡拉马市环境部门的一名环境学家叶瑞·卢扎在采访时说：“很显然，随着中国铜矿需求的不断上升，环境污染会越来越严重。”

他以加夫列拉·米斯特拉尔矿为例。该矿生产的产品全部销往中国，仅2013年一年，该矿对华纯铜销售量就超过了12.8万吨。这里的污染就是当地政府目光短浅、只顾采矿发展经济的有力证据。

他继续说，“不幸的是，过去的

阿塔卡马沙漠上的大风吹起地表的颗粒物质，使提纯过程中释放的有毒气体四处弥散。

五六十年里，卡拉马的空气、土地和水都受到了严重污染。卡拉马原本是内陆地区重要的商业通道，农业也是其主要产业之一。现如今，来自国外的需求压力让这里彻底变成了矿产区。”

现年 33 岁的环境工程师奥兰多告诉我，他曾经负责检测丘基卡马塔铜矿的空气质量，在那座城市呆了三年，如今他却形容那里“糟糕透顶”。“空气质量太差了”，他一遍开着车一边说道，车上坐着一群从圣佩德罗德阿塔卡马到月亮谷的游客。月亮谷是个旅游圣地，几百年来滴雨未降。奥兰多的家人在智利北部开了一家旅行社，他现在就在旅行社工作。

水是主要问题。冶炼铜需要大量的水，这将消耗掉阿塔卡马沙漠上大量的水资源，而阿塔卡马已经是全球最干旱的地方了。卢扎说，“加工过程需要将硫酸和水一起使用，大量的水被蒸发掉了。同时，农业灌溉用水的水质也受到影响。”

接下来是运输卡车的问题。这些卡车将铜和废料运出铜矿；在丘基卡马塔，上百辆卡车来来回回，一周七天、一天 24 小时地从不间断。其中德国大型卡车的装载量最高可达 400 吨，日本小型卡车的装载量最高也达到 330 吨。干地亚又告诉我：“这里每天需要清除 40 万吨废料”。这些进出于丘基卡马塔的卡车每分钟消耗 3 升柴油。

虽然 2013 年 CODELCO 投资了 1.81 亿美元用于改善安全和职业健康

问题，但智利人还是在大规模的铜生产活动中付出了环境的代价。铜矿开采和提炼给工人们带来了严重的健康问题，轻至哮喘，重至免疫力降低。实际上，六岁以下的儿童和孕妇是不允许进入丘基卡马塔铜矿的。

奥兰多说：“许多矿工都生了病，患上矽肺。矿里的温度太高。以前，因为没有任何安全生产标准，许多工人都死于意外。现在终于有了相关标准。”

需求增长 VS 结构单一

中国快速的城市化发展每年需要消费全球 40% 左右的铜供应量，用于制造高科技产品、电缆、汽车、摩托车、冰箱、管道设备等等。

中国如此庞大的需求从智利的统计数据中可见一斑。2013 年，中智之间的贸易额比 2005 年两国签订自由贸易协定时上涨了 22 个百分点；2012 年，智利 80% 的铜都出口到了中国，总价值高达 140 亿美元。同年，时任中国国务院总理温家宝在出访智利时说，两国政府计划到 2015 年将双边贸易翻一翻，贸易额将达到 600 亿美元。

智利对外关系部下属国际经济关系科曾在一份报告中指出，“（两国贸易）增长与同期智利铜产量扩大成正比。”

很明显，智利的经济发展高度依赖对华铜出口贸易。2013 年联合国拉丁美洲经济委员会的一份报告指出，智利对华出口中，金属材料占

85%，其中绝大部分为铜。智利可以算得上是拉美地区最富裕的国家之一，但其出口结构过于单一——7% 的 GDP 来自对华铜出口。

中国需求重塑拉美矿业版图

智利不是唯一一个满足中国矿产品需求的国家。今年 4 月，大宗商品巨头中国五矿集团达成一项价值 58.5 亿美元的交易，买下了秘鲁最大铜矿之一的拉斯班巴斯铜矿。这也是中国矿业企业迄今完成的最大收购之一。该铜矿将于 2015 年投入运营，预计头五年年产量将达 45 万吨。中国五矿集团因此成为全球十大铜生产商之一。

根据国家矿业协会的统计，中国国有企业在秘鲁投资总额达到 190 亿美元，成为秘鲁主要铜制品生产商。但这些企业对当地环境疏于管理的恶名也逐渐传播开来。2014 年 3 月，秘鲁当局对中铝矿业国际将有毒废料排放到河流中的行为做出处罚，中铝国际不得不关闭其在特罗莫克的铜矿。

迭戈·干地亚在采访时还说，地质学家在智利北部发现了另一个深及千米的铜矿层，足够开采 50 年。看来只要中国对铜的胃口还在，智利就会无休止地开采，污染也会继续存在。☺

卡米妮亚·拉慧慈，阿根廷记者，报道内容涵盖中国在拉美外交政策等议题

Chile's pollution grows to meet China's copper demand

Smelting high-grade copper to meet China's needs is putting pressure on Chile's parched north

Kamilia Lahrichi

You can hear the wind howling in the ghost town next to the Chuquicamata mine in Chile's Atacama Desert. Some 2,800 metres above sea level, abandoned houses and shops display "no entry" signs. Placards on the road warn the path ahead is closed.

This town used to be home to 25,000 people working in the world's largest open-pit copper mine. But in February 2008, the last family living here moved away. Pollution from the mine was so severe the area was deemed unsafe for human habitation and the Corporacion Nacional del Cobre de Chile (CODELCO), Chile's largest company and copper producer, relocated employees and their families to the oasis town of Calama – 17 kilometres away through the desert.

Ghost town has vibrant trade

The town might be empty, but the mine is still working at full tilt. It forms part of the CODELCO machine that churns out copper to satisfy the increasingly specific demands of its biggest buyer, China.

"When CODELCO grows, Chile develops itself," goes the company motto. The firm employs about 67,000 people (directly and indirectly) and owns the world's largest copper reserves, reaching 77 million metric tonnes, or 20% of the planet's total. It also claims to account for 10% of global copper production, or 797 million tonnes.

"But this is not enough for our client – China – who wants higher quality of copper," says Diego Candia, a CODELCO representative. "China uses copper to build

technological devices like tablets, mobile phones and cameras, which contain fine fibres of copper. Therefore, producing copper for Chinese clients requires more work and time."

Producing the sought after high-grade metal uses pollution-intensive methods, so higher demand for fine copper from China is also increasing the pressure on Chile's environment. After extracting copper rocks from Chuquicamata, the smelting process uses temperatures of 200 degrees Celsius to separate copper from the sulphide and oxides it contains, leaving just the metal behind. The refined product is then put into a mould and turned into concentrated black powder, or shipped off to China in blocks.

This process emits large quantities of trace elements, particulate matter and sulphur oxides, which can have adverse environmental and health effects. "The smelting process contaminates the air a lot," says Candia, as he explains the extraction process in the ghost town's library. The winds of the Atacama Desert further act to lift particles from the soil and circulate toxic gases generated by copper extraction.

'Horrible' air

"Clearly with the increasing demand for copper from China, there will be more contamination of the environment," says Yery Luza, an ecologist in the environment department of Calama municipality.

He points to the Gabriela Mistral mine which sells everything it produces to China, amounting to more than

128,000 metric tonnes of fine copper in 2013. Pollution here, he says, is testament to how narrowly focused on metal extraction the local economy has become.

“Undoubtedly, there has been in the past 50 to 60 years a strong contamination of the air, the land and the water in Calama. Initially, the city was an important commercial route for Chileans from the interior of the country. Agriculture was also an important industry. This zone has now become exclusively mineral due to foreign pressure,” says Luza.

A 33-year old environmental engineer named Orlando tells me he used to monitor the air quality of the Chuquicamata mine. He worked for three years in the town he now describes as “horrible”. “The air quality was not good at all,” he says as he drives a group of tourists from San Pedro de Atacama to the Moon Valley, a busy destination where not a single drop of water has fallen in hundreds of years. He now works for his family’s travel agency in northern Chile.

Water and waste

Water is a major concern. Copper extraction requires large amounts of it and this is a significant drain on resources in the Atacama Desert, known as the driest place on earth. “In the industrial process, sulphuric acid is used with water and a lot of water evaporates,” says Luz. “The quality of the water for the agriculture sector has also been affected.”

Then there are the trucks conveying copper and waste out of the mines. In Chuquicamata, hundreds of them come and go 24 hours a day, seven days a week. The larger ones, imported from Germany, carry up to 400 tonnes, while the smaller Japanese models take 330 tonnes. “There are 400,000 tonnes of waste to remove daily,” says Candia. Trucks in the Chuquicamata mine consume three litres of diesel per minute, he adds.

Although CODELCO invested US\$181 million in security and occupational health projects in 2013, Chileans still suffer the environmental costs of high levels of copper production. Extraction and refining have generated serious health problems for miners, from asthma to weakened immune systems. Visiting the Chuquicamata mine is forbidden for children under six and pregnant women.

“Many workers got sick and had silicosis. The temperature is too high in the mine. Some people died because there were not any norms of security. Today there are,” says Orlando.

Growth narrows economy

Rapidly urbanising China consumes around 40% of the planet’s copper supplies, which it uses to make technological devices, electric cables, cars, motorcycles, refrigerators, plumbing lines and much more.



©Tennen-Gas

China consumes 80% of Chile's copper, and demand is rising

Such demand is reflected in Chile's statistics: in 2013, trade between China and Chile was up by 22% on 2005 figures, when the two countries signed a free trade agreement. In 2012, 80% of Chile's exported copper went to China, reaching US\$14 billion. On a visit to the South American nation in the same year, then Chinese premier Wen Jiabao said the two governments planned to double bilateral trade to US\$60 billion by 2015.

The "growth [of bilateral trade] is consistent with the rate of expansion of copper during the same period", points out a report by the General Directorate for International Economic Relations, part of Chile's Ministry of External Relations.

It is clear that the country's economy is highly dependent on copper exports to China. A 2013 report by the United Nations' Economic Commission for Latin America set out that about 85% of exports to the Asian giant are metals, of which the majority is copper. Chile may be one of the region's richest countries, but its exports are far from diversified – 7% of Chilean gross domestic product now comes from the copper it ships to Chinese ports.

Chinese mines reshape the Andes

Chile isn't the only country supplying China's mineral needs. In April this year, commodities giant China Min-

metals reached a US\$5.85 billion deal to buy one of Peru's largest copper mines. The Las Bambas mine is one of the largest foreign acquisitions to date by a Chinese mining company. When it starts operations in 2015, it is forecast to produce 450,000 tonnes of copper annually for the first five years. This would make China Minmetals one of the world's top 10 producers of copper.

Chinese state-owned companies are already the main copper producers in Peru, with total investment topping US\$19 billion dollars, according to the National Society of Mining. But these players are developing a reputation for environmental laxity in the resource-rich region. In March 2014, for instance, Peruvian authorities sanctioned Chinalco Mining for pouring toxic waste into rivers. The Chinese mining consortium had to shut down operations at its Toromocho copper mine.

In the north of Chile, meanwhile, geologists have discovered another kilometre-deep layer of copper, which would enable the South American nation to extract copper for 50 more years, explains CODELCO'S Diego Candia. As long as China keeps up its appetite for copper, Chile looks set to keep digging – and polluting. ↻

Kamilia Lahrichi is a journalist based in Argentina.

打击非法木材国际贸易，中国将如何行动？

中国政府首次举办非法木材国际贸易会议的举措值得赞赏，但下一步中国政府会立法禁止非法木材进口吗？

迈克·戴维斯

2014年2月20-21日，中国黑龙江省的中俄边境城市绥芬河召开了“推动合法和可持续中俄木材贸易国际研讨会”。这是首次由中国政府部门举办的讨论非法木材国际贸易议题的会议，显示出中国政府在这个由中国、美国、欧盟和日本起引领作用的议题上的意识及决心的提升，同时也让会议参与各方进一步思考：中国政府接下来将采取什么具体措施来防止非法木材进入中国市场？

俄罗斯是中国木材进口最大的来源地。此次会议的举办地绥芬河紧靠俄罗斯，有便捷的铁路及公路与俄罗斯相连，是中俄贸易中木材进口量最大的通关口岸之一。世界自然基金会（WWF）与英国环境调查研究所（EIA）不久前在中国黑龙江省毗邻的俄罗斯远东地区进行了一系列的调查，揭露出中国进口俄罗斯木材的数量大大超过了合法的供应量。WWF去年的报告指出，2010年俄罗斯出口至中国的蒙古栎（Mongolian oak）至少有一半是非法来源。EIA对来自于俄罗斯并经中

国出口到美国市场的非法砍伐木材进行了数年的跟踪。该组织的调研成果促使美国执法部门于去年9月份启动了一项针对违反雷斯法案可能性的调查，该法案本应阻止非法林产品进入美国。

目前，美国雷斯法案、欧盟木材法案及其他国家的类似法案对进口木材及木制品都提出了合法性要求，这虽然使得中国木材贸易商们在向这些地区出口木制品时不得不考虑木材来源的合法性。但是中国作为木材的消费大国，越来越多进口木材留在国内而非加工后再出口。如果中国政府希望阻止大量的非法木材进入中国，设立中国自己的相关法律将是必须的。

绥芬河会议与会的各方代表，包括中国及俄罗斯的政府部门，企业及公民社会组织，普遍认识到俄罗斯境内的非法砍伐是一个不容忽视的严重危害森林及气候的问题。俄罗斯自然资源与生态部的高级官员着重介绍了他们在防止非法砍伐上的努力，俄罗斯《原木法案》已于2013年12月30日被立法部门通

过。该法案将对俄罗斯境内的原木进行严格的记录及跟踪，并计划创建一个可以追踪供应链文档的在线数据库。俄罗斯政府官员们在会议上呼吁中国政府及企业大力支持该法案的实施。

中国国家林业局的张艳红副司长在其主题演讲中也指出现阶段国际林产品贸易的趋势是更加注重环境保护与可持续发展，中国政府正通过一些国际合作及谈判参与到打击木材非法采伐的行动中。但同时，她也注意到政府监管尚存缺位仍是需要高度关注的问题，也是下一步努力的方向。

在会议的总结环节，全球见证提交了以下几点行动建议：

首先，中国政府应该立法禁止非法木材进口。这将有助于中国企

“中国进口俄罗斯木材的数量大大超过了合法的供应量。”

业开展合法业务，使出口商遵守美国和欧盟的立法并保护木材生产国的森林。这也将赋权给中国海关和其他执法官员——他们目前在面对证据确凿的非法木材时无法采取任何行动。

其次，在即将发布的木材贸易指南中，国家林业局应借鉴联合国《尽职调查准则》，该准则的制定是为了防止非法矿产进入矿产供应链中。2010年，该准则在制定过程中得到了中国政府及其他联合国安理会成员的委托和批准。全球见证组织已经将该准则做出了必要的调整，以便可以将其应用到木材供应链中。

最后，建议国家林业局就之前发布的两个指南的实施情况进行监测并做出公开报告。这两个现有的国家林业局指南，特别是2009年出

台的针对中国企业境外森林经营利用的指南，涵盖了一系列明确指示，要求中国企业在经营过程中遵守东道国的所有相关法律。然而，目前还没有对指南的实施进行监测。系统的监测和公开报告将有助于找到好的实施案例，并促进企业之间的学习。这也将曝光不遵守指南的企业，使得他们有动力去改善其经营行为。

在绥芬河会议上，全球见证组织关于中国“立法禁止非法木材进口”的建议并非孤立无援，家具零售商宜家（IKEA）的代表和绥芬河海关副关长都做出了类似的呼吁。

绥芬河海关的金副关长呼吁中国政府加快相关的立法进程。她通过描述她与她儿子的对话来表明她的观点。她儿子很喜欢看中国国内受欢迎的动画片《熊出没》，该动

画片讲述了两头熊试图从通过偷砍木头赚钱的光头强那里保护森林的故事。“我儿子询问我所从事的监督俄罗斯进口木材的相关工作，并对我说：‘妈妈，你为什么要帮光头强？’”，她说道。

绥芬河会议在对非法木材问题的诊断上取得了难得的一致，国家林业局及林科院在促进坦诚和实质性的交流上做出了值得祝贺的努力。然而，这次会议也提出了一些具挑战性且紧迫的问题：中国政府是否会尽快制定相关法律？中国的海关部门是否将拥有相关权力与光头强们的非法木材贸易抗争？

迈克·戴维斯，全球见证组织成员

Combating illegal timber: what action will China take?

Chinese officials deserve praise for organising a recent conference on the illegal timber trade - but they still need legislative action

Mike Davis

The Chinese government held its first ever conference on ways to tackle international flows of illegal timber in February in Suifenhe, Heilongjiang province. The convening of the event reflects Beijing's increased awareness of the need to address a globally destructive trade in which China, the US, the EU and Japan all play a leading role.

Suifenhe sits right on the border with Russia, which is the number one source of Chinese timber imports. Recent investigations by WWF and the Environmental Investigation Agency (EIA) in the Russian Far East, adjacent to Heilongjiang province, reveal that much of the Russian wood entering China is harvested illegally.

In a report published last year, WWF calculated that at least half of the Mongolian oak exported to China in 2010 was from illegal sources. EIA, meanwhile, conducted an investigation over several years to trace illegally logged timber from Russia through China and on to US markets. Last September, the NGO's findings triggered an investigation by the US law enforcement authorities into possible violations of the Lacey Act, which prohibits the import of illegal wood products.

The Lacey Act and the European Timber Regulation, which also bans illegal wood imports, have forced Chinese wood product manufacturers to consider how their wood

was obtained when exporting to the US and Europe. However, China has no such laws concerning the timber that flows into China to meet the growing demands of Chinese consumers. If the Chinese government is to prevent the large-scale import of illegal timber, it will have to introduce its own legislation.

The participants in the Suifenhe conference – the Chinese and Russian governments, companies and civil society organisations – all recognised illegal logging as a significant threat to forests and climate which must be faced directly. Senior representatives of Russia's Ministry of Natural Resources and Ecology placed particular emphasis on their efforts to enforce a 'Roundwood Act' passed by the Russian legislature on December 30, 2013.

This law requires much more rigorous inventorying and tracking of timber, as well as the creation of an online database displaying supply chain documentation. The Russian officials made a direct appeal to the Chinese government and Chinese companies to support its implementation.

Zhang Yanhong, the deputy director of China's State Forestry Administration (SFA), highlighted the importance of environmental protection and sustainable development to the international forest products trade. She explained that the Chinese government was pursuing an approach

“ If the Chinese government is to prevent the large-scale import of illegal timber, it will have to introduce its own legislation. ”

based on international cooperation and negotiation, with regards to efforts to combat illegal logging, though was not yet playing an active role in monitoring the performance of companies in the forest sector, an area it intends to work on.

At the Suifenhe conference, Global Witness was not alone in calling for China to introduce its own legislation prohibiting illegal timber imports. The same point was made by others, including furniture retailer Ikea and the director of the Suifenhe Customs Authority. In the final session of the conference, Global Witness presented three recommendations for action:

The Chinese government should introduce legislation that prohibits the import of illegal timber. This would help protect Chinese companies conducting legitimate business, enable exporters to comply with US and EU legislation and protect forests in producer countries. It would empower Chinese customs and other law enforcement officials, who are currently unable to act, even when confronted with imports of timber that were clearly illegally harvested.

Secondly, in its forthcoming guidelines for companies trading timber, the SFA should draw on the UN due diligence framework designed to exclude illicit materials from mineral supply chains. This framework was commissioned and endorsed by the Chinese government and other UN Security Council members in 2010. Global Witness has adapted the framework so that it can be applied to timber supply chains.

Thirdly, the SFA should carry out monitoring and public



WWF has calculated that at least half of the Mongolian oak exported to China in 2010 was from illegal sources

reporting on implementation of its existing guidelines for forestry enterprises overseas and also of its forthcoming guideline for companies trading timber, once this is completed. Existing SFA guidelines, notably the 2009 guide for companies engaged in forest management overseas, include a range of clear instructions to Chinese companies to respect national laws in all aspects of their operations. However, there is currently no monitoring of the guide's implementation.

Systematic monitoring and public reporting would highlight and recognise examples of good practice and facilitate learning between companies. It would also expose companies that are not implementing the guidelines and this might provide them with an incentive to improve their practices. ↻

Mike Davis is a campaigner at Global Witness.

中国六家银行无视亚马孙地区环保人士的请求

中国六家银行为饱受争议的铜矿项目提供资金支持，厄瓜多尔非政府组织为此致信这几家银行，但至今未收到任何回应。

大卫·希尔

中国公司接管亚马孙地区一个饱受争议的铜矿项目，厄瓜多尔公民社会组织 and 原住民领导人随后表示，希望与为该项目提供贷款的中国六家银行会面，但未得到任何回应。

米拉多铜矿是中国公司投资厄瓜多尔采矿业的首个项目。铜矿位于厄瓜多尔和秘鲁交界的孔多尔山脉，这里生物多样性非常丰富，居住着原住民舒阿尔人和阿瓜鲁那人。

2010年，经营米拉多铜矿的厄瓜多尔科里安特公司，被中国铁道建筑总公司和铜陵有色金属集团的子公司收购。有六家中国银行批准了铜陵公司的贷款，厄瓜多尔非政府组织认为，正是这些贷款使米拉多铜矿得到开发。

他们最关切的是，为米拉多铜矿提供资金违反了中国政府2012年出台的《绿色信贷指引》，政策要求银行向海外项目提供贷款时，考虑项目的社会环境影响，遵守“国际准则”、采纳“良好的国际实践”。

1月28日致中国各银行信函中写道：“在我们厄瓜多尔人心中，米拉多铜矿的所在地——孔多尔山脉

是国家的象征。铜矿开发将对这一地区脆弱的生态系统造成不可逆转的破坏，也侵犯了原住民生活、发展、控制自己领地的合法权利。”

信中还说：“中国正成为可持续投资与发展的领导者，在建立绿色投资模式方面甚至超过了很多西方企业。我们认为《绿色信贷指引》将有助于推动中国在厄瓜多尔的可持续投资。我们希望你们也能遵守《指引》的要求。”

这封信被寄往中国银行、中国国家开发银行、中国进出口银行、中国招商银行、中国建设银行、中国工商银行以及中国银行业监督管理委员会和厄瓜多尔驻华大使馆。在信上署名的包括非政府组织 Acción Ecológica (AE)、CDES、CEDENMA、CEDHU、INREDH、RAMA 以及克

丘亚族联合会 ECUARUNARI 以及 18 位米拉多地区的原住民领导人和代表。

他们还提出希望与中国各银行相关人员见面：“为协助《指引》的实施，我们希望与贵行会面，为贵行提供一些非正式的咨询，解释米拉多不适合中国和厄瓜多尔采矿的原因。”

“如您所知，厄瓜多尔人一直在与外国企业抗争，以确保当地居民能受到尊重和公平对待，我们真诚地希望中国各银行不重蹈西方同业者的覆辙。我们认为，《指引》的实施是向这个方向迈进的第一步。”

尽管信件已寄出三个多月，但米拉多项目还在继续推进，银行方面没有做出答复。唯一可算作回应的是，寄往中国建设银行和工商银行的信件被退回，中国银行则致电 AE 希望其提

厄瓜多尔众多组织越来越担心中国对厄瓜多尔的影响力，同时也对中国民间团体影响政府和银行的能力缺乏信心。

供西班牙语版本的函件。

AE 的格洛里亚·兹采扎说：“这真是一段艰难的旅程。我们无法与各银行取得联系。除中国银行曾回电外，我们还未得到任何答复。”

中国投资引发担忧

厄瓜多尔众多组织决定游说六家中国银行，表明他们越来越担心中国对厄瓜多尔的影响力，同时也对中国民间团体影响政府和银行的能力缺乏信心。

近期 AE、CDES 以及总部位于美国的非政府组织“守护亚马孙”发布了大量报告，充分表明了厄瓜多尔环保和社会组织的担忧。

AE 指出，厄瓜多尔向中国借了数笔利息高昂的贷款，中国已成为其最大的债权国。报告《厄瓜多尔的中国矿产公司：新的依赖》指出，厄瓜多尔的“债务正呈螺旋式上升状态发展。2008 到 2011 年底，短短三年时间内，厄瓜多尔欠中国的债务就超过 80 亿美元。”

AE 称这些贷款“对中国来说是绝佳的生意”，厄瓜多尔新增八个水电项目，中国参与了其中的七个，另外还有两个大型采矿项目。AE 说，在与厄瓜多尔签订石油开采合同的外国公司中，每五家就有两家为中国企业。AE 认为，最终的结果就是新的债务，厄瓜多尔越来越依赖自然资源，社会、文化和环境都会受

到影响，民主也被破坏，“中国劳工待遇低、不注意保护环境等做法也会对厄瓜多尔产生不良影响。”

AE 称：“尽管侵犯人权、滥用自然资源等极端行为并非中国采矿业首创，但应该注意的是，中国正在输出的对社会和环境的破坏行为，与其他在厄瓜多尔的跨国公司并无不同，甚至更糟糕。”

报告的第一作者格洛里亚·兹采扎接受中外对话采访时说，中国矿产公司的安全记录尤其令人担心，每年中国矿工的遇难人数比任何一个国家都多，仅 2010 年就超过 2400 人。她说：“这些不好的做法也被带到了厄瓜多尔。”

守护亚马孙在其报道《北京、银行和石油：厄瓜多尔亚马孙地区的中国公司与石油》中表达了同样的担心。报道称，截至 2013 年中国对厄瓜多尔的投资占到总额的 60%，作为回报，厄瓜多尔出口的石油 90% 都将运往中国。这些石油来自于“生物多样性极为丰富的原始热带雨林，这里也是 10 个原住民族群的聚居地，很多原住民强烈反对石油钻探。”

报道还说：“厄瓜多尔近期获得的贷款推动了亚马孙地区新一轮的石油开发，引发权力与资源之争，决定着亚马孙及其居民的未来。”

去年厄瓜多尔政府并未接受国际基金并禁止在叶苏尼国家公园开采石油的提议，非政府组织认为，中

国是这背后的主要原因，中国投资者已经威胁到厄瓜多尔的自主决策。非政府组织的利拉·萨拉萨尔·洛佩斯告诉中外对话，中国的影响力“不仅严重威胁到厄瓜多尔亚马孙地区及捍卫领地的原住民，同时也成为厄瓜多尔国家主权的最大威胁。”

法规执行不力

就像在中国国内一样，厄瓜多尔公民社会组织最为不满的是，公司的行为未遵守书面的规定。尽管厄瓜多尔和中国银行的相关规定都令人满意，CDES 的宝莲·伽泽诺夫指出：“法规执行和监管不力。”

伽泽诺夫说：“好的方面是，我们得承认，中国进出口银行采纳了世界银行的规定，即对每个项目都进行环境影响评价，这比其他国家的银行都领先了一步，这是世界银行都未作出的要求。”伽泽诺夫是近期出版的《中国境外贷款社会、环境法规指导手册》的作者之一。

美国地球之友的凯瑟琳·鲁进一步指出：“公平地说，据我们所知，中国是唯一一个颁布法律规范其海外投资和社会影响的国家，在这个意义上，值得我们称赞。”

不过，六家银行均未对此发表评论。☺

大卫·希尔，南美自由撰稿人

Chinese banks ignore Ecuador mining campaigners

The failure to respond to an NGO letter challenging investment in the Mirador mining project has played to Ecuadorian fears about China's growing clout

David Hill



The Mirador copper mining project in Ecuador's richly biodiverse Cordillera del Condor is under the control of Chinese state-owned companies

Chinese banks are understood to have approved loans to Tongling, and Ecuadorian NGOs believe these loans are facilitating the Mirador mining development.

The main thrust of their concern is that funding Mirador violates China's Green Credit Directive, a Chinese government policy

Pleas by civil society organisations and indigenous leaders in Ecuador to meet with six Chinese banks following the Chinese takeover of a controversial copper mining project in the Amazon have met with silence.

The Mirador project is one of the first Chinese ventures into large-scale mining in Ecuador. It lies in the Cordillera del Condor, a richly biodiverse area and the territory of indigenous Shuar and Awajún people, which extends across the border into Peru.

The company running Mirador, Ecuacorriente, was bought in 2010 by subsidiaries of the Chinese state-controlled China Railway Construction Corporation and the Tongling Nonferrous Metals Group Holding Company. Six

requiring banks to consider the socio-environmental impacts of projects and conform to "international norms" and "good international practices" in overseas lending.

"As Ecuadorians, we view La Cordillera del Condor, where El Mirador is located, as a precious symbol of our nation and home," states the letter to the banks, sent on January 28. "Developing the copper mine would irreversibly devastate the region's fragile ecosystem and violate the legal rights of indigenous peoples to live, develop and control their land and territory."

It continues: "China is becoming a leader in sustainable finance and development, even exceeding Western institutions in establishing new models of green finance. As such,

we are interested in the Green Credit Directive as a compelling model to promote sustainable finance in Ecuador. We hope you will honor it.”

Copies of the letter were sent to the Bank of China, the China Development Bank, China’s Export-Import Bank, the China Merchants Bank, the China Construction Bank and the Industrial and Commercial Bank of China, as well as the China Banking Regulatory Commission and Ecuador’s embassy in China. They were signed by six NGOs, including Acción Ecológica (AE), the Centre for Economic and Social Rights (CDES) and the Ecuadorian Committee for Nature and Environment Defense (CEDENMA), by the Kichwa federation ECUARUNARI, and by 18 indigenous leaders and representatives from Mirador’s area of influence.

The signatories go on to propose a meeting between the banks and the campaigners: “To assist in implementing the directive, we would be happy to invite [your bank] to a meeting and offer informal guidance on why El Mirador is a poor choice as a development project for both China and Ecuador.

“As you know, Ecuadorian people hold a history of battling foreign corporations in order to ensure that local communities are treated with respect and fairness, so we sincerely hope that banking institutions in China will not follow the same path of its Western counterparts. We believe that [the] implementation of the Green Credit Directive is a first step in this direction.”

Despite the letter being sent in January, by April not one reply had been received. The only response of any kind was the return of the copies of the letter sent to the China Construction Bank and Industrial and Commercial Bank of China, and a telephone call from the Bank of China to AE asking for a copy of the letter in Spanish.

“It was a real odyssey to send them,” says AE’s Gloria Chicaiza. “The banks are inaccessible. Apart from that phone call from the Bank of China, there’s been no reply at all.”

Growing unease over Chinese investment

The decision by so many Ecuadorian organisations to lobby the six Chinese banks illustrates growing concern over the power China wields in the country – and a lack of confidence that Chinese civil society can hold its government and banks to account.

A flurry of recent reports – by AE and CDES as well as US-based NGO Amazon Watch – has brought home the

extent to which these fears have taken hold among Ecuadorian social and environmental groups.

AE points out that Ecuador, following a series of high interest loans, now owes more money to China than it has ever owed to one country before. “The debt is spiralling,” states its report, *Chinese mining companies in Ecuador: a new dependency*. “In just three years, between 2008 and the end of 2011, Ecuador’s debt to China went above US\$8 billion.”

AE calls these loans the “perfect business for the [Chinese] dragon”, pointing to Chinese involvement in seven of eight new hydro-electric power projects and two large-scale mining projects. Of five foreign companies to have signed new oil contracts, two are Chinese, it says. The result, AE claims, will be new debt, increasing dependency on natural resources, social, cultural and environmental impacts, less democracy, and “the import from China of deplorable labour and environmental practices”.

“While Chinese mining didn’t invent the abuse and violation of human rights and the natural world associated with extractivism,” AE states, “it should be noted that it is exporting social and environmental practices of extreme severity equal to, or worse, than those already practiced in Ecuador by transnational companies from the [global] North.”

Gloria Chicaiza, the report’s lead author, told *chinadialogue* that the safety record of China’s mining industry was a particular concern, pointing out that more miners die in China per year than anywhere else in the world – the death toll in 2010 alone was above 2,400. “It’s these practices that are being transferred to Ecuador,” she said.

Similar concerns are expressed by Amazon Watch in *Beijing, Banks and Barrels: China and Oil in the Ecuadorian Amazon*, which says China was providing Ecuador with more than 60% of its financing by 2013, and will obtain almost 90% of Ecuador’s oil in return. The oil is slated to come from “vast tracks of pristine rainforest with record

“

Ecuadorian organisations have growing concern over the power China wields in the country – and a lack of confidence that Chinese civil society can hold its government and banks to account.

”

levels of biodiversity and home to 10 indigenous nationalities, many of whom are vehemently opposed to drilling,” it says.

“The recently acquired debt is driving a new Amazonian oil boom, setting the stage for a major battle over rights and resources that will shape the future of the Amazon and its people,” states the report.

Pointing the finger at China for the Ecuadorian government’s decision last year to abandon an initiative to marshal international funds to restrain oil extraction within the Yasuni National Park, the NGO also accuses Chinese investors of threatening Ecuador’s self-determination. China’s power is “not only the greatest threat to the Ecuadorian Amazon and the indigenous communities defending their ancestral territories – it is also the greatest threat to its national sovereignty,” the NGO’s Leila Salazar-Lopez told *chinadialogue*.


The implementation gap

As in China itself, one of the key grievances of civil society groups in Ecuador is that activity on the ground fails to

abide by the rules laid down on paper. Although Ecuadorian regulations, and those of Chinese banks, are satisfactory, “implementation and supervision is very weak,” says Paulina Garzon of CDES.

“On the bright side, we do need to recognise that China’s Exim-Bank has adopted World Bank regulations – a step beyond any other national bank in the world – and requires an EIA [environmental impact assessment] for the completion of all projects, unlike the World Bank,” says Garzon, author of a recently-published legal manual on social and environmental regulations for Chinese loans abroad.

Katharine Lu, from Friends of the Earth-USA, goes even further: “It would be fair to say that China is the only country we’ve seen that has issued a banking regulation to govern its environmental and social impacts for overseas investments, and deserves some credit for going above and beyond in that sense.”

None of the six Chinese banks could be reached for comment. 

David Hill is a freelance journalist based in South America.

喀麦隆面对中国投资的五味杂陈

中国已成为喀麦隆的最大开发伙伴国和投资国，但在采伐和建设项目上存在着不容忽视的社会与环境的影响。

豁·金丝利·蒙德



中国在喀麦隆的新克里比港项目恐会给当地的居民生活造成威胁

在西非喀麦隆的南部沿海，中国的专业人员正在进行一个大型港口的扫尾工作。而这座港口有可能会掀起中部非洲的发展热潮。

中国港湾工程有限公司（简称中国港湾）正在建设一个造价高达5.67亿美元的多用途海港，中国工人参与了几乎每个方面的日常工作，从工程建设到卡车驾驶。中国不仅是克里比深水港的建设者，还是未来航运经营的管理者。

这项工程给当地喀麦隆人带来的感觉是五味杂陈的。

一位当地卡车司机伊曼纽尔·恩科布接受中外对话采访时说：“中国人想什么都自己干，我是一个合格的司机，但我们当地人没有机会给工程干活。他们什么都是从中国带来的。”

港口的一期工程已经完成了96%，在目前的1125名工人中有大约一半是喀麦隆人，他们大多数从事的都是低级工种。这一阶段的工程将在7月份投入运营，包括一个16-25米深、吞吐能力达到10万吨的港口。

非洲开发银行首席经济学家兼

副行长姆苏利·恩库贝说，中非间已签署的协议实际上成了“创造就业的障碍”，因为中国用的都是自己的劳动力。

喀麦隆经济政策分析员安瑟伦·蒙乔说：“克里比港本来应该成为本地喀麦隆人在工程和其它技术工种领域掌握各项技能的良机，但中国的做法与喀麦隆政府减少失业的努力背道而驰。”

但是驻场的中国工程师们却说，喀麦隆人缺乏专业培训，文化差异也让雇佣工作变得更加困难。工程师孟力(音)告诉中外对话说：“首先，语言差异太大，我们更愿意带着能更好理解我们意图的中国工人来；其次，在喀麦隆很难找到合格的工人。”

喀麦隆就业与职业培训部培训与职业定位负责人大卫·艾萨克·萨尼说：“我们试图通过敦促企业对其工人进行培训以满足产业的需要，来弥补熟练工人的缺乏，我们对中国投资方也是这样要求的。”

喀麦隆制定了一项“三七开”法律，即工程30%的工人用外国人，70%用喀麦隆人，并在所有产业中尽可能地予以推广。

但据萨尼说，无论中国还是其他国家，大多数在喀企业都没有遵照此项规定，也没有把技术和技能传授给当地人。孟力和其他工程师都指出，他们的工期非常紧张，因此很难在工程开始前招募和培训工人。

克里比港工程的一位雇员大卫·旺贾说：“2012年以来我一直在这里当建筑工，但和我们的中国老板打交道并不总是那么容易。根据合同，我理应得到住房、假期和每天8小时最低3000喀麦隆法郎（6美元）的工资，但这些都没有兑现。我们每天工作到夜里，工资却只有2000法郎（4美元）。”

工程的另一个雇员萨缪尔·贝特说：“中国人自己没有假期，也不让我们休假。我们经常星期天都在干活。”

非法出口到中国的木材

中国在喀麦隆的影响还包括在对华非法木材出口问题上遭到的批

评。环保组织呼吁在这些项目中制定保护措施。

国际林业研究中心（CIFOR）的一份报告指出，中国的许多木材都来自那些高盗伐比例的国家。

好几年来，中国一直都是喀麦隆木材最重要的出口市场。而这些木材不受该国部分原木出口禁令的管制。为了打击非法采伐和非法木材交易，喀麦隆已经与欧盟签署了自愿伙伴关系协定。但中国从喀麦隆进口非法木材可能会妨碍这些目标的实现。

喀麦隆对华木材出口占该国总出口量的比例从2003年的29%增加到2009年的65%。在这短短六年时间里，对华出口猛增7倍，达到27万立方米。

绿色和平组织喀麦隆分部最近进行了一项研究，揭示了一家在喀的美国跨国企业——赫拉克勒斯农场公司（Herakles Farms）是如何通过设立当地企业（Uniprovince）来非法采伐木材，并将其中大部分出口到中国的。

“对来自喀麦隆的非法木材来说，中国是一个方便快捷的目的地。杜阿拉港有大量非法来源的木材都是要运往中国的。”绿色和平的布兰丹·舒瓦茨对中外对话说。

舒瓦茨说，由于中国对木材的需求量大，不可能和欧盟等挑剔的市场采取同样的木材质量标准，因此采伐时对树木不加选择。这对喀麦隆森林资源产生了直接的环境和商业影响。

世界自然基金会（WWF）驻喀麦隆工商政策官员杜勒尔·哈勒森补充说：“中国是非洲增长最快的投资国，任何新的投资都应该考虑到环境和社会影响。西方投资者都是在一个完备的框架下进行投资。与此不同，中国对外投资还没有这样一个框架。我们也在努力与中国合作，减小其在喀麦隆和全球的生态足迹。”

懿·金丝利·蒙德，喀麦隆记者

Chinese influence creates mixed feelings in Cameroon

China has become the biggest development partner and investor in Cameroon, but questions remain about the impact of logging and construction projects, including the Kribi Seaport

Nfor Kingsley Monde

On the southern coast of Cameroon, West Africa, Chinese expertise is putting the finishing touches to a new mega-port that could create a boom in development in Central Africa.

China Harbor Engineering is building a US\$567 million multipurpose seaport, with Chinese workers engaged in almost every aspect of daily activities in the port from engineering to truck driving. China not only intends to build the entire Kribi Deep Seaport, but also manage its future shipping operations.

It's a project that has created mixed feelings among locals.

"The Chinese want to do everything themselves," A Kribi based truck driver Emmanuel Nkob told *chinadialogue*. "I am a qualified driver but no opportunity was given to us locals to be employed. They bring everything from China."

The first phase of the port is 96% complete and has a current manpower of 1,125 people, about half of them Cameroonians mostly employed as menial labourers. This phase of the project, due to go operational in July 2014,, comprises a 16 to 25-metre deep harbour, with capacity to receive vessels of up to 100,000 tonnes.

According to Mthuli Neube, chief economist and vice president of the African Development Bank (AfDB) the agreements between African nations and China have in effect, created "a barrier to employment creation" as China imports its own labour.

"The port would have been an opportunity for local Cameroonians to gain skills in domains such as engineering but

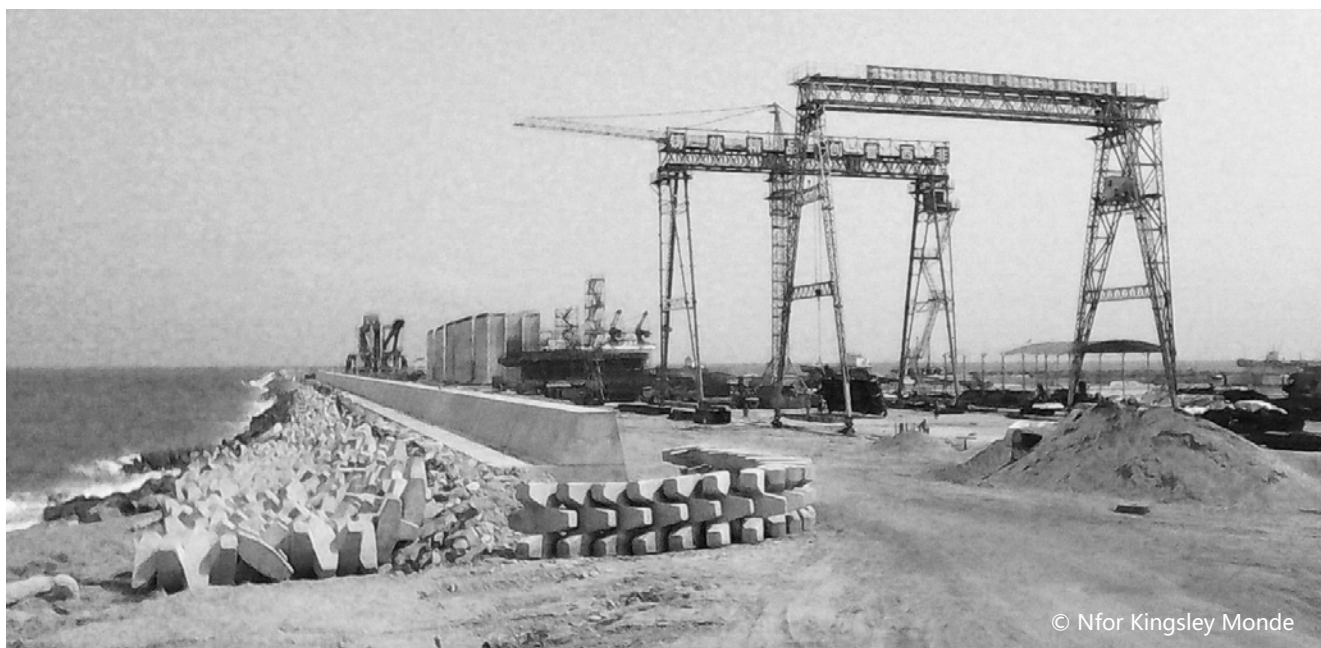
Chinese practices are not favourable to the government fight against unemployment in Cameroon," says Anselm Mengjo, an economic policy analyst in Cameroon.

But Chinese engineers on site say Cameroonians lack the necessary professional training and that cultural differences make it more difficult. "Firstly, we have language differences so we prefer to bring Chinese who can better understand us. Secondly it is very difficult to find qualified workers in Cameroon," Li Meng, a Chinese engineer, explains.

"We are trying to reduce the lack of experienced professionals by urging firms to engage in training their own workers to fit the need of the industry and we do the same with Chinese investors," says David Esseck Sany, director of training and professional orientation in the Ministry of Employment and Vocational Training.

Cameroonian law prescribes a policy of, as far as possible, hiring 70% Cameroonians and only 30% foreigners on any project. But according to Sany, most companies present in Cameroon – Chinese or otherwise – do not respect this recommendation, nor the desire for transfer of technology and skills to the local population. Meng, like others, argues that Chinese project managers have to deal with very strict timelines so it is difficult to recruit and train people before work starts.

"I have worked as a builder with the Seaport project since 2012," says David Wanja, "but it has not always been easy dealing with our Chinese bosses. On my contract, I



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The new Kribi Seaport in Cameroon could create a boom in development in central Africa

was supposed to have access to housing, holidays and a minimum pay of 3,000 francs (US\$6) for eight hours work, but it is not respected. We get 2,000 francs (US\$4) daily with working hours that extend right into the night.”

Samuel Bate another employee with the port says, “Chinese people do not have holidays and do not respect our own holidays. Most times we work on Sundays.”

Illegal timber exported to China

China’s impact in Cameroon has also suffered criticism due to high volumes of timber illegally exported from the African state. Environmental groups are now calling for safeguards to be established in logging projects.

According to a report from the Center for International Forestry Research, much of China’s timber comes from countries experiencing high levels of illegal logging. For several years, China has been the leading export market for Cameroonian logs that remain unregulated by the partial log-export ban. Cameroon has signed the Voluntary Partnership Accord with the EU, committing to fight illegal logging and sale of timber, but China’s continued import of illegal wood from Cameroon might jeopardise these goals.

Cameroon’s log exports to China increased from about

29% to 65% of its total log exports between 2003 and 2009.

A recent study by Greenpeace Cameroon highlighted how a US multinational in Cameroon created a front company in order to illegally export timber, much of which was destined for China.

“China is a quick and easy destination for illegal timber from Cameroon. There is a high amount of timber from these illegal sources at Douala seaport destined for China,” Brendan Schwartz of Greenpeace International told *china-dialogue*.

China does not require the same standards of timber quality as more demanding markets such as the EU, says Schwartz. This has a direct environmental and commercial impact on Cameroonian forests.

“China is the biggest growing investor in Africa,” adds Durrel Halleson, WWF Cameroon’s Business and Industries Policy Officer. “Any new investment should think of environmental and social impacts. Unlike western investors with a well-defined framework under which they do their investments, this is not visible in Chinese outward investments. We are trying to work with China to reduce its ecological footprint in Cameroon and globally.”

Nfor Kingsley Monde is a journalist based in Cameroon.



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