

## 特定テーマ評価「経済連携」報告書に関するレビュー

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本報告書は、ASEAN4カ国における「貿易分野のキャパシティ・ディベロップメント (TCD)」の過程を、直接的な輸出振興に狭く限定せず、広く企業の競争力全般を向上させるための中小企業・裾野産業育成に関わる支援も含めて分析し、その結果を踏まえて JICA による支援の評価を行い、今後の支援に関する教訓と提言を導き出したものである。

まず、種々のハードルの存在にも関わらず、チャレンジングなテーマに、包括的に取り組んだことを高く評価したい。具体的なハードルについては、評価報告書の第 1 章に的確に述べられているが、以下のように要約できよう。

1. 「発展途上」にある評価手法を、しかも環境分野で開発されたものを初めて貿易分野に適用するものであることから、この評価自体が「試行錯誤」の性格を帯びざるをえないこと。
2. 民間部門の活動の方が貿易セクター全体のパフォーマンスに与えるインパクトが大きいこと、また JICA による当該国に対する支援は、各国・機関からの協力の総和の一部にすぎないことを承知の上で、JICA 等の支援を切り離して、そのインパクトを評価しなければならないこと。
3. そもそも協力プロジェクトを企画・デザインした段階では、当事者が意図していなかった「CD」という概念を、後付で判断基準のスケールに用いて評価を行うこと。

以上の点を十分に理解・意識した上で、今後環境、貿易に加えて他の分野にも CD の概念が適用されて、幅広く評価の実例が蓄積され、それに基づき評価手法がよりの確なものに向上し、ひいては広く社会的能力の向上に繋がることを期待したい。

また、提言で本評価対象国の経験を生かした CLMV やアフリカ諸国への支援と南南協力の展開について述べていることに着目したい。もとより、アジアでの経験がそのままアフリカの現場で活かせるとは限らないし、アフリカへの展開は CLMV への展開よりもさらに慎重な検討が必要となろう。したがって、本評価で得られた結果をもとに、アジアの経験をさらに詳細に再整理した上で、「後発国の需要サイドから見た使える経験」の発掘・選択・修整を行うという過程が求められよう。また、南南協力を担う者として、本評価対象国の関連機関の人々に何を期待しうるか、その役割の特定も必要となろう。

CD は息の長いプロセスで、「途上国支援の中核」をなすべきものである。その意味で、1980 年以降の比較的長期間に渡る過程をスコープとした本評価は、上記後発国への支援の出発点としても、大いに有効活用できる可能性を有しているものと信ずる。

## 特定テーマ評価「経済連携」報告書に関するレビュー

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本報告書は JICA による貿易分野の援助について、キャパシティ・ディベロップメント (CD) の観点から評価を行ったものである。貿易分野の援助は 2001 年の WTO ドーハ会議を契機として注目され、先進国と途上国の間の FTA や EPA を促進する役割も重視されるようになってきている。CD は途上国の内発性を重視したアプローチとして、CIDA や UNDP、JICA を含めた援助実施機関、国際機関が取り入れている。したがって、今回の評価は、テーマと方法論の両面において時期を得たものであるといえよう。

本報告書では、キャパシティ・アセスメントとそれにもとづく援助評価を踏まえて、援助のプログラム化と「政府から民間 (G to B)」という援助チャネルの重要性に関する教訓と提言を導き出している。アセスメントにもとづいた一連の評価は、従来の研究で体系的に行われていなかったが、本評価チーム総括の松岡広島大学教授は「社会的能力」という概念にもとづく独自の分析枠組みを用いて、これらの流れを一貫した形で提示することを目的として研究を進めてきた。環境分野ではすでに一定の成果を上げており、今回は貿易分野への適用を試みたものである。今回の評価は以上のパイオニアとしての取り組みの一環であり、その点で高く評価されるべきである。

ただし、パイオニアとしての評価の一方で、方法論は必ずしも厳密に展開されているわけではなく、さらに改善の余地がある。まず、例えば能力が輸出パフォーマンスにもたらすインパクトの把握は難しい作業である。環境をはじめとする他の開発課題と比較すると、能力とパフォーマンスの間には必ずしも強い関係が観察できない。輸出先市場の状況や WTO をはじめとする国際的取り決め、為替レートなど能力以外の要素による影響が大きいためである。

筆者は途上国の開発問題を捉える枠組みとして、「フローチャート・アプローチ」を提案している。このアプローチでも「社会的能力」アプローチと同じく発展段階による把握を行っており、(1)貧困削減、(2)持続的成長のための能力開発、(3)成長戦略の導入による環境と持続的開発の 3 ステージを想定している。これまでの検討で、現実の開発政策策定に適用するには、Transition Criteria、Prioritization、Policy Implementation の順で実施する必要があることを明らかにした。「社会的能力」アプローチと目指す方向性は同様であり、今後共同して研究を進めることを通じて互いの方法論を精緻化したい。

本報告書で展開されてきた社会的能力アセスメントとその結果にもとづく援助評価は評価の方法論として先駆的な試みで、今後の貿易分野における JICA 援助に関して、重要な提言を導き出している。まだ不十分な点も残っているが、重要な一歩であると評価している。JICA としても本評価をしっかりと受けとめて、実務への応用を含めた今後の可能性について、長期的な視野を持って取り組む必要があると考える。評価を実施した広島大学、三菱総合研究所にも、さらに研究を進め、開発援助のイノベーションに資する成果を生み出すことを期待している。

## 現地コンサルタント・コメント

本報告書（ドラフト・ファイナル・レポート）に対して、4カ国の現地コンサルタントからコメントを取り付けた。これらのコメントにもとづき必要に応じて修正を行い、最終報告書にまとめた。

### 1. Indonesia

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Indonesia welcomes the report of study by JICA on Social Capacity Development in Trade Sector in four ASEAN countries namely Indonesia, Malaysia, The Philippines and Thailand. The objective of the study is to assess the role of Japanese assistance in developing social capacity in trade sector in East Asian region.

Japan has assisted East Asian region since 1980's under the concept of "development strategy oriented for growth through the trinity of aid, trade and investment". Although ASEAN has been a main recipient of Japanese aid since early 1970's, especially for development of infrastructure, and capacity building in general, but the capacity building in trade sector was a new concept. As the report stated that Japanese assistance for trade sector in ASEAN just started in the late 1980's.

Indonesia received in 1988 technical cooperation and construction of the centre for exports training (IETC) in Jakarta, as the milestone of social capacity development in trade sector. The presence of IETC in Indonesia has greatly expanded the capacity of government agencies to improve the skills of private firms in trade sector through export training and promotion. Having received positive response from business community, the center has expanded to regional area such as Medan, Surabaya, Makassar, and Banjarmasin.

IETC has contributed positively to improving the skills of firms in Indonesia in the era of economic globalization. Indonesia opened its economy to global market by signing regional trade liberalization (AFTA) in 1992 and multilateral trade liberalization (WTO) in 1994. Most recently Indonesia also agreed to expand the regional liberalization to include China (2002), India and Japan (2003) and Korea (2004). In the bilateral forum, Indonesia just started to negotiate Economic Partnership Agreement (EPA) with Japan in 2005, with aimed to have comprehensive partnership beyond trade liberalization which include investment and capacity building.

The series of agreement that had been signed by Indonesia government since 1994 has greatly affected business community. Expanding overseas market through reduction of tariff and elimination

of non-tariff barriers became a great opportunity for export industries. However, economic globalization also brought about severe competition faced by domestic industries from imported goods. Domestic market is flooded by massive imported goods ranging from low price textile and apparel, footwear, and toys to semi precise tools. According to a report by Chamber of Commerce (KADIN), hundreds of manufacturing companies closed its industries or reduce its employment because they were unable to compete in domestic market. Increasing energy prices and pressure from labor union also contributed to closing down some manufacturing industries.

Some important comments regarding the report as follows :

#### 1. Economic Growth

During the economic crisis in 1997 – 1998, Indonesian economic adjustment was very slow compared to neighboring countries such as Thailand and Malaysia. Slow economic recovery was mainly because Indonesia was facing dual economy and political crisis at the same time. Economic indicators showed that GDP fell down, inflation skyrocketed, currency depreciated, exports declined and investment stagnant.

#### 2. Trade Growth

Since the crisis, external trade has suffered severely. Exports performance reached its pre-crisis level just in recent years. Rising new competition from China and Vietnam has been eating out some of Indonesian exports from global market. When the government of other countries offered assistance to their exporters in the form of subsidies, Indonesia has not had any capacity to do the same way. Worse than that, Indonesia closed down its Trade Promotion Center in 13 countries in 1998 (and just re-opened 6 since 2002).

#### 3. International Competition

The report discusses intensively about Indonesian export competitiveness by utilizing Trade Specialization Index model. This model tell us the competitiveness of a certain products when the product involves exports and imports. However, when the products only one of the exports or imports, the model is inferior. Another model to measure a competitiveness of a country such as Reveal Comparative Advantage will suit better.

#### 4. Direct Investment

After the crisis, Indonesia has not been succeed to attract foreign direct investment. The absence of foreign direct investment was mostly because of lack of domestic infrastructure and delay of formulating new investment law.

#### 5. SMEs

The role of SMEs is important in Indonesia in term of labor absorption and value added. During the crisis, when most of large corporations collapsed, most of SMEs survived. This is the only sector

that was not asking government support during the crisis. For the SMEs, the most important is access to low cost capital funding beside access to market overseas.

#### 6. Training

Indonesia welcomes the transfer of skills from Japanese experts in the field of quality control, product development, market research and trade promotion technique to Japanese market, etc. However, Indonesia also needs expertise on the market penetration to other markets.

#### 7. Labor Productivity

The report mentions about the improvement of labor productivity in manufacturing sector in Indonesia and compared to labor productivity in advance nations such as Japan. It is also important to benchmark the labor productivity with neighbor countries such as Malaysia, Thailand, the Philippines. Even comparison with China and Vietnam will be very helpful.

#### 8. Questionnaires

It is understandable that very difficult to collect data from previous training participants. However, using 132 responses from 400 users of IETC are not representing most problems faced by SMEs. The reports should have been better if could attracted more respondents.

#### 9. Foreign Ownership

Since the purpose of Japanese assistance in export training is mainly to improve the export capability of Indonesian local companies, the inclusion of foreign own firms into the training is another diverting from the original purpose.

#### 10. Government Institutions

The report raised the problem of coordination among government institutions in Indonesia. This is not a new issue. Even after the re-split Ministry of Trade and Ministry of Industry, coordination among government institutions became more difficult. Concerted efforts to promote exports by all government agencies such as Ministry of Trade, Ministry of Industry, Ministry of Finance, Ministry of Agriculture, Ministry of Forestry, etc, is very important. Without coordination, it will be very difficult to expand exports beyond regular growth. It is understandable that most of instruments to improve export capability and competitiveness of the country are beyond jurisdiction of Ministry of Trade.

#### 11. The role of NAFED

NAFED has actively promoted Indonesian exports since early 1970's. However, because of limited funds available from government budget, NAFED has limited capability to attend international exhibitions overseas. When comparing NAFED to the same kind of agencies in other neighbor countries such as Malaysia and Thailand, it is clear that NAFED still need improvement. In addition, NAFED needs expertise in marketing strategies, better export promotion technique, beside adequate

budget.

12. The role of IETC

IETC has trained thousands of firms in the exports business since its opening in 1990. However, most recently this agency is facing difficulty to recruit training participants. IETC needs more capacity in human skills and budget to improve its curriculum and laboratories. Without better curriculum and adequate laboratories to adjust to the new era of globalization, IETC would not be able to attract participants from business community. Elevation of its rank from echelon III to echelon II level, should be helpful.

## 2. Malaysia

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The present report clearly defines the objectives of the study. It is stated at the outset that the purpose of the study is to evaluate Japan's aid to a select number of ASEAN countries through the instrumentality of JICA. Obviously, there is a need to assess the role that JICA has played for two reasons. The first is purely at the level of an audit, and the second is at the level of a re-assessment. As an audit, this report is expected to outline the programmes that JICA has implemented over the years and the effectiveness of these efforts. The second reason is more comprehensive in so far as it is an attempt to sieve the lessons that can be learnt from JICA's cooperation with the partner-countries in ASEAN.

Both an audit and a re-assessment are timely because of changing global economic developments and the new dynamic of economic relations between ASEAN and East Asian states. These changes will mean that JICA will have to adopt a different mode of functioning to cater for shifts in the economic landscape. One can quickly think of two considerations. First, an audit and a re-assessment are useful because they can help guide future assistance to the CLMV countries; and this is expressly stated in the study. Second, the levels of economic growth and development that the countries under study have achieved since JICA first extended its cooperation are definitely different than those that obtained, say, 20 years ago. The requirements of these countries would have changed in respect to their expectations from JICA. Third, JICA may want to play a countervailing role in ASEAN with the economic presence that China now assumes. While the political economy considerations are not distinctly spelt out in Chapter 1, they must lie at the background. Some mention must, therefore, be made of the more competitive climate under which JICA must now operate. This must be acknowledged since it is to ASEAN's and Japan's benefit that the latter continue to engage itself within the region, but perhaps more aggressively, especially with the anticipated rise of China's presence.

The significance of the CD approach is nicely presented in Chapter 1. How the CD approach is defined in the present study and its relationship with other attempts in the field is also well presented. Clearly, the present study chooses to focus on a more narrowly defined area than some of the earlier work on CD, concentrating on the "aid business done by JICA in trade", but without ignoring the contributions of other organisations such as JETRO, etc. This is an entirely acceptable approach, and worthwhile from the policy point of view.

Chapter 1 also discusses the framework for the evaluation. In particular, it concentrates on social capacity assessment and the evaluation of Japan's contribution to the export capabilities of

developing countries. The diagram on social capacity (Fig.1.1) indicates what the authors mean by social capacity and how they choose to define it. What is less clear is first point that they make in applying the concept to trade, which states that, "compared with the other fields of development such as the environment, education, and healthcare, the role of government is restricted and the role of corporations is large." Looking at the Malaysian case, I would hold that the government has played and continues to play a substantial role. The size and influence of the government-linked corporations (GLCs) in Malaysia cannot be denied. It would, therefore, be useful if this point be clarified.

The relation between social management system, social-economic conditions and external causes is described in Chapter 2 and presented in diagrammatic form in Fig 1.2. The role of institutions is not clear because based on the diagram, institutions seem to impact on the inter-relationship between the government, citizens and firms. However, I think that institutions (formal and informal) determine the nature of the inter-relationships between the three actors (government, citizens and firms). I also note that there is little clear discussion that firmly situates the role of institutions within the proposed framework, although it is mentioned in places. Whatever it is, there is no doubt that JICA has assisted some of its partner countries in setting-up various procedures and legal frameworks to enhance trade.

The section on trade sector assistance from Japan provides a useful overview of the assistance that has been extended to Malaysia. It is mentioned that the number of trainees from Malaysia have been decreasing. It would be interesting to know why this has been so. It is also mentioned on the same page that the total number of trainees from Malaysia has been lower than those from Thailand and Indonesia. Again, it would be interesting to know why. The number of JODC TA professionals sent to Malaysia seems very small in comparison to the numbers sent to Indonesia and Thailand. Again, these figures raise the reader's curiosity. Is it because Malaysian enterprises do not need the kind of expertise that is offered? Or is it because the programmes are not being properly utilised? Or is there some other reason?

Section 4.3.2 considers trade capacity building of the private sector. I like the way the authors have selected the proxy indicators and I agree with them that although these are simple indicators they give a feel for the trade capacity of a country. On this note, I wonder if it would be useful to have some comparison on the basis of total factor productivity growth. Was this considered by the authors? It would be interesting to know why it was not selected as one of the indicators? As far as the indicators are concerned, I think one observation that the study makes is especially noteworthy. The authors point out that Malaysia does well as compared to its neighbours on these indicators, but lags behind Japan. This is, indeed, the challenge for Malaysia, because Malaysia is ahead of its neighbours, but still not competitive enough. And this point should suggest that Malaysia still has much to benefit from the aid that Japan can extend; but in a different form than was extended previously.



In section 4.3.3 it is mentioned that the research findings show that most of the respondents chose ASEAN countries as their export destination whereas official trade statistics show that the largest export destination from Malaysia is the US. This is not surprising given the most of the respondents, as stated on p.82, are SMEs. Typically, SMEs do not have the capital or resources to export to the US.

Section 4.4 is about the capacity building of the government to expand Malaysian exports. I have no disagreement with any of the points mentioned in this section. I would say that the authors have perceptively analysed the shifts in industrial policy in Malaysia and they correctly point that IMP3 is likely to concentrate on the service sector. However, it should be noted that the IMP3 is yet to be released, so the observation is probably based on personal interviews.

Similarly, I think that the review of the progress and development of MATRADE is brief, but sufficient and accurate. The views of private sector entities on MATRADE also seem to correspond to the general sentiment experienced through contact with many private sector companies and other entities. Although the number of opinions on this issue is not large enough to allow one to generalise, it reflects popular general perceptions regarding MATRADE.

The research study has some disturbing findings on how Malaysian enterprises evaluate policy measures in trade expansion. The findings suggest that there are shortfalls on the approval processes for governmental standards, job training programme, industrial development program in budgetary and tax incentives and tariff processes. These indicate, as noted by the authors, that there are problems in government services. There is a clear need to rectify problems such as these. I wonder if there is any role that JICA can play in assisting to smoothen existing procedures or practices in these areas. Problems in government services are obviously a good instance of the functioning of inefficient institutions. The theoretical framework in this study correctly pointed out that social capacity is improved or hindered by institutions, and in this section we have a good example that supports the framework.

It is intriguing that although there seem to be some problems with the government in the provision of trade related services, the private business groups do not have any such problem. In fact, from the responses that were obtained it appears that the companies interviewed are satisfied with the services provided by the private groups. This is a very positive observation and can be extended to suggest one of two things: either the private groups should be relied upon more and more in future in order to provide the services that are required, or the government should be encouraged to improve on the factors that constrain the effective functioning of its duties. Although both approaches can be used, one suspects that more immediate results are likely to be realised by allocating more resources to the functioning of the private business groups.

Section 4.5 of the research study is a good summary of Malaysia's development and how JICA has assisted in this developmental process. It is obvious that JICA's assistance has always been sensitive to the development stage of Malaysia and its needs at the time the assistance is extended. As the author's point out, Malaysia has been progressing well and Malaysia is able to develop its industrial policy independently, as well as institute its legislation without external assistance. Nevertheless, this does not mean that Malaysia no longer needs any further assistance from Japan. It only means that the type of assistance that is required will be of a different nature.

I would think that Malaysia can still benefit from Japan's expertise through the transfer of 'hard' skills and 'soft' skills. By soft skills I mean those skills relating to laws, trade negotiation, appraisal and evaluation of free trade agreements (FTAs) and the like. When speaking of hard skills, I refer to skills of a technical nature. Thus, I think Malaysia is, perhaps, in need of skills in terms of evaluating the impact of possible WTO agreements on national economic outcomes. It is also in need of skills in drafting and evaluating options for FTAs. This is because Malaysia does not have much experience with FTAs, whereas Japan has extensive capabilities in this area. Further, Malaysia is venturing into new areas such as biotechnology and nanotechnology. These are areas in which Japan has well developed industries. Thus, I believe that are many areas in which Malaysia can continue to benefit from Japan's expertise; and with some ingenuity it would be possible to engineer the right kind of programmes that will help Malaysia develop its social capacity in the trade sector.

### 3. The Philippines

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The study applies to trade the Social Capacity Assessment framework (Matsuoka et al 2005), which was originally developed for environmental management. The application is intended to help evaluate Japan's international cooperation policy, particularly JICA's development assistance. The study mainly consists of 1) presentation of framework and methodology, 2) individual country case studies of the ASEAN-4, and 3) summary evaluation with a brief comparison of ASEAN capacities leading to the policy recommendations. Each of the country studies incorporate findings of a self-rated survey of firms about their conditions and assistance provided them if any by government, donor agencies, and business associations (such as industry associations and business federations). The conduct of these surveys offers considerable comparative value. In addition, since surveys on Philippine SME conditions have been growingly scarce, the HU-MRI survey provides a much deserved update.

I would like to start my comments on the Philippine country study with a brief review of government policy and policy administration. Later, I examine the study against a review of Philippine export and business conditions as well as the impact of foreign direct investments (FDI) and official development assistance (ODA) on foreign trade and productivity. Other substantive comments are provided at the end.

For decades, the Philippines maintained a restrictive or protectionist policy toward foreign trade and investment. Following the typical trade pattern of developing countries, exports were primarily based on primary commodities while major imports consisted of finished goods and industrial inputs. In the 1970s, the Marcos government instigated a structural shift, which altered the pattern of trade. Again, it might be said that this policy change followed the labor-intensive, export-oriented industrialization undertaken by several East Asian countries.

In the 1980s, the government initiated trade and investment liberalization. Controls and restrictions were gradually loosened. The impressive trade performance of the 1990s should be underscored in relation to performance records of previous decades. It must be emphasized therefore that the economic liberalization policy produced a positive effect on Philippine foreign trade. Even the partial liberalization of the banking sector contributed, helping ease the preexisting tight credit situation. Consequently, consumer finance became a competitive business area. Likewise, business loans became more accessible for small entrepreneurs.

The trade liberalization policy framework was accompanied by the creation of new organizations and the mobilization of other government organizations, led by the Department of Trade and

Industry (DTI). These organizations responded to needs in various functional areas of business. In technology/production, there were at least ten (10) government instrumentalities involved; in marketing, six (6); in training, four (4); in regulation and provision of incentives, nine (9). In finance, five government financial institutions (GFIs) were mobilized to assist the SME sector in a unified lending program.

To facilitate export trade, one-stop export documentation centers were created. These were later expanded into the Export Assistance Network (EXPONET) to provide information and troubleshoot problems of exporters. The EXPONET included a network of several government agencies such as the Bureau of Customs and the Central Bank as well as business associations. To facilitate investment, one-stop action centers were created with the participation of the Board of Investment (BOI), BSP, Bureau of Immigration (BI), Department of Labor and Employment (DOLE), Securities and Exchange Commission (SEC), and the Philippine Industrial Estate Association (PHILEA).

Evidently, several government organizations have gathered to provide a variety of business support services in aid of expanded trade and investment. The HU-MRI correctly recognizes the formation of a trade capacity development “system” (under a liberalized trade and investment regime). As shall be pointed out later, this system enabled the rapid growth of the country’s foreign trade. However, a slowdown in trade and manufacturing FDI flows since 2001 have weakened the ASEAN-4’s overall manufacturing competitiveness. Vast amounts of FDI flowed to countries that offered greater cost advantages than the ASEAN-4.

Despite the gains reaped during the 1980s and 1990s, various studies and reports have revealed areas of improvement for government support services. A survey of SMEs conducted by Salazar et al (1986) from May to October 1984 showed that the process of availing of government fiscal incentives were costly and saddled by bureaucratic red tape. Twenty years later, the World Bank’s *Doing Business in 2005* would reaffirm this situation. In various aspects of doing business, transactions with government were costly, time-consuming, and inconvenient. Using data from this World Bank study, a benchmark analysis with other countries would indicate the need to reduce the number of procedures, time, and costs of starting and closing a business, of registering property, and of enforcing contracts.

Other studies such as those of Lamberte et al (2003) and Tecson (2004) pointed to the cost of doing business as a major barrier to investment and competitiveness. These studies attributed the high costs of doing business to high electricity and water charges, high transportation costs (due to congested port facilities), poor infrastructure, peace and order, and again bureaucratic red tape.

A number of SMEs in the HU-MRI survey of Manila and surrounding areas would echo similar complaints about government service delivery. Although a number of SMEs signified improvements in satisfaction levels of government support to the export sector, support areas noted above have not

been effectively addressed. Particularly, improvements in customs procedures as well as government support in the areas of finance, marketing and information had been strongly suggested (see Table 5.19 of HU-MRI study).

The lack of resources is often cited as a major reason for government service delivery challenges. This could be traced to the government's fiscal problems, particularly in revenue generation, debt-service payments, and mal-allocation of resources due to political considerations. Recently, however, the government has expanded the value-added tax to boost its revenue-generating capacity and address the fiscal imbalance. Some improvements in government services could or should thus be expected.

Given the aforementioned mix of positive developments and service delivery weaknesses, it is difficult to characterize outright the Philippine government's support capacity for trade and investment. The impact is not thoroughly clear. There is a methodological challenge to construct quantitative indices of impact and capacity. Conceptually, these indices could be part of a larger social capacity development index (SCDI), which the HU-MRI draft introduces.

In the same vein should the business sector's capacity be measured. In other words, a business sector trade capacity weighted index could be constructed as an aggregate quantitative indicator. The English version of the draft does not make it clear at the beginning but the survey's focus is SMEs. Therefore, any reference to a country's trade capacity should take into account this limitation.

Based on a 1993 special survey of manufacturing establishments conducted by the National Statistics Office (NSO), Tecson (2004: 69) notes that of domestic firms, SMEs shared 64 percent of manufacturing output and 44 percent of manufactured exports. Similarly, of firms with foreign equity, SMEs accounted for 34 percent of output and 66 percent of manufactured exports. Hence, according to Tecson (ibid), an important segment of SMEs were generally "successful" in competing abroad and attracting foreign capital. This despite economic liberalization, weaknesses in government support, and high attrition rates during the mid-1990s.

Over a thirty year period (1975-2005), the export growth rate averaged close to 10 percent. The more remarkable period for Philippine foreign trade was the 1990s. From 1990-2000, the value of Philippines exports (FOB US\$ million), led by the electronics, grew at an average of 17 percent per year. From traditional primary commodities, the country's revealed comparative advantage shifted to labor-intensive industries, particularly in consumer electronics and machinery assembly operations, and garments. The pattern of the total value of imports followed that of exports but at a much larger scale so that trade deficits were also experienced.

Exports fell in 2001 and, thereafter, performance became erratic. This could be attributed to a number of factors. One factor involved the poor government response to the aftershocks of the 1997

Asian crisis. Against the backdrop of massive capital outflows and impending trade slowdown, the Philippines witnessed excessive government spending starting in the late 1990s (Batalla, 2005). This eventually disrupted macroeconomic stability and the exchange value of the peso further dropped against major currencies. Further, China's entry into the WTO in November 2001 adversely affected the flow of investments into Southeast Asia. Many labor-intensive firms experienced tremendous difficulties, folded up or transferred operations to China, which enjoyed a tremendous labor cost advantage.

As before, adversities such as those mentioned above have not deterred some Japanese medium and large firms, particularly in electronics and machinery, from locating in the Philippines. Tecson (2000) identifies factors for the location decisions of large Japanese multinationals, which defy common perceptions about political, economic, and social risks. However, for SMEs, there is a need for a much improved business environment in order to maximize trade and investment in their sector.

Given serious government limitations, the Philippine business sector has somewhat benefited from external forces, particularly from what the HU-MRI draft calls as the "trinity" of policy instruments of international cooperation, namely: FDI, ODA, and trade. However, it is important to clarify certain economic phenomena involving these instruments.

The steep climb of the Philippines' foreign trade in the 1990s was accompanied by inflows of FDI and ODA, notably from Japan. The Philippines had been a major recipient and in the 1990s was being among the top five recipients of Japan's ODA (J-ODA). From 1985 to 2004, J-ODA accounted for 52 percent of the total value of ODA received by the Philippines. Likewise, from 1985 to 1996, J-ODA net disbursements to the Philippines averaged 1.13 percent of the country's gross national income (GNI). During the period 1997-2004, Philippine "aid dependency" from J-ODA declined to 0.42 percent of GNI. In fact, the ratio of J-ODA disbursements to GNI dropped in all ASEAN-4 countries.

Mapalad (1999) showed that since J-ODA focused on economic infrastructural projects, it did not negatively affect or substitute domestic saving in order to finance investments. Moreover, J-ODA positively affected the Philippines' income growth, employment, and foreign trade. However, the impact on the Philippines was small relative to those on Thailand, Indonesia, and Malaysia (Mapalad, 1999).

The effect of Japan's direct investment (JDI) on Philippine exports would be similarly positive. The main reason was that JDI went into export-oriented manufacturing industries particularly electronics, which led the export boom of the 1990s. The share of manufacturing to total JDI averaged 70 percent during the period 1990-2000.

Nevertheless, the Philippines received considerably less FDI than Malaysia, Thailand, and Indonesia.

From the 1985 Plaza Accord to the 1997 Asian financial crisis, the Philippines received the least JDI (US\$3.8 billion). Indonesia received the largest cumulative amount of US\$ 15.5 billion, followed by Thailand (US\$ 11 billion), then finally Malaysia (US\$ 7.2 billion). During the same period, based on the total inflows of JDI and J-ODA, the share of JDI was highest in Malaysia (93 percent), followed by Thailand (67 percent), and Indonesia (59 percent). JDI into the Philippines only accounted for 36 percent of the total amount of Japanese investments and ODA.

Because the bulk of J-FDI went into export-oriented manufacturing, the Philippines' export production structure and performance significantly changed. However, the change was far greater in Malaysia and Thailand for similar reasons (investments into labor-intensive, export-oriented manufacturing). This is the main reason for rapid increases in manufacturing productivity in these countries. In contrast, Japanese direct investments in Indonesia, the recipient of the largest amounts of JDI and ODA, were more diversified. The gap between JDI shares in manufacturing and non-manufacturing industries was not consistently high.

The main implication of these empirical findings is that export-oriented direct investments are significant to a country's export capacity. The economic impact of ODA, though positive, could be further enhanced if more substantial amounts are focused on facilitating investments within a country and from abroad. On the one hand, it could help facilitate FDI through a variety of assistance programs aimed at reducing the costs of doing business in the country. This suggests continuing economic infrastructural support (e.g., transportation) and exchange programs, enhancing technology transfer, promoting peace and order, etc. On the other hand, J-ODA could open a facility for direct support of Philippine private enterprise. This facility is similar to facilities of other donor agencies like CIDA's, as cited in the HU-MRI draft report. Such undertakings have received favorable feedback from Philippine SMEs.

Another theoretical consideration involves the empirical relationship between productivity, FDI, and foreign trade. The growth in FDI outflows is a relatively new phenomenon that defies traditional conceptions of productivity growth. In the case of the Philippines, the historical record of manufacturing productivity shows poor levels (ILO, 1974; Lamberte et al 2003).

However, consistent with the point being emphasized throughout these comments, gains in Philippine total factor productivity (TFP) have been largely the result of trade and liberalization policy (Lamberte et al 2003; Coraroton, 2004). Coraroton's (2004) regressions using data from 1975 to 1999 reveal that TFP in the Philippines was strongly determined by FDI. Other determinants include exports, share of manufacturing to GDP, and a two-year lag in R&D expenditure to GDP; a one-year lag in imports also had a positive but small effect. These findings support Urata's observation of an FDI-trade nexus in East Asia in the last two decades.

In addition, the HU-MRI study correctly points out that, based on the firms' self-rated survey, export

performance is greatly affected by demand and market conditions, despite admissions of productive capacity development. This finding could be further strengthened by analyzing the correlation between the presence of foreign ownership and the firms' export performance. Also, the analysis should firmly establish if improved productivity and export performance are industry-specific.

As is well documented in the literature, manufacturing FDI often brings with it work systems and technologies ready to be installed in the host country though subject to local adaptation. Likewise, manufacturing FDI usually carry established market linkages. It could be said that firms with more or less established financial, production, and market linkages, would tend to be more productive. Firms and industries not possessing these linkages and facing little incentives would tend to be less productive.

The above discussion suggests that the business sector's capacity for trade is determined by investments as much as its work systems and the costs of doing business. A caveat should therefore be considered when using (labor) productivity as an independent variable for determining the business sector's aggregate trade capacity. Less careful treatments could potentially lead to spurious results. Similarly, extreme care should be observed when making value-laden statements such as "where industrial development has been completed" or the Philippines having "no capacity leading to enhancement of export performance" (underscoring mine). In addition to what have been stated earlier on, the latter statement downplays or negates interpretations of Figure 5.15 which shows rising system indices for social capacity in the Philippines since the mid-1990s.

Concepts often demand operational clarity and preciseness. In this regard, improvements could be made on operational definitions and specific quantitative indicators of concepts found in the draft. Among the more important ones are "social capacity development index," "social development stages," "export promotion capacity of government," and "stages of system making." Since the analysis of these concepts in each country case ultimately result in a cross-country comparison, a more focused and well-defined comparative methodology is desirable. Measurement is necessary in order to avoid over- and under-estimation of individual country capacities (or in general, the variables studied as a basis of making claims).

It is also better to thoroughly present concepts/terms, operational definitions, indicators, and issues related to social capacity development in Chapter 2 than in later chapters of the study. Particularly, Chapter 7 discusses the issue about the types of aid inputs (sequential and additional inputs, with-without perspective, small-, medium-, and large-scale aid inputs) and their relative effectiveness. From a methodological perspective, this issue could have been raised earlier in Chapter 2 then after formulating the appropriate hypotheses, test these hypotheses against the experiences of the four ASEAN countries. The overall validity and value of the current draft could be further enhanced once problems of methodology and consistency of data interpretation as mentioned above have been surmounted. I am hopeful that the revised final draft would be able to



overcome these challenges.

The SCA framework provides for a more detailed examination of each country's trade capacity. Using the framework, capacity evaluation could be conducted from a different but powerful perspective. It examines trade capacity from a total systems view. Understanding the totality of a system is a great challenge however because it requires expert knowledge of each system component. One suggestion for the future use of SCA framework is to identify specific opportunities for the development of manufacturing industries through an optimal mix of international cooperation policy instruments (FDI, ODA, and trade).

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#### 4. Thailand

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This comment analyzes and gives suggestions on the “Social Capacity development in Trade Sector and Japan’s Assistance Report” specifically on in the case of Thailand. The comment has two parts. First part is comment on the broad view of the report. The second part will comment on the case of Thailand.

##### General Comments on the Report:

This report aims to evaluate JICA’s aid in the field of trade, from the standpoint of capacity development by using the method of social capacity assessment. The report set three agendas of analysis. The first agenda is to analyze the social capacity development which promotes economic partnership with the method of Social Capacity Assessment. The second agenda is to evaluate the impact of JICA’s aid to the social capacity development of the country. The third agenda is to examine how the business of the trade center, which is the representative project of JICA, contributed to social capacity development, social economic development, and the performance of trade and investment.

This report evaluate JICA’s aid in the field of trade by looking at (1) contribution to capacity development, (2) the consistency with the development stage of social capacity (timing of aid entry and exit, relevance), (3) partnership with domestic organizations, consistency of policy, (4) consistency with the policy of the country of subject. To evaluate these conditions, the more important questions are how JICA approach aids to these developing countries, (developing country) demand pull or (Japan) supply push? What is the mechanism of Japanese trade-related organization used to initiate aid for developing country? Are policies planned according to the conditions and development stage of each country, or according to long-term goals and external competitive conditions? Generally, Japan Trade Assistance organizations, including JICA, initiate trade-related aid program by looking at international and domestic market of aid-receiver developing countries. International trade between ASEAN countries and Japan has begun since these countries implement import substitution policies. The main reason of Japanese foreign direct investment (FDI) is to access domestic market. After investment, international trade had started followed by aid. The characteristic of the international relationship was shown as the new development strategy oriented to growth through the trinity of aid, trade, and investment. Therefore it is highly possible that JICA’s aid has consistency with higher level trade and investment policies. Moreover, it has a full partnership with domestic organizations since most of ASEAN developing countries’ industrial policies were guided by Japanese government.

However, to evaluate JICA’s aid, the report should not do only checking whether the organizations

have trade-related activities (or aids) or not but also measuring the difference between expected and actual amount of social capacity by considering trade and investment level. Although these capacities are hard to measure, it is worth trying some proxy to measure them. This report has already shown the details of trade-related aids and it also shown some proxies of actual social capacity eg. the number of trainee participating in trade aid program. Nevertheless, the target level of these proxies has not yet shown clearly. Furthermore, since most of ASEAN developing countries' industrial policies were guided by Japanese organization, it will be interesting to see how different between Japan's suggestion and actual policies and what are main reasons of differences?

Another suggestion is about SMEs issues. This report seems to assume that the progress in SMEs development will show the social capacity which finally have effect on trade. However, SMEs in ASEAN countries slightly relate to supporting industries. They also have less proportion in export share. They focus on domestic market rather than export market. It may be possible to use development of SMEs as the proxy on social capacity development. Nevertheless, to link development of SMEs with trade, we need to define SMEs more specifically.

Overall, this report provides insightful perspective of the relationship between JICA's Assistance and social capacity development in developing countries. The conclusions and recommendations are very useful and practical for future policy implementation.

Comment on Social Capacity development in Trade Sector and JICA's Assistance in Thailand:

This comment was on the review of JICA's major aid to the Thai trade sector and their effects on social capacity development in Thailand. This report defines trade sector aid in several forms including direct aid to trade promotion, a variety of types of cooperation such as investment promotion, promotion of small and medium sized firms and supporting industry, and industry development.

In the first part, the chapter explain about trade sector assistance from Japan to Thai trade sector. The Japan assistances include JICA, JETRO, JODC, AOTS, and JBIC. This part show the most important assistance programs in trade / direct investment, the fostering of SMEs and supporting industries, and industrial development by providing the project name and the year. However, to show this program at year of operation will not show the real effect of these programs on social capacity development. Japan aids in trade sector mainly initiate industrial development plan, set up institutional structure (organization) (or social capacity), and providing physical and human resources to Thailand. The results of many Japan' organization development studies and suggestion plans were implemented. These plans are the blue-print of Thai manufacturing structure. The structure, then, affects the pattern of trade and investment. Although the number of trainees from Thailand in trade, direct investment, and SMEs development seem to be small number but, in fact, these trainees became key player in initiating and implementing industrial development policies. Therefore, the influences of these Japan's trade aids will be more than just the year of

implementation but their effects will cover the period in industrial development plan. However, to understand Japan's assistance on Thailand trade sector, it will be better that the report can briefly explain if each program is successful or not. It will be more obvious to show the relationship between Japan's trade aid program and Thai social capacity development rather than explain them separately.

In the second part, this chapter explains about economic development, trade, and direct investment. It shows Thai economic growth, the ratio of Thai product/ services export to GDP, rate of manufacturing sector in Thai export value, international competitiveness of Thai export item, and foreign direct investment inflow to Thailand. It should be noted here that although the share of once-dominated resource-based and labor-intensive exports has gone down while that of science-based and differentiated exports has gone up especially in the 1990s, one cannot argue that Thai exports have turned to be more technological intensive, as the dividing categories do not reflect the sophistication of technological activities required to produce goods, for example, those categorized as science-based exports might be only assembled locally, while their technologically sophisticated and high-value-added components are imported. Although this part shows socio-economic environment in Thai economy, it does not show the relationship between Thai and Japan. It will be better if these economic indicators show more specific relationship between Thai and Japan e.g. trade volume, FDI etc. Moreover, the report does not show the effect of economic crisis. In fact, the crisis changes social capacity and trade pattern in many ways. For example, during and after crisis, many foreign joint ventures export their products more to prevent low domestic demand. Many firms start to improve their capacity to compete in export market. Therefore, the author should emphasize economic crisis as the one socio-economic condition which affects social capacity development in Thailand.

In the third part of this chapter explain about trade capacity building in firms. Firstly, the evaluation on capacity building of local SMEs was demonstrated. Although there are many good signs of development in productivities or in export growth, it has to be noted here that since most manufacturing production takes place in larger establishments, SME productivity can be greatly increased by encouraging them to invest in new equipment and modern production facilities, possibly as a result of new business linkages with larger firms. Moreover, some export growth especially after crisis was encouraged by parent transnational corporations (TNCs) rather than their own competitiveness. Labor productivity in small and medium industries was only half that of larger industries. Furthermore, the proportion of SMEs products in Thai trade volume is very small. The interpretation should be careful. Especially when we want to conclude that the Thai trade sector has transitioned from the System-working Stage to the Self-management Stage.

For business group, this chapter includes Thai Chambers of Commerce (TCC) and Federal of Thai Industries (FTI). In fact, there are many business groups which have influence in Thai economy. For example, Technology Promotion Association (Thailand-Japan) or TPA. Its main objective is to

enhance technology transfer to Thailand through human resource development. Another business group is Thai-Japanese Association (TJA). It collaborate with DIP to operate the Invigorating Thai Business project (ITB), which was launched in 2002 with a budget of 2 billion Baht during crisis. Industrial associations, can play significant roles in diffusion of knowledge and new technologies among member firms. Many industry associations exist in Thailand, however their function has been limited to being a social forum and a lobby group. Many do not employ full-time staff and are relatively informal. The potential of industry associations in building competitiveness has hardly been realized in Thailand, with rare exceptions (Plastics, TAPMA, IDEMA and Toyota Cooperation Club). In the new competitive environment, not just firms, but also industry associations need to upgrade. The government should play a role in ensuring that the potential for industry associations for promoting joint actions is not missed. The government needs to understand the specific challenges faced by individual sectors.

This part also explains about trade capacity building of the private sector. The report should explain further about the general structure of capacity building in Thai manufacturing sector. Several studies of Thai firms conducted since the 1980s state that most firms have grown without deepening their technological capabilities in the long run, and their technological learning has been very slow and passive. Only a small minority of large subsidiaries of TNCs, large domestic firms and SMEs have capability in R&D, while the majority are still struggling with increasing their design and engineering capability. For a very large number of SMEs, the key issue is much more concerned with building up more basic operational capabilities, together with craft and technician capabilities for efficient acquisition, assimilation and incremental upgrading of fairly standard technology. For self-analysis of trade capacity by enterprise, the sample was only 24 firms. Therefore, it is hard to generalize these results. However, the results of the survey mostly are consistent with many previous studies. In this case, the author should use previous studies to confirm conclusion.

The forth part of this chapter explains about capacity building of the government to expand Thai export. The report explains Thai government agencies provide services related to export focusing on the Ministry of Commerce and the Ministry of Industry. The role of Department of Export Promotion (DEP), International Trade Training Institute (ITTI), the Office of Small and medium-sized enterprises Promotion (OSMEP), and the Bureau of Supporting Industry Development (BSID) were explained. However, explanation on more general view of Thai government policies on capacity development is necessary. In Thailand, the most important instrument of trade policy, tariff, has not been used strategically to promote technological learning. Instead, trade policy was very much influenced by macro economic policy, for instance, to reduce domestic demand for imports at the time of balance of payment deficit. Moreover, industrial policy in Thailand has been limited to the so-called 'functional' intervention such as promoting infrastructure building, general education, and export push in general. The exception was the local content requirement in automobile industry, which was rather successful in raising local contents of passenger vehicles to 54% in 1986. However, on 1 January 2002, one the most significant

developments in the trading environment of Thai manufacturing firms was the adoption of the 0-5 per cent tariff band on 85 per cent of tariff line items from other ASEAN countries to spur competition and enlarge the regional market. Another measure was the abolition of local content requirements in the auto industry in 2000, two years ahead of the WTO deadline, to attract foreign direct investment in auto assembly and component manufacturing. Investment policy, especially the promotion of foreign direct investment (FDI), aims primarily at generating inward capital flow and employment. However, after crisis, FDI has progressively being allowed in service industries, particularly in the financial and communication sectors. The 25 per cent limit on foreign equity participation has been lifted in banking and other financial services, except insurance. New insurance licenses have been granted to foreign firms to introduce more competition in the domestic market, while insurance laws are being amended to allow higher foreign equity participation. In August 2000, the Board of Investment introduced a new FDI policy containing the following key measures: (i) 100 per cent foreign shareholding in all activities are now allowed, with the exception of those listed under List One of the Foreign Business Act; (ii) claims for investment incentives must be accompanied by evidence of performance; (iii) projects above Baht 10 million are required to obtain a quality certificate such as ISO 9000; (iv) SMIs with an investment of Baht 1 million are now eligible for investment incentives of the Board of Investment; and (v) the debt-equity ratio has been reduced from 4:1 to 3:1 to encourage financial prudence. Long-standing investment strategy has recently been rearranged in accordance to a major economic structural adjustment. Priority has been given to increase in the support of industries that are knowledge-intensive. The new investment strategy of the country focuses on increasing value-added and indigenous technology capability of the industrial sector. This is a significant shift from the investment centered at employment generation.

At present, the concept of industrial cluster becomes very popular worldwide, policy makers at national, regional and local levels and business people in both forerunner and latecomer countries are keen to implement the cluster concept as an economic development model. In Thailand, a latecomer country in terms of technological catching up, the cluster concept has been used as a means to rectify weakness and fragmentation of its innovation systems. The present Thai government aspires to apply the concept to promote both high-tech manufacturing clusters, services clusters and community-based clusters at the grass-root level. Main driving forces of the three clusters are cluster intermediaries. Forms of these organizations are different from a government research and technology organization (RTO), an industrial association, to a self-organized community-based organization such as Industrial Technical Assistance Program (ITAP), National Electronics and Computer Technology Center (NECTEC), and Software Park Thailand (SPT). The links between industrial-oriented RTOs and industrial firms in Thailand are rather limited. Thai RTOs have been concentrating on developing technologies for industry and, then, transferring them to private firms, rather than promoting transferring of people from RTOs to private firms, which is important for deepening technological development capabilities in industry.

The fifth part of this chapter explains about Thai capacity development in trade and evaluation of support from Japan. The support from Japan is not only from public sector but also from private sector. However, the links for technological development between TNCs and their subsidiaries in Thailand are rather limited and trivial. Previous studies found that the transfer of technology has tended to be limited to the operational level, i.e. TNCs tended to train their workers just so that they can efficiently produce goods. There has not been sufficient transfer of technology at higher levels such as designing and engineering. Little investment from TNCs in Thailand has been made in R&D. TNCs have not been active in developing subcontractors or giving technical assistance to local suppliers. The reason behind this is inefficiency and backwardness of local supporting industries. Equally important, TNCs lack willingness and effort to devote the resources and time to upgrade local suppliers. There is a good sign about the cooperation among Japanese companies, local companies and university, for instance, the Ayuthaya Technical Training Center (ATTC). This is a joint venture between the Hi-Tech Industrial Estate and the King Mongkut Institute of Technology North Bangkok. It was set up in 1992 with considerable assistance in the form of training equipment and technology from a number of Japanese companies led by Canon Ltd. In a subsequent development supported by the Mitutoyo Corporation, a precision instrument and metrology centre was added to the ATTC facility. Another case is, in 1994, the cooperation between Chulalongkorn university and Toyota Motor Thailand (TMT) helped re-establish the auto-engineering degree program with the provision of monetary support and instructors from both TMT and the parent firm in Japan. Nearly 600 students have participated in these programs under the sponsorship of 34 Toyota-provided instructors.

## 別添 1

### 東アジア経済の概観

#### 1. 金融・経済の動向

1985年のプラザ合意以降の円高基調への転換にともなって、日本企業は生産拠点をコストが安いアセアン諸国にシフトを本格的に開始した。アセアン諸国で生産し、欧米そして日本国内への輸出を行うという迂回輸出戦略である。アセアン諸国はそれまでも、輸入代替政策の遂行において、日本企業の直接投資を導入した経験もあり、日本企業にとっても地理的な近接性に加えて、こうした経験があったため、進出しやすかったのである。これに1992年の中国の改革開放政策の再確認が加わって、中国が日本企業等の直接投資先として加わった。

しかし、1996年頃から円高ドル安傾向が転換し、円安ドル高傾向に転じるとアセアンを経由した欧米市場への輸出はコスト競争力の低下を招くようになった。アセアン諸国の通貨は米ドルと事実上ほぼリンクした為替レートになっていたからである。他方、1994年1月に対ドルレートを約30%切り下げた中国の人民元が日本企業等の迂回輸出向け生産拠点の設置先として有力になってきた。加えて、人件費がアセアン諸国（マレーシア、タイ等）よりも安く、「社会主義市場経済」という政治と経済の分離を歌い、積極的に外資企業に中央政府のみならず、地方政府レベルでも優遇措置を発動する中国に対して先進各国からの製造業に関わる直接投資が大幅に増加した。「経済特区」への市場経済制度の運用や輸出加工区に税的優遇（外資企業に対する企業所得税や輸出製品への付加価値税の減免、還付等）等を加えた「経済技術開発区」の設置などの政策が次々と実現したからである。この結果、中国は1990年代後半には「世界の工場」と称されるようになった。

これに対してアセアン諸国も先進国からの直接投資に関わる誘致において、政策面で対抗するようになった。アセアン内での自由貿易協定であるAFTA（ASEAN自由貿易地域）を1992年に始めて構想していたが、1996年アセアン工業協力計画（以下AICOと称す）によって、域内関税の引き下げを目指すAFTAのなかの共通有効特惠関税（Common Effective Preferential Tariff）を導入し、個別外資製造業企業によるASEAN域内製造された製品の取り引きにおける域内関税0-5%の早期適用を図った。

東アジアの直接投資環境を転換させたのが1997年～1998年のアジア通貨危機である。これにより、アセアン諸国の対米ドルレートは大幅に下方修正され、AFTAと併せた相乗効果のなかで直接投資先として再度、魅力の向上が始まっている。また、2000年代半ばに至ってはアジア通貨危機で企業に対する資金の流動性を損なった不良債権問題も解決しつつある。また、一方の中国においても、1998年～2000年の時期に高度成長の踊り場における経済の調整や国有企業の改革に伴う国内企業のリストラと国有銀行の不良債権処理が行われ、需要面に起因する景気の落ち込みに直面した。しかし、2001年12月にWTOへの加盟を果たし、外国資本への規制緩和（投資制限業種の縮小や小売、流通、金融、保険における外資企業の活動範囲の大幅緩和等）により直接投資を製造企業以外の分野に誘致が本格的に始まったことにより、再び先進国等からの中国への直接投資は活発化している。



## 2. 先進国からの直接投資

1980年代後半の先進国からアセアンへの直接投資は前述のように、円高によるコスト競争力の低下に対する回避手段として始まった。これに加え、1880年代後半の日本の「バブル景気」において過剰流動性がもたらした、海外への資金還流が国外に及んだことから直接投資のみならず金融的な投資も行われるようになっていた。こうした投資がアセアンにおいては物件費や人件費の上昇を加速したことはもちろん、各企業に過剰な供給力を保有させることになった。日本企業について言えばこの時期の課題は「日本およびアセアン」という「アジア大」範囲での過剰供給設備の調整である<sup>78</sup>。また、後述するように中国への製造業の投資の蓄積にともない、中国を含めると東アジア全体でみると過剰供給状態が深刻化した。同時に東アジア各国は同様な機械製品に競争力をもち、お互いに競争しあう、産業構造を有するようになっていった。

表 別添 1.1 通貨危機前までのアジア主要国の輸出増加額の品目別構成(1985年と1997年)

	SITC00	SITC01	SITC02	SITC03	SITC04	SITC05	SITC06	SITC07	SITC08	SITC09	計
タイ	20%	0%	4%	1%	0%	1%	18%	29%	26%	1%	100%
マレーシア	5%	0%	10%	6%	2%	2%	8%	51%	16%	0%	100%
インドネシア	13%	1%	8%	-21%	0%	6%	54%	4%	34%	1%	100%
フィリピン	7%	1%	1%	4%	0%	3%	7%	17%	24%	36%	100%
中国	8%	1%	3%	-5%	0%	7%	23%	14%	26%	24%	100%
ベトナム	30%	0%	11%	29%	0%	0%	3%	0%	25%	1%	100%
世界計	9%	0%	5%	19%	1%	8%	16%	31%	8%	3%	100%

(注) SITC00: 食料品及び動物、SITC01: 食料及びタバコ、SITC02: 原材、SITC03: 鉱物性燃料、SITC04: 動植物油脂など、SITC05: 化学品、SITC06: 原料別製品(革製品、繊維(糸、織物)、鉄鋼、金属製品など、SITC07: 機械及び輸送機器(産業機械、自動車、エレクトロニクスなど)、SITC08: (衣類、履物、時計、眼鏡など)、SITC09: その他(再輸出品、金、武器など)。表中で\_印をつけた数値は、輸出特化度の高い商品。下線は構成比の大きい品目。

(出所) UN「International Trade Statistics Yearbook」より三菱総合研究所作成。

これに、1990年代半ばまでの「円高 アセアン通貨安」基調から通貨危機前までの「円安 アセアン通貨高」、そして1990年代末から2000年代の「アセアン通貨安」基調への再転換やAFTAの推進とベトナムの市場経済化(およびカンボジア、ラオス、ミャンマーのASEAN加盟)、そして中国の需要拡大と米国からの絶え間ない人民元の切り上げ要求ともあいまって、企業の直接投資戦略にも変化をもたらした。

具体的にはアセアン域内における生産工程の最適配置である。これまでに1カ国で一品目の生産を簡潔させるのではなく、部品レベルで最も効率的な国に生産拠点を配置あるいは調達し、アセアン域内のハブになる国で最終組み立てを行い、域内および欧米への輸出を行うものである。特に自動車産業においては「マレーシアで電装系部品、フィリピンで駆動系、インドネシアでその他の汎用部品、最後にタイで基幹部品等の一部(中枢部品は

<sup>78</sup> 「日本企業はアジアで成功できるーグローバル経営を成功できる指針」、土屋勉男、東洋経済新報社(1999年)50~51ページ

日本から輸出)と最終組み立てを行う」などの分業が行われる方向を構築しつつある。

他方、電器・電子産業はマレーシアを中心にアセアンの最終組み立てを行ってきたが、東アジアの需要において中国に重心が移ってきたため、大きな消費地に近い中国に新規の生産能力をシフトする動きが出ている。

また、1990年代からの成長を背景に東アジアの人材の高度化が実現してきている。こうした人材を活用した研究開発機能の設置や WTO や FTA の浸透にともなう流通、物流分野への外資企業への参入拡大によって先進国からの直接投資はサービス分野にも及ぶ多様性を見せだしている。これを大別すると製造業においては 輸出生産基地設置のための直接投資 現地市場向けの直接投資 国際分業体制の一環としての生産拠点である。研究開発拠点は、への対応であり、サービス業の直接投資も同じく、の製造業の流れに対応したものである。先進国企業の直接投資における課題は過剰供給能力の調整からより多様で高度な機能の現地展開のためのリソース確保に移ってきているのである。人材の高度化や自国製品・企業の国際競争力向上のためのノウハウの構築、制度構築の支援を行うものが増えてきた。

### 3. 地域経済連携の進展<sup>79</sup> 広がる経済連携、直接投資の広がり、そして援助効果の面的拡大の可能性

世界的には 1950 年代に始まった FTA も東アジアでは進展を見ず、東アジアは従来 FTA の「空白地帯」といわれてきたが、1990 年代の AFTA および WTO の始動により、経済連携が急速に進展し始めている。FTA 締結に及び腰であった東アジア諸国の中で、いち早く自由貿易圏の形成に向かったのは、今日において人口 5 億人、7370 億ドルの市場をもつ ASEAN であった。1992 年、ASEAN 首脳は、AFTA (ASEAN Free Trade Area : ASEAN 自由貿易地域) の設立に合意し、その後、関税引き下げ等に取り組み、その統合は、EU をモデルとした経済統合を目指している。ASEAN 自由貿易地域 (AFTA) の関税引き下げは、ほぼ実現されつつある。ただし、ASEAN 加盟国は、国によって産業構造が異なるため、経済連携の個別具体的な問題については国によって推進についての温度差がある。具体的にはマレーシアが自動車セクター保護のために自由化を一部遅らせていたなどの問題があった。

東アジアにおいては、1992 年の AFTA 設立合意以降、個別国間の FTA 締結に向けた目立った動きはなかった。しかし、1997 年にアジア通貨危機が起こると、東アジア地域における経済連携の重要性が強く認識されるようになり、それ以降、FTA 締結に向けた動きが活発となった。そのなかでこれまで最も FTA 締結に積極的に取り組んできたのはシンガポールである。シンガポールは、資源に乏しく中継貿易地として発展してきたが、FTA 締結は、いっそう地域経済の「ハブ」としての自国の役割を強化し、自らの経済発展につなげていくために重要であると考えているためである。2002 年には、日・シンガポール包括的経済連携協定が発効した。タイも FTA 締結に積極的で、バーレーン、オーストラリアと FTA を締結し、現在は米国、インドとの交渉を進めている。その他の東アジアの国々の FTA への取り組みも活発化している。2002 年に、中国は 10 年以内に ASEAN との間ですべての貿易障

<sup>79</sup> 「自由貿易協定 (FTA) ハンドブック—FTA の現状と動向に関する重要ポイント—」財団法人中部産業活性化センター (2004 年)

壁を廃止すると表明した。この FTA が実現すると、人口 17 億人、経済規模 2 兆ドル、貿易総額 1 兆 2300 億ドルの巨大経済圏が誕生するからである。中国側は積極的で、農産物など特定品目の関税率の先行引き下げを提案している。

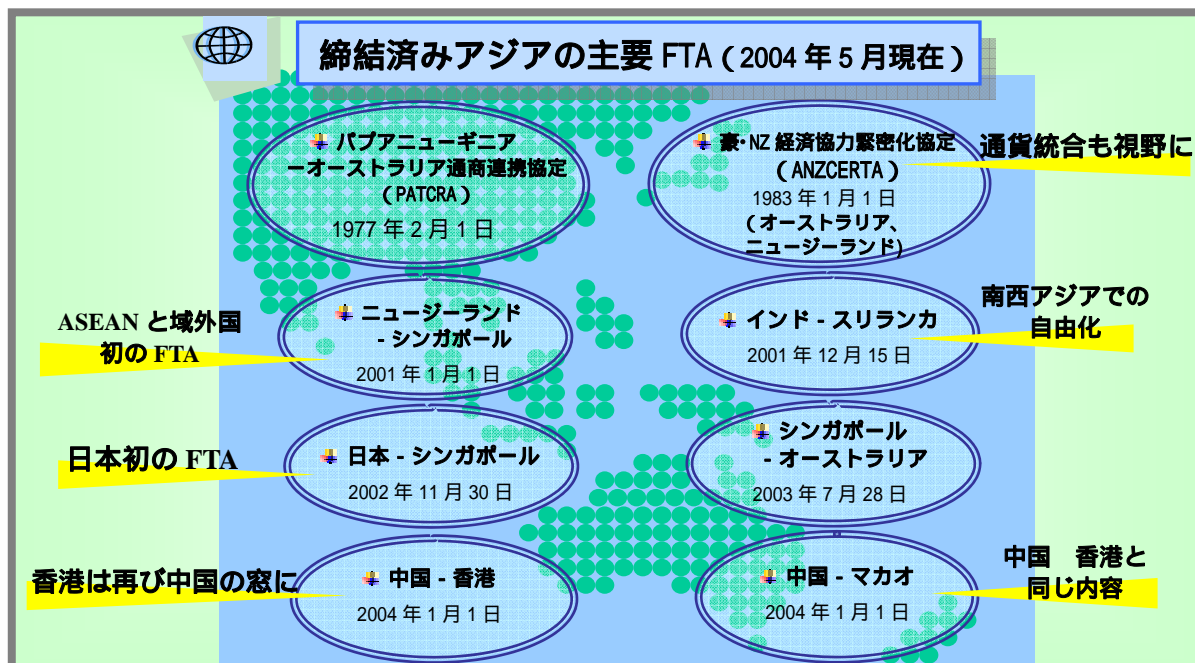
東アジアから南アジアおよびアフリカや南米等への「南 - 南連携」と発展途上国間の経済連携も広がりつつある。例えば、ASEAN とインド、インドと南アフリカ、スリランカ、パキスタン、シンガポール・メキシコ、タイ・ペルー、シンガポール・インド、インド・メキシコ、シンガポール・スリランカ、シンガポール・ヨルダン等の FTA が研究もしくは交渉中である。発展途上国間でもそれぞれの発展段階と競争力のある産業の違いを活用して工程間分業や産業間補完によって更なる経済発展を目指している。この過程で、制度、ノウハウの水準の高度化・共通化・共有化が図られることになろう。こうした動きは世界中で最適調達、最適生産を目指す先進国の多国籍企業のみならず、多国籍企業の機能分業に併せて個別具体的な部品等の供給を行うために海外に展開する中堅・中小企業の直接投資を促進するファクターである<sup>80</sup>。さらには産業機能集積に付随して起こる需要の量的質的拡大は現地企業の成長を促し、多国籍企業との戦略連携を推進するファクターにもなりつつある。

日本は従来 GATT/WTO における多国間交渉を是としてきたが、その行きづまりから 90 年代後半には二国間の FTA を通商戦略の中心に据えた。通貨危機以後、日本は FTA を活用した独自の東アジアにおける地域的な枠組みの構築を意図している。この背景には中国の急速な政治的・経済的台頭への日本の焦りが挙げられる。中国企業は、政府からの手厚い支援もあり、国際競争力をつけ、ASEAN 市場へ本格的に参入しはじめている。我が国についても 2002 年には、遂に日本初の FTA である日本・シンガポール新時代経済連携協定（JSEPA）が発効した。その同時期には、メキシコとの政府間交渉の開始、日韓 FTA の共同研究の開始、ASEAN との FTA の提案など、FTA に関する話題が相次ぎ、FTA は日本の通商戦略の重要な位置を占めるようになり、地域的な枠組みの構築を考えている。同時に経済連携を活用して、これまで培ってきた日本とアセアン諸国の間で築いてきた発展途上国への制度、ノウハウ、技術のトランスファー等の経済協力の効果が第三国の発展途上国により世界的な FTA の広がり、なかんづく、発展途上国同士の「南 - 南」間の FTA のひろがりを媒介にして拡大していく「面の拡大」の展望も開けていきつつある。

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<sup>80</sup> タイ・インド間の自動車生産分業や中国・タイ、中国・マレーシア等の電機・電子製品の生産分業で見られるような中小企業の進出の集積にその例を見ることができる。

図 別添 1.2 アジアの主要な FTA



(出所)「自由貿易協定 (FTA) ハンドブック - FTA の現状と動向に関する重要ポイント -」財団法人中部産業活性化センター (2004)

## 別添 2

### アンケート調査に基づく製造業企業の輸出パフォーマンス分析

本分析の目的は、企業の輸出パフォーマンス向上における能力の各構成要素（ファクター）の貢献の度合いを実証分析することである。分析には以下の回帰モデルを使用する。より詳細な変数の定義は表 別添 2.1 に示した。

$$\text{EXPORT} = \alpha + \beta_1 P + \beta_2 R + \beta_3 K + \beta_4 \text{FIN\_SUP} + \beta_5 \text{TECH\_SUP} + u$$

各変数の定義は以下の通りである。

EXPORT: 輸出額

企業の輸出能力:

政策・対策要素 P ( Policy and Measure ) : ISO 取得の有無

人的・財政的・物的組織資源要素 R ( Resource ) : 資本集約度 ( 資本量/労働者 )

知識・技術要素 K ( Knowledge, Information and Technology ) : 貿易に係わる技術・ノウハウの充足度

政府と企業の関係性:

FIN\_SUP ( Financial support ) : 政府提供の金融支援に対する満足度

TECH\_SUP ( Technical support ) : 政府提供の技術支援に対する満足度

表 別添 2.1 分析モデルで使用する変数の定義

変数名	定義	
EXPORT	輸出額 ( 百万USドル ) ( ASEANが発表している実勢為替レートにて換算 )	
企業の輸出能力	P(Policy/Measure )	ISO9000、ISO14000のいずれかを取得していれば1、いずれも取得していなければ0
	R(Resource)	資本集約度 ( capital intensity ) (労働者一人あたり百万USドル) ( ASEANが発表している実勢為替レートにて換算 )
	K(Knowledge/Technology)	マーケティングおよび貿易実務分野において自社の知識・技術の充足度が5段階中4以上 ( 4: sufficient)であれば1、3以下 ( 3: almost sufficient ) であれば0
企業 - 政府の関係性	FIN_SUP ( Financial Support)	政府の提供する金融支援に対して満足度が5段階中4以上 ( 4: satisfied ) であれば1、3以下(3: almost satisfied)であれば0
	TECH_SUP(Technical Support)	政府の提供する生産支援に対して満足度が5段階中4以上 ( 4: satisfied ) であれば1、3以下 ( 3: almost satisfied)であれば0
産業ダミー	製造業の産業分野が繊維・衣類産業であれば1、それ以外は0	
国ダミー	フィリピン = 1、インドネシア = 0	

(注) いずれの変数も企業アンケートによって得られた回答であり、2004年時のものである。

(出所) 筆者作成。

本分析モデルでは、非説明変数として企業の輸出額を用いる。開発途上国における企業レベルの輸出パフォーマンス分析は、総生産額（売上高）に占める輸出額を非説明変数として扱ったトビット・モデルによる推計が多い（Ramstetter 1999<sup>81</sup>；Dijk 2002<sup>82</sup>；Rasiah 2004<sup>83</sup>）。しかし、分析対象はすべての企業が輸出活動をおこなう企業であることから、非説明変数として輸出額を用いることは妥当である（Rasiah 2003<sup>84</sup>）。

次に、説明変数について述べる。輸出対策の立案・実施を表す要素については、ISO9000およびISO14000の取得の有無を使用した。ISO取得は必ずしも貿易取引だけに利益をもたらすものではないが、企業の輸出対策に係わる一要素である。人的・財政的・物的組織資源要素には、資本集約度を使用した。Dijk（2002）では資本集約度を輸出部門における資本として扱っており、輸出生産を資源面で支える要素とみなすことができる。知識・技術要素は、企業アンケート調査によって得られた自社パフォーマンスに対する「技術・ノウハウ」の充足度で表す。この充足度は、マーケティングおよび貿易実務についての経営課題に対する充足度であり、5段階の順序尺度で計測される<sup>85</sup>。生産および製品開発の充足度もアンケートによって尋ねたが、分析モデルにおいて多重共線性（multicollinearity）がみられたことにより、マーケティングおよび貿易実務の代理変数を使用する。

政府の金融支援と技術支援に対する満足度は政府と企業の関係性を検討するために使用した。満足度が高いほど、政府と企業の関係がより密接であるという仮定のもとでの設定である。中小企業の輸出振興支援で金融支援と技術支援が重視されていることから、これら変数を貢献要因と考える（Urata 2000<sup>86</sup>）。

以上の非説明変数と説明変数はいずれも各国の中小製造業に対しておこなったアンケート票のデータであり、2004年時点の数値である。サンプル数の確保のため、インドネシアとフィリピンをあわせたクロス・セクション・データを使用する。実際に分析に用いたサンプル数は、欠損値を除いた72社（インドネシア：32社、フィリピン：40社）である。回答企業の特性として、全ての企業が輸出をおこなっていること、軽工業（食品加工、衣類、木製品）中心、また外資比率50%未満の地場企業中心であることがあげられる。

次に、本分析モデルの留意点を述べる。それは、クロス・セクション・データの分析における分散不均一性（heteroscedasticity）の問題である。分散不均一性とは、最小2乗法（Ordinary Least Squares; OLS）によって推計した誤差項の分散がサンプルを通じて一定でないことである。本分析では、企業間比較をおこなっており、規模の大きい企業の誤差は大きく、規模の小さい企業の誤差は小さいことが考えられる。Breusch-Paganテストにより、

<sup>81</sup> Dijk, Michel, van. 2002. "The determinants of export performance in developing countries: the case of Indonesian Manufacturing." *Eindhoven Centre for Innovation Studies Working Paper*. 02.01. Technische Universiteit Eindhoven. The Netherlands.

<sup>82</sup> Ramstetter, Eric, D. 1999. Trade Propensities and Foreign Ownership Shares in Indonesian Manufacturing. *Bulletin of Indonesian Economic Studies*. Vol.35. issue.2. pp.43-66.

<sup>83</sup> Rasiah, Rajah. 2004. *Foreign firms, technological capabilities and economic performance: Evidence from Africa, Asia and Latin America*. U.K. and Northampton. Mass.: Elgar.

<sup>84</sup> Rasiah, Rajah. 2003. "Foreign Ownership, Technology and Electronics Exports from Malaysia and Thailand." *Journal of Asian Economics*. Vol.14. issue.5. pp.785-811.

<sup>85</sup> 5段階(5: very satisfied, 4: satisfied, 3: almost satisfied, 2: a little satisfied, 1: unsatisfied)の順序尺度(内田治、醍醐朝美、2001、『実戦アンケート調査入門』、日本経済新聞社。)

<sup>86</sup> Urata, Shujiro. 2000. *Policy Recommendation for SME Promotion in the Republic of Indonesia*. Japan International Cooperation Agency (JICA) .

分散均一性 (homoscedasticity) の帰無仮説は棄却されたため、解決策として FGLS (Feasible Generalized Least Squares) によって推計する。

最後に分析結果を考察する。推計されたパラメータおよび弾力性値を表 別添 2.2 に示した。まず、企業の能力のファクターについて考察する。政策・対策要素 (P)、人的・財政的・物的組織資源 (R) および知識・技術要素 (K) の 3 要素はいずれもプラスの符号で有意であった。P と R は 1% で有意であり、K は 5% で有意である。これら 3 要素は輸出額の増加に寄与することが明らかになった。したがって、社会的能力のフレームワークにおいて、3 つのファクターで構成される能力が重要であることがわかる。さらに、それぞれの変数の輸出パフォーマンスに対する弾力性値について算出した。弾力性値とは、説明変数の 1% の変化に対して非説明変数 (輸出額) が変化する割合 (%) を示したものである。3 つのファクターはいずれも非弾力的な値であり、知識・技術要素 (K) がもっとも高く 0.51 であり、次に人的・財政的・物的組織資源 (R) の 0.38、そして政策・対策要素 (P) の 0.30 という結果になった。P と R は 1% で有意であり、K は 5% で有意である。したがって、インドネシアとフィリピンにおける中小製造業において、輸出パフォーマンス向上のためには知識・技術要素が潜在的に高い貢献度を持つとすることができる。

次に、政府と企業の関係性を示す政府の各支援に対する満足についてみてみたい。まず、金融支援についてはプラスの符号で 1% 有意であった。したがって、金融支援は輸出額の増加に寄与することが明らかになった。このことは、開発途上国における中小企業の輸出振興支援で金融支援が重視されていることを支持するものである (Urata 2000)。弾力性値は比較的高く、0.51 であり、1% で有意である。一方、技術支援についてはマイナスで統計的に有意ではなかった。本分析モデルでは、各支援に対する満足度を関係性の代理変数としていること、使用した変数はファクターの一部にすぎないことが問題であり、変数の選択にさらなる検討が必要である。これら問題を克服するためには、理論的研究によって各ファクターの項目を明らかにすること、また同時に、実証分析に使用できる指標の開発が必要である。

表 別添 2.2 FGLS による推計結果と弾力性値:  
輸出パフォーマンスに対する能力変数の影響

被説明変数	係数	標準誤差	弾力性
P	1.71 ***	0.63	0.30 ***
企業の輸出能力	R	80.83 ***	22.29
	K	1.00 **	0.42
企業 - 政府の関係性	FIN_SUP	1.91 ***	0.58
	TECH_SUP	-0.66	0.45
産業ダミー		1.77 ***	0.62
国ダミー		-1.42 ***	0.43
定数項		0.04	0.43
自由度修正済みR <sup>2</sup>		0.38	
F値		7.21 ***	
n		72	

(注) \*\*\*, \*\*はそれぞれ 1%、5%の有意水準を示す。



### 別添3 企業アンケート調査票（英語版）



27 August 2005

#### Questionnaire Survey on Trade Capacity Development in ASEAN 4 countries

This questionnaire survey is carried out as part of the Japan International Cooperation Agency (JICA) study on "Social Capacity Development in trade in ASEAN 4 countries (Indonesia, Malaysia, the Philippines, and Thailand)". This study aims to clarify the conditions of capacity development in corporate and government sectors, which have played key roles in export promotion of these countries. In this questionnaire survey, we would like to obtain essential information necessary for our analysis through asking questions on self-evaluation of export-related capacity of your company as well as evaluation of the government's policies and your satisfaction level.

While our team, the Hiroshima University-Mitsubishi Research Institute Joint Venture (JV), is implementing this whole study under contract with JICA, we have also contracted out a questionnaire survey to local organizations in individual ASEAN 4 countries. In Malaysia, the JV has asked Malaysian Institute of Economic Research (MIER) to implement the questionnaire survey.

Our team plans to compare the results of questionnaire survey in Malaysia with those of the other countries in order to assess the future directions of Japan's technical assistance to these countries. In addition, we would like to learn lessons from ASEAN 4 experiences that could be applied for assistance to other ASEAN countries, especially countries of Indochina as well as Africa.

The results of the whole study including this survey will be compiled in the final report (Japanese and English) by the end of 2005 and will be up on the JICA website.

In order to ensure the quality of the results, please make sure that

the person at a high management level in your company such as CEO and CFO will kindly take time to answer this questionnaire, or at least review and give authorization to the filled out questionnaire.

We would like to express our sincerest appreciation for your understanding and cooperation on this questionnaire survey.

Shunji Matsuoka, Ph. D  
Professor  
Graduate School for International  
Development and Cooperation  
Hiroshima University  
and  
Evaluation Team Leader  
Joint Venture of  
Hiroshima University and  
Mitsubishi Research Institute,  
Inc.



**Company Name:**

**1. Corporate Profile**

Basic information about your company

1) Year of foundation		
2) Category of business 2-1) Types of business activities (Circle the alphabet(s) in the right cell)	a) Manufacturer/Direct Exporter b) Manufacturer/Indirect Exporter c) Nonmanufacturer/Export Trader d) Others (please specify: )	
2-2) Types of Industries (Circle the alphabet(s) in the right cell)	a) food c) pulp and paper e) medical goods g) wood product i) glass, soil and stone product k) nonferrous metal m) general machinery and parts o) transport equipment and parts q) others (please specify: )	b) apparel and textile d) chemical f) petroleum and coal product h) rubber product j) iron and steel l) metal products n) electric equipment and parts p) precision equipment and parts

About following items of 3) to 10) , please answer the situations in 2000 and 2004, respectively. With regard to information as of 2000, If your company did not exist in 2000 or did not export or if you are unable to fill in the cells for any reasons, please circle N/A.

	2000		2004
3) Major product		N/A	
4) Paid-up capital (Ringgit)		N/A	
5) Fixed assets (Ringgit)		N/A	
6) Foreign capital ratio (% of foreign ownership e.g. write 0% if there is no foreign ownership)		N/A	
7) Sales amount (Ringgit)		N/A	
8) Export value (Ringgit)		N/A	
9) Major export market (Circle the alphabet(s) in the right cell)	a) ASEAN b) Japan c) China d) South Korea e) Central Asia f) South Asia g) Middle East h) Western Europe i) Eastern Europe j) Africa k) North America l) Central and South America m) Oceania n) Others	N/A	a) ASEAN b) Japan c) China d) South Korea e) Central Asia f) South Asia g) Middle East h) Western Europe i) Eastern Europe j) Africa k) North America l) Central and South America m) Oceania n) Others
10) Number of Employees (including part-time employees)		N/A	

## 2. Evaluation of the government's measures related to export promotion

From the following policy options set out in items 11) to 18), please answer your satisfaction level about these policies' contribution to your company's export promotion in 2000 and 2004.

( 5: very satisfied 4: satisfied 3: almost satisfied 2: a little unsatisfied 1: unsatisfied N/A: unable to answer)

	2000	2004
	Satisfaction Level on contribution to your company's export promotion	Satisfaction Level on contribution to your company's export promotion
11) legal systems and operations	5 4 3 2 1 N/A	5 4 3 2 1 N/A
12) Infrastructure building		
12-1) Logistics (roads, bridges, ports, airports, etc.)	5 4 3 2 1 N/A	5 4 3 2 1 N/A
12-2) Electricity	5 4 3 2 1 N/A	5 4 3 2 1 N/A
12-3) Communication (Telephone, Postage, Internet, etc.)	5 4 3 2 1 N/A	5 4 3 2 1 N/A
12-4) Water Supply	5 4 3 2 1 N/A	5 4 3 2 1 N/A
13) Government Standard certification system (standard, measurement, test)	5 4 3 2 1 N/A	5 4 3 2 1 N/A
14) Human resources development		
14-1) Elementary and secondary education	5 4 3 2 1 N/A	5 4 3 2 1 N/A
14-2) College/University education	5 4 3 2 1 N/A	5 4 3 2 1 N/A
14-3) Vocational education	5 4 3 2 1 N/A	5 4 3 2 1 N/A
14-4) Training programs for skilled engineers	5 4 3 2 1 N/A	5 4 3 2 1 N/A
15) Industrial and Trade development policy		
15-1) Financial Support (subsidies, loans, export finance, insurance, etc.)	5 4 3 2 1 N/A	5 4 3 2 1 N/A
15-2) Tax preferences (tax reduction, tax credit, etc.)	5 4 3 2 1 N/A	5 4 3 2 1 N/A
16) Response to the trade liberalization (WTO, AFTA, bilateral FTAs)		
16-1) Reduction of import tariffs for raw materials	5 4 3 2 1 N/A	5 4 3 2 1 N/A
16-2) Reduction of obstacles for foreign export	5 4 3 2 1 N/A	5 4 3 2 1 N/A
17) Establishment and operation of the export processing zone	5 4 3 2 1 N/A	5 4 3 2 1 N/A
18) Efficiency of the customs procedure	5 4 3 2 1 N/A	5 4 3 2 1 N/A

### 3. Evaluation of trade-related services for companies by the government

From 19) to 22) please answer your company's satisfaction level on the government's services as of 2000 and 2004, respectively

( 5: very satisfied 4: satisfied 3: almost satisfied 2: a little unsatisfied 1: unsatisfied N/A: Unable to answer)

	a) Individual counseling, Consulting	b) Training, Seminar	c) Trade Fair, Exhibition	d) Provision of information
19) Production (specification, quality management, process management)	2000 5 4 3 2 1 N/A	2000 5 4 3 2 1 N/A		2000 5 4 3 2 1 N/A
	2004 5 4 3 2 1 N/A	2004 5 4 3 2 1 N/A		2004 5 4 3 2 1 N/A
20) Product development (design, packaging)	2000 5 4 3 2 1 N/A	2000 5 4 3 2 1 N/A		2000 5 4 3 2 1 N/A
	2004 5 4 3 2 1 N/A	2004 5 4 3 2 1 N/A		2004 5 4 3 2 1 N/A
21) Marketing (getting market information, customer development )	2000 5 4 3 2 1 N/A	2000 5 4 3 2 1 N/A	2000 5 4 3 2 1 N/A	2000 5 4 3 2 1 N/A
	2004 5 4 3 2 1 N/A	2004 5 4 3 2 1 N/A	2004 5 4 3 2 1 N/A	2004 5 4 3 2 1 N/A
22) Trading business (export-import business, knowledge of relevant systems )	2000 5 4 3 2 1 N/A	2000 5 4 3 2 1 N/A		2000 5 4 3 2 1 N/A
	2004 5 4 3 2 1 N/A	2004 5 4 3 2 1 N/A		2004 5 4 3 2 1 N/A

### 4. Evaluation of Trade-Related Services for Companies by the Business Sector

From 23) to 26) please answer your company's satisfaction level on the services provided by business and industry groups, private companies as of 2000 and 2004, respectively.

( 5: very satisfied 4: satisfied 3: almost satisfied 2: a little unsatisfied 1: unsatisfied N/A: Unable to answer)

	a) Individual counseling, Consulting	b) Training, Seminar	c) Trade Fair, Exhibition	d) Provision of information
23) Production (specification, quality management, process management)	2000 5 4 3 2 1 N/A	2000 5 4 3 2 1 N/A		2000 5 4 3 2 1 N/A
	2004 5 4 3 2 1 N/A	2004 5 4 3 2 1 N/A		2004 5 4 3 2 1 N/A
24) Product development (design, packaging)	2000 5 4 3 2 1 N/A	2000 5 4 3 2 1 N/A		2000 5 4 3 2 1 N/A
	2004 5 4 3 2 1 N/A	2004 5 4 3 2 1 N/A		2004 5 4 3 2 1 N/A
25) Marketing (getting market information, customer development )	2000 5 4 3 2 1 N/A	2000 5 4 3 2 1 N/A	2000 5 4 3 2 1 N/A	2000 5 4 3 2 1 N/A
	2004 5 4 3 2 1 N/A	2004 5 4 3 2 1 N/A	2004 5 4 3 2 1 N/A	2004 5 4 3 2 1 N/A
26) Trading business (export-import business, knowledge of relevant systems )	2000 5 4 3 2 1 N/A	2000 5 4 3 2 1 N/A		2000 5 4 3 2 1 N/A
	2004 5 4 3 2 1 N/A	2004 5 4 3 2 1 N/A		2004 5 4 3 2 1 N/A

## 5.Evaluation of your company's performed work

In items 27) to 30), please answer the questions about your company's overall competitiveness, number of skilled/ specialized staff, and technology/know-how. Please answer the situations in 2000 and 2004, respectively. Note that a) number of skilled/specialized staff and b) technology/know-how are regarded as key components of overall competitiveness.

### 27) Production (specification, quality management, process management)

Overall Competitiveness	Sufficient global competitiveness	Top companies in the country	Same as fellow traders	Inferior to fellow traders	Undeveloped	Unable to answer
2000	5	4	3	2	1	N/A
2004	5	4	3	2	1	N/A
a) Number of Skilled/ Specialized Staff	Highly sufficient	Sufficient	Almost sufficient	Insufficient	Severely insufficient	Unable to answer
2000	5	4	3	2	1	N/A
2004	5	4	3	2	1	N/A
b) Technology/ Know-how	Highly sufficient	Sufficient	Almost sufficient	Insufficient	Severely insufficient	Unable to answer
2000	5	4	3	2	1	N/A
2004	5	4	3	2	1	N/A

### 28) Product development (design, packaging)

Overall Competitiveness	Sufficient global competitiveness	Top companies in the country	Same as fellow traders	Inferior to fellow traders	Undeveloped	Unable to answer
2000	5	4	3	2	1	N/A
2004	5	4	3	2	1	N/A
a) Number of Skilled/ Specialized Staff	Highly sufficient	Sufficient	Almost sufficient	Insufficient	Severely insufficient	Unable to answer
2000	5	4	3	2	1	N/A
2004	5	4	3	2	1	N/A
b) Technology/ Know-how	Highly sufficient	Sufficient	Almost sufficient	Insufficient	Severely insufficient	Unable to answer
2000	5	4	3	2	1	N/A
2004	5	4	3	2	1	N/A

### 29) Marketing (getting market information, customer development)

Overall Competitiveness	Sufficient global competitiveness	Top companies in the country	Same as fellow traders	Inferior to fellow traders	Undeveloped	Unable to answer
2000	5	4	3	2	1	N/A
2004	5	4	3	2	1	N/A
a) Number of Skilled/ Specialized Staff	Highly sufficient	Sufficient	Almost sufficient	Insufficient	Severely insufficient	Unable to answer
2000	5	4	3	2	1	N/A
2004	5	4	3	2	1	N/A
b) Technology/ Know-how	Highly sufficient	Sufficient	Almost sufficient	Insufficient	Severely insufficient	Unable to answer
2000	5	4	3	2	1	N/A
2004	5	4	3	2	1	N/A

30) Trading business (export-import business, knowledge of relevant systems)

Overall Competitiveness	Sufficient global competitiveness	Top companies in the country	Same as fellow traders	Inferior to fellow traders	Undeveloped	Unable to answer
2000	5	4	3	2	1	N/A
2004	5	4	3	2	1	N/A
a) Number of Skilled/ Specialized Staff	Highly sufficient	Sufficient	Almost sufficient	Insufficient	Severely insufficient	Unable to answer
2000	5	4	3	2	1	N/A
2004	5	4	3	2	1	N/A
b) Technology/ Know-how	Highly sufficient	Sufficient	Almost sufficient	Insufficient	Severely insufficient	Unable to answer
2000	5	4	3	2	1	N/A
2004	5	4	3	2	1	N/A

**6. Acquisition of ISO (International Standardization Organization) authentication**

31) Please indicate year of your company's acquisition of ISO Standards authentication.

31-1) ISO9000 (Quality Management System)	a. Acquired (in )	b. To be Acquired (scheduled for acquisition in )	c. No plans to acquire
31-2) ISO14000 (Environment Management System)	a. Acquired (in )	b. To be Acquired (scheduled for acquisition in )	c. No plans to acquire
31-3) Other International Standards			
Name of the standard ( )	a. Acquired (in )	b. To be Acquired (scheduled for acquisition in )	
Name of the standard ( )	a. Acquired (in )	b. To be Acquired (scheduled for acquisition in )	

**7. Assistance from foreign aid donor agencies**

32) Have you ever received assistance from foreign aid donor agencies? If so, please specify the names of agencies and assistance provided by the donor agencies.

32-1) Names of Donor Agencies (Circle the alphabet(s) in the right cell)	a) JICA (Japan) b) JETRO (Japan) c) AOTS (Japan) d) CIDA (Canada) e) USAID (USA) f) AUSAID (Australia) g) GTZ (Germany) h) ADB (Asian Development Bank) i) World Bank j) Others (please specify: ) k) N/A (unable to answer for any reason)
32-2) Forms of assistance by foreign donor agencies (Circle the alphabet(s) in the right cell)	a) individual counseling/ consulting b) training, seminars c) trade fair, exhibition d) provision of information e) financial assistance f) others (please specify: ) g) N/A (unable to answer for any reason)

**8. Suggestions for future efforts by the government**

33) Please provide suggestions for future efforts by the Government so that it can better serve the needs of your company in export promotion

( )

**Thank you for your cooperation.**



## 別添 4

### 現地調査行程表（第1次現地調査）

	Date	Activities	
1	3/6 San	11:30 Departure from Osaka (NH5863) 17:25 Arrival in Kuala Lumpur (Matsuoka, Takahashi)	11:45 Departure from Tokyo (JL723) 18:30 Arrival in Kuala Lumpur (Mizuta, Koze)
2	7 Mon	AM Courtesy visit and Interview to the JICA Malaysia office PM MATRADE, and MITI	
3	8 Tue	JETRO Kuala Lumpur Center Japanese Chamber of Trade and Industry, Malaysia National Chamber of Commerce and Industry Federation of Malaysian Manufactures	
4	9 Wed	11:50 Departure from Kuala Lumpur (MH704) 15:45 Arrival in Manila (Matsuoka, Takahashi, Mizuta, Koze)	
5	10 Thu	AM Courtesy visit and Interview to the JICA Philippines office PM PITTC, and DTI	
6	11 Fri	JETRO Manila Center Japanese Chamber of Trade and Industry, the Philippines Philippine Chamber of Commerce and Industry Federation of Philippines Industries	
7	12 Sat	14:15 Departure from Manila (SQ073) 17:45 Arrival in Singapore 18:45 Departure from Singapore (SQ166) 19:20 Arrival in Jakarta (Matsuoka, Takahashi, Mizuta)	14:50 Departure from Manila (JL742) 19:50 Arrival in Tokyo (Koze)
8	13 San	Team meeting	11:25 Departure from Tokyo (JL725) 17:05 Arrival in Jakarta (Kobayashi)
9	14 Mon	AM Courtesy visit and Interview to the JICA Indonesia office PM ITTC, and NAFED	
10	15 Tue	JETRO Jakarta Center Jakarta Japan Club Jakarta Chamber of Commerce and Industry	
11	16 Wed	13:10 Departure from Jakarta (TG434) 16:40 Arrival in Bangkok (Matsuoka, Kobayashi, Takahashi, Mizuta)	
12	17 Wed	AM Courtesy visit and Interview to the JICA Thailand office PM ITTI, and DEP	
13	18 Fri	JETRO Bangkok Center Japanese Chamber of Trade and Industry, Thailand Thai Chamber of Commerce and Industry Federation of Thailand Industries	
14	19 Sat	09:10 Departure from Bangkok (JL728) 16:15 Arrival in Osaka (Matsuoka, Takahashi)	08:30 Departure from Bangkok (JL708) 16:10 Arrival in Tokyo (Kobayashi, Mizuta)

現地調査行程表（第2次現地調査）

	Date	Activity	
1	5/22 Sun	14:25 Departure from Osaka (JL713) 22:05 Arrival in Jakarta (Matuoka, Takahashi)	11:25 Departure from Narita (JL725) 16:50 Arrival in Jakarta (Kobayashi, Mizuta)
2	23 Mon	8:30 Mr. Toru Honma, Assistant Resident Presentative, JICA Indonesia Office 10:00 Institute for Economic and Social Reserch, Faculty of Economics University of Indonesia 11:30 Material compilation (BPS)	
		14:00 IETC	
3	24 Tue	11:10 Departure from Jakarta (MH710)	
		14:10 Arrival in Kuala Lumpur	
		17:00 The Japanese Chamber of Trade & Industry, Malaysia	
4	25 Wed	9:30 MIER	
		14:00 MATRADE Export Facilitation Division	
		20:15 Departure from Kuala Lumpur (TG418) 21:25 Arrival in Bangkok	
5	26 Thu	7:30 NIDA Dr. Dr. Wisarn Puppavesa, Director, The Center for International Economics and Development Studies (at the hotel) 8:30 Mr. Inoue, Assistant Resident Represntative, Planning & Coordination Section, JICA Philippine Office 10:30 Dr. Sonon Thitisuia Faculty of Economics Thammasat University (at the hotel)	
		Material compilation, National Statistical Office Dr. Chayun Tantivasadakarn, Associate Professor Faculty of Economics Thammasat University	
6	27 Fri	09:10 Departure from Bangkok (JL728) 16:35 Arrival in Osaka (Matuoka, Takahashi)	08:35 Departure from Bangkok (JL708) 16:35 Arrival in Narita (Kobayashi, Mizuta)

現地調査行程表（第3次現地調査）

	Date	Activity	
1	8/3 Wed	10:45 Departure from Osaka (TG621) 13:35 Arrival in Manila (Matsuoka, Takahashi)	09:40 Departure from Tokyo (JL741) 13:00 Arrival in Manila (Kobayashi, Mizuta,)
		16:00 JICA Philippine Office Mr. Shozo MATSUURA (Resident Representative JICA Philippines)  18:00 De La Salle University Dr. Eric Batalla, Dr. Francisco Magno (La Salle Institute of Governance)	
2	4 Thu	9:00 Board of Investments, Department of Trade and Industry (DTI) Mr. Masaharu TAMAKI (JICA Long Term Expert in SME Promotion Policies)  11:00 Office of Operational Planning, DTI Dir. Mary Jean T. Pacheco, Director, Office of Operational Planning, DTI  14:00 Center for International Trade Expansions and Missions (CITEM) Ms. Dorris Gacho, (Asst. Div. Chief, Corporate Planning Division)	9:30 CTC Exports (Marilao Bulacan)   13:30 Maxi-Metal (Caloocan City)
		9:00 Bureau of Small and Medium Enterprise Development, Department of Trade and Industry Ms. Alice Opena (Division Chief), Mr. Jerry Clavecillas (Assistant Director)  13:00 Bureau of Export Trade Promotion, DTI Ms. Cristina Gonzales (Division Chief, Technical Staff)  16:00 JICA Philippine Office Mr. Shozo MATSUURA (Resident Representative JICA Philippines)	
4	6 Sat	14:40 Departure from Manila (TG621) 16:45 Arrival in Bangkok *all members	
5	7 Sun	Internal meeting	
6	8 Mon	<ul style="list-style-type: none"> <li>・ Department of Export Promotion (DEP) : 原則として各部署の政策・企画担当者</li> <li>(Office of Export Service)</li> <li>International Trade Information Center</li> <li>Office of the Export Planning</li> <li>(Office of Overseas Trade Fair Activities)</li> <li>Product Development Center</li> </ul>	
		7 Tue	<ul style="list-style-type: none"> <li>・ Office of Small and Medium Enterprise Promotion</li> <li>・ (Thailand Board of Investment)</li> <li>・ 質問票調査対象企業 2 社 (軽工業、SI 各 1 社)</li> </ul>
8	10 Wed	09:10 Departure from Bangkok (JL728) 16:35 Arrival in Osaka (Matsuoka, Takahashi)	08:35 Departure from Bangkok (JL708) 16:35 Arrival in Tokyo (Kobayashi, Mizuta)

現地調査行程表（第4次現地調査）

	Date	Activity	
1	8/23 Tue	12:55 Departure from Osaka (JL721) 20:25 Arrival in Kuala Lumpur (Matsuoka, Takahashi)	12:25 Departure from Tokyo (JL723) 18:35 Arrival in Kuala Lumpur (Kobayashi, Mizuta,)
2	24 Wed	10:00-11:30 Electrical and Electronics Unit, MATRADE	A.M. HYT Food Industries SARJET Corporation
		14:30-16:00 Chemicals, Pharmaceuticals, Food, Agricultural Products and Fisheries Unit, MATRADE -Asian / African Division, MATRADE	
3	25 Thu	10:00-11:30 Planning and Strategy Division, MATRADE 13:30-15:15 Mr. Koichi Hayase, Senior Investment Advisor, JETRO 16:00-17:30 Mr. Abdul Hadi Othman, Senior Director, Strategic Planning, MITI (Division responsible for policy on small and medium sized enterprise and industry, and export promotion) -Industronics	
4	26 Fri	09:00-10:00 Ms. Norsalehah, (Director Strategic Planning Division, Small and Medium Industries Development Corporation (SMIDEC) 11:00-12:00 Dr. Mohamed Ariff, Malaysian Institute of Economic Research (MIER) 17:00-17:30 Mr. Akira Murata (Resident Representative, JICA Malaysia Office)	
5	27 Sat	13:35 Departure from Kuala Lumpur (MH721) 14:35 Arrival in Jakarta (Matsuoka, Kobayashi, Takahashi, Mizuta)	14:25 Departure from Osaka (JL713) 22:05 Arrival in Jakarta (Tanaka)
6	28 Sun	Internal meeting - Moving to Surabaya - 13:00 Departure from Jakarta 14:20 Arrival in Surabaya	
7	29 Mon	-Combined interview, the Regional Export Training and Promotion Center in Surabaya, and Bureau of Commerce and Industry, East Java Region -RETPC user company (Request to introduce the RETPC in Surabaya -SMEs or SI - Moving to Jakarta - -Departure from Surabaya - Arrival in Jakarta	
8	30 Tue	-Division responsible for policy planning on supporting industry, MOI -IETC -Naoki Ito, JICA expert, MOI Evening Mr. Shinobu Umeda, JICA Expert, Indonesia Investment Coordinating Board	
9	31 Wed	-Division responsible for policy planning, State Ministry for Cooperatives and Small-Medium Enterprises -Mr. Saburo Izumi, Senior Investment Advisor, JETRO -JICA Indonesia Office 23:20 Departure from Jakarta (Matsuoka, Takahashi)	
			22:35 Departure from Jakarta (JL726) (Kobayashi, Mizuta)
10	1 Thu	-Dr. Saman, Assistant Director for Industrial and Manufacturing Information, Central Bureau of Statistics -Mr. A. Anugrah, Director for Export and Import Facility Development, Ministry of Trade -NAFED 23:20 Departure from Jakarta (JL714) (Tanaka)	
		08:15 Arrival in Osaka (Matsuoka, Takahashi)	07:55 Arrival in Tokyo (Kobayashi, Mizuta)
11	2 Fri	08:15 Arrival in Osaka	

## 参考文献

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