

面向21世纪的思考

中国经济体制改革和
对外开放20周年：

回顾与前瞻

主编 王洛林

中国社会科学出版社

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Abstract

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Policies** **Tanaka Osamu**
- 6. Essence of the Asian Financial Crises**

Yoshinori Shimizu

This paper examines the real cause of the current Asian currency crises to draw lessons from those. According to the “theory of debt-deflation”, the common fundamental cause of depressions is over-indebtedness brought about by the preceding easy money. Once the borrowing financed profitable investment opportunities collapse, the over-indebtedness enforces deflation spirals to lead into great

depressions.

Triggers of easy money vary depending on the situation of each depression. Japanese bubble economy was brought about by the monetary policy aimed to control the exchange rate to prevent the appreciation of the yen. In the Asian countries experienced the currency plunge, the easy money was created by excessive foreign capital inflows, induced by the high interest rates, and the low credit risks. The latter was led by the fixed exchange rate system and the expected IMF rescue loan. The Asian governments pursued the growth policy depending excessively on foreign capitals and deregulating their financial markets too far under the fixed exchange rate. The fixed exchange rate system reduced the perceived exchange rate risks for both lenders and borrowers, resulting in excessive capital inflows relative to the actual risks involved.

Considering the experiences, the first measure will be to adopt the flexible exchange rate system and to abolish the IMF. The second solution is to regulate domestic residents to borrow only in the local currencies and not to enforce any other regulations on international capital transactions.

7. Success in the Past Can Be the Cause of Failure in the Future

Dong Ki Kim

This paper holds that the current economic difficulties being experienced by the Republic of Korea can be attributed to several major factors: 1. The measures by the Korean government were somewhat

inadequate and belated; 2. Improper management of foreign exchange reserve; 3. Speculative attacks by international hot money, especially hedge funds, on Asian financial markets; 4. Heavy corporate reliance on debt and owner's ambitious production capacity expansion left many domestic enterprises vulnerable to crucial shocks. 5. The unprecedented industrialization of Korea for the last four decades far outpaced development in the financial sector in Korea.

The lessons that China can learn from the ROK are: 1. Non-debt nature foreign investment is much more desirable for developing economy like China; 2. Financial institutions should be competitive; 3. The central government should take proper measures to protect domestic financial markets from the attack of speculative foreign hot money, especially foreign hedge funds; and 4. Trade balance between import and export or trade surplus must be realized.

The author also made an analysis of ROK's experience in the relationship between political reform and economic reform. He believes the "economic development first, political reform next" theory is correct.

8. Public Finance Reform and Opening-up: The Experience of Hungary

Jean-Jacques Dethier

This paper presents a case study of public finance reform during a process of opening up of the economy. Using Hungary as an example, it argues that opening up the economy and making a successful transition to a privately owned market-based economy under conditions

of reasonable macroeconomic stability requires not only fiscal discipline (which, in part, means resisting excessive social demands) but also structural reforms in the public sector to create institutional arrangements that are sustainable in the long term. If profound reforms of the public sector are not undertaken together with the opening up process, fiscal pressure creates macroeconomic complications which have to be corrected sooner or later: short term gains for some groups will translate into long term losses for the country as a whole.

Hungary embarked early on a course of economic and political liberalization, but growth was disappointing until 1997. In large part, though not exclusively, this is due to delayed fiscal adjustment. Fiscal imbalances increased because of a fast growing public debt and of a large increase in transfers to households that were not offset by the sharp reduction in enterprise subsidies. A first wave of reforms in public finance took place in Hungary just before and after democratization in 1989. But policy makers were unwilling to carry out a comprehensive reform of public expenditures. A large twin deficit of the external current account and of the budget developed in 1994. A stabilization program was adopted in 1995 to restore macroeconomic equilibrium. The government embarked on a series of reforms to achieve a lasting turnaround in public accounts—some purely fiscal, some structural. The reform with the most far-reaching consequences was the reform of the pension system in 1996-1997. The privatization process was accelerated and nearly completed. Proceeds of the sales of public assets were used to reduce the public debt. The budget cuts put the fiscal program on a long-term path consistent with a decline in government debt to reach a much reduced debt/GDP ratio. Current

levels of taxation and spending are still unsustainable and further reforms in the accomplished, and Hungary can begin accession negotiations with the European Union with less social and economic tensions.

9. On China's Energy Situation: Comparative Analysis of Energy Strategy in China and Japan

Inoue Atsushi

The three Es stand for energy security, economic growth and environment protection. They are important to the energy conditions in any country. With the three Es in mind, a comparison of China's energy situation with that of Japan and the world average will yield the following conclusions: (1) Per capita energy consumption in China is still at a low level. With economic development, demand for energy will increase and energy security will become an important issue. (2) The demand supply structure of energy in China demonstrates China's extreme dependence on coal with the result that coal dust and sulfur dioxide pollute atmosphere, and large emissions of carbon dioxide aggravate problem of global warming. (3) China's energy demand is characterized by high energy cost per unit of GDP and great potential of energy saving. The Chinese government has been actively undertaking steps to increase supply, to promote efforts at energy conservation, to develop clean-coal technology and new energies. Currently, NEDO has been actively cooperating with the Chinese government. With China's development potential in mind, it is no doubt that realizing 3Es will be an increasingly important policy issue.

Therefore, it is indispensable for all the parties, concerned, including the Chinese government, those who are engaged in energy issues in China and NEDO to take further steps to strengthen mutual cooperation and pool our wisdom and experience together.

10. Emancipating the Mind, Seeking Truth from Facts and Continuously Opening up New Realms of Marxism

Xu Chongwen

Deng Xiaoping continuously opened up new realms of Marxism, which is displayed in his resolution of three vital problems in Marxism that had not been understood clearly for a long time in the past. Firstly, on the relation between the basic tenets of Marxism, the scientific system formed by these tenets and their individual theses, Deng Xiaoping sharply distinguished between the two, contrary to the practice that deifies every word of classic writers. He, therefore, corrected Mao Zedong's mistakes late in his life, and at the same time, gave a scientific appraisal of Mao Zedong and safeguarded the historical role of Mao Zedong's thought. Secondly, on the problem of how to integrate the basic tenets of Marxism with the concrete practice of a country, contrary to the practice that starts from mere theoretical principles, Deng Xiaoping started from the objective reality of China in his application of the basic tenets of Marxism and proposed the theory of the primary stage of socialism. This theory solved the most difficult problem of building socialism in underdeveloped countries in the 20th century. Thirdly, on the relation between inheriting Marxism and developing Marxism, contrary to the practice that splits the two, Deng

Xiaoping based himself upon the present practice and combined both. He put forward the theories concerning the essence of socialism, the reform and a socialist market economy, opening a new road of building socialism with Chinese characteristics.

11. Deng Xiaoping Theory and the Creation and Enhancement of the Superiority of Shenzhen's Reform and Development

Peng Lixun et al.

Based on the practice of reform and development in Shenzhen over the past 20 years, this paper expounds the great guiding significance of Deng Xiaoping theory to China's reform, opening to the outside world and modernization and proves that the success of the construction of the Shenzhen Special Economic Zone is a signal victory of Deng Xiaoping theory. Furthermore, in the light of new realities of the Special Economic Zone, this paper discusses how the third-generation leading group of the CPC maintains and develops Deng Xiaoping's theory of the Special Economic Zone, analyses the rich theoretical contents of the proposition of "creating and increasing new superiority, climbing one storey higher" proposed by Jiang Zemin. The paper makes an analysis of new conditions and problems that Shenzhen is faced with today, points out that history has entrusted to Shenzhen's reform and development new opportunities again while posing new challenges to it, proves that on the journey of "pioneering for a second time" Shenzhen must take Deng Xiaoping theory as the guideline, act on Jiang Zemin's important instruction in an all round way, further emancipate the mind and renew the ideas, experiment vigorously,

practice boldly, create and increase new superiority in Shenzhen's reform and development. Lastly, combining theory with practice, this paper puts forward several countermeasures on how to create and increase new superiority in Shenzhen's reform and development in the fields of innovation in economic system, opening to the outside world, industrial upgrading and urban functions.

12. On Emancipation of the Mind

Zhang Wu

Under the guidance of Deng Xiaoping, emancipation of the mind has been a new ideological revolution in the latter half the 20th century, starting from the Third Plenary Session of the 11th Central Committee of the Communist Party of China. It has become a strong ideological trend and spiritual force for the reform and development drive in China. This paper reviewed the development process of ideological emancipation movement in China in the past twenty years and pointed out that with each time of emancipation of the mind, there was always a big breakthrough in the reform, and the great social development. The author believes that emancipating the mind is an infinite process. The report at the 15th National Congress of the Party marked a new level and realm of the emancipation of the mind. In this important new period towards the new century, we must adhere to the ideological line of emancipating the mind and seeking truth from facts and adapt our ideological and mental outlook to the requirement by 15th National Congress and the times. Further, we must creatively apply and develop Deng Xiaoping theory and push forward Marxism in practice.

These are sacred historic responsibilities shouldered by our Party.

13. On the Emancipation of the Mind in the New Period

Qu Qingshan

The emancipation of the mind in the new period centres on “one looking-for”, “one crux”, “two re-understandings”, “three breakthroughs” and “three emancipations”. The main experience we have gained is that: (1) Ideological preparation is the prerequisite. (2) Seeking truth from facts is the end-result. (3) The masses are the main body. (4) Leading cadres are crucial. (5) Making bold exploration is the path. (6) “No debating” is the principle. (7) Integrating theory with practice is the focal point. (8) Solving problems is the aim. (9) “Three favorable” is the criterion. (10) The guarantee by the system is the condition. The enlightenment we have gained from emancipating the mind in the new period is as follows: (1) It is necessary to treat Marxism with a Marxist attitude. (2) China should maintain vigilance against the Right tendencies, but primarily against the “Left”. (3) The Party should have a correct ideological line. (4) The Party should be bold in and good at summing up experience and lessons, and correcting its mistakes promptly.

14. New Development of “Combination” Thought in Contemporary China - A Tentative Discussion on the Second Historical Leap

Hu Zhenping

The paper is focused on the theoretical characteristics of the thought of the Chinese Communists represented by Deng Xiaoping in their effort to realize the second historical leap, on the road of combining the basic tenets of Marxism with China's socialist construction. The “combination” thought rebuilt by Deng Xiaoping has new developments as manifested by the following five aspects: (1) Stressing the emancipation of the mind and taking it as an important component of our ideological line. (2) Emphasizing the importance of seeking truth from facts and regarding it as Marxism's marrow. (3) Stressing the synthetic principle and making “combination” a principle of methodology. (4) Encouraging original and creative practice. (5) Adopting more clear and correct judgement criteria.

15. Historical Coordinates of the Primary Stage of Socialism

Ma Zhongliang

“The primary stage of socialism” is not a beginning stage that all countries geared to socialism have to go through, but a particular period in which industrialization and economic socialization, marketization and modernization are accomplished under the socialist conditions, a historical period in which natural and semi-natural economies are transformed into a highly developed market economy,