



# 越南蓝皮书

BLUE BOOK OF VIETNAM

## 越南国情报告

(2016)

广西社会科学院

广西东南亚研究会

主编/谢林城

副主编/李碧华 罗梅 陈红升

ANNUAL REPORT ON VIETNAM'S

NATIONAL SITUATION (2016)



社会科学文献出版社  
SOCIAL SCIENCES ACADEMIC PRESS (CHINA)

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版

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## 编撰说明

为了加强对越南现状的基础性研究，为研究教学人员、实际工作者及对越南问题感兴趣的各界人士提供准确翔实的系统性研究报告和最新资讯，广西社会科学院东南亚研究所与国内有关单位合作，组织越南问题研究的知名专家、学者，自 2000 年起，逐年编纂《越南国情报告》。

连续出版的《越南国情报告》作为具有较高学术水准和资料准确翔实的系统研究报告、工具书，已成为国内外各界了解越南最新发展情况和研究越南发展趋势的重要参考书，受到广大读者的欢迎。

《越南国情报告（2016）》内容框架分为四部分：第一部分为总报告，较为全面地反映和研究了 2015 年越南政治、外交、经济、贸易、社会、文化等方面的发展和下一年度的前景预测；第二部分为越南 2015 ~ 2016 年度的发展分报告，介绍越南各个行业、领域的发展状况；第三部分为专题报告，对 2015 ~ 2016 年度越南若干重大事件、焦点问题进行分析研究；第四部分为综合资料，设有 2015 年越南及中越关系大事记、有关重要文献、越南经济社会统计资料。

参加《越南国情报告（2016）》撰写工作的人员分工如下。

李碧华、谢林城：总报告；

于向东：政治；

罗梅、马金案：外交；

蒋玉山：军事；

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云倩：越南承接中国产业转移的动因及对策研究；

张磊：中越旅游发展及合作研究；

颜洁：越南与美国建立外交关系 20 周年回顾与展望；

蒋玉山、马金案：2015 年越南及中越关系大事记；

李碧华译：越南《征求民意法》；

朱莹莹：经济社会统计数据。

广西社会科学院领导、越南问题研究专家和社会科学文献出版社对本项目的重视和支持，使本书得以顺利出版发行，在此表示感谢。由于我们的水平有限，肯定会存在这样或那样的缺点和不足，敬请专家和读者批评指正，并给予宝贵建议，我们将努力把下一本《越南国情报告》编写得更好。

编 者

2016 年 9 月

## From the Editors

With an aim to strengthen the fundamental research on present Vietnam and provide a systematic reference to those who are interested in Vietnamese issues, the Institute of Southeast Asian Studies, Guangxi Academy of Social Sciences, cooperated with relevant organizations and specialists and scholars, has compiled the *Annual Country Report of Vietnam* since 2000.

As an academic publication, *Annual Country Report of Vietnam* is well-received by readers and has become an important reference domestically and internationally to acquaint the latest information on Vietnam.

The *Annual Country Report of Vietnam (2016)* includes four sections. Section I is the general report on the retrospect of 2015 regarding the politics and foreign relations, economy and trade, as well as social and cultural development of the country, and its outlook on the next year. Section II are the reports concerning the development of various industries and fields during 2015 – 2016. Section III consists of some special reports, analyzing major events and highlights of the year. Section IV are background data, including chronicle of events of Vietnam and Sino-Vietnam relations in 2015, relevant documents, economic and social statistics of Vietnam.

Authors of *Annual Country Report of Vietnam (2016)* are listed as follows:

Li Bihua, Xie Lincheng    General Report;

Yu Xiangdong    Politics;

Luo Mei, Ma Jin'an    Foreign Relations;

Jiang Yushan    Military Affairs;

Liu Jianwen    Agriculture;

Qin Lifang    Industry;

Ma Jin'an, He Yanhong    Finance and Monetary;

Nie Bin    Foreign Trade;

He Jingbo    Tourism;

Pang Minjia, Huang Xiaolong    Technology, Education, Culture, Medical





Care and Public Health, Sports;

Chen Haili The Capital of Hanoi;

Ma Jin'an, You You The Industrial and Commercial Center of Ho Chi Minh City;

Li Bihua, Liang Wei Frontier Economy in North Vietnam;

Pan Jin'e The 30 – year *Doi Moi* of Vietnam: Retrospect and Prospect;

Yun Qian Motive Reasons and Countermeasures of Vietnam Accepting Industrial Transfer of China;

Zhang Lei Sino-Vietnam Tourism Development and Cooperation;

Yan Jie Retrospect and Prospect of the 20<sup>th</sup> Anniversary of the Diplomatic Relations between Vietnam and the United States;

Jiang Yushan, Ma Jin'an Chronicle of Events of Vietnam and Sino-Vietnam relations in 2015;

Li Bihua ( trans. ) Vietnam's *Law on Referendum*;

Zhu Yingying Economic and Social Statistics.

Our thanks are to Guangxi Academy of Social Sciences, senior specialists and scholars on Vietnamese Studies, and Social Sciences Academic Press ( China ). Without their attention and support, the book will not be published smoothly. Any omissions and mistakes are on us, critics and comments are welcome in order for an improvement next year.

September 2016

## 摘 要

2015 年，在越南党和政府的领导下，越南政治环境相对稳定，越南共产党进行各项准备工作迎接越共十二大召开；外交活动活跃；经济增长较快；社会文化取得一定的进步。

政治方面：政治环境相对稳定。2015 年，越南隆重举办一系列纪念活动，其中有纪念越南共产党成立 85 周年、南方解放和南北统一 40 周年、胡志明主席诞辰 125 周年、越南八月革命胜利和国庆 70 周年等，通过举办各种纪念活动加强对全民的革命传统和历史教育。进行各项准备工作迎接越共十二大召开。各级党代会相继召开，越共中央直属的 68 个党部按照计划完成召开新任期党代会。越共十一届十中、十一中、十二中、十三中全会召开，经过反复讨论审议，基本完成了越共十二大人事安排、《政治报告》草案等重要文件在内的各项准备工作，为 2016 年 1 月越共十二大的顺利召开打下了基础。2015 年，越南第十三届国会第十次会议通过了包括《征求意见法》在内的 16 部法律、15 项决议，对 10 项法律草案提出意见，成立了国家选举委员会。继续大力加强防治贪污腐败，一系列惩治打击贪污腐败的政策机制出台，在越共十二大召开前集中调查和提起公诉审判 8 起重点经济贪污案件。

外交方面：外交活动活跃。2015 年是越南外交部门成立 70 周年，越南外交部第二次被授予越南最高等级的荣誉勋章——“金星勋章”。年内，越南落实继续全面融入国际的方针政策，服务于越南外交的三大目标，即发展、安全和地位。在政治外交方面，继续推动双边关系深入发展，与周边邻国、传统伙伴国、各大国开展高层访问、会晤。双边关系上的高层出访频繁，一些外国领导人应邀对越南进行访问。与菲律宾、马来西亚建立战略伙伴关系。截至 2015 年，越南与 15 个国家建立了战略伙伴关系，与 10 个国家建立了全面伙伴关系，是东南亚唯一一个与联合国安全理事会 5 个常任理事国全部建立战略伙伴和全面伙伴关系的国家，与非洲、拉丁美洲的一些重要国家建立了战略伙伴



关系。在经济外交方面,2015年,越南签署2项自由贸易协定,结束2项自由贸易协定谈判,年底与东盟各成员国建立东盟经济共同体。截至2015年,越南推动与世界上224个国家和地区的经济、贸易、投资合作关系,缔结或参加500多个各领域的双边和多边协定,吸收外商直接投资近2600亿美元。继续推进文化外交工作。积极参与世界和地区论坛及组织的活动,举办各国议会联盟第132届大会。继续派遣军官参加联合国维和行动。

经济方面:经济增长较快。2015年,越南GDP增长率达6.68%,创2011年以来新高,超额完成越南国会提出的6.2%的目标。其中,农林渔业增长2.41%,工业和建筑业增长9.64%,服务业增长6.33%,扣除产品补助后的产品税增长5.54%。越南的经济规模依照现行价格达4192.9万亿越盾,人均GDP约达4570万越盾,相当于2109美元。经济结构继续有积极的转变但调整速度慢。工业生产方面,加工、制造业增长快。电信服务业利润增长幅度大。继续执行经济结构重组总体实施方案,撤出在10家大型企业的全部国有资本,旨在实现企业投资资金来源多样化,同时促进企业改善管理方式。外贸出现逆差。2015年,越南货物贸易进出口总额为3280亿美元,出口总额为1624亿美元,进口总额为1656亿美元,如果加上服务进出口额,那么外贸总额达3547亿美元以上,显示了越南高度的外贸依存度。贸易逆差约32亿美元,其中,外资企业贸易顺差171亿美元,国内企业贸易逆差203亿美元。通货膨胀维持低水平增长。2015年,越南居民消费价格指数上涨2.05%,创14年来新低。2015年,财政、银行系统为实现稳定采取了一些重要举措,国家银行首次零元收购商业银行,两次大幅度调整越南盾汇率。越南公债接近上限。2015年,越南在吸引外资方面实现高增长,反映出伴随着越南结束《跨太平洋伙伴关系协定》(TPP)谈判以及东盟经济共同体的建立,外商对到越南投资的信心提高。全年越南共吸引外国直接投资241.1亿美元,同比增长10%,比原定计划(220亿美元)增长9.6%。加工制造业仍是吸引外资最多的行业,其次为生产和分配电力、煤气、热水蒸汽和空调机行业,再次是房地产业。韩国仍是越南最大的外国直接投资来源国,其后是马来西亚、日本。在旅游业方面,2015年,越南接待国际游客794.37万人次,比2014年增长0.9%。2015年,越南多项重要工程建成投入使用,将使越南基础设施得到进一步完善。越南在经济方面取得成绩的同时,存在的困难主要是:宏观经济尚未稳定,经济效

率、质量、竞争力仍较低；国家预算收支不平衡，公债增加，虽然近年来处理坏账取得一定成果，但仍存在不少障碍；国有企业股份化进程未达到预期；虽然进出口增长，但是贸易平衡状况未得到改善，贸易逆差重现，尤其是国内经济领域逆差程度高。

社会文化方面：在第28届东南亚运动会上取得好成绩，广平省丰芽－格邦国家公园第二次入选世界自然遗产名录，影片《绿地黄花》上映后深受欢迎，河内市砍树激起公愤，多地气候变化异常，食品安全问题严重等，成为社会文化领域引人关注的事件。

展望2016年，越南将集中精力落实第十三届国会第十次会议提出的2016年经济社会发展总体目标和各项主要指标。继续保持宏观经济稳定，推动实施各项战略突破，经济结构重组与增长模式转变双管齐下，提高效率、质量、效果和竞争力，力争实现国内生产总值增长约6.7%的目标。

**关键词：**2015年 越南 政治 经济 国情报告

# Abstract

Under the leadership of the Communist Party of Vietnam (CPV) and Vietnamese government, the year of 2015 marked a stable political situation with preparations for the convention of the 12th Party Congress of CPV, active diplomatic activities, relative fast growth economy and certain progress in social and cultural development in Vietnam.

Political aspect: political situation remained relatively stable in 2015. A series of commemorative activities during the year, including the 85th Anniversary of the Founding of CPV, the 40th Anniversary of Liberation of South Vietnam and North-South Unification, the 125th Anniversary of Chairman Ho Chi Minh's Birth, the 70th Anniversary of the Victory of the August Revolution, helped to strengthen the national revolutionary tradition and historical education of the country. Preparations for the CPV's 12th National Congress were undertaken. Congress of CPV at all levels were held successively, 68 headquarters subordinate directly to the Central Committee of CPV convened the new-term congress of CPV according to their plan. The year had also seen the convention of the 10th, 11th, 12th and 13th Plenary Sessions of the 11th CPV Central Committee, settled basically preparation work for the CPV's 12th National Congress after repeated discussion and scrutinization, including key documents such as the personnel arrangement and the draft of Political Report. Such preparation set a foundation for a smooth convention of the 12th National Congress in January 2016. Sixteen laws including Law of Referendum and fifteen decisions were passed at the 10th plenum of the 13th National Assembly. The meeting also reviewed 10 draft laws and the national election committee was set up. In 2015, the country kept on the campaign against corruption, issuing a series of anti-corruption policies and mechanisms. 8 key economic corruption cases were under concentrated investigation and initiated public prosecution trial before the convention of the twelfth CPV's National Congress.

Diplomatic relations aspect: Vietnam had been active in diplomatic activities in

2015. The year was the 70th anniversary of the establishment of diplomatic institutions of Vietnam. Ministry of Foreign Affairs was awarded the second time the highest medal of honor of the country—Golden Star Medal. Vietnam carried on the implementation of its guideline and policy of comprehensive integration into the international in 2015, which was orientated by the three objectives of Vietnamese foreign policy, namely development, security and status. Politically, Vietnam continued to deepen bilateral relations and conducted high-level visits and meetings. Vietnamese leaders paid frequent visits to neighboring countries, traditional partnership countries and big powers, while some foreign leaders were invited to visit Vietnam in the meantime. Vietnam built strategic partnership with the Philippines and Malaysia in 2015 and had established strategic partnership with 15 countries, comprehensive partnership with 10 countries by the end of the year. It is the only country in Southeast Asia that had established strategic partnership and comprehensive partnership with all the 5 permanent members of the United Nations Security Council. It was also established strategic partnership with some African and Latin American countries. In terms of economic relations, Vietnam signed two Free Trade Agreements (FTAs) in 2015, ended up the negotiation of the other two FTAs, and worked together with the rest ASEAN members to establish the ASEAN Economic Community. Up to 2015, Vietnam had promoted economic, trade and investment cooperation relations with 224 countries and regions, established or participated in over 500 bilateral or multilateral agreements in different fields, and attracted nearly USD260 billion Foreign Direct Investments. Besides, Vietnam kept promoting cultural diplomacy, active in participating international and regional forums and organizations and organizing the 132th Inter-Parliamentary Conference. Vietnam continued to send military officers to UN peacekeeping operations.

Economic aspect: the economy of Vietnam in 2015 has seen a relative fast growth, with a GDP growth rate of 6.68%, the highest since 2011 and overfulfilled the estimated growth rate of 6.2% by the National Assembly. As of industries, agriculture, forestry and fishery increased by 2.41%, industry and construction increased by 9.64%, service industry increased by 6.33%, product taxes after deduction of product subsidy increased by 5.54%. According to current price, the economy size of Vietnam amounted VND4192.9 trillion and GDP per capita reached VND45.7 million (USD2109). The economic structure continued to be



transformed in a positive direction but slow process. Processing and manufacture in industrial production, as well as the profit growth of telecommunication service had grown at a fast speed. To achieve finance resources for business investment in multiple ways and promote the improvement of business management, Vietnam continued the implementation of the overall planning for economic restructuring, withdrew all national capitals from ten large state-owned enterprises (SOEs). Foreign trade appeared deficit in 2015. The total value of import and export was USD328 billion, with export value reached USD162.4 billion and import value reached USD165.6 billion. The total value of foreign trade amounted USD354.7 billion including service trade value, showing a high foreign trade dependence of the country. The trade deficit was about USD3.2 billion, in which foreign-owned enterprises were in a surplus of USD17.1 billion and domestic enterprises in a deficit of USD20.3 billion. Inflation remained at a low level of growth. Consumer price index of Vietnam increased 2.05% in 2015, a new low in 10 years. Some measures were adopted to maintain the stability of finance and banking systems, including the State Bank of Vietnam purchased at no cost commercial bank for the first time and twice adjusted the exchange rate of Vietnamese currency at a large scale. The government loans of Vietnam were close to the limits. The FDI in 2015 resulted in a high growth rate, reflecting an increase of confidence by foreign investors to the country, along with Vietnam's completion of TPP negotiations and the establishment of ASEAN Economic Community. Total value of FDI in 2015 reached USD24.11 billion, increased by 10% on a year-on-year basis and 9.6% of the targeted USD 22 billion of 2015. Manufacture remained the most popular industry for FDI, followed by production and distribution of electricity, gas, hot steam and air conditioner industry, and real estate and construction. South Korea remained the top one source of FDI to Vietnam, followed by Malaysia and Japan. In terms of tourism, Vietnam received 7943700 international tourists in 2015, increased by 4% of that of 2014. Several major projects were completed and put into operation, further improved the infrastructure environment of the country. Besides the achievements, the economy of Vietnam faced some challenges, namely instable macro-economy and low economic efficiency, quality and competitiveness, imbalanced budget and expenditure and increased public loans even after some improvements in handling with bad loans in recent years, slow equitization process of SOEs, and the recurring of

trade deficit especially that on domestic economy. Trade balance is to be further improved although import and export value were increased.

Social and cultural aspect: some events had aroused public concern, including the great performance of Vietnamese delegation in the 28th Southeast Asian Games, Phong Nha-Ke Bang National Park of Quang Binh Province being listed in UNESCO World Heritage for the second time, the well received film of *Yellow Flowers on the Green Grass*, the public indignation aroused by cutting old trees in Hanoi city, the unusual climate change at different places, and the serious food safety issues, and so on.

Looking into the year forward, Vietnam will endeavor to accomplish the goals and indicators of the economy in 2016 proposed during the 10th Central Committee Plenum of the Thirteenth National Assembly, keep the stability of macro-economy, implement major strategies and parallel program of economic restructuring and growth pattern transforming, improve the economic effectiveness, quality, effect and competitiveness, and achieve the goal of a GDP growth of 6.7% in 2016.

**Keywords:** 2015; Vietnam; Politics; Economy; Country Report



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