

ヴィエトナムにおける農村工業化の可能性

— 中国の経験からの教訓 —

菊池道樹

法政大学

1. 中国における農村工業化の経験

中国が計画経済体制から市場経済体制への転換を開始したのは1978年末のことであるが、その後20年余にわたり、年平均9%前後もの世界各国の中で最も高いレベルの成長率を維持し続けている。そうした高度の経済成長を達成し続けている要因をめぐってはさまざまに議論が交わされているが、農村地域における郷鎮企業 (Township and Village Enterprises: TVEs) が高成長の牽引車的な役割を果たしてきた点においては大方の見解が一致している。

1997年1月1日付けで公布された、『郷鎮企業法』によれば、郷鎮企業とは「農村の集団経済組織、あるいは農民による投資を主とし、町（所轄の村を含む）で起業し、農業支援を義務として担う各種企業を指す」（第2条）。より具体的に言えば、農村地域に立地する、町営、村営といった所有権が町、村当局に帰属する集団所有型の企業、私企業、さらには外資系との合弁企業など、非国有のさまざまなタイプの企業群を指す。規模の面においても、農家が単独で副業としてビジネスを営む零細規模の企業から、従業員は数千人規模、高水準の技術を有し、国際競争力を保持するような近代的な企業も少数とはいえ存在する。もっとも、概して郷鎮企業の技術水準は低く、また経営管理面では合理性に欠く企業が多い。

そうした企業がなぜ、目覚ましい成長を遂げてきたのか。こうしたマイクロレベルでの成長要因に関しては、独立採算、損益自己負担の原則に即して経営を行うことから、市場経済体制に適合的な企業体質を有し、そのことが持続的な高度成長を可能にしてきた、という見方が有力である。しかし、中国の郷鎮企業の発展が高く評価される所以は、単に成長率の高さにとどまるのではなく、開発過程において工業化の進展が農業部門の成長との相互関連において可能であることを現実を示したからである。経済開発の過程における農工間の均衡のとれた発展と言え、農村地域からの無限労働供給を吸収することによる近代工業部門の発展という、アーサー・ルイス (Arthur Lewis) が定式化したモデルが有名であり、多くの欧米諸国や日本、および韓国、台湾においてはそうした枠組みで工業化のプロセスを説明することが可能であった。しかし、第二次世界大戦後の開発途上国においては、人口爆発により農業部門の労働供給が加速度的に増大するのに対し、工業部門の労働吸収は資本集約度が高い故に限定的であるという事情から、農業部門の大量の過剰労働が都市の非公式な部門に滞留するという農工間、都市農村間の不均衡な発展がほぼ共通し

た現象としてみられた。こうしたなかで、中国の郷鎮企業の発展は農村地域のなかから工業、およびサービス、運輸・交通などの部門が生成し発展するという、世界的にあまり類例がない、新たな開発戦略の成果として、世界銀行をはじめとする国際金融機関や各国の研究者層から注目を浴びてきたのであった。

本稿の狙いは、経済開発のメカニズムという観点から、中国の郷鎮企業の発展動向を農工間の相互関係に焦点をあてて整理することを通じて、ヴェトナムの農村工業の発展の可能性を探ることにある。

1. 中国の郷鎮企業発展の推移

まず最初に、1978年末に中国が市場経済体制への転換に踏み切った後、農村の工業化の発展動向、ならびに国民経済の成長に果たしてきた郷鎮企業の役割について概観しておくこととする。

中国のTVEsは、企業資産の所有権の性格から、所有権がそれぞれ町、村という集団に帰属する集団制企業と私有企業とに大別される。前者は町営企業（township enterprises）、と村営企業（village enterprises）とからなり、後者は複数の農家からなる連合企業と一家の経営による個別企業とに分けられる。個別企業はさらにまた雇用人数の規模により8人以上を私有企業、7人以下を個人企業とに分類される。

業種は農業を含む7種類からなるが、1998年度の付加価値ベースでみた構成額の比率は、製造業（70%）、建築業（8%）、交通・運輸業（6.1%）、卸し・小売業（8.9%）、旅行・飲食・サービス業（4.1%）、農業（16%）、およびその他業種（1.3%）となっており、製造業中心であることは明らかである（『中国郷鎮企業年鑑1999』）。

今度はそれぞれの業種において、郷鎮企業の生産額とそれぞれの業種毎のGDPに占める比率を示しておこう（表1）。

表1. 郷鎮企業生産額と対GDP比率（括弧内の単位は億元で、郷鎮企業生産額/全国生産額。1978年度は集団制企業のみ。*は1986年）

	1978年	1984年	1998年
郷鎮企業全体	495/6846 (7.2%)	1698/13171 (12.9%)	22187/79396 (27.9%)
製造業	385/4237 (9.1%)	1240/7617 (16.3%)	15530/33430 (46.5%)
建築業	35/569 (6.2%)	246/1263 (19.5%)	1781/5262 (33.8%)
運輸・交通業	19/205 (9.3%)	258/598* (43.1%)	1361/5029 (27.1%)
商業・サービス業	19/438 (4.3%)	282/1202* (23.5%)	1970/6610 (29.8%)

『中国統計年鑑1999』、『中国郷鎮企業年鑑1999』より作成

国民経済に占める郷鎮企業の果たす役割の大きさは、市場経済体制への移行とほぼ並行して増大してきたことは、各部門に共通して顕著に示されている。特に製造業においては、国民経済全体のおよそ半分の比率を占めるに至っており、これまで工業化に成功した諸国にも類例が

みられないほどの、農村地域の工業のめざましい発展である、と言っても過言ではあるまい。また、建設業においては、高成長に伴う都市建設を担う建設企業の多くが農村を拠点とする郷鎮企業であり、運輸・交通業、飲食業などのサービス業種は国有部門の立ち後れを補う役割を果たしている。

製造業のうち、主な業種の年度別生産額は表2が示すとおりである。70年代末においては、機械、建材が中心であったが、80年代以降、衣類・繊維や食品加工など軽工業部門の業種の伸びが著しく、また電器、電子・通信などの資本集約型の業種も目覚ましい発展をみせるなど、業種の多様化が進みつつある。

郷鎮企業による生産量が全国総生産量に占める比率が高い商品を示したのが表3である。軽工業品や建材、農業関連資材などが主力であり、表には示していない、煉瓦などの建材も郷鎮企業による生産がほぼ100%に達している。また、後に示すとおり、石炭などのエネルギー素材、重工業品に分類される業種のなかでも比率が高いものがあり、全体として国有企業との間で業種の棲み分けが成立している。

表3. 郷鎮企業による主な商品の生産量の対全国比

セメント (1998年)	2億3025万トン (43%)
化学肥料 (1998年)	877万トン (29.1%)
衣服 (1997年)	104億着 (74.9%)
生地 (1998年)	186億件 (77.2%)
布靴 (1997年)	15万足 (93.2%)
地酒 (1998年)	402万トン (70.2%)
ビール (1998年)	286万トン (14.4%)

『中国統計年鑑』、『中国郷鎮企業年鑑』、各年度版より作成

いまひとつの特徴は、表4が示すとおり、集団制企業の比重が低下しているのとは対照的に、私有企業の比重が著しく増加している点である。これは一連の経済体制改革が進展するにつれて、私的所有権を漸進的に公認するに至ったことを反映している。

表4. 所有制別生産額とその構成比

	1984年度	1998年度
集団(町営、村営)企業	1035億元 (82.6%)	3兆5567億元 (51.5%)
私有・個人経営企業	218億元 (17.4%)	3兆3561億元 (48.5%)

『中国郷鎮企業年鑑』、各年度版より作成

郷鎮企業の発展が果たしてきた役割のなかで中国内外の研究者、政策担当者から最も注目を浴びてきたのは雇用吸収であり、その効果は表5に示されている。郷鎮企業従業者の、農村労働者数に対する比率は年々増大する傾向にあり、郷鎮企業全体としては4分の1強、製造業に限っても約16%に達する。

表5. 郷鎮企業による農村労働力の吸収（1978年は集団制企業のみ）

	1978年	1984年	1998年
農村労働者総数	30638万人	35968万人	46432万人
郷鎮企業従業者数	2218万人 7.2%	4924万人 13.7%	12263万人 26.4%
うち製造業部門	1734万人 5.7%	3656万人 10.2%	7334万人 15.8%

『中国統計年鑑』、『中国郷鎮企業年鑑』、各年度版より作成

この事実は、先進諸国の工業化初期においてみられた、農民が離農・離村し、都市への移住を伴う型の労働移動を伴う工業化のプロセスとは異なり、中国においては「離農しても離村せず」という居住地である農村から離れず、農村地域、その多くは現地で非農業部門へ転業するというユニークな特色を物語っている。それはまた、多くの農民は農業を完全に放棄し、農業から離脱したのではなく、いわば兼業農家層が増大した結果とみることもできる。なお、1996年の1億3,508万人をピークに郷鎮企業の就業者数は減少する傾向にある（1億3,050万人（1997年）→1億2,537万人（1998年））。減少は主として集団制企業が経営効率の向上をめざして、資本設備を増加させ、就業者数を削減したことによるものであり、集団制企業の就業者数は、1996年の5,953万人から、1997年には5,327万人、1998年になると4,829万人と対前年比10%強も落ち込んでいる。こうした雇用吸収力の低下は、1労働者当たりの資本額を表わす、資本装備率の上昇に対応するものであり、集団制企業の場合、資本装備率は1983年には1470元にすぎなかったが、1998年には27,840万元に上昇し、名目で18.9倍、実質ではほぼ5.8倍の伸びをみせている。製造業部門の資本装備率上昇のテンポはさらに速いはずである。

郷鎮企業の果たしてきた重要な役割のひとつが、輸出セクターとして、中国経済の輸出指向型成長をリードしてきたことである。すなわち、1987年においては郷鎮企業による直接輸出額119億元であり、輸出総額1,470億元に占める比率は8.9%であったのに対し、1998年になると郷鎮企業の直接輸出額5,300億元は輸出総額15,232億元の34.8%に達するに至っている。なお、外資と提携した郷鎮企業による外貨獲得額を含めると、1998年度においては6,854億元であり、全国の輸出総額の45%に及ぶ。

郷鎮企業の発展には、地域間で大きな格差がみられた。発展が特に著しいのは、沿海地域の江蘇、浙江、山東、広東の4省においてであり、1983年において既にこの4省の生産額356億元が郷鎮企業全体の生産額に占める比率は50%にも及んでいた。これら地域は所得水準が高いところであり、社会主義の計画経済体制のもとにおいて既に、集団労働による資本形成が進んでいたことも事実である。もっとも、近年、中央政府の中部、西部地域における郷鎮企業発展の奨励策もあり、1998年においては4省の生産額8058億元は全体の生産額2兆2186億元の36.3%に低下している。

2. 政策展開

郷鎮企業発展のプロセスを中央の党、政府の政策に即して概観しておく。

社会主義の統制経済体制のもと、中国共産党と中央政府は、農村においては「人民公社」単位での集団農業経営システムを確立し、食糧生産を最優先の政策課題としてきた。食糧自給を一定の範囲内の農村地域で達成するという狙いから、集団労働による農地の開墾、水利施設の建設と並び、農業生産性の上昇を可能とする小規模な製造業、「五小工業」と称された、電力・石炭、セメント、鉄鋼、肥料・農薬、農業機械（小型耕運機、電動ポンプなど）などの業種の発展を奨励した。こうした農業支援型の工業化は「二本足で歩く工業化」とも言われ、その担い手となったのがTVEsの前身、「社隊企業」（commune and brigade-run enterprises）、つまり、人民公社が所有し、経営を行う「社営企業」（commune-run enterprises）、および人民公社の下の生産大隊が所有し、経営を行う「隊営企業」（brigade-run enterprises）とからなる集団所有制タイプの企業であった。こうして、社会主義の集団農業システムの下で、農工間の相乗効果を発揮できるような産業構造の形成が志向された。

1978年、市場経済体制への移行に踏み切る直前の社隊企業の業種別生産額構成比は、機械と建材（セメント、煉瓦）で全体の53%、これに金属、化学製品、石炭を加えると70%に達する。当時既に農村工業の主要な部門は、投入財、中間財であったことを示しており、農業支援型の工業化政策が具体化していたことを示唆している。また、中央政府による資金援助、資材の補給は殆どないままに農村工業化が進んだことにも留意すべきであろう。

しかし、極度の平等主義を分配の原則とし、個々の農民の生産意欲を引き出すにあたり、主観的能動性、つまり政治、思想面での教育にのみ頼らざるを得なかったために、それを持続的に維持することは不可能であった。しかも、中央集権的な計画経済体制のもと、必要な資材の調達に難しく、販売も限られた範囲に制限されるなど、農業関連製品の生産、販売が局地的にならざるを得ず、農工両部門間の相互関連的な発展には限界があった。そのうえ、中央政府は人口／土地比率など生産要素の賦存状況を殆ど考慮せず、全国一律に農業支援型工業化の実現を強制したために、地域によっては却って農業生産が停滞に陥る事態に至った。

市場経済体制への移行が開始されたことにより、上記の農村工業化政策も大きく転換することになる。その基本的な政策内容は、1979年に公布された「TVEsの発展のための条例」に織り込まれているが、要点は以下のとおりである。

TVEs発展の主要な戦略は、農業生産の支援にあるが、国民の生活改善に貢献し、大規模な工業を支援し、輸出を促進することも重要である。地元の諸条件に相応しい手段をとるべきであるという経営上の方針に従い、TVEsの経営にあたっては、独立採算、損益自己負担を原則とし、町、村の行政当局は決して干渉してはならない。発展が推奨されるべき部門として次の6つの部門がある— ①農業生産に関連した消費財、生産財。農産物、および副産物の加工。中小規模の農業用機械、用具。肥料、農薬、食糧の生産。農機具の修理。②工業生産のための物資、石炭など、鉱産物の採掘。煉瓦、セメントの製造。水力発電、地熱発電。③伝統的な芸術工芸品 ④飲食店、小売店、理髪店、靴の修理店などサービス業。⑤大企業との下請け契約に基づく、部品、中間品の製造 ⑥小規模な化学製品、金属製品、日用雑貨品。

こうして郷鎮企業は、軍事関連などごく少数の例外を除き、さまざまな分野への進出が可能となり、軽工業部門を中心に大きく発展した。特に、国有企業（state-owned enterprises : SOEs）が未だ計画経済体制の枠に縛られて企業の自主的な経営が容認されず、企業改革も本格化せず、政府による各種補助が存続していたなかで、郷鎮企業の果たす役割は大きかった。所得水準の向上がもたらした国民の消費需要の拡大に対応した生産がきわめて不十分である状況のもとで、国有企業に対する補完的なセクターとして、消費財の供給を賄う一方、大規模な国有企業に対する部品、半製品を供給する下請けとして系列型の関係を維持する企業も現われた。こうして、郷鎮企業と国有企業との間に良好な棲み分けが形成されるようになった。

上記の基本政策を実現するために1980年代前半には、流通、金融、労働移動に関する規制が徐々に緩和され、製造業、商業についての制限も撤廃された。その結果、町村に居住する人々は、依然許可なしに大都市へ流入することは禁じられていたが、小都市へは移住して、商工業に従事することが許可された。農村の金融部門においては、従来町、村当局が直接運営をしていた農業信用合作社（Rural Credit Cooperative : RCC）が利潤追求を原理とする組織へと改編された。

さらに、1984年3月に関係各部門に通知された、「郷鎮企業創設に関する報告」において、郷鎮企業は国民経済において重要なセクターであることが確認され、行政当局から完全に分離されて運営すべきであるとされた。また、個人経営、および協同経営の企業も合法的、かつ重要な部門として認められるようになった。

これ以後、郷鎮企業は農業関連部門だけでなく、その他の広い範囲の部門でも発展することになる。しかし、1993、1994年の開発区ブームに起因するバブル期、1997年のアジア通貨・金融危機を経て、郷鎮企業の淘汰が進むことになった。また国有企業の組織改革が進み、競合が本格化したことにより、価格競争に劣る企業は撤退せざるを得なくなった。さらに、金融組織の市場経済化に向けての改編に伴い、行政からの独立と経営の透明性を確保する必要から、郷鎮企業を含む借りにタイする審査が厳しくなったことも企業の淘汰に拍車をかけた。こうした市場原理が拡大するなかで、中央政府は1997年に先述の「郷鎮企業法」を公布し、市場経済体制に適合的な合理的組織への誘導を図った。

3. 農村工業化のメカニズム

工業化の最大の鍵はいかにして資本形成が可能となるのか、であることは言うまでもない。中国の農村工業化はいかなるメカニズムによって達成されたのか。まず、確認しておくべきは、農村工業化政策は明白な戦略に裏付けされたものではないという事実である。現実に郷鎮企業発展の前提となったのは、「それぞれの土地に応じてよろしく事を行うべし」（中国語で「因地制宜」）という、現地の事情に応じた自由な事業の選択とその展開を容認する、いわばレッセフェールの原則であった。事実、郷鎮企業の発展過程には各地域においてさまざまなタイプがあり、地名を冠した「□□モデル」が無数といっても過言ではないほど出現した。まさ

に「戦略なき発展」と呼ぶに相応しい状況であった。

しかし、開発戦略として経験を未開発地域へ活かすためにも、また開発経済学の観点から他国への教訓を導くためにも、農村地域において共通して観察される工業化をメカニズムとして捉える試みも必要である。中国国内の研究者、政策者の間でも、農村工業化の理論的分析をめぐって議論が活発となった。その先駆けとなったのは、1988年後半、雑誌『農業経済問題』、『中国農村経済』などの誌上でのArthur Lewisモデルの応用としての「農村地域内2部門間モデル」、あるいは「二層の2部門間モデル」をめぐりものである。このモデルの骨子は、中国の郷鎮企業は、①厳格な戸籍制度のもとで、農村から大都市への移住を伴う労働移動は認めない、という従来の社会主義体制の下での規制を維持したまま、②農家が営農主体となり、労働生産性が向上したことにより、偽装失業者層が顕在化し、雇用の受け皿が必要となったという背景のもと、③農業部門からの無限労働供給を、農村地域内の集団所有、私的所有を問わず、製造業、建築業、商業、サービス部門など非農業部門の企業が吸収しつつ発展したものであり、④多くの場合、小城镇と呼ばれる中小都市の形成、成長と並行しており、インフォーマル・セクターの発生を防ぐ機能も果たしている、というものである。論争は、都市住民に対する農民の差別を生み出している戸籍制度の是非、集積効果を発揮できない、郷鎮企業と小城镇を中核とする工業化の限界、さらには中規模都市を中核とする農村—都市間の2部門間モデルの提言、などにも及んだ。その後、Lewisモデルの再評価を含めて研究者の間では、都市近代工業部門対農村の伝統的農業部門という国民経済の大きな枠組みのなかで、郷鎮企業の発展を開発戦略としてどのように捉えるか、という課題を解明する試みが続いている。

農村工業化の前提として見落してならないのは、1979年に市場経済体制へ実質上移行が開始されたのに伴い、個別農家による経営請負責任制が普及し、穀物生産に偏重していた、強制的な作付け構成から各地の自然条件、実情に応じた自由な作付け種の選択が可能となった事実である。さらに、政府が増産を促進させる狙いから穀物買い付け価格を引き上げた結果、各農家の、利潤動機を梃子とした経営に対するインセンティブが増大し、農業生産にかかわる資源配分は是正され、農業生産性は上昇し、所得は大幅に増加した。農民の所得の増加は、消費需要の拡大をもたらし、軽工業部門を中心に郷鎮企業の設備投資の増加を促す一方、貯蓄をも増大させ、農村の末端の金融機関である農村信用合作社を経て郷鎮企業の資本形成の原資となった(図1参照)。

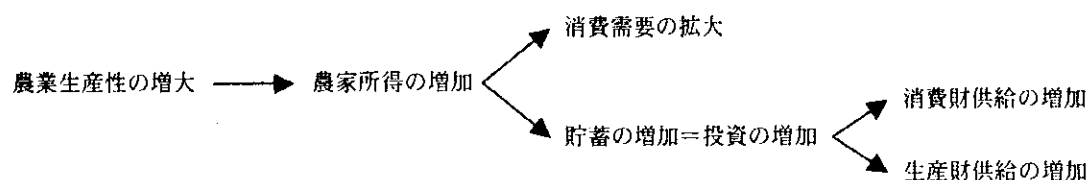


図1. 農村地域内工業化メカニズム

労働市場においては、農業部門の生産性上昇により、偽装失業者層が顕在化し、その結果、郷鎮企業が雇用の受け皿としての役割を担うことになった。こうした全般的な状況のもとで、各地域それぞれの初期条件に規定されながら、独自の農村工業化が進展することになる。発展のプロセスは以下の3つに類型化することができる。

1) 農業生産の突破型 (agricultural production 'breakthrough') 。

先述のように、「人民公社」の時代に既に、農業関連投入財の生産が農業部門の生産性を向上させ、工業部門の資本形成を拡大させるという農工間の相互に成長をもたらす良性循環のメカニズムを形成するという政策が追求された。度重なる政治上の対立に影響を受け、また生産組織の制度上のさまざまな問題を抱えながらも、穀物の収穫量は年平均2.4%増加し(1億6千万トン(1952年)→3億トン(1978年))、土地生産性も年平均2.5%上昇した(1322トン(1952年)→2527トン(1978年))。こうして、江蘇省南部の蘇南地域などでは、農業部門からの余剰を社隊企業の資本形成に充て、主として農業生産投入財の生産を拡大し、農工両部門の相互依存的な良性循環をもたらすようなメカニズムが形成された。上海など都市の製造業において農業関連の機械類の供給が不十分であったことも、農村地域で地元で必要とする農機具を生産する要因のひとつであった。

1978年末に、中国共産党が実質的な市場経済体制への移行に踏み切り、集団制農業が解体され個別農家経営請け負い制へ転換されると並行して、社隊企業に対しては経営自主権が付与され、損益自己負担の原則に従って企業経営を実行する権限が与えられた。さらに1984年に人民公社が解体されると、社隊企業の名称も郷鎮企業と変更され、企業経営が町、村の行政機関から独立することにより、一層インセンティブが与えられた反面、企業運営に緊張感を以って臨むことを余儀なくされた。町、村の行政機関による、郷鎮企業の経営管理への介入は少なくとも公式上は厳禁され、その一方、企業経営にかかわる制限、例えば、「三就地」と呼ばれる、原材料の調達、製造、販売を現地で行うべきこととする旧来の規制が撤廃された。その結果、農業関連投入財の生産が拡大し、個別農家が経営に対するインセンティブを高めたこととの相乗効果も現われ、農民の所得は顕著に増加し、消費、貯蓄の増大をもたらした。他方、農家の所得増による消費、住宅需要の増大は消費財関連部門、および建材部門の発展をもたらす契機となった。従来、社隊企業が殆ど供給していた建材に加え、国有企業の改革が進まないまま、その供給が不足していた部門、特に繊維・アパレル、食品加工などの部門は飛躍的な発展をみた。

このような農工間の、良性の循環に沿って発展がみられたのは、上海(Shanghai)近郊、江蘇省(province of Jiangsu)南部の蘇州(Suzhou)市、無錫(Wuxi)市、および常州(Changzhou)市管轄下の農村である。これら地域の目覚しい発展を、1986年に「蘇南モデル」(Sunan model)と名づけて国内外にその存在を紹介したのは著名な社会学者、費孝通(Feixiaotong)氏である。費氏をはじめとする、地元の事情に通じた研究者、政策担当者

たちは同地域の郷鎮企業発展の要因をおよそ次のように指摘する。

①肥沃な土地に支えられた農業部門での生産性の高さ、工業部門での伝統的な技術の蓄積、大都市上海への供給基地、など経済成長に好都合の条件。②「人民公社」の時代の社隊企業を継承した、集団所有制の郷鎮企業が主導的な役割。③社会主義の統制経済のもとでは制限されてきた流通部門の発展。④市場経済体制が未発達であるなかでの、町、村の行政当局が果たしてきた企業の運営、製品の販路の開拓などでの役割。特に④に関しては、「華西村」(Hua xi village) (江蘇省 (province of Jiangsu)) にみられるように、村当局が多角的な業種の経営に乗り出し、企業集団を創設して、好調な業績を上げている。類似の事例として、「南街村」(Nanjie village) (河南省 (province of Henan))、「大邱荘村」(Daqiuzhuang village) (天津市 (Tianjin City) 郊外) などの発展があり、いずれも中国農村のなかで最も所得水準が高い地域として知られている。

2) 人口圧力に由来するプロト工業化論タイプの郷鎮企業

土地・人口比率がきわめて低く、その他の自然資源にも恵まれず、農業生産にのみ依存しては住民の生活はきわめて困難であるような地域においては、工業化に必要な資本形成を農業部門から期待できる余地は殆どなく、集団制企業の発展には限界があった。こうした地域では、農業生産とは直接関連をもたない業種を中心として小規模な私的企業が地域の発展をリードすることになる。その典型が浙江省 (province of Zhejiang) 南部の温州市 (Wenzhou city) 管轄下の農村であり、「温州モデル」として、中国内外から注目を浴びている。その理由は、この地域は全国のなかで最も貧しい地域の一つであり、開発の条件に恵まれていなかったにもかかわらず、急速に発展し、今や全国有数の富裕な農村になったからである。

温州の農村地域においては、「橋頭鎮 (地名) の男には娘を嫁にやるな、相婿はいつも各地を駆け回るから」、「肖江 (地名) では数歳の子供でも商売をする」というような言い伝えが示すとおり、前近代において少なからぬ農民が農業のみで生計を維持することはできず、国内各地への出稼ぎに出る者が多く、1930年代には西欧諸国を中心とする海外へ移住する者も増加した。中国共産党政権が推進した、穀物生産に重点を置き、集団所有・集団労働に基づく「人民公社」制度に最も強く抵抗したのはこの地域であったと言われる。土地・人口比率が余りにも小さく、集団労働に基づく農作業はかえって生産の停滞をもたらしたからである。今日の個別農家を営農の主体とする農家経営請負責任制を50年代半ばに提唱したのもこの地域の農政担当者であった。その後、彼は共産党中央から厳しい処罰をうけることになるが、それでも現地の農民のなかでは非合法と知りながら、農家単位の耕作を行ったり、商工業に従事する者は稀ではなく、また出稼ぎに赴く人々も絶えなかった。

改革・開放政策のもとで、農家経営請負責任制が普及し、商品経済化が進み、農家の所得水準が向上するようになると、日用雑貨や住宅関連資材などを中心に消費需要が拡大した。

特に、国有企業とは競合しないような軽工業品、あるいは同じ製品、例えば衣類、靴などでも、国有企業の製品と比較して、低価格、低品質の商品に対する需要は膨らんだ。そうしたビジネスチャンスを果敢に利用しようとしたのが、温州地域の農民であった。各地域の農民は、商工業、出稼ぎで得た収入を貯え、さらに友人、親戚などからの借入金や頼母子講に加入して得られたまとまった額の現金、および民間の金融業者や地元の公的な金融組織からの融資などを加えて、創業資金とした。都市部の工場で処分される廃棄物を利用して衣類、小間物類を製造したり、安価な商品を仕入れて行商に従事するなど、商工業に従事する者は低額の資本金で開始し、さまざまなネットワークを利用し、相当遠隔地まで販路を広げた。90年代になり、対外開放政策が一層拡大すると、使い捨てライター、釦など海外市場向けの生産も活発になった。

この地域での発展の要因としては、①人口・土地比率が小さく、商工業に従事する伝統、特に、流通、金融の広範囲のネットワークの形成。②集団所有制企業が脆弱であるのに対して、農家、および農家同士の共同企業が商工業主体。③消費者のニーズに対応した商品、サービスの開発。特に、国有企業、あるいは町営、村営企業とは競合しないような日用雑貨品や、低品質・低価格商品の製造、販売に重点。④町、村当局による、個人経営の商工業者の積極的な支援。特に、私的セクターが合法化されていない時期に、町営、村営の集団制企業の名義を貸したり、全国の市場情報の提供などの便宜を供与。

この地域では、工業化過程においては農業の生産性向上に直接関連する工業部門が育たなかったが、製造業、商業・流通業の発展に伴い、余剰労働力がそれらの部門に吸収されることにより、農業の生産性向上に貢献した。地方政府の指導もあり、農家間でまとまった土地を賃貸借することにより大規模な農業経営が普及するようになり、また、外部の農民と請け負い契約を結んで農地を耕作させ、自らは商工業に専念する農家も多くみられた。このようにして、労働、土地の合理的配分が進展した。

3) 外資連携型の郷鎮企業

広東省、福建省は明、清代において既に、海外へ多数の移住者を出していたことが示しており、土地・人口比率は低く、農業の発展条件には恵まれていなかった。しかも、統制経済のもと、穀物生産に偏重し、商工業分野の活動に規制が加えられたために、地域経済は概して停滞していた。開発過程において必要な初期の資本形成の源を外国からの投資に依存するところに、この地域の特徴がある。

1979年に始まる対外開放政策は2つの省で実質的に開始された。その重要な柱が、外資の積極的な導入を促進することを狙いとする4つの経済特区、深圳、汕頭、珠海（以上、広東省）、および廈門（福建省）の指定であった。以後、香港や台湾、華僑系に加え、先進諸国の資本は、北京の中央政府の対外経済政策に左右されながらも、現地の郷鎮企業を中心とする企業との間でさまざまな形態の契約を結び、特区などに進出した。これら地域での郷鎮企

業の発展のメカニズムは、香港に隣接する広東省 (province of Guandong) の「珠江モデル」 (Zhujiang model) 、および海峡を隔てて台湾と向き合う福建省 (province of Fujian) の「晋江モデル」 (Jinjiang model) が典型的な事例として有名である。

投資の主体は、広東省においては香港、福建省の場合は台湾系の企業が多い。投資の形態にはさまざまなタイプがあるが、90年代中頃までは外資側と現地企業との間の委託契約に基づくものが支配的であった。その主な内容は、外資側により搬入された原材料の加工 (consignment processing) 、あるいは指定されたサンプルに基づく加工、また搬入された部品の組み立て加工 (consignment assembling) の3つのタイプからなる。外資側より機械設備の搬入をうけて製品を加工し、その製品の代金で設備費用を返済するという、補償貿易 (compensation trade) も外資進出の代表的なひとつの形態であった。1992年の鄧小平による南巡講話以後は、単独の直接投資の形態が急速に普及していく。

外資の進出は、香港や台湾、さらには日本、韓国などの東アジア諸国の輸出関連企業の経営戦略と密接な関係にあった。つまり、80年代半ば以降、それぞれの国内での賃金水準が高騰し、国際市場における比較優位を失いつつあるなかで、生産拠点を広東省など中国の沿岸地域へ移転する動きが活発化し、1992年以降はさらに外資進出の流れが加速することになる。このような、外資系企業によるさまざまなタイプの投資がみられたのが東莞市であり、今日においても同市は中国で最も外資系企業の進出が目覚ましい地域として知られている。

しかし、珠江デルタ地域の諸都市、福建省の晋江市の企業側では外資との提携を積極的に進めたものの、外資に全面的に依存していたわけではなく、各地それぞれに地元の資源など諸条件を活かしながら地元企業の自立的な発展を模索した。例えば、順徳市では1991年の工業総生産額に占める集団制企業と国有企業による生産額の比率は93%で、外資系と個人経営企業による生産額比は7%にすぎなかった。同市の管轄下においては、冷蔵庫、扇風機、エアコンなど国内市場では最高級のブランドとして名高く、海外へも輸出される高品質の家電製品を大量に生産する町営企業が出現している。

いまひとつ、広東省の農村工業化の特徴として挙げられるのは初期において、農産物加工品の比重が特に大きかった点である。「貿一工一農」モデルといわれるように、農業生産の拡大と郷鎮企業の発展は密接に関連していた。

3つのタイプの農村工業化の特徴は以上のとおりであるが、さらに次の点を補足しておく。

まず、Lewisモデルとの相違であるが、郷鎮企業は農村地域内でのみ労働移動に限定しており、農民は完全に離農しているわけではない。耕作する土地を留保する権利はすべての農民に与えられており、最低限の食糧は確保されている。要するに兼業農家の増大をもたらしたわけである。中国の政策担当者あいだでは、この点を他の途上国に比較して優れたシステムであるとして積極的に評価する向きが多いが、確かに工業化の初期段階ではむしろ、こうした労働形態が有益であることを示唆している。

第二に、中国の政策レベルにおいては地域開発を先導する企業の所有制の性格の違いから、上記1)を集団所有制型、2)を個人所有制型、3)を外資系との連携型に大きく区分するが、現実には複数のタイプの企業群が並存するケースが多い。例えば、安徽省（province of Anhui）の「耿車モデル」（Gengche model）と呼ばれるところは、町営、村営企業に加え、個人経営企業、数家族による共同経営企業等が共存している典型的な地域として知られているし、「珠江モデル」の南海市においても同様に5タイプの所有制を異にする企業が混在している。

そして第三に、1)のタイプも含め、人口圧力が農村工業化推進の重要なモメントであったことは各地に共通している。生産性の向上による農業部門の発展との相互依存的な良好な循環と表裏一体の関係として、人口の増加がもたらす雇用機会の創出が製造業、流通業を興す契機となっている。

さらにまた、町、村、集落単位で同一の製品の生産、販売に特化する傾向も広い範囲で観察される。中間財の加工や、運輸、通信、宿泊・食堂といった関連する第3次産業部門の成長をも誘発する場合も多い。いわば集積効果が発揮されて地域全体が発展する。

4. 発展の要因

市場経済体制への移行期において、旧ソ連が低成長に喘ぎ続けているのに対し、中国が何故高成長を持続させたのか、という設問については、急進主義の失敗、漸進主義の成功という解答が一応はコンセンサスとして定着している。旧ソ連、東欧諸国の市場化へ向けての急進主義の採用に影響力を保持していたジェフェリー・サックス（Jeffery Sachs）は、旧ソ連が工業化が相当程度進んでいたが故にソフトランディングが困難であったのに対し、中国の場合、農業の比重が大きかったことが移行期に特有の諸問題を吸収するクッション役を果たして、高成長につながった、と弁明している。その当否をここで全面的に問う余裕はないが、そうした問題を検討する手がかりとして、郷鎮企業の発展要因について考察することとしたい。

1) 国有企業との棲み分け

移行期においても、工業部門の主力は国有企業であったし、郷鎮企業の発展、農村工業化は国有企業との何らかの関係なしにはあり得なかった。特に移行開始直後においては、国有企業による供給が不十分であったうえに国有企業が関わる業種が限定されていたことが、niche業種を形成させる結果をもたらした。図2にみられるとおり、国有企業との補完関係、棲み分けが中国における移行期の特徴であり、郷鎮企業の高成長を持続させてきた重要な要因のひとつであった。

生産財においては、石炭などのエネルギー商品、及び国有企業製の商品よりは品質が劣るものの価格が安い粗鋼類などがそうした国有企業による供給量が不十分である典型的な事例である。後者の例として有名なのは、天津市郊外の大邱庄村の製鉄業である。ここでは鉄鋼

生産の伝統、経験が全くない地域であったが、低品質だが低価格の粗鋼類の需要増を見込み、町当局が起業し、鉄鋼、および関連業種が急速に発展した。

国有企業との直接的な関係をもとに発展した例としては、国有企業から請け負う、部品、中間財を生産するタイプの企業である。80年代においては北京周辺の冷蔵庫の部品、上海近郊の自転車部品などが有名であった。

国有企業との棲み分けが特に明白であるのは、消費財関連の業種である。平均的な所得水準の上昇による消費需要の量的拡大、他方で所得格差の拡大に対応する、消費財の種類が多様化が進むなか、郷鎮企業は市場に参入することが比較的容易であった。この種の消費財・サービスの生産の伸びには目覚ましいものがあり、以下のようないくつかのタイプがみられた。

低所得者向けの、低価格、低品質で廃棄物などを利用したものを含む、衣類、靴、鞆、家具、文具などの非耐久消費財。

農民の住宅用建材－煉瓦、かわら、セメント。

新規需要製品－ネームプレート、釦などの装飾品、時計のベルト、百円ライター。

伝統的美術工芸品－絹織物、陶磁器、人形。

輸出向け高品質製品－アパレル（サンプル加工）、羊毛などの生地、扇風機。

なお、以上の概観を通じて観察される特徴のひとつは、資源立地条件は必ずしも郷鎮企業の発展動向に影響を及ぼすとは限らない点がある。農産物加工も数多くの業種の一部にすぎず、前章の2)のタイプには無資源地域が少なくないことから明らかである。

2) 流通・情報、金融ネットワークの形成

市場経済体制への移行が進展するのに対応して、市場の範囲は国内の大都市をはじめ、遠隔地域にも及び、ローカルな市場から全国規模の広がりをもつようになる。そうした市場規模の拡大は、流通・運輸、通信部門の発展によるところが大きい。

工業化の初期においては、流通、交通、および情報関連のインフラストラクチャの未整備が経済開発のネックとなることは、今日多くの途上国において経験しているところである。中国においても、食料の長期輸送や保存に耐えられず、商品を破棄する事例も珍しくなかった。そのうえ計画経済体制のもとで、流通領域を実質的には国有部門が独占し、単に指令に基づいた財の移動がその職務とされてきた。したがって、市場経済体制への移行に対応して、国有の流通部門が効果的に物流業務を担うことはできなかった。そうした事情のもとでは、地方政府、民間レベルの業者が流通分野に自由に参入し、運輸、販売面で大きな役割を果たすことになる。

既述の諸々のタイプの郷鎮企業は集団制、個人経営を問わず、流通事業との密接な関係があってこそ目覚ましい発展が可能であった。国有企業が物資を運ぶのに手間取る、決められた企業にしか運ばない、などの硬直的な経営を続けていたのに対して、集団制企業や個人経

営の企業は円滑に、かつタイミングよく、輸送し、販売することで売り上げを大幅に伸ばすことになる。つまり、郷鎮企業は、流通先導型企业と言ってよい。この点に関しては、中国の数多くの研究者たちも認識が一致している。

しかも、市場が拡大するのと並行して、消費者のニーズ、生産財・中間財などの需要動向といった情報は、きわめて貴重な価値を持つことになる。そうした情報を丹念に収集し、また情報を発信することで市場を開拓する役割も非国有の情報関連部門が自発的に担い続けてきた。

流通と並び、資金の調達、循環もまた工業化には不可欠の要素である。農家所得水準の向上が貯蓄率の増大をもたらし、公式には「農村信用合作社」を、非公式には「揺会」、「成会」などの頼母子講タイプ、「銀脊」、「私人錢莊」などの金融業者タイプの金融組織を通じて農家の余剰資金が工商業の資金源へ転化した。

流通、情報部門にしる、金融部門にしる、ネットワークを形成するにあたり、地縁、血縁の人的関係、また金融においては前近代において普及していた伝統的な組織が特に初期においては重要な役割を果たしてきたことは注目に値する。

3) community原理の担い手としての地方政府の役割

郷鎮企業の発展のミクロ的要因については、独立採算、損益自己負担といった市場メカニズムに適合的な経営方針を採っていること、郷鎮企業群に対する町、村当局による企業統治システム (corporate governance) が効果的に作用していること、などを強調する研究者が少なくない。

しかし、発展過程においては郷鎮企業が市場メカニズムに適合的な合理的な組織であったとはいえないし、そもそも市場組織が未発達であり、企業を何らかの補完、補助する組織、制度が不可欠であった。そうした状況においてとりわけ重要であったのは、地方政府の持つ、市場体制が未発達なもとの市場拡張的な機能、あるいは市場代替的な機能とでも称すべき役割である。

町営、村営の集団制企業の場合は地方政府が直接経営、管理を行い、私的企業に対しては後方支援的な援助、協力を実施することが一般的であった。具体的な役割としては、①見本市、特産展の開催といった日本でもみられるような事業、②国内外の市場情報の収集と企業、個人への提供、③技術の伝播、外部から技術者をスカウト、④地元住民、企業に対する法的な保護、⑤地元住民を対象とする所得再分配—農業振興、福祉基金などを目的とした郷鎮企業からの徴税、負担の請求権—などである。特に④については、市場メカニズムが機能するうえで法体系が完備していることが不可欠であるにもかかわらず、法体系が整備されず、法意識が希薄ななかで、経済行為をめぐる、当事者間で紛争が発生する場合に、地方政府が地元住民の行為をオーソライズするという決定的な役割を果たす。

但し、町、村の当局者たちは常に郷鎮企業の発展をリードしてきたとは限らない。地方政

府に与えられた徴税権を乱用するなど、郷鎮企業の発展を阻害する行為にでることも稀ではなかった。さらに権限を過度に行使することにより、縁戚者や知人を従業員として無理矢理採用させるなど、市場経済の原理に反する行為も後を絶たなかった。

4) 企業家精神

企業経営には企業家精神が不可欠であるが、郷鎮企業の場合、大抵は地域に根を下ろした政治面での指導者がリーダーシップを発揮してきた。これまでに優秀な企業家としてさまざまな機会に表彰されてきたのは、学歴もほとんどなく、企業経営についての知識は全くとっていいほど欠如している人たちであった。中国東北部のD市近郊の、鎮にあるD企業集団の最高責任者であるL女史もそうした経営者の典型である。L女史はじめ、多くの卓越した郷鎮企業の経営者たちは成功の理由を、ほぼ例外なく、ひたすら地域住民の所得水準の向上、福利、厚生改善を達成するという使命感が強力な動機となって成功したのであり、経営能力は自然に身につく、と述懐する。

彼等は政治の分野での多方面のネットワークを活かした情報の収集、提供に努める一方、地域住民の経済行為に対する保護、奨励を行うことを責務と考えている。もっとも彼等も地元の独裁者になる傾向が強く、なかにはかつては国家レベルの模範的な経営者兼指導者として評価されていた人物が、村民に対して横暴な行為を働いて死に至らしめ、実刑判決を受けた事例もある。

なお、郷鎮企業発展の要因として、上海など大都市との関係を重要視する向きもある。例えば、「蘇南モデル」地域は、文化大革命時代の政治の混乱期に上海の国営工場で生産不能状態になった折りに、近郊農村への生産拠点の移転が進むと同時に、技術者の流入も進んだ。また、80年代半ば以降の、急成長が多かれ少なかれ、東アジア諸国の輸出指向戦略の転換と関連づけて理解すべきだ、と主張する研究者も少なくない。確かに、日本、およびアジアニーズ諸国が労働集約部門で比較優位を失うなかで、中国沿海地域の郷鎮企業が中心となり、原材料を輸入して加工し、製品を先進諸国へ輸出するという、メカニズムが形成されつつある。

5. 限界と問題点

郷鎮企業の発展過程は完全無欠であったわけではない。これまでも、国有企業との過度な競争、その結果生じる資源、エネルギーの浪費、環境汚染などの諸問題がしばしば批判の対象となってきた。そもそも、高度の成長率といっても旧社会主義国の統計において用いられた、中間財を重複計算するところの、Material Production System (MPS) 方式で表示するために、付加価値方式に比べて生産額は多くなる傾向にあった。しかも、町営、村営の企業においては町村当局者が、上部組織による業績評価を良くしようとして生産額を実際より水増して報告する事例が少なくなく、今日においてもそうした悪弊を取り締まるよう勧告が再三出されて

いるほどである。

しかも、1997年頃から郷鎮企業の成長には翳りがみられるようになり、郷鎮企業終焉論さえ語られるようになった。もっとも、1998年度においても、付加価値ベースでの成長率は郷鎮企業全体では17.3%、工業部門に限ると16.9%もの高い水準を維持しており、安定成長に入りつつあるなかで郷鎮企業が依然中国経済の牽引車としての役割を失ったわけではない。にもかかわらず、以下のような問題が表面化してきたのは否定できない。

最大の問題は、社会主義の計画経済体制が有していた固有の欠陥から生じるところの「不足の経済」から、今度は移行にあたって徹底した競争を容認した結果、「供給過剰経済」への変動によって生じた企業の淘汰である。つまり、国有企業の組織改革が一定程度進展し、企業間の競争がより激化するなかで、品質が重要視され、量的な拡大を誇ってきた郷鎮企業が倒産したり、廃業するのは自然な成り行きである。さらにまた、集団制企業の所有権にかかわる問題が、企業経営へマイナスの影響を及ぼすことが明らかになりつつある。所有権が最終的に誰に帰するのかを曖昧にしているがために、経営責任が不明確となり、杜撰な企業運営になる企業が少なくないという問題である。その点と関連して、金融機関が経営の自己責任を明確化することが迫られる中で、貸し出し規制が厳しくなりつつあり、郷鎮企業にとっては資金を調達することが困難になり始めた。市場メカニズムの原理が拡大、深化することの帰結として、より合理的な企業組織へ転換することができる企業一なかには国有企業と規模や技術面で劣らない企業も存在する一と没落する企業との両極化が始まったと言えよう。

そうした動向を反映して、郷鎮企業の発展の最も重要な機能である雇用吸収効果は、成長率の低下に加え、資本装備率の増大に因る労働需要の遞減傾向から次第に衰えつつある。しかも、賃金が相対的に高い、都市における出稼ぎ機会が存在し、暫住であることを条件に労働移動を正式に認めてきたことから、農村から都市への相当規模の労働流出がみられるようになり、農民を農村に留めたままでの工業化は実質上、形骸化しつつあることを物語っている。

こうしたなかで中央政府は、市場競争の原理に即して郷鎮企業を自然淘汰させる一方、中小企業の構成要素として大方の郷鎮企業を位置づけようとしている。そうすることにより、日本や欧米諸国の経験をもとに、国有の大規模企業との系列関係を拡大したり、新たなniche産業を見出し大規模企業には馴染まない分野で重点的に発展させる方向に誘導しつつある。

II. ヴィエトナム農村工業化の全般的な特徴

1. ヴィエトナムの農村工業化の現状

ヴィエトナムの農村企業についての定義はさしあたり、「農村地域に立地する、さまざまな業種に及ぶ非国有企業群」としておく。既存の農村工業の発展のいくつかの特徴をみると、まず第一に、1998年度の農村地域の工業生産高は全国工業生産高の18%、また私的部門の生産高の17%とまだ少ない（UNDPの資料による）。しかし、中国における移行開始期の比率

より劣るものではない。

第二に集団セクターの比重は高くない。1998年度の国内総生産額36兆1016億ドンの構成比を所有制別にみると、国有部門（40.0%）、集団部門（8.9%）、私有部門（3.4%）、家庭部門（33.8%）、混合部門（3.8%）、外資部門（10.3%）である。また同年度の製造業生産額の構成比をみると、国有部門（46.2%）、うち、中央（30.3%）、地方（15.9%）。非国有部門（22.0%）、うち、集団部門（0.55%）、私有部門（2.3%）、家庭部門（13.6%）、混合部門（5.6%）、外資部門（31.8%）である。

製造部門はじめ、生産額構成において、国有部門の比重は低下しつつあるが、非国有のなかでは、私的セクターや外資セクターが占める比率が比較的大きく、集団セクターのそれはきわめて小さい。ヴェトナムの合作社を中心とする集団農業経営のもとでは、中国の人民公社と比較して、集団による資本形成は限定的であり、その原因については今後の比較研究の課題となりうると思われる。

2. 農村工業化政策上の問題点

- 1) 失業率が農村においても高い水準にある状況において、ヴェトナム政府当局は、就業機会の確保、農業部門からの所得の不足を補う機会、農家の家計補助的な役割として、農村の工業化の役割を重視しているように思われる。この観点からすれば、当面工業化の中心となる事業分野は、農産物の加工、および主として農閑期を利用した伝統工芸品、日用品の小規模製造業などであり、その主要な担い手は農家である。つまり、兼業農家が農村工業化の重要な推進役ということになる。
- 2) 農村工業化の展開を農業生産の拡大との関係から、すなわち、農作業の機械化による農村地域内の農工間の、生産物、および生産要素の良性循環としてとらえようとの発想はあまりみられない。これは耕地の小規模な分散に加え、国内外の米の需給バランスの現況から米の生産拡大へのインセンティブが弱いという事情によるところが大きいと思われる。
- 3) 他方、農村の工業化が進展すれば、貧富の格差が一層拡大するのでは、という懸念も政策担当者の間では根強いような印象を受ける。所得格差、地域格差の問題は目下最大の政策課題のひとつであるが、農村の工業化を奨励すれば、投資機会を窺う富裕層はますます富み、貧困層との間の所得格差が一層拡大する事態を危惧していることと思われる。
- 4) つまり、1)と3)のジレンマこそ、中央政府レベルで農村工業化を積極的に推進できない原因であるように思われる（なお、UNDPや世銀は農村工業化を制限している要因として国有企業優遇政策を挙げ、ヴェトナム政府の姿勢を批判している。これに対しヴェトナム側の反論は根強い）。
- 5) 企業家マインドの問題として、「資本」「技術」「マーケットメカニズムについての習熟度」「情報、流通面のネットワーク」などいずれの要素においても、きわめて乏しいか、不足しており、また国内の市場規模が小さいことが新たな事業展開のネックとなっている。

- 6) 上記の点と関連して、企業経営が失敗した場合のリスクに対する不安が大きい。一時的に業績が好調であっても、市場が飽和状態になり、売り上げの停滞、経営の悪化する局面を恐れている。
- 7) 中国における、鄧小平の強力なリーダーシップのもと、経済優先を旗印にした政策の明確さとは対照的に、ヴィエトナムでの指導者層は一気に市場経済への移行に踏み切ることには慎重であるように思われる。

3. ヴィエトナムにおいて成長可能と思われる具体的な部門とそのための戦略

雇用吸収を主目的とするにしても、持続的な発展が可能である条件を見出すことが不可欠である。そのためには、短期的に収益が期待できる業種に集中するだけでなく—その必要性は認めざるを得ないものの—、資本形成のメカニズムという観点から、国民経済のなかで、各地で比較優位を持つ業種を選択し、発展を追求することが肝要である。中国における郷鎮企業の発展は、時期、地域、発展の過程と要因において多様な特徴を持つこと、また国有企業との棲みわけの関係において発展してきたこと、この2点はヴィエトナムにおける農村工業化促進政策に十分に有益な教訓となるはずである。

- 1) 農業生産性の向上を図るために、農業関連部門の工業化に重点を置き、農工間の良性循環を追求すべきである。
- 2) 中国の経験からすれば、集団制企業にしろ、家族経営企業にしろ、国有企業との関係において、その部品の系列化、あるいは競合しない日用雑貨品の製造などさまざまなタイプが存在しうる。先に挙げた、中国の代表的な郷鎮企業の製品群、①低所得者向け、低価格、低品質、②農民の住宅用建材、③新規需要の小間物、日用品、④伝統的美術工芸品（バッチャン村などでは既に実績）、⑤輸出向け高品質製品（衣類など一部商品は既に実績）、これらは niche 産業として発展の余地が大きいのではないかと。③について補足しておく。ハノイの代表的な市場、ドンスエン（Dong xuan）市場で販売されている、多種類の日用雑貨、小間物類の多くは外国商品である。特に中国製商品は、衣服、ライター、雨傘、粘着テープ、靴、玩具、財布、等々種類が多い。これらの大部分は温州地域などの郷鎮企業製であり、いずれも企業創業時に必要な資本は小額ですみ、さほど高い水準の技術を要しない。近年はヴィエトナム製商品が相当善戦し、中国製の商品を駆逐しつつあるという話を聞いたが、そうであるならば、海外市場への進出も含めさらに大きな発展を期待できるのではなからうか。
- 3) 地場産業の創出—ヴィエトナム型「一村一品運動」の展開が期待される。中国においても多かれ少なかれひとつの村、地域が特定のひとつ、ないしは2、3の商品の生産に特化する傾向にあり、日本の大分県を発祥の地とする、「一村一品運動」と類似している。中国の費孝通氏は、日本の「一村一品運動」に注目しており、中国語でも「一郷（町）一品」、「一郷多品」などの言葉が使用されるようになった。ヴィエトナムの紅河デルタ Red River Delta においては、Pierre Gourou (1936) の名著、Les paysans dans delta tonkinoisで紹介さ

れた、綿織物、竹細工など専業村の伝統をいかに復活させるかが、ひとつの課題である。過去においてそうであったように、専業村化することにより、流通、サービス部門を含めた集積効果が期待できる。

また、地場産業の活性化にあたり、日本においてもまた中国においても成功した地域では指導者層のリーダーシップが不可欠であった。日本、中国でのモデル的なリーダーとの人的交流はベトナムにとって、きわめて有益であるように思われる。

4) 地方政府（省一県一社）が果たす役割の大きさ

上記の、課題とも関連するが、農村企業の発展の鍵は地方政府であるといっても過言ではない。市場組織が未発達の状態のもとで、取り引きコストを削減するためには「制度」＝communityの存在は重要であり、特に、ベトナム北部の「社」の持つ、歴史的なコミュニティ原理はその機能を果たし得ると思われる。「蘇南モデル」のように、集団制企業を創設し、直接経営の主体となることも可能であろうし、「珠江モデル」、「温州モデル」のように、地元政府が企業を後方支援する役割の大きさも軽視できない。次のような行為が現実には有効であろう。

①「社営企業」(commune-run)の創設と経営、あるいは地元企業連合体に経営主体として参加する。②行政面での人的なつながり、ネットワークを利用した市場情報の収集と企業、個人への提供。商品販売ルート拡大、信用取り引きなどで、政府自ら保証主体となり得る。③行政区域内の農家にビジネス上のトラブルが生じた場合の、法的な裁定者としての役割。④開発金融の制度的保証。集団制企業の場合には町、村政府へ利潤の留保、個人企業については減税が不可欠である。また、民間金融組織の合法化も重要である。都市での余剰資金の受入を可能とするような、預金利率の一定幅での自由化。

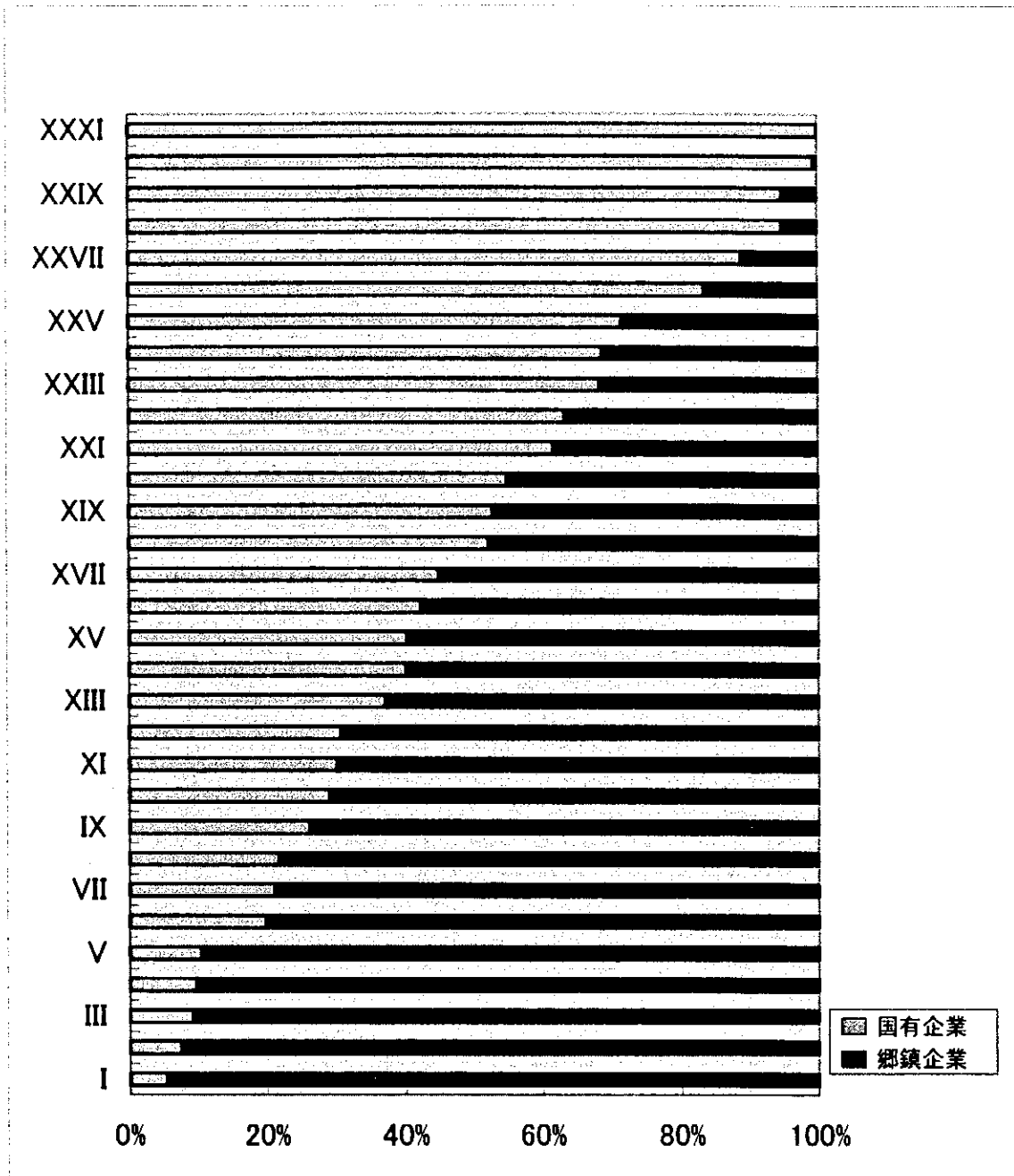
5) 輸出主導型開発戦略のシナリオー東アジア、東南アジア諸国との競争と共存関係

以上の立体的、多角的な視野に立つ農村企業の奨励、誘導策が必要であると思われる。

表2. 郷鎮企業による業種別生産額の推移

	(単位、億元)						
	1986	1988	1990	1995	1996	1997	1998
重工業	1,084.34	2,178.90	2,916.32	19,961.79	20,715.80	20,805.20	20,497.45
石炭	54.05	77.43	123.55	540.59	645.37	654.68	666.05
鉄採掘選鉱	6.12	11.54	17.46	159.96	192.17	172.15	185.49
非鉄採掘選鉱	7.25	17.35	25.04	230.04	249.81	264.57	301.79
建材及び非金属採掘選鉱	52.13	89.57	124.89	1,027.43	1,093.88	1,051.88	1,069.88
塩	2.56	4.04	5.92				
その他鉱物採掘選鉱	0.00	0.71	1.03	50.53	57.84	65.19	59.25
木材伐採運送	0.00	5.81	6.04	48.55	42.09	40.32	45.04
電力、蒸気、温水	5.44	9.7	16.92	120.27	127.5	154.08	173.14
水道						46.38	52.54
ガス						14.08	13.62
資源・エネルギー小計	127.55	216.15	320.87	2,177.37	2,408.66	2463.33	2,566.80
石油精製	0.00	7.29	13.25	125.35	266.72	265.52	237.54
コークス	3.21	9.7	22.21	110.99			
化学	66.85	178.51	270.93	1,729.17	1,842.99	1,852.97	1,880.32
医薬	0	16.82	24.11	255.42	272.03	275.3	290.47
化学繊維	0	12.53	22.95	205.84	204.07	231.68	272.28
ゴム製品	14.64	34.32	49.71	301.73	357.87	375.99	378.37
プラスチック	61.95	141.17	180.46	1,152.14	1,233.83	1,313.96	1,312.12
化学 小計	146.65	400.34	583.62	3,880.64	4,177.51	4315.42	4,371.10
建材及び非金属鉱物加工	319.11	541.96	664.56	3,966.20	4,047.76	3,754.37	3,631.80
鉄精錬、圧延	37	85.48	126.88	1,435.12	1,449.21	1,396.58	1,282.21
非鉄精錬、圧延	23.02	59.56	87.23	847.73	832.59	761.03	715.02
金属加工	120.02	234.89	322.2	2,290.50	2,341.21	2,368.36	2,277.06
金属 小計	499.15	921.89	910.89	8,539.55	8670.77	8,280.34	7,906.09
機械	198.53	386.48	470.19	2,107.21	2,025.11	2,029.50	1,976.98
専用機械				601.99	618.65	590.64	518.76
交通・輸送設備	24.02	56.15	74.93	752.36	797.09	863.96	804.8
電気機器	65.24	141.05	192.79	1,219.58	1,233.93	1,354.62	1,371.06
電子、通信設備	16.54	43.31	56.33	540.43	635.99	719.81	817.63
計器、事務用品	6.66	13.53	16.72	142.66	148.09	187.58	164.23
機械 小計	310.99	640.52	810.96	5,364.23	5458.86	5,746.11	5,653.46
軽工業	632.29	1,262.30	1,839.75	14,781.90	11,954.72	12,350.83	11,885.89
飼料加工	7.88	17.39	25				
食品加工	118.4	233	338.5	2,483.08	2,753.69	2,662.23	2,569.85
食品製造				582.59	533.57	623.18	579.12
飲料加工	32.2	63.3	74.68	471.84	541.07	578.49	579.56
煙草	0.38	0.31	0.4	3.29	4.88	5.79	7.99
水産加工	0	1.51	2.81				
紡績	231.25	459.3	660.15	3,481.34	2,872.63	2,918.11	2,639.88
縫製	59.81	119.35	206.13	1,716.33	1,745.59	1,900.13	1,874.06
皮革・毛皮	29.96	62.22	94.52	828.5	902.62	916.13	878.7
木材・竹・藤細工	25.34	46.58	63.73	591.88	678.62	698.18	670.32
家具製造	20.99	40.53	49.51	378.47	409.34	444.07	451.87
製紙	44.17	93.73	137.81	839.29	909.22	913.05	913.52
印刷	17	31.17	45.3	260.73	281.92	323.95	328.68
文具・体育用品	11.41	24.22	37.01	264.47	321.57	367.52	392.34
工芸美術品	33.5	69.69	104.2	546.39			
その他	79.97	125.26	172.39	2,333.70	2,746.42	2,915.10	3,183.61
合計	1,796.60	3,566.46	4,928.46	34,743.68	35,416.94	36,071.13	35,566.95

出典：『中国郷鎮企業年鑑』、『中国統計年鑑』、各年度版による。



出典：『中国郷鎮企業年鑑』、『中国統計年鑑』1998年度版より作成

図2. 郷鎮企業と国有企業の生産額構成比 (1997年度生産額)

I	衣服	XI	印刷	XXI	電子、通信
II	家具、工芸品	XII	機械	XXII	石炭
III	金属	XIII	繊維	XXIII	交通・運輸
IV	文房具	XIV	ゴム	XXIV	鉄精錬、圧延
V	プラスチック	XV	非鉄金属	XXV	医薬
VI	非金属加工	XVI	食品加工	XXVI	水道供給
VII	鉄鉱	XVII	化学繊維	XXVII	コークス
VIII	非金属加工	XVIII	非鉄金属加工	XXVIII	電力、スチーム
IX	事務機器	XIX	特殊機械	XXIX	コークス、石油精製
X	電器	XX	化学繊維	XXX	煙草
				XXXI	石油

Development of Rural Industry during Industrialization and Modernization in Viet Nam

Nguyen Dinh Phan

Nguyen Van Phuc

Hanoi National Economics University

1. Nature and actual status of Viet Nam rural industry

(1) Nature and role of rural industry

In the world of scientists and managers, there are different opinions about the concept and existence of rural industry (RI). There exist 5 different ways of understanding of RI:

- RI is small artisanal industry in countryside distributed in craft/ trade villages.
- RI is industry in rural area, regardless of its scale and qualification.
- RI is industry serving the countryside, whether in urban or rural areas.
- RI is an industrial part located in rural areas and associated tightly with agriculture and countryside. It does not include big enterprises serving the whole country and less associated with agriculture and countryside. For example, exploitation enterprises, cement enterprises, military enterprises.
- RI is invested by farmers.

These concepts have common points as follows:

- Not referred to scale in RI concept. Although at the present, RI in Viet Nam mainly includes small -and-medium-sized artisanal industry (SAI). In the future, RI may include large enterprises.
- RI shall be associated with agriculture and countryside in terms of distribution market, raw materials and labor.
- RI is a dynamic concept.

In our opinion, RI is a part of the whole country's industry, distributed in countryside and has a tight relationship with socio-economic development in rural areas, including production and business activities of economic family-households, businesses of various economic entities, whose production and business operations are carried out on a basis of exploiting local resources and serving local, national and international markets.

Others are of the opinion that, RI has not been shaped yet but only small artisanal industry in rural areas. In our opinion, RI has been shaped over some decades and it is truly an economic entity, that plays an increasingly important role in rural areas.

Because:

- The key form of RI in Viet Nam at the present is small artisanal industry, an initial form of industrial development, that has existed and developed for many years.
- RI is a large and independent force in the countryside, beside labor and business entities there exists also a large workforce specialized in handicraft and industry in rural areas. RI has created a not small quantity of products for the society, including capital goods and consumer goods to serve production, life and export.

RI exists in a subjective manner, for the following reasons:

- Law on social labor division takes place in the orientation that industry is splitted from agriculture to become an independent sector, at the same time industry, in its turn, returns to combine with agriculture at a new higher level; a part of rural labor is shifted to work in the area of industry and service. The more the industry develops to a higher level, the more the demand for combination is urgent.
- Development of RI in rural areas is also started from a high pressure, that is to settle employment in countryside, a place where land is narrow with a high density of population and labor is in a severe redundancy. According to statistic data, labor redundancy and unemployment in countryside across the country in 1998 numbered about 7.11 million persons, accounting for 25.3% of total persons needed for employment in rural areas.
- Development of RI is due to emergency demand from the very development of agriculture and rural areas. For recent years of renovation, Viet Nam agriculture has developed in the direction of commercial production and diversification. This requires industry for producing capital goods serving agriculture such as fertilizers, insecticides and working tools... At the same time, agriculture also requires the strong development of industry of preservation and processing of fishery, agro-forestry products with a view to raising productivity, improving value of agricultural products and minimizing losses and damages during farm-product harvest and preservation. Thanks to RI, farm-products value over an unit of cropping area has been considerably increased in recent years.

Our country is going upwards from an agricultural country, so RI and its development play a crucial role during industrialization and modernization of the whole country in general and the countryside in particular. This is reflected in two aspects:

- RI development will create more jobs and increase income for rural population. In average, a trade/craft-specific establishment/facility creates stable jobs for 27 laborers, a craft household for 4 - 6 laborers. Besides the number of regular employees, craft households and businesses still involve more idle laborers: 2-5 persons per household and 8-10 persons per facility, particularly trades of textile, embroidery, bamboo-, rattan-wickerworks, a facility can involve 200 - 300 employees. Income from RI usually can be 2 -3 times as much as compared to pure agriculture, it numbers 70% for

farmer-households doing more than one trade/ profession.

- RI development creates a not small quantity of goods to meet demands of production, life and export. In many provinces, RI accounts for nearly 70% of gross value of local (provincial) industries and generates a lot of products such as processed agricultural products, handicraft articles, building materials to serve production and life at localities and many products that have been exported (handicraft commodities, bamboo-rattan wickerworks).
- RI development contributes to convert economic structure in rural areas. Through development of industry for agricultural, forestry and fishery products processing, industry of producing capital goods for serving agriculture and development of other industries, small artisanal industry that involve many laborers and create more jobs, RI has contributed to convert economic structure in rural areas in the direction: developing commercial agriculture with high economic efficiency, increasing proportion of industry and service in rural areas, converting labor from agricultural production with low income into development of industry with high income. Development of industry of processing longan, litchi, garlic, capsicum... even although at rough processing level (drying...), but it has an obvious impact on economic structure conversion in a number of rural areas.

Role of RI is of historical and stage nature. When the economy in general and urban economy in particular, develop at a low level, RI plays an important role, contributing actively to socio-economic development and structural conversion of rural economy. However, when the economy in general and urban economy in particular have reached a high development level, RI importance will decline, many products and a number of trades/ professions will give up their place and will be substituted by urban industry, such as ordinary textile, metallurgy, mechanical engineering... However, rural industry still necessarily exist and there are many products that cannot be substituted by urban industry such as artisanat (wooden craftworks, wickerworks, embroidery, porcelain, pottery handicrafts).

(2) Actual status of development of RI in the past years

2.1 Situation of development of RI in the past years

From 1990 up to now, Viet Nam RI has seen a considerable development but uneven and unstable. It has been present in almost all fields, with various products and has contributed actively in socio-economic development of rural areas in particular and all the economy in general.

a- Scale and dynamics of development of RI

From 1990 up to now, RI has seen two periods of development in two different directions: In 1990-1993 period, RI has considerably declined. Workforce in RI in mid-1993 remained only about 70% as compared to 1990. In the same period, total output value has been reduced by about 80%. From the midst of 1993, RI resumed its development. Basically, up to 1995, RI has been restored to be equal to its level in 1990. However, its structure has been significantly changed: Most products

produced previously in the centrally subsidized mechanism (for instance, export contracts on a basis of agreements between Vietnamese Government with other countries' governments, contracts for exporting many handicraft articles,...) have sharply declined, not able to be restored or restored insignificantly. On the contrast, many new commodities, designed and produced/ commercialized on a basis of market economy, had been developed rather strongly. Particularly, rapid development could be acknowledged in the industries whose products in a large demand from domestic market, associated with restoration of the economy particularly rural economy, for instance, ordinary construction materials, metal products (particularly in construction), garment, processed food,...

From 1995 to 1998, RI has seen a growth both in number of facilities, employees and results of production and business operations. According to survey data in a number of provinces, growth rates are illustrated in table 1.

Table 1: Growth rate of rural industries in some provinces* (%)

No	Provinces	Units	Labour	Output value	Annual average
1	Phú Thọ	13.9	30.4	40.1	8.02
2	Hoà Bình	27.0	7.5	31.7	6.34
3	Hà Tây	11.6	6.0	84.2	16.84
4	Thái Bình	5.6	22.0	61.1	12.22
5	Hải Dương	1.4	- 4.1	27.6	5.52
6	Đà Nẵng**	-8.6	-1.2	38.1	12.7
7	Daklak	83.1	40.0	46.6	9.32
8	Gia Lai		56.1	784.3	156.86
9	Kiên Giang	4.8*			
10	Tay Ninh	234.7	172.0	964.4	192.88
11	Đông Tháp	29.4	12.5	-4.1	
12	Cá Mau**	-6.1	28.1	46.2	9.24

*During only 1997- 1998; ** During 1996- 1998

Source: Report on the survey of rural industries in provinces, 1999

Data in table 1 show that: Except for provinces in Red River delta, at localities where RI has reached a rather good level and scale of development sine 3 years, growth rate has declined, even sharply declined in some provinces. Meanwhile, in provinces where RI has not developed yet (Gia Lai, Daklak, Tay Ninh) the growth rate has been very high. This indicates that RI is serving mainly local market and there is a spreading from provinces whose RI is developed to provinces whose RI is less developed. It is just this spreading that causes the competition between RI facilities to become more rigorous. Meanwhile productivity, quality, particularly the change of design patterns of products in the "source" facilities is not faster as compared to newly founded facilities and villages, while just the transferrers of trades/jobs face more difficulties, even decline. This phenomena has been also recorded in a number of traditional artisanal villages such as La Xuyen (Nam Dinh), Huong Canh (Vinh Phu), Bat Trang (Hanoi).

Started from awareness of RI advantages in proportion of investment to each facility that is far much lower as compared to big enterprises, most provinces give prior concern to import non-agricultural trades/professions into their local areas to eradicate "trade-white" villages and communes. Many provinces have regarded this as a priority policy to develop RI in particular and industrialization/modernization of agriculture and countryside in general. Provinces in Red River delta are subject to high pressure in terms of labor and employment, as they have traditional artisanal villages, give a particular concern to this policy. It took a couple of years for Thái Bình province to eradicate this situation. Nam Dinh, Hà Tây and Hải Duong are also provinces that obtained good results in this orientation.

Comparison of growth-rates of 3 indexes in terms of output value, number of employees and number of businesses in different provinces has not shown any obvious and common interaction: while in a number of provinces, all 3 indexes are increased together, in other provinces, there is one that declines while others increase. Relation of direct proportion between growth rates of indexes have not been seen as well. This seems as a contradiction with common logic in interactive relationship between number of employees input with production value output and number of production facilities. This contradiction can be only explained by the restructuring of IR products: Due to change of demand, proportion of product output of low value declines, while percentage of products of high value increases. This is also in line with the trend seen in processing industry in rural areas: many agricultural products have been processed with an increasingly higher level.

Another noteworthy point is: in 1997 - 1998, economic crisis happened in South-East Asia. According to common logic, it has to influence our country's economy, of which there is RI, with a certain "delay". However, according to reports of provincial departments of industry in surveyed provinces, this phenomena of decline has not been noted largely in RI of these provinces. In provinces where RI is assessed as declined, output value and product output did not decline or there was only some changes of structure between products and trades.

This is explained because RI only serves basically domestic demand, firstly local demand, but it is associated with really stable and thoroughly investigated demand. Association between RI and urban industry, particularly under the form of processing association, is not common and popular. It is just this absence of association between RI and urban industry, that causes RI to face a danger: many RI products inherently distributed at local market are now substituted by urban industry's products. Typical cases include sweet, cakes, processed products. Economic globalization will make this effect more heavier and stronger.

Comparison of absolute value of said provinces can give a rather big difference between IRs in various provinces. Generally, provinces with high value of IR are those who have small artisanal industries developed for many years. Convenient infrastructure is regarded as a condition urging

forward IR to develop more stronger (but currently, no data have been collected to reflect their interaction relationship). Provinces in delta region generally reach product value of IR far much higher as compared to those in hilly and mountainous region. Value of RI in Red River delta provinces is also higher as compared to other provinces as shown in table 2.

Table 2: Output value of rural industries in provinces (Million VND)

No	Provinces	1996	1997	1998
1	Phú Thọ	166,426	186,835	214,478
2	Hoà Bình	55,520	65,319	68,025
3	Hà Tây	973,500	1,030,400	1,098,300
4	Thái Bình	116,993	110,356	992,116
5	Hải Dương	439,586	510,302	560,800
6	Đà Nẵng	370,937	425,877	512,330
7	Daklak	397,995	445,355	514,000
8	Gia Lai	182,501	200,768	
9	Tây Ninh	324,062	318,346	298,668
10	Đồng Tháp	483,554	550,080	542,114
11	Cà Mau	352,363	393,045	515,000

Source: Report on the survey of rural industries in provinces, 1999

Table 2 also shows that in 3 years 1996-1998, RI is not developed evenly in all provinces. Province that has the largest RI output is Hà Tây. In 1998, output value of RI in this province is 16 times as much as compared to Hoa Binh province (that has lowest output value of RI), nearly 2 times as compared to Hải Dương province (that has output value of RI ranked second after Hà Tây in surveyed provinces).

In some provinces, RI has seen not only no increase but decline both in results of production and business operations and the number of employees involved. Tây Ninh is a typical example. Output value of IR from this province declined in 3 consecutive years. Number of employees involved in this field also declined. The key reason for this situation is the conversion of economic structure in the orientation of expanding service area. Proportion of service industry has been continuously increased from 1995 until now and it has occupied the second position, 1.69 times as much as compared to proportion of industry in GDP of the whole province in 1997.

In economic structure of surveyed provinces, RI has only a very moderate position. Production value generated by RI accounts for only% in industrial product value of the whole province. In GDP of provinces, this proportion is much more smaller. In most localities, it has not escaped from the position as "an ancillary industry" associated tightly with agriculture. Just in traditional-trade villages, where RI generates over 50% of income for the community, agriculture is still regarded as "foundation" and RI as "ancillary trade/ profession" which produces so much whatsoever, is regarded as full of hazard.

Not only small from overall aspect, but also even each production facility/ establishment belonging

to RI and private business, joint-stock company, company with limited liabilities in rural areas also have a small size. According to estimation of State-management officials in many surveyed provinces, over 80% of workforce belonging to RI is operating in production facilities of family-size. With businesses of various kinds (private business, company with limited liabilities, cooperative), number of employees working on regular and stable basis is limited under 100 persons.

Size of average capital of these businesses in provinces surveyed in 1999, fluctuates between VND 60 million to 90 million. If compared to cost of equipment and technology in current market, level of social investment to RI (see table 2) is enough only for rehabilitation of buildings/ shops or procurement of some additional equipment locally manufactured of low or average technological level. With such an investment from provinces, it is able to secure investment to some enterprises and not quite enough for investment to many enterprises with modern equipment, not to mention automatic equipment capable to manufacture products with high precision and homogeneity, enabling to diversify products easily.

Table 3: Investment in rural industries in the surveyed provinces during 1998 (million VND)

	Provinces	Investment capital	Invested units	Investment capital/unit
1	Phú Thọ	35,695	931	38.3
2	Hoà Bình*	2,751	384	7.2
3	Hà Tây	72,114	6,856	10.5
4	Thái Bình	25,580	47	544.3
5	Hải Dương	35,378	2,586	13.7
6	Đà Nẵng	13,843	109	127
7	Daklak**	59,481	2,310	25.7
8	Gia Lai	43,452		
9	Tây Ninh	100,345	5,214	19.2
10	Đồ ng Tháp	6,293	149	42.2
11	Cà Mau	83,073	3,067	27.1

Source: Reports by Provincial Departments of Industry, 1999

* The first half of 1998

** For 1997

Data in this table also indicate that investment level to facilities at localities differs very much from each other. While output value of RI in Red River delta is higher as compared to other provinces, the investment rate for facilities in this area is lower. This trend enables us to forecast that in some time to come, output value of RI in other provinces is likely to catch up Red River delta. Moreover, it can be expected that with such investment, technical and technological qualification of Red River delta will be improved more slowly than other provinces.

b- Structure of trade/industry and products

According to reports from provinces, in trade/industry and product structure of RI, the industry which accounts for the highest proportion is food processing industry. This percentage reaches the

highest level in Tây Ninh province with more than 77%, Ca Mau with 70% RI output value generated by the food industry and the lowest is in Thái Bình with proportion of 18.8%, Daklak 26.5% (in 1998) respectively.

It is noteworthy that in reports from most provinces, the food industry has been increased in 3 consecutive years 1996 - 1998. However, if looking thoroughly at the situation of this industry, we can infer that it has been developed mainly in an extensive way and almost no change has been made in terms of quality. Its products in this period remained to have no significant change and it was only service of grinding and rough processing of farm products, producing sweet and cakes of low quality and distributed mainly on local markets. In organizational respect, major kind applied in this industry is production from households with basically manual equipment.

One of the factors influencing strongly on the change of industry/ trade and products of RI is the change of tradition and habits of consumption and income of the community. In the past years, average income per capita in countryside has increased, nature of commercial production of agriculture has been raised. Therefore, rural communities have the trend to increasingly use processed products and goods of high quality and higher cost as well.

Deliberation of rural consumers has been more balanced between price and quality. Proportion of goods at average and high price has been slightly increased.

Two other industries which have rather important positions in RI are production of building materials and small mechanical engineering industry (particularly mechanical service of repair). In 9 surveyed provinces taken as a whole proportion of mechanical engineering in total output value of RI in 1998 is 13.38% and of produced building materials is 15.99% respectively. Looking at structure of industry/ product of each province, except for provinces in Red River delta and Dong Thap, where produced building materials accounts for a large percentage, in other provinces small mechanical engineering industry occupies a percentage many times larger as compared to construction materials industry. This reflects partly the actual structure of products of these industries: first and foremost the materials producing industry gives only ordinary materials: (bricks, tiles, lime, sand, pebbles, stones, construction porcelain, ordinary enameled tiles with low quality,...) serving construction works of local communities. In delta provinces, where the population is dense with a large demand for construction and average income capita is not as high as in urban areas, the said products are in large demand and high consumption (4). On the contrast, in other places, demand for metal products (including farming tools, metal goods (ironmongery) for construction...) and mechanical service (especially repair services) is in large demand and has conditions for stronger development.

Industries yet having small size and proportion, but exist in most provinces are textile and garment, leather-shoes, handicraft.

Development of each specified industry or trade takes place in different ways.

In 1998, proportion of textile and garment industry in total RI output value reaches its highest peak in Phu Tho (15.65%), Daklak (13.8%), Hà Tây (13.0%).

Noteworthy are 2 two provinces whose textile and garment industry used to play an important role with a rather high percentage (15-20% of gross RI product), namely Hải Duong and Đá Nãng, this proportion declined sharply (down to 6.2% in Hải Duong and nearly 6% in Đá Nãng). The reason for the sharp decline of this industry in said provinces is due to the loss of link between RI in these provinces with production and commerce facilities of the same industry in urban area (that used to be maintained under the form of processing relationship, including processing relationship which foreign countries). Just in Hà Tây, before 1995, percentage of textile-garment industry always numbered 15-20% of RI gross product value due to maintaining processing relationship with many facilities in Hanoi (among them, Hoa Xa textile village is a typical example). Currently, these relationships are lost, and product value of this industry declines accordingly, that causes their percentage to decline respectively.

From above-mentioned analysis on industry structure and product structure of RI in surveyed localities, we can draw some remarks as follows:

- First and foremost, RI has a change in structure of industries/ trades and products in the orientation of association with market and subject to the market adjustment. The reason is that, production units of RI really operate as per market mechanism. However, changes in industry/ trade structure of RI are not yet basic changes. These are changes in terms of quantity of an industrial entity, that are mainly targeted at product manufacture as on-the-spot service for local demand.
 - In the past years, advantages in terms of on-site resources and natural resources has declined in respect of their role in IR development. Such factors as tradition, production experiences, workmanship have not maintained any longer their determining position for development of each production facility, even of each area. Regarding this issue, relationship of traditional clients, capacity of applying scientific technological advances, capacity of diversifying, renovating and improving products to be in line with consumers' requirements are of increasingly higher importance.
 - Relationship of association between RI and urban industry influences strongly on capacity and orientation of RI development.
- c- Geographic distribution of RI

RI development takes place unevenly between regions in the country. Areas with strongest development are delta areas and those previously existed rather strong development of artisanal trade villages.

Even in each province, development of each part is not similar to each other. Areas with pace and level of high development usually are: i) areas with high density of population, ii) areas having convenient conditions of infrastructure (particularly road system), and iii) areas with non-agricultural production tradition.

In RI development, handicraft-trade villages are playing an important role. The spread of these trade villages has not taken place as expected both in size and rate. However, they remain as industrial production centers in rural areas. Firstly, provinces in Northern delta, where exists a tradition for artisanal production, have a largest scale of production among all surveyed provinces (table 2). Secondly, even in Red River delta provinces, RI also reaches highest output value in districts or parts where many traditional trade villages exist. Comparizing values of industrial outputs of various districts in Thái Bình province, we found that areas with many traditional trade villages produce more than two times as much as compared to areas without traditional trade villages (see table 4). A similar result is obtained if analyzing data of Hải Duong and Hà Tây provinces. Also in areas with such villages, exist most businesses (private business, company with limited liabilities and joint stock company).

Another study on the trade producing consumers' goods made from rush plant in Kim Son district (October 2000) also indicates that in villages where rush commodities are of traditional trade, even in most severe years and months, income of craftsmen is always higher as compared to pure farming laborer. On the other hand, it is just the rust-trade laborers who have found out how to improve design learned patterns and learned models which are in line with requirements, with a view to seeking and obtaining new markets for their own products.

These above remarks show that reality is on contrast to extreme conclusions that trade village, due to the nature of its traditions and conservatism is hampering RI development in these localities.

Table 4: Output value of rural industries in Thai Binh by district (million VND)

No	Districts	1995	1996	1997	1998
1	Township	91.479	115.413	139.650	142.100
2	Vũ thu	55.828	76.728	91.306	91.306
3	Kiên xuong	101.852	90.237	103.000	105.926
4	Tiên hải	76.316	89.028	95.076	98.492
5	Đông hung	82.287	101.180	111.500	114.200
6	Quy nh phu	48.230	69.955	64.500	71.754
7	Hung hà	237.954	311.667	302.025	270.628
8	Thái thuy	52.605	76.900	82.745	87.710
	Total	746.551	931.108	989.802	992.116

Source: Report by the Department of Industry of Thai Binh, 1999

d- Market of RI

Observations made in different localities in all North, Central and South regions, permit to identify key channels and forms of product distribution of RI as follows:

- Processing for businesses in urban areas (industrial production, import-export).
- Selling directly to suppliers/distributors (with various forms of payment such as down payment in-cash, payment in advance or on credit, barter,...).
- Distributing directly on the market.

The two forms of processing for and selling to suppliers are recognized as common. This permit to acknowledge the hypothesis that, labor division has really developed a step, commercial production has been raised up to a higher level. From this, we can see that RI market has been expanded due to having a link that assumes this work, and shared profits from production units.

RI products are mainly distributed in domestic market, of which most are distributed just at the locality or adjacent areas.

A survey in Tu Liem district shows that over 2/3 artisanal households distribute their products just in district area, or bring their products to be sold in the city or adjacent districts in Hà Tây, Vinh Phuc provinces. Most of products belonging to farm-products processing industry, building materials, metal goods-mechanical products, earthenware, are of this kind. It is noteworthy that earthenware (pottery, porcelain) of low quality that had been previously sold to underdeveloped areas of China in a large number (in the early years of nineties) are now absent in the border area. On the contrary, while the trend of sewing clothes by oneself (for use by individual and family) in rural areas has been substituted by the increasing trend of using ready-made clothes, on domestic market, products of textile-garment industry are increasingly subject to competition by Chinese garment products. Just in border area of Ha Giang province, price of a man's suit of China is only equal to 1/3 - 1/2 of that of a suit of the same quality from Viet Nam. This has not only an adverse impact on production of garment industry in urban areas but also in countryside. In the early years of 90's, Co Nhue commune thrive rapidly on goods processing to export to Korea and other countries. Currently, due to competition, the garment trade there has declined by more than one half as compared to peak point.

However, a lot of traditional artisanal products have been exported to other countries, particularly developed industrial countries.

Wickerworks, rush commodities... that have sharply declined to an extent that over 50% of production facilities had to be dissolved previously, have been restored, even resumed their strong development. Their market from the situation that they were only distributed to East-Europe, has been expanded to "hard-to-please" markets such as West-Europe. This indicates that RI products are not unable to be exported to developed industrial nations but the key problem is whether these

products could be recognized as appropriate and compliant with requirements of customers.

In the years the economy is converted into operating in market mechanism, this mechanism is not only applied to products of output but also raw materials and services. Even labor market has been shaped.

e- Technology

Technology of RI is generally assessed as at low-level, despite of some significant renovation in recent years. Surveys carried out in selected areas show that technological renovation has major characteristics as follows:

- Technology and techniques of RI production units are generally assessed as backward. Manual techniques are applied commonly to RI. In Hà Tây, a province with largest product value of RI among surveyed provinces, average capital for equipment per capita reached only VND 3.433 million in 1998 rather smaller as compared to other provinces.

Small mechanical repair industry as best equipped reaches only VND 5.745 million per capita. According to assessment by industry-control authorities (Provincial Department of Industry), technology in industry of small mechanical repair, building materials production, food processing and handicraft is at average level, but in other industries, it is backward as compared to the common level in Viet Nam. Just in Daklak and Gia Lai provinces, where RI output value is not high and workforce is not numerous, their capital for equipment is high. Average capital for equipment in RI of surveyed provinces is collected by just provincial Departments of Industry of surveyed provinces.

Table 5: Capital per head in provinces (million VND)

No	Provinces	
1	Phú Thọ	5.440
2	Hà Tây	3.445
3	Thái Bình	1.395
4	Hải Dương	7.520
5	Dà Nẵng	9.800
6	Daklak	10.951
7	Gia Lai	6.540
8	Tây Ninh	5.825
9	Đông Tháp	6.387
10	Cà Mau	7.458

* For food processing only

Source: Reports by Provincial Departments of Industry

Data in the above table also enable us to remark that level of capital exploitation and use by various provinces are different from each other. It is just in the places where equipment capital is high, its exploitation and use is not as good as those with low equipment capital.

- Technological renovation takes place intensively firstly in industries whose products are in large demand and common on the market, with high affordability. Spreading, development and

rather high proportion of such industries as food processing, household furniture manufacture, artisanal articles..., constitute typical example for this situation.

- Technological renovation often takes places in a focussing manner, particularly in services for consumers' demand of taste nature. In wooden furniture manufacture, improvements and innovations in recent years are implemented in processes of polishing, paint spray,... which are processes recently concerned by consumers. These innovations are usually associated with product renovation in line with modern trend of consumption.
- Technological renovation has been associated with production mechanization. Manual labor as previously common has been substituted by usual machinery and equipment. In trade villages of food processing, furniture manufacturing, many processes have been equipped with machines. In Dong Ky village (Tien Son district, Bac Ninh province), most families have used machines of small capacity in most processes ranging from timber splitting and sawing, up to product polishing. Local paint and traditional lacquer used previously are also substituted by imported spray-paint, not only to give a high glossiness but also using modern sprayer. Artisanal households manufacturing stone-handicrafts in Non Nuoc (Dà Nāng province) and Ninh Binh province also apply small machines in stone splitting, surface-grinding, chiseling.

Through survey in these villages and households, proportion of "self-built" machines has declined, and number of machine/ equipment bought from mechanical manufacturers has increased. However, there have not any design and research establishment for these specific equipment to serve RI facilities. In witness, although mechanical enterprises supply equipment to RI facilities, but over 60% of cases are that they implement to users' orders, on a basis of what they have observed or innovate just the equipment that are being used by these facilities. A small proportion (about 10%) of households manufacturing stone handicrafts in Non Nuoc (Dà Nāng province) still informed that equipment are manufactured as per sample or description given by themselves.

In trade villages of food processing (alcohol distillation, vermicelli, cake and processed food of various sorts...), equipment and tools of production are all manufactured by the producers themselves.

Surveys conducted in Ninh Binh, Dong Anh, Hà Tây, Nam Dinh from June to October 2000 show that at this moment, machinery and equipment used in IR are mainly of origin as discarded from big industrial enterprises in urban areas, another proportion is imported from China and finally, the remainder is self-made machinery, equipment.

Data from surveyed provinces also show that basically, production facilities are very small in size and their technology is backward and old-fashioned. If compared with survey conducted in 1996 in a number of provinces, size of RI businesses has been considerably increased. However, with average capital of each business as at the present, it is not enough for procurement of modern equipment and performing the mechanization.

Another important feature is that, while modernization of RI technology is generally conducted with a slow pace, many areas of agricultural production associated with technology have been applied much more with technological advances, particularly biological technology. Almost all provinces in the delta region (Thái Bình, Hải Dương, Hưng Yên, Hà Tây,...) has introduced many new varieties into production and developed new production orientations (culture of mushrooms, rearing animals of speciality,...). This can be implemented thanks to impacts from local industry and service.

f- Fund for RI

RI requires a large amount of business capital. This funding is usually required for resolving of 3 problems as follows:

- New development of production facilities/units, particularly for business-owners who start their business operations (new business thanks to learning job from other places, separating from old facility to set up a new one, household separation, investment to a new locality,...).
- Maintaining and expanding of existing production facilities, particularly in the case where the facility has a good standing through some years, maintained and stabilized its marketplace, found additional big and reliable clients,...
- Building and upgrading/ modernization infrastructure in territorial area (rural area) to serve the tasks of socio-economic development in the locality in general and RI development in the locality in particular.

To meet these requirements, RI facilities have raised their fund mainly from the following sources:

- Self-owned fund of householders, business owners. Generally, this self-owned fund is still limited because i) initial accumulation of these business owners is small and has been invested mostly into initial business operations ii) profits from business operations and accumulative part for re-investment to production expansion are small (due to small business efficiency and scale), and iii) in some cases for different reasons, so they are really uneasy in mind to put more fund into business and afraid of risks.
- Fund borrowed from idle money of the community through banking system. According to survey conducted in 1998 by the Bank of Agriculture and Rural Development, about 10% of households have average savings-deposit of VND 10 million per annum. Therefore, capacity of involving fund from deposits at Bank for economic development of rural households is still limited because low accumulative capital and population habits in rural areas are unfavorable and banking service is not really good.
- Fund from non-official financial market. According to survey results from the Ministry of Agriculture and Rural Development in 1997, only about 30% of facilities are allowed to borrow capital from banks. This fund resource also meets only 30% demand of rural business households

for capital borrowings. Amount of non-official fund from private loans or other non-official loans accounts for 20% of funding demands of businessmen in this sector.

- Fund from national assistance funds such as fund for poverty reduction, fund from non-government organizations. This resource is not large in number but it has a good effect due to rather easy conditions of loan, favorable for business and production facilities in countryside.
- Fund allocated from the State budget at both local and central level. At the present, development of agriculture and rural areas is a top-priority strategical task of the whole country, given incentives in terms of fund. However, when the amount of fund allocated to localities, the part granted to RI is insignificant.
- Fund from the community for RI. This is always an invested capital indirectly reserved to RI under the form of community's contribution for infrastructure building and development (roads, power-supply system, socio-economic system of service...).

One of noteworthy problem jeopardizing the continued exploitation and mobilization from the outside for RI is that the efficiency of using fund for RI is rather low. Data collected from typical survey show that proportion of profits over investment capital in RI only reaches less than 4% per annum in businesses, companies, cooperatives and less than 30% in individual business households, far much lower as compared to facilities of the same kind of service in countryside.

g- Labor and training for the rural industry

The development of the rural industry (RI) has involved many laborers and created many jobs in rural areas. The rural industry involves laborers of different ages for its production activities. The development of traditional craft villages has created jobs not only for local people but also for ones from other areas.

Along with specialization of commodities production as per traditional craft villages, RI's workers are also specialized as per commodity or component/part of the product.

Laborers of rural industry have various skill levels. They mainly have been in the way of on-job training, on-site training and handing down a trade. Theoretical qualification of laborers staff in RI is usually low. This factor hinders the innovation ability of the RI workers. The commercial and managerial staff of the rural industry also have a lot of limitations. Most of business owners have not been trained systematically in trading and business management. A major part of them are at low education level. Their knowledge of international trade, laws, computer as well as foreign languages are very limited. These limitations cause many difficulties for the production facilities in the rural industry to access to the world market for expanding production activities. They also suffer disadvantages in the transactions with clients from both inside and outside country.

The rural industry workers usually get income 2-3 times more than the pure agricultural laborers.

h- Production organization

The household production still is the main form of the production organization in the rural industry. According to survey results from the selected areas, the household production represents about 90 percent of the rural industry laborers, generates more than 80 percent of product value. The characteristic of these households is the combination of handicraft and agriculture production. So far, the workers of rural industry are not completely separated from the agriculture production. Households whose members do not take part in the agriculture, still keep cropping land and hire laborers from other places for their farming works. In La Xuyen area, the apprentice workers help the masters' families to harvest or come back home on leave during the harvest seasons, only then continue their training.

Businesses of various kinds have been set up in rural area. Its activities partly contribute to the development of rural industry.

The traditional craft villages are considered as an important factor for rural industry development. These traditional craft villages play specific role in the development of the Red River delta. Preliminary statistics show that there are more than 300 traditional craft villages in this area. At the beginning of the nineties, the restoration of these traditional craft villages have contributed fast development for RI as well as made us expect that we already found out the answer for RI development. Over past years, the practice did not meet our expectation. In the majority of traditional craft villages, although there are upscaling, mechanization and variation of household production, the growth is not in line with the potential. There are not households that are big enough to involve other households to form large businesses that they can go out to the world market or run effective competitions with international companies even at home market. The products of Trieu Khuc textile village even have been exported but mainly elbowed their way to " branch market". Almost no long term investment is available.

The kinds of limited and joint-stock companies are also applied in RI. The number of limited liability companies is larger than the number of joint-stock companies because the operating mechanism and the foundation procedures of the formers are simpler. The reported figures from surveyed provinces show that there are only 252 companies of both kinds in 1998, an increase by 62 as compared to 1996. According to these figures, except Hài Duong and Phu Tho provinces, the number of companies in other provinces of these seven provinces is growing continuously. Although there were not official reports and statistics from provinces, following the evaluation of many experts, the number of companies increases not much even after significant simplification of foundation procedures and trade registrations for private enterprises. The main reason is that the owners of rural production facilities still do not perceive the need of enterprise foundation as a business tool. This factor also indicates a simple character, small size and need of cooperation/assignment of

production facilities in RI .

Table 6: Number of private enterprises, limited liability companies and joint stock companies by province

No	Provinces	1996	1997	1998
1	Phú Thọ	30	27	28
2	Hà Tây	30	38	44
3	Thái Bình	12	15	16
4	Hải Dương	56	54	53
5	Đà Nẵng	49	59	82
6	Daklak	7	10	9
7	Gia Lai		12	20
	Total	184	215	252

Source: Reports by Provincial Departments of Industry, 1999

Two provinces of Me Kong delta (Đồng Tháp, Cà Mau) and Tây Ninh, that are not similar to provinces mentioned above, have hundreds of enterprises of these kinds. Those production facilities mainly function in the field of food processing (rice husk and polish). The facilities were set up by business men doing rice processing for export companies coming from big cities, especially Ho Chi Minh city. Moreover, there are big quantities of rice to process, the businessmen need an enterprise as legal instrument to facilitate transactions and organize business activities (particularly for sales contract with other clients).

i- Effect of production and socio-economic impacts

In general, the effect of production and socio-economic impacts of RI can be evaluated as following:

- The RI helps to create jobs for a large number of laborers in rural areas. Particularly in Thái Bình province, in 1995 RI created about 150,000 jobs that involve about 20 percent of laborers in the province. Kiên Giang province has more than 30,000 laborers working for RI that account for 2.8 percent of its rural population; Cà Mau has more than 10,000 people (about 1 percent of rural population). The respective indicators in Đồng Tháp are 35,000 (2 percent), Hải Dương - 36,000 (8 percent, not including 45,000 people working for RI by seasons), Hà Tây- 150,000 (7.1 %), Thái Bình - 143100 (7.9 percent),...
- The RI helps to increase income for the rural laborers. Thái Bình province statistics also show that 20 percent of its total laborers provide 30 - 35 percent of its total income for rural area. It means RI laborers get income 1.5 - 2.0 times as much as compared to agricultural ones. The practice indicates that the living standard in those areas that have non-agricultural jobs is usually higher than the living standard in pure agricultural areas. The living standard of non-agricultural households is higher than the living standard of pure agricultural households. The practice occurred

in contrast with the farmers' calculations: the living conditions of the farmers who possess cropping land are not more stable than the living conditions of the craftsmen who have no cropping land. In contrast, because agricultural production is unstable, it depends much on weather conditions, the different levels of price between raw agricultural products (especially rice) and industrial-handicraft products become bigger and bigger, the living conditions of the farmer, especially the living conditions of those people who grow rice, become unstable compared with the craft workers.

- The RI and its development contribute to change the rural economic structure. This change of the structure first is due to fast growth of RI. The proportion of agricultural products in the total products is intensively declining although its absolute value is increasing. Moreover, the RI has an impact on trade structure and variation of products in the agriculture: the monoculture was changed by a wide variety of plants and home animals; Extensive farming was changed by intensive farming,... In many areas, professional business services with big size and large area have been also established due to fast development of RI. Chau Giang district (Hung Yen province) that was a pure agricultural area, runs business from the North to South with hundred trucks.
- The RI intensively contribute to the urbanization and modernization of rural areas. Many townships and concentrated population points have been set up in those areas that developed RI. In most rural areas, the living custom has been changed under RI production or its infrastructure. On the other hand, RI in the process of its development, provides more completely necessities and industrial products for rural people. Small mechanical engineering industry not only repairs production means but also produces and supplies to local people simple production means fitted to local characteristics.
- An important part of RI that functions in the field of processing agricultural products, is located just in the rural area. These production facilities have many impacts: on the one hand, they improve the value of raw agricultural products, then increase the effect of agricultural production. On the other hand, they help to minimize the losses after harvest, subsequently increase agricultural productivity, create premise for reducing necessary cropping land and keep it for other purpose. Finally, these production facilities allow to increase their productivity in the field of processing themselves by reducing transportation cost and using scraps from food processing industry for agricultural purpose (produce microorganism fertilizer from scraps of food processing industry,...).

2.2 General assessment of the RI development over recent years

We can come to conclusion on general assessment of the RI development as following: over recent years of renovation, the rural industry has developed openly and effervescently under the impacts of such policies as the rural development and multi-sector economy. The RI has obtained essential results and achievements as following:

a) **The RI has been developed both extensively and intensively, especially extensively.** From extensive approach, the RI has been developed in productivity, size and good growth rate. Period 1986 - 1990: the RI generally developed well; 1990 - 1993: the RI developed slowly because it could not succeed in reorientation and restructuring when the national economy shifted intensively to the market economy; 1993 - 1997: the RI developed better. The growth rate of RI in many areas got 7-9 percent, especially the Southeast region got more 15 percent; 1998-1999 the RI development stopped. Generally speaking, the RI has seen a growth over recent years.

From intensive approach: the RI development shifted to the needs of the market. Which items of product? How is the quality? The production facilities should meet the requirements of the market. Many traditional villages changed their items of product to meet the market needs. The pottery villages shifted from making popular pottery to art pottery. Da Hoi village shifted from making agricultural mechanical tools to making consumer mechanical goods and construction mechanical tools. A majority of production facilities invested and renovated their technology (although it was at low level) for increasing productivity and improving the quality of products.

b) **The traditional craft villages as a main force of RI has been developed well.** In the whole country, there are about 1000 traditional craft villages. These villages are mainly located in the Red River delta. The traditional craft villages have long history of development and prove its strong vitality. Many traditional craft villages obtained growth rate at 20 percent per year. The strong development of traditional craft villages and appearance of new traditional craft villages by expanding mode have promoted RI development in many rural areas. If in 1995, there were 493 traditional craft villages in the region of Red River delta, then after three years (1998) the total number of traditional craft villages in this region increased to 731. It accounts for 70 percent of total traditional craft villages in the whole country. The traditional craft villages become backbone and motive force of RI development.

c) **It appears some new factors in the RI development as following:**

The average and small industrial areas have taken shape during the RI development. In Ha Tay and Bac Ninh provinces, some traditional craft villages have been expanded and became small and average industrial areas. These areas are separated from population areas and do not cause environmental pollution and the problem of infrastructure for RI development can be solved there.

- In rural areas of traditional craft villages, businesses have been developed, mainly private businesses and limited liability companies. These facilities contribute to production expansion, trade development and goods production in rural areas. There are more than 50 limited liability companies and cooperatives for furniture manufacturing in Dong Ky village (Tien Son district, Bac Ninh province); Dinh Bang (Bac Ninh) commune has more than 10 limited liability companies, one enterprise in joint-venture with Taiwan producing fashion shoes for export, one facility for

processing agricultural products, four facilities for casting non-ferrous metals, five cooperatives for producing hygienic papers.

- However, there are some limitations in the RI development over recent years:
- The RI is still small and backward, it is not strong enough to change economical structure in provinces. In many local areas, the RI still is considered as " the side profession". The total product value of RI number only 10 percent of total product value of the province. Proportion of industrial households is very small. The 1999 statistics show that proportion of industrial and construction households in the whole country occupies 2.7 percent, for the red river delta, the figure is higher and occupies 3.69 percent. Production means industry is very small, processing industry for forestry, agriculture and fishery is not big and has backward technology. That is why the RI development do not influence much on the change of economical structure of the province.
- The RI development is unstable because of the market difficulties and low competitions of the RI.

The RI and Viet Nam industry face the same difficulties as market availability. On the other hand, because of backward technology and equipment plus limited fund, the RI products have low and unstable quality. The products undergo high cost-price and have low competitiveness. Then, the production facilities don't like to invest and expand its activities.

- The RI development bring about serious environment pollution (air, water...) in many rural areas. Because the technology is backward, it has no processing equipment for industrial waste, the production facilities are usually located near by population residence, the more the RI develops the more environment pollution is serious. The temperature at Huong Canh village (producing brick, tile) and Bat Trang village (producing pottery) is 2-3 °C higher as compared other villages; the water at Duong Lieu, Lang Van (produce foods) undergo heavy pollution.
- There is an uneven development of RI among provinces. The RI developed well where it has traditional craft villages. The Southeast provinces have RI more developed than other provinces. Ha Tay province got highest product value (in 1998 - 1,098,300 million VND) and it is 16 times more than Hoa Binh province (68,025 million VND) and it is 2 times more than Hai Duong province (1998 - 560,800 million VND).

The reasons of weaknesses mentioned above are: a) The government has no plan of RI development, and the RI has developed spontaneously. The government also has no complete set of policies for encouraging RI development; b) The endogenous ability of RI is low.

2. Environment and conditions for RI development in Viet Nam

The RI development is not separated from the common environment of national economy. However, the RI environment includes specific factors affecting the RI development in different ways. Every component environment factor for RI development also undergoes influence of many other factors. The characteristics of the component factors that affect the environment and conditions for its development, are shaped and changed during long periods. These factors are interrelated. The influence of every factor on RI is not similar in provinces. Then, every local area needs specific study on the impacts of every factor in order to make suitable interventions.

(1) The impact of socio-political environment on RI and its development

The socio-political environment has enormous and decisive impact on orientation and development of RI. There have been many policies for agriculture and rural development issued after the 5th conference of Central Committee of Party (7th congress). These policies encourage fast and sustainable development of RI in order to urge on socio-economic development in rural areas. In many provinces, the local authorities issued specific policies of industrialization, modernization, and RI development. There are not only policies from the central government but also local policies of industry and small artisanal industry development. For example, Hoa Binh province had two decisions, one from Party Committee (Decision N 33 CT TU issued on 04.01. 1995) and another from the people's committee (Decision N 76 QD/UB-CN issued on 18.01.1995), that were related to small artisanal industry development. Thai Binh province also had decisions from Party's Committee and People's Committee (Decision 09) related to economic development programs. Besides provincial decisions, many districts made its decisions about policies on trades and traditional craft villages development in the areas. However, many other provinces were passive and had no decisions and policies on industry and small artisanal industry development. These provinces were also passive in orientation and management of this economic field.

One very important factor for RI development is the perception of the ownership in this sector. There are different perceptions of this concept as mentioned above. The survey results from 12 provinces showed that the officials of industrial departments of all 12 provinces considered RI as only small artisanal industry (SAI). The policies of RI development only oriented to SAI development. That is why the focus of these policies emphasized on providing credit for people, trade introduction and training, conditions for production places..., investment for road and electricity development was also paid attention in many areas (in rural area, the way is that the government and people together do invest). Then, the local authorities could not issue long-term consistent policies for the local RI development. The policies of market, integration,..., related to indirect policies for economic regulation by economic levers, were not specified in detail and applied commonly in provinces.

Besides Party's and government's policies of RI development, other social factors also have active impacts on the RI. Of which two primary factors are:

- The custom and tradition to help each other in rural area, especially the relations of family line and worker classmates in some traditional craft villages. This has positive impact on RI development because it creates favorable condition to mobilize initial fund for those people who want to start business, able get training and necessary experience to run business. In many cases, the support includes shift of clients or "business tips", or agreement on the market division, competition control, or at least excluding competitive practices that could bring about common losses for the trade. In La Xuyen (Nam Dinh), Dong Ky (Bac Ninh) when the adult children set up separate households, most parents provide them with initial fund (the amount of money is different, it depends on each family, but the fund is usually enough to start business), transfer/assign some contracts/orders (it is usually the case of clients previously known to the employer/householder), share necessary experience. In some cases, the old parents help to manage business for new households for the first period until the activities become normal. These phenomena were observed in most traditional craft villages in provinces Hà Tay, Thái Bình, Hưng Yên, ...However, this relation has a limitation that it is only for the members of family line and it is not popular. In particular, the trade secrets, know-hows are not disseminated largely on a disinterested basis.
- The role of some mass organizations in the RI development. Women union (in programs of poverty reduction) and the professional associations have special role. In every area, these organizations, on the one hand, try to import new profession (organize training on new profession, mutual assistance to learn new profession in other places, self training among their members,..), on the other hand, to find out the funding source, introduce clients or help to advertise the products,.. to help the producers to distribute their products. These organizations also play an important role, despite of its ephemeral nature, in supporting producers with marketing their products, training and upgrade knowledge of business management,... The consideration of activities of related agencies in the long term program of these organizations is necessary in the upcoming period.
- One important factor concerning socio-political environment is the attitude towards and settlement of concrete problems arising from every area. In the local area, where the authorities pay attention to helping the production facilities to overcome their difficulties, the business activities could develop well. Stability and consistency of the local authorities officers (concerning all organization, policies and specified personnel) also play an important role in RI development.
- Among the factors that hinder the RI development, this is the overlap in the state management for some RI aspects, at the same time, omission of other aspects, especially in resolving or supporting to resolve completely the local difficulties. The coordination in activities of state management system for the RI is also considered as the second weak point in the state management and its role for the RI

development. These two points were mentioned in 8 of 12 provincial survey reports. Moreover, some provinces emphasized two other points as i) There is not an appropriate law corridor in which the production facilities can actively explore resources for business development, and ii) Control and supervision works should be done properly in order to help them adjust their mistake on time, avoid conflicts and disadvantage subsequences. What concerns the second problem, there is an opposite opinion from the production facilities: the enterprises always complain that there are too much unnecessary procedures and papers. At the same time, they undergo a lot of inspections, repeated inspections, inspections without complete conclusion,...

(2) The impact of economic environment on the RI development

The economic environment has impact on the RI and its development as following:

- The market and demand of the RI products. In general, the RI products are mainly sold in rural area market. However, all provinces have the RI products exported. For example, the furniture of La Xuyen (Nam Dinh), Dong Ky (Bac Ninh) are sold even in Taiwan, China, Hong Kong, Southeast Asia, West Europe,... Many textile garment products have ever been exported to Europe. The value of exported RI products has achieved USD millions every year. However, on the other hand, on the spot market is the essential market for the RI products. The characteristics of this market are low income, limited purchasing capacity. The common custom of the consumers is that they like to make products themselves to meet their needs following a self-sufficient way. Over about ten years, this custom started to change into direction of commercial production. The farmers intensively make various kinds of commercial products (including agricultural products) with high productivity for selling. They buy necessary products in the market (including agricultural products). Consequently, the change of income of the farmers leads to the change of the size of the market and influences the RI development. This negative impact can be observed in the regions with high rate of population growth and low rate of economic growth. In this case, consumption structure is not good for the RI products. The additional income firstly is for the necessities as foods and not for other industrial products.
- Economic growth rate and the RI development. This is an interactive relationship: those areas that have high rate of growth, have a developed RI. At the same time, those areas that have the RI with big size and high rate of development, have more favorable conditions for high rate of economic growth. The most important impact of the fast economic growth is that it creates many opportunities for the RI production facilities.
- Rural population and motive force for RI development. Population and labor are considered as resources for the RI development. In practice, not every region with high density of population has the RI developed. However, high density of population and numerous labor press on the development of RI. That explains why many populous regions in Hà Tay, Hung Yen, Thái Bình, could easily accept non-agricultural professions faster than others. The people here are easy and active to seek and import

handicraft professions faster than the people of Mekong delta. This is a basis for two ways of formulation of handicraft trade. This influence on directions of RI development in two major deltas in Viet Nam: in the Red River delta, the producers import any trade as practicable as possible. In the Mekong delta, people import only trades that they need most. These characteristics require different directions of RI development for different regions. The intervention measures must be different accordingly.

- Private investment and the RI development. Theoretically, the more investment fund (accumulation) is available, the more investment can be allocated for the RI development. However, when the proportion of investment is high, it remains limited resources for consuming, purchase capacity declines and adversely affects the market of RI. And the local market is the essential market for RI. Then, where the provinces are richer, the people have higher income, the RI develops more strongly. On the contrast, in those provinces where people have low income, the economy is underdeveloped, the RI develops slowly. It is difficult to compose the RI into the production structure in those provinces. If we look at statistics for the whole country, it can note that, the role of private investment is declining in rural areas. Because, while the proportion of private investment from the total investment was declined significantly over four years (from 29.4 % in 1995 to 21.3 % in 1998, see table 7), it concentrated in the urban areas. If there are not strong regulations, the fund that are allocated for underdeveloped regions, will run to the regions with the higher level of development.
- The investment from Government and the RI development. This is an additional fund for private investment. These funds are usually allocated for infrastructure constructions, primarily for roads, electricity system, irrigation system and some constructions of social infrastructure (school, system of rural markets). According to statistics (see table 7), the proportion of the government fund is very small in the total fund of the whole society. In which, the proportion of fund from the local budgets increases a little, but continuously during four consecutive years. Looking at this structure, it can estimate that the total fund for economic development will increase both in quantity and proportion. However, if we look at uneven investment among regions, we can see that, in general, disadvantaged regions often are rural areas.

Table 7 Breakdown of Viet Nam's investment during 1995-1998 (%)

	1995	1996	1997	1998
State investments	38.3	45.2	48.1	53.5
O/w: State budget	19.9	20.8	21.2	21.5
o/w : Central	11.5	11.3	10.2	9.3
Local	8.4	9.5	11.1	12.1
Credits	4.5	10.4	13.1	15.4
State-owned enterprises	13.8	13.9	13.7	16.7
Non-state investment	29.4	26.2	20.6	21.3
Foreign investment	32.3	28.6	31.3	25.2
Total	100.00	100.00	100.00	100.00

Source: *Statistical Yearbook 1998, Statistical Publishing House, Hanoi, 1999, page 227*

- Capacity of ensuring the supply of on-site material inputs and services. A major part of rural industry State managerial officers in different localities affirm that one of the advantages allowing the smooth development of this economic sector is the local availability of main raw materials. It is estimated that, in Daklak province, up to 85% of raw materials may be locally supplied for rural industry, whereas Đà Nẵng city may locally supply 60% of necessary raw materials. This may be assessment for industries that are considered as "spearheads" localities, not for rural industry in general. In the reality, despite the on-the-spot availability of raw materials, production and business enterprises still need a lot of services which are not locally available and are to be purchased or imported from other provinces. Gia Lai province's conditions are similar to those of Đà Nẵng city; the rural industry's structure of both localities is almost the same, but in the former's locality, the value of locally exploited raw materials as inputs of local processing industry of agricultural, forestry products fluctuates between 75 and 90% whereas in other sectors, imported materials and materials purchased from other provinces amount to 80-90%.

(3) Impacts of institutional environment upon rural industry and its development

Institutional environment is understood as the general system of legal regulations and the institutional system which ensure the activities and effects of the regulation systems, the mechanism and effects of the regulations as well as the organs enforcing these regulations. At present, another issue to be addressed is the effect of all systems on the socio-economic development. A lot of studies in the past considered that the mechanism environment is the same and unified nation-wide. However, in the reality, dealing with the human factor and localism of localities, it is observed that the homogeneity likely exists only in some legal documents (Laws, ordinances and other legal regulations issued by institutions of national level) and in the general institutional structure for the enforcement of laws. The enforcement, the mechanism for enforcing legal regulations, statutes, regimes ...are, in fact, not the same in various localities. This leads to different conditions for the development of rural industry in different provinces and to the different development scale of different provinces. Moreover, even in a same province, the development of rural industry of different areas is also different. This originates from the non-uniformity in the

enforcement of general regulations of the central Government and the provincial administrations.

Beside the absence of a legal corridor for the enterprises to take the initiative of doing their production and business, authorities of many localities think that there exist also the incompleteness/non-orchestration between different elements of the institutional environment. This is shown in the fact that the policy is not correctly understood by responsible, managerial and operational officers; the policy becomes irrational right after its promulgation, resulting in bad effectiveness of implementation; the same subject is treated by different institutions through different ways and different regulations stipulated in different documents. A general situation at present is that the regulations are formulated and promulgated following the "vertical line"; after the issuance of a legal document, there is often another document of lower legal value for "guiding" the enforcement, and the institution which issues the guiding document is just the enforcing, supervising and inspecting the implementation of a higher ranking institution's legal regulations. Therefore, these documents tend to explain the general regulations in a way more favorable for enforcing institutions, creating easier conditions not for enterprises, for the grass-roots facilities, but for enforcing institutions. Because of limitations in information system in rural areas, many policies stipulated by the State cannot be disseminated to rural people. Surveys conducted in Vinh Phuc province and Hanoi city's suburban areas have showed that information is mainly received by rural people through radio, TV and news paper which are not really a concrete, detailed source of original policies and legal regulations. Through these sources of information, can only understand the essentials of legal documents, and concrete, detailed regulations must be caught from other sources. Moreover, the contents of legal documents published in mass media are often not complete; auditors, viewers and readers are often inattentive and cannot grasp well the contents of regulations; or they forget immediately after receiving information, and they wrongly remember when they have to implement these regulations. Thus, it is necessary to strengthen the information systems, the introduction of legal documents, governmental policies and regulations for rural areas.

One of elements constituting the mechanism environment is professional organizations and their activities. Efforts have not yet been adequately made for studying, drawing experience and taking appropriate measures in this matter. Field surveys carried out in Huong Canh have showed that, the "club of kiln owners" established since 1993 have positive effects. This club, originated in its initial step from the communal structural organizations, subsequently acts as a professional club with its members who are owners of brick kiln, tile kiln in the commune. The club meets once per month or a couple of months for the members to discuss together how to solve difficulties and issues related to their production. Many solutions for problems, new projects, investment programs for building local infrastructure have been firstly proposed by the club and effectively supported and carried out, If this form of organization is really effective, before launching a movement or activity, it is necessary to carefully study in details for identifying the mood and action which are applicable as a "frame" mechanism for similar clubs.

The mechanism environment of rural industry is strongly influenced by the contingent of State managerial officers in the locality, especially grass-root officers. These officers are elected by the people; a part of them have completed their secondary education. The recent field surveys have showed that in a lot of communes, a number of officers have been graduated from in-service colleges, mostly in agronomy, economic management. Not any officers is graduated from the formal higher education; and almost not any officer has been thoughtfully trained in laws. Therefore, one of important and urgent tasks for improving the mechanism environment for RI development is the constant training and heightening the capability of grass-roots staff.

3. Some basic viewpoints and measures for developing rural industry in coming years

(1) Basic viewpoints to be permeated in developing rural industry in coming years

Rural industry development represents one of important tasks in the socio-economic development of the country in coming years. For an effective development of rural industry in a close connection with the country's politic tasks, it is necessary to thoroughly grasp the following viewpoints:

Firstly, the development of rural industry must be in a close relation with the development of agricultural production, trade and services. But, at present, the relationship between these branches is still somewhat incoherent. Rural industry's raw materials are mainly locally produced agro-products. But the supply of these raw materials is not enough; the scarcity of raw materials and the raise of price of these products occur in many localities. The supply of services in loaning, in technology transfer, in information ... is still underdeveloped. The trading system for supplying materials inputs and selling final products is of spontaneous characteristic. For an effective, sustainable development of rural industry, which in turn positively influences the transition of economic structure, it is necessary to build the organic relationship between the development of rural industry and that of agriculture, trade and services. Chinese experience in enriching farmers' property which is essentially commercialization of agro-products, is an useful lesson for us.

Secondly, it is necessary to bring into play the factor of tradition in the development of rural industry. Some people assess the tradition as an obstacle in the process of industrialization and modernization of agriculture and rural areas. This assessment is somewhat excessive. The element of tradition must be brought into play because:

- Bringing into play the tradition is bringing into play the nation's cultural identity.
- Bringing into play the tradition is to exploit the potentialities, develop our internal strength. With the development of traditional professions, marketing and investment, the localities may raise and develop production.

Of course, the modern life-style requires materials and commodities which are closely related to the

up-to-date socio-economic conditions and modern technology and purely traditional materials and commodities may not fully satisfy the taste of all people. An important thing is to modernize the traditional technology for meeting the requirements of the markets.

Thirdly, the goal of development of rural industry is to produce sellable commodities. This is a vital matter of rural industry; it decides the effective competitiveness, hence the sustainability of rural industry. The market-oriented rural industry development means:

- The identification of species of commodities, price of items ... must be prompt from the market demand. It is necessary to strive to satisfy the market demand, but not to start from the existing items of rural industry, from the traditional commodities.
- Each professional village or locality should concentrate its efforts in developing the professional qualification and the commodities with advantageous conditions in the availability of skilled labour force and raw materials.
- Rural industry products must be highly competitive with domestic and imported commodities. This is a difficulty; but for the survival of rural industry, the commodities must be competitive in quality and in price.
- What is the form of production and business for rural industry to develop and to be competitive? Maybe, the way for rural industry to develop must be mainly on the basis of rural household, then to establish rural enterprises and to build the cooperation between rural enterprises and urban enterprises. Only by this way, can rural industry expand the production scale, heighten the production skills and competitiveness and develop the markets.

Fourthly, rural industry must cooperate with urban industry. Rural industry is part of the whole country's industry. Moreover, rural industry faces much more difficulties in technology, management capability, skill, marketing ... compared with urban industry. Therefore, rural industry in the Red River Delta must both compete and cooperate with urban industry. The cooperation and linkage between rural industry and urban industry may be realized under the following forms:

- Primary processing is undertaken by rural industry, and urban industry is responsible for finishing.
- Rural industry performs as satellite of urban industry in the processing of products.

The cooperation and linkage as above mentioned will create and develop the markets for rural industry, and lead to a scientific and rational distribution of work between different industrial forces. Thus, urban industry may concentrate its efforts in solving difficult, complicated in technology and production.

Fifthly, the role played by the State for the development of rural industry must be strengthened. It is correct to say that due attention has not yet been made by the State to this aspect. Therefore, the development of rural industry is still of spontaneous characteristic, meets with difficulties and obstacles. The State's role of encouragement, support and management constitutes an objective prerequisite condition for rural industry to develop.

- First of all, the State institutions of national and provincial levels must identify a strategy and planning for the development of rural industry as part of the general development plan of the country and province.
- The State encouragement, support and management should focus on the supply of information, technology transfer, scientific research, training, advertisement and marketing;
- The State should promulgate a supportive policy in land allocation and low-cost renting and in the development of medium and small-sized industrial zone for rural industry.

(2) Some basic measures for developing rural in the period 2001 - 2020

2.1 Development of markets for rural industry

The markets for rural industry include the markets of inputs such as information, science and technology, labour force and raw materials ... and the markets for consumption of rural industry's products. At present, the markets for rural industry remain neglected by State owned enterprises for private merchants to have their own swaying way. It is necessary to develop the activities of all economic sectors in these markets, among which the role of State enterprises must be emphasized in the supply of inputs (information, technology...) and the consumption of rural industry's products.

Through the forms of placement of orders for processing and production and business cooperation between enterprises of urban areas and rural areas, a spectacular perspective for large and sustainable markets for rural industry may be created.

2.2 Strengthening the application of scientific and technological progresses in rural industry

In recent years of the renovation process, rural industry's production and business enterprises have made a lot of progress in the introduction of advanced technologies such as the mechanization for raising the productivity, the gradual modernization of some traditional technologies ... But, in general, rural industry's technological level remains backward; the renovation of technology is likely slow and at a low extent. It is necessary to strengthen the application of science and technology in rural industry, the modernization of traditional technology, the introduction of modern technology in processing agro- products for supplying domestic and foreign markets with high-quality products of high competitiveness. For this end, it is necessary to supply rural industry with scientific and technological advances. The State should ensure a supportive mechanism in granting credits for the renewal of rural industry's technology, in the supply of consultation services, rural industry's technology, in the supply of consultation services, training and setting up demonstration pilots, in the research and application of modern machinery and equipment in rural industry.

2.3 Development of medium and small-sized industrial zones for rural industry

Rural industry's production and business activities are in general carried out on the basis of household economy; the farmers' house is for both purposes, dwelling and production, hence the space for

production is too narrow and environment is polluted, no capability is available for enlarging production and infrastructure conditions can not be ensured for the development of production and business. In a near future, rural industry must develop and be separated from dwelling quarters, with adequate environment-friendly infrastructures. The development of medium and small-sized industrial zone in rural areas represents one of positive and effective measures for smoothly solving the above mentioned problems.

2.4 Development of medium and small-sized enterprises of rural industry

As above mentioned, rural industry's production and business is generally carried out by the households. This production and business form accounts for 98% of production and business enterprises in rural areas. The strong points of this form are: all types of labour force may be absorbed, all idle capital in the countryside may be mobilized thus creating a motive force for pushing up the development of rural industry. But there exist a lot of limitations in different aspects: in the renewal of technology, in the expansion of capital investment for expanding production and business activities, in marketing. It is necessary to develop medium and small-sized enterprises of different economic entities in rural areas for rural industry to develop the production of commodities. These enterprises may be established following 2 forms:

- The household enterprises are gathered into medium and small-sized enterprises this may be a principal form.
- To establish new medium and small-sized enterprises in rural areas by calling for capital from investors who live in the cities or other provinces.

2.5 Strengthening the policies of comprehensive incentives to rural industry

Compared with agriculture, forestry and fisheries, the State promulgates fewer policies which are concrete, consistent and comprehensive for promoting the development of rural industry. Rural industry's internal strength for the development of itself is still weak and limited and it can not develop well in the competitive conditions. Therefore, the State support and management seem very necessary and may be realized under the following forms:

- The State must identify and practice a strategy and planning for the development of rural industry for each province, especially the strategy and planning for the production of exportable fine handicraft products, agricultural, forestry and maritime products.
- The State should allocate or hire land, exempt/reduce taxes, and grant long-term credits for the renewal of technology, for supporting the development of rural industry.
- The State should encourage and support the development of consultancy, training, technology transfer organizations to supply services for rural industry.
- The State should recognize and encourage artists in the preservation and development of the nation's cultural identity through rural industry's products.

日越共同研究グループメンバー

日本側	ベトナム側
ジェネラルスーパーバイザー 総括主査 石川 滋	Vo Hong Phuc (MPI) Nguyen Quang Thai (DSI)
総論部会 (Topic 1)	
主査 石川 滋	Nguyen Quang Thai (DSI)
西村 可明	Tran Dinh Nghiem (PPH)
Tran Van Tho	Kieu Dinh Thu (OOG)
福井 宏一郎	Do Quoc Sam (MPI)
大野 幸一	Vo Dai Luoc (WEI)
菊池 道樹	Pham Quang Ham (DSI)
江崎 光男	Nguyen Dinh Phan (NEU)
	Vu Quang Minh (OOG)
舩山 誠一	Tran Phuong Lan (MOT)
御手洗 久巳	Han Manh Tien (CONCETTI)
酒井 仁司	Nguyen Van Phuc (NEU)
原 正一郎	
饗場 崇夫	
橋本 裕子	
貿易産業部会 (Topic 2)	
主査	Pham Quang Ham (DSI)
主査代行 大野 健一	
木村 福成	Pham Chi Cuong (VSC)
川端 望	Nguyen Huu Tho (VSC)
	Do Huu Hao (MOI)
	Duong Dinh Giam (MOI)
	Le Minh Duc (MOI)
	Nguyen Van Vinh (DSI)
	Nguyen Thi Nga (DSI)
	Vu Thi Ngoc Phung (VEA)
	Nguyen Van Thuong (NEU)
	Pham Hong Chuong (NEU)
	Mai Ngoc Cuong (NEU)
	Hoang Duc Than (NEU)
	Nguyen Ke Tuan (NEU)
	Do Duc Binh (NEU)
	Truong Dinh Chien (NEU)
	Nguyen Duy Bot (NEU)
	Pham Dang Tuat (NEU)

Pham Thai Hung (NEU)
Tran Van Hoe (NEU)
Pham The Anh (NEU)
Ngá Thi Hoai Lam (NEU)
Nguyen Suc Hien (NEU)
Hoang Viet (NEU)
Nguyen Thuong Lang (NEU)
Vu Minh Duc (NEU)
Vu Huy Thong (NEU)

財政金融部会 (Topic 3)

顧問		Lai Quang Thuc (MPI)
主査	堀内 昭義	Le Quoc Ly (MPI)
主査代行	渡辺 慎一	Nguyen Doan Hung (MPI)
	田近 栄治	Ha Xuan Tu (MPI)
		Le Viet Duc (MPI)
	小山 昌久	Tran Van Son (MPI)
	廣畑 信雄	Dang Van Thanh (MOF)
	片桐 寿幸	Nguyen Quynh (MOF)
		Nguyen Ngoc Tuyen (MOF)
		Ngo Huu Loi (MOF)
		Nguyen Van Phung (MOF)
		Pham Ngoc Thach (MOF)
		Nguyen Duc Tang (MOF)
		Quach Duc Phap (MOF)
		Truong Ba Tuan (MOF)
		Nguyen Thu Thuy (MOF)
		Nguyen Thi Kim Thanh (SBV)
		Chu Thi Hong Minh (SBV)
		Nguyen Ngoc Bao (SBV)
		Nguyen Phuong Lan (SBV)
		Nguyen Thu Ha (SBV)
		Nguyen Van Tan (SBV)
		Nguyen Thi Hong (SBV)
		Le Phuong Lan (SBV)
		Nguyen Son (SSC)
		Dao Le Minh (SSC)
		Phung Xuan Nha (HNU)
		Cao Cu Boi (NEU)

農業農村開発部会 (Topic 4)

主査	原 洋之介	Le Hong Thai (MPI)
主査代行	泉田 洋一	
	桜井 由躬雄	Dao The Tuan (VASI)

池本 幸生

Nguyen Sinh Cuc (GSO)

新藤 政治

Nguyen Van Tiem (Farmers Asso.)

Nguyen The Nha (NEU)

Dang Kim Son (MARD)

Nguyen Thanh Duong (MPI)

国営企業改革・民間セクター振興部会 (Topic 5)

主査

石川 滋

Le Dang Doanh (CIEM)

江橋 正彦

Tran Tien Cuong (CIEM)

丸川 知雄

Nguyen Dinh Tai (CIEM)

岡本 康雄

Bui Van Dung (CIEM)

長瀬 勝彦

Cu Ngoc Huong (CIEM)

Nguyen Van Huong (CIEM)

酒井 仁司

Nguyen Kim Anh (CIEM)

高田 仲朗

Nguyen Thi Luyen (CIEM)

手島 直幸

Nguyen Anh Dung (CIEM)

土生 英里

Nguyen Nam Hai (CIEM)

Ta Minh Thao (CIEM)

事務局

* JICA Tokyo

松岡 和久

等々力 勝

畠山 敬

瀬戸 健太

斎藤 亜紀子

中林 さえ子

小竹 優子

宇野 清乃

* JICA Vietnam

金丸 守正

Ho Quang Minh (MPI)

戸川 正人

Nguyen Xuan Tien (MPI)

細川 大輔

福永 敬

天津 邦明

小沼 千晶

太田 美穂

Luong Mai Dzung

Dinh Thi Kim Oanh

Pham Viet Duc

