

# ERINA REPORT

ECONOMIC RESEARCH INSTITUTE FOR NORTHEAST ASIA

## ERINA REPORT 120

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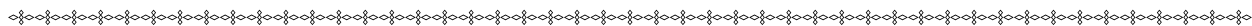
2014  
OCTOBER  
No. 120

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# *On the Special Feature: Northeast Asian Regional Economic Cooperation Mechanisms and the Prospects for and Approaches to Mongolia's Participation Therein*

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The Mongolian Minister of Foreign Affairs L. Bold's participation in the Ministerial Meeting of the ASEAN Regional Forum (ARF) in 2013 has garnered public attention regarding the country's prospects for joining ASEAN and participating in regional mechanisms. At the same time, it is not yet clear to the public what will be the benefits and risks associated with Mongolia's participation in regional political and economic multilateral cooperation mechanisms. There are very few, if any, extensive studies available on these issues.

Against this background, ERINA, jointly with the Mongolian Institute of Strategic Studies (ISS), a government-funded think tank affiliated with the National Security Council of Mongolia, organized a research workshop on 11 August 2014 in Ulaanbaatar to discuss issues related to various aspects of Mongolia's participation in regional economic cooperative mechanisms. Bringing together Mongolian researchers specializing in various fields and representatives from among the country's policy makers, this workshop aimed to get some insights on the possibilities and prospects for the country's joining of these mechanisms.

This is the third research workshop organized by ERINA in Ulaanbaatar in cooperation with collaborating Mongolian organizations. This special feature presents selected papers discussed at this workshop. The key messages of the papers were as follows:

- B. Indra, a Senior Researcher of the ISS, shared her analysis on China's-one of Mongolia's two sole neighbors-strategy for and process of participating in regional organizations. She underlined that although China does not harbor a global strategy, it has a very strong interest in maintaining a regional presence. China's rapid economic growth and increasing power have enabled it to emerge as a prominent and influential player in regional organizations and bear more responsibilities and duties. Therefore, in order to protect its regional interests China is actively pursuing bilateral and multilateral mechanisms within the region, such as the Shanghai Cooperation Organization (SCO) and Boao Forum for Asia (BFA).
- In tandem with Western countries' sanctions against Russia due to the Ukrainian crisis, Russia, the other neighbor of Mongolia, intends to find "new financial partners" in Asia and establish its economic influence throughout the Far East and Asia. Mr. N. Dorjsuren, Head of the Center for China, East Asia Studies, ISS, shared his viewpoint on this issue and informed the participants about Russia's recent moves toward enhancing its economic relations with the DPRK as well as the ROK. He emphasized that the recent economic and commercial negotiations between Russia and the DPRK are useful for both parties as the beginning of a massive regional and geopolitical restructuring in Asia.
- Dr. G. Tumurchuluun, Advisor, Policy Planning and Research Department of Mongolia's Ministry of Foreign Affairs, highlighted that becoming an active player in regional economic interaction has always been a foreign policy priority of the country. According to Mongolia's Foreign Policy Concept, which was approved in 1994, the so-called "4-de" policy objectives of (i) de-Sovietization, (ii) de-ideologization, (iii) decentralization and (iv) democratization were the cornerstone of the country's recent foreign policy. However, as Dr. Tumurchuluun argues, it is too early yet to confirm that these goals have been accomplished.
- Mongolia's history of membership in international organizations began when the country became a member of the United Nations in 1961, and currently Mongolia maintains membership and observer status in nine cooperative organizations in the political, security and economic fields. B. Otgonsuren, Researcher at the Center for China and East Asia Studies, ISS, observed that Mongolia-as a small economy-has heavy external dependence and little influence when participating in regional cooperation mechanisms. Therefore, Mongolia should implement a plan that considers effective ways to cooperate.
- Originating from the UNDP's Tumen River Area Development Programme (TRADP), which was initiated in 1991 with the intention of developing the Tumen River basin delta area, the Greater Tumen Initiative (GTI) constitutes one of the sub-regional cooperation mechanisms in the Northeast Asian region, with four member countries: China, Mongolia, the ROK and Russia. However the performance of the past 20 year-long cooperation has not been that satisfactory, noted D. Irmuun, Director, Division for Promotion and Consultancy Services of the Invest Mongolia Agency and a former staff member of the GTI Secretariat. Yet times are different now, and the member governments at both the central and local levels are now ready to input their resources to regional cooperation projects, and he believes that the GTI has undeniable potential to become the center of this unique region and boost the economic paradigm between those nations involved.

# 特集：北東アジア地域経済協力メカニズムと モンゴルの参入の展望及びアプローチ

## 特集にあたって

ERINA 調査研究部主任研究員 Sh. エンクバヤル

L. ボルド・モンゴル外務大臣が2013年のASEAN地域フォーラム外相会議に参加したことによって、モンゴルのASEANへの加盟と地域メカニズムへの参入に対する見通しに国民の注目が集まった。その一方で、地域の政策的・経済的多国間協力メカニズムへの参入が、モンゴルにどのような恩恵とリスクをもたらすのかは、まだ一般には明確でない。この問題に対する詳細な研究は、ほとんど行われていない。

このようなことを背景に、ERINAは、モンゴル政府の出資によるシンクタンクで国家安全保障会議に所属するモンゴル戦略研究所 (ISS) と共同で、2014年8月11日にウランバートルでワークショップを開催し、モンゴルの地域経済協力メカニズムへの参入の様々な側面に関する課題について話し合った。各分野に詳しいモンゴルの研究者や国の政策立案の代表者らを交えたこの研究発表会の目的は、モンゴルがこれらのメカニズムに参画する可能性と見通しについて見識を深めることであった。

これは、ERINAがモンゴルの共同機関と協力して開催する3回目のワークショップである。本号の特集では、このワークショップで発表された論文のいくつかをそのまま掲載している。各論文が主旨は、次の通りである。

- ISSのB. インドラ主任研究員は、モンゴルと国境を接する2カ国のうちの1つである中国の地域組織への参加に対する戦略と過程について、分析を行った。同研究員によれば、中国は一定の世界戦略を抱いていないが、地域内での存在を維持することに対する関心は非常に高い。急速な経済成長と勢力増大によって、中国は地域組織の中で突出した影響力ある存在として台頭し、より多くの責任と義務を負うことが可能となった。それゆえ、地域の利益を保持するために、中国は、上海協力機構 (SCO) やボアオアジアフォーラム (BFA) など、地域内の二国間、多国間メカニズムを積極的に推進している。
- モンゴルのもう一方の隣人であるロシアは、ウクライナ危機に対する西側諸国の対ロ制裁と並行して、「新しい金融パートナー」をアジアに求め、極東・アジアに経済的影響力を広げようとしている。ISSのN. ドルジスレン中国・東アジア研究センター長は、この点について見解を発表し、最近のロシアの北朝鮮・韓国と

の経済関係強化の動きについて報告した。近年のロシアと北朝鮮との経済的・商業的交渉は、アジアにおける大規模な地域的・地政学的再構築の始まりとして、双方にとって有益であることを強調した。

- モンゴル外務省のG. トゥムルチュルーン政策立案・調査部アドバイザーは、地域経済交流において活発な役割を果たすことが、これまで常にモンゴル外交政策の優先事項であったと述べた。1994年に承認されたモンゴルの外交コンセプトによれば、(1)ソビエト離れ (de-Sovietization)、(2)非イデオロギー化 (de-ideologization)、(3)非集中化 (de-centralization)、(4)民主化 (democratization) という、いわゆる「4つのde」政策目標が、近年のモンゴルの外交政策の要である。しかし、トゥムルチュルーン氏が述べているように、これらの目標が達成されたと断言するのは時期尚早である。
- モンゴルの国際機関への参加は、1961年の国連加盟に始まり、現在は、政策、安全保障、経済の各分野において、9つの協力機関に加盟・オブザーバー参加している。ISSのB. オトゴンスレン研究員によれば、経済規模の小さいモンゴルは、対外依存度が大きく、地域協力メカニズムへの参加の影響力は小さい。そのため、モンゴルは効果的な協力方法を考慮した計画を実行に移すべきである。
- 図們江流域デルタ地帯の開発を目的として、1991年に国連開発計画 (UNDP) が打ち立てた図們江地域開発計画 (TRADP) を母体とする大図們江イニシアチブ (GTI) は、中国・モンゴル・韓国・ロシアの4カ国をメンバー国とする小地域協力メカニズムである。ただし、過去20年間の協力活動は、それほど満足できるものではなかったと、前GTI職員で現在モンゴル投資庁のD. イルムーン促進・コンサルタントサービス部長は述べている。しかし、今や時代は変わり、メンバー国の中央及び地方の政府には、地域協力プロジェクトに各々の資源を投入する準備ができており、GTIが関係各国間の経済的パラダイムを高める中心となる可能性があると述べている。

[英語原稿をERINAにて翻訳]

# *China's Participation in Regional Organizations*

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## **Introduction**

China is a country that does not harbor a global strategy, however, has a very strong interest in maintaining a regional presence. In order to protect its regional interests, China actively practices bilateral and multilateral mechanisms within the region. The recent governing elite led by Xi Jinping is taking steps further in its foreign policy with objectives to not only actively participate in global international organizations, such as the UN and G-20, but also to be more proactive in the regional organizations, such as the BRICS and the Shanghai Cooperation Organization (SCO). This article aims to analyze and explore the three aspects of China's political, economic and security implementation in the regional organizations. Through the existing regional multilateral mechanisms, China is working to strengthen the political trust with surrounding regional states, to seek stable economic development and to establish a cohesive unanimity on ensuring security. Hence, by using multilateral regional cooperation China aims to diffuse any kind of problematic factors that may occur in China's neighboring region.

## **1. Regarding China's participation in regional organizations**

**1.1 China's objectives in participating in regional organizations:** China's foreign policy's principal objective is to create a benevolent external environment for peaceful and stable domestic development. From the early XXI century, the guiding principles of China's foreign policy have been identified as: "to hold relations with major powers as the primary focus, to hold primacy in relations with its neighbors and to hold relations with developing countries as cornerstone" of its multilateral foreign policy objectives.

There are two main external and internal factors for China's active partaking in international organizations. The internal factor is concerned with validating China's place in the world along with implementing its reformed policies, while the external factors such as rapid globalization and intense regional integration have greatly influenced China to take more proactive stance.

**1.2 China's progress and involvement within the regional organizations:** China started to actively partake in the activities of regional organizations beginning from as early as the 1990s. In 1997, China had proclaimed that: "The country was the most responsible great power within the international community". In 2004, China established total of 267 multidimensional international agreements 124 of which were established since the 1990s.<sup>1</sup>

Inasmuch as China's economic strength grew, its interest and capacity in participating in international organizations had also risen in the XXI century: in 2001, an organization named after a Chinese city the Shanghai Cooperation Organization (SCO) was established and the

same year Boao Forum for Asia was created, initiating two substantial global scale regional organizations.

Looking at China's participation in regional organizations, one can observe that in the beginning China carefully participated in the multilateral economic mechanisms and eventually began to partake in all aspects, and furthermore, began to take more proactive stance. For instance, the SCO, the Six Party Talks regarding the Korean peninsula issue, the Boao Forum, the free trade zone between the PRC and ASEAN, the APEC and Summits to strengthen confidence building in Asia are demonstration of China's active involvement in the region.

**1.3 The context of China's participation in regional organizations:** During the 16<sup>th</sup> National Congress of the Communist Party of China held in 2002, it was declared that "the PRC will actively participate in multilateral activities of the world and increase its responsibility within the UN and other international organizations" while during the 17<sup>th</sup> Congress held in 2007, it was declared that "the PRC shall take a more active role in the international community through active participation and bearing responsibilities in the world and shall commit to promoting fair and just international law and order"<sup>2</sup> which indicated a more proactive stance.

During China's 18<sup>th</sup> National Congress, where Xi Jinping assumed the new leadership, it was declared that "the PRC shall take even more proactive role in multilateral activities, while actively supporting the executive duties of the UN, G-20, SCO and BRICS and promote international stability and order in a just manner", which was the first time international organizations were pointed out in particular. It is clear from Xi Jinping's ruling policies that China is trying to actively assume its responsibilities especially within the G-20, SCO and BRICS. For instance, during the G-20 Summit in May, 2013, China urged to improve the multilateral trade mechanism and oppose the trade protection policies. Moreover, during the September and November SCO summits China's "Shanghai Spirit" embodying mutual trust, equal concession, mutual respect for different civilizations and common prosperity was considered as successful depiction of China's involvement in international relations by setting a new and successful norm and standard for the world.<sup>3</sup> Furthermore, during the BRICS summit held in July of 2014, China's role in initiating the "Reserve Fund" and establishment of the BRICS bank indicates its aim to establish a prominent structure within the international financial system.

## **2. China's participation and integration within the regional organizations**

China, as mentioned earlier, is a country that does not harbor a global strategy, however, has a very strong interest in maintaining a regional presence. Hence, in order to maintain its interests in the region, it employs not only

bilateral mechanisms but also multilateral mechanisms actively as well.

**2.1 China on political confidence building:** Not only is China trying to promote its policies towards its neighbors using regional multilateral organizations, but also it aims to strengthen political trust with its neighbors. China actively participates in ministerial summits of the regional organizations. For instance, China participates in summits such as the SCO Summits and Ministerial Summits, ASEAN 10+1, 10+3, 10+6 conferences, all high level meetings, Shangri-La dialogue, Conference on Interaction and Confidence Building Measures in Asia (CICA), East Asia Summit (EAS), and using multilateral dialogues promotes political confidence building in the region. The majority of the participating states in these regional multilateral dialogue mechanisms are China's neighbors and in the past ten years China realized a "friendly neighbor, partner neighbor" and "friendly neighbor, peaceful neighbor and prosperous neighbor" policy along with Xi Jinping's proposal for a "close, reliable, generous and tolerant" neighbor policy that is being promoted through the international mechanisms in order to promote regional political confidence building.

**2.2 China seeks stable economic growth:** China puts economic cooperation as the core of its foreign policy. This is mainly due to China's external leverage for a successful implementation of its new and reformed policies. China joined the APEC in 1989, which was the very first international economic organization and by joining the WTO in 2001, China began a more active participation in the global economic multilateral cooperation. China has participated in regional economic cooperation projects such as: the North East Asian joint economic Tumen River project, the South East Asian Mekong River project, the Yellow Sea free economic zone, Bohai Bay economic rim, Japan's exclusive economic zone and when 10+3 mechanism was created since the 1997s, China began to shift regional economic cooperation towards the East Asia.<sup>4</sup>

After Xi Jinping assumed the leadership, China has become more assertive and rather than a passive player, emerged as a leader in the regional economic cooperation in order to enhance its economic influence. For instance, China proposed an initiative to develop the Eurasian economic integration "One road, one belt" (the New Silk Road Economic Belt and maritime Silk Road). Moreover, in the framework of ASEAN cooperation, China is also advancing the Regional Comprehensive Economic Partnership (RCEP) cooperation. In addition, China aspires not only to use the existing multilateral mechanisms but also establish new regional organizations in order to increase its economic influence in the region. The creation of the Asian Infrastructure Investment Bank (AIIB) and owning 50% of the bank is an apparent illustration of China's aspirations. Additionally, a BRICS bank was

established with the headquarters in Shanghai, China.

**2.3 China's aspiration to establish a joint security union in the region:** China first advocated the "New Security Concept for Asia during the Conference on Interaction and Confidence Building Measures in Asia (CICA), held in May of 2014, in Shanghai. Xi Jinping proposed that "The New Security Concept for secure Asia should be collaborative, cohesive, stable and open" and the proposition was issued in the "Shanghai Declaration" of the conference. Hence, using the CICA as a foundation for joint security cooperation in the region and by establishing an international regional security organization, it is apparent that China would like to assume leadership and fill the gap in Asia's multilateral security mechanism where Asian issues would be resolved by Asian people themselves.<sup>5</sup>

## Conclusion

China's rapid growth and power have enabled China to emerge as a prominent and an influential player in the regional organizations bearing more responsibilities and duties. In other words, for China, it is a historically significant change where it is becoming one of the active initiators in the international system.<sup>6</sup>

Nowadays, China is implementing an external strategy to "stabilize in the East and make a way into the West", aspiring to become the epicenter that links Eurasia. Moreover, using the regional multilateral mechanism, China aims to create a political confidence building, promote stable economic development and establish security integration in the region. Hence, China would like to decrease and diffuse any existing negative factors near its proximity using the multilateral cooperation mechanism, to create interdependence among the regional states and to establish favorable external environment.

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# 地域組織への中国の参加

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## 要旨

中国は一定の国際戦略を抱いていないが、地域内での存在を維持することに関心を持つ超大国である。従って、地域の利益を確保することを目的として、二国間メカニズムよりは地域における多国間メカニズムを積極的に活用している。習近平政権の外交政策には、国連やG20などの国際機関及びメカニズムに積極的に参加する一方、BRICS、上海協力機構など地域的な国際機関において率先して活動することが盛り込まれている。本稿では、地域組織への中国の参加を、政治・経済・安全といった側面から分析する。中国は地域多国間メカニズムを通じて隣国における政治的相互信頼関係を強化し、持続的な経済発展及び安全保障面における緊密な連携を目指し、取り組んでいる。それらは、周辺地域に発生し得る危機を、多国間メカニズムで拡散しようとするための行動である。

キーワード： 中国、地域組織



# *Economic Relationships between the Democratic People's Republic of Korea, Russian Federation and the Republic of Korea (DPRK-Russia-ROK)*

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With the western countries' sanctions against the Russian Federation [Russia] due to the Ukrainian crisis, Moscow is intending to find 'new financial partners' in Asia and settle its economic influence throughout the Far East and Asia. Consequentially, Russia tries to enhance its cooperation in the field of economic relations with China, and it is simultaneously seeking economic and commercial negotiations with the Democratic Peoples' Republic of Korea [DPRK] actively. As a Northeast Asian security expert, this is a considerable issue for me. Thus, this article is intended to reveal the economic relationship between Russia and DPRK as well as the present economic cooperation between the DPRK-Russia - ROK.

## **The economic cooperation of Russia and DPRK refreshes into a new era from its stagnation<sup>1</sup> (From a passive mode into a pro-active mode)**

According to some experts, Asia is supposed to be splitted up under the economic interventions and under the direct and indirect effects of Russia and the USA in the near future. China, which is the main supporter of Russia, is located in this continent, as well as India, and DPRK that are either new or old partners of these countries. As 2014 began, economic correlation between Russia and DPRK is obviously activated, and several significant agreements have been already made. For example:

1. During the visit of Alexander Galushka, Minister for the Development of the Russian Far East, to DPRK from March 24<sup>th</sup> through March 28<sup>th</sup> 2014, the parties negotiated to make their bilateral trade volume to reach USD 1 billion by 2020. The bilateral trade value was just \$112 million in 2013 (*which increased by 48.1% than the amount in 2012*), where Russian export was \$103.4 million which included metallurgical coal, diesel and metal dominantly, and import equaled to \$9.3 million. Now this amount is intended to increase 10 times within the next 6 years per the negotiation between these 2 countries. For this intention, it will be necessary for the parties to intensify their economic cooperation as much as possible. Another issue confirmed during the visit was that the countries agreed to make their financial settlements and payments related to commercial activities in Russian Rubles.<sup>2</sup>
2. In the beginning of April 2014, Russia's State Duma

wrote off 90% of \$10 billion DPRK's debt. The remaining debt of \$1 billion will be repaid in equal installments every six months during the next 20 years. In addition, the payment will be spent to build a gas pipeline and railroad through North Korea to South Korea that can be a valuable contribution of these two countries' economic cooperation. Chronologically, when the United Nations made a resolution to impose sanctions against Russia that deemed responsible for a contested independence referendum in Crimea, Russia signed an agreement with the DPRK for commercial and economic cooperation. This was considered as not an unintentional occurrence.

3. The Presidential Envoy to the Far Eastern Federal District Mr. Yury Trutnev visited Pyongyang from April 28<sup>th</sup> through April 30<sup>th</sup>, 2014. The personnel team of this visit included the Governors of Amur Region, Primorsky and Khabarovsk Territory. As a result, the Ministry of Foreign Trade of the DPRK and the Amur Region Governor signed an agreement on trade and economic cooperation. The Ministry received 50 fire extinguishers as a humanitarian aid.
4. The 6<sup>th</sup> Session of the Russian - North Korean Intergovernmental Commission was held on Russky Island, Vladivostok from June 2<sup>nd</sup> to June 5<sup>th</sup>, 2014. During the session, North Korea revealed the information about its economic free zones, and made several significant decisions mutually on the bilateral economic cooperation development including:
  - To fulfill the agreement made on 22<sup>nd</sup> of May, 2014 to write off the North Korea's debt to Russia (*formerly the Union of Soviet Socialist Republics*);
  - To provide Russian economic institutions, companies and businessmen located in the DPRK with visa facilitation and have a right to use advanced communication technologies such as cell phones and internet within the territory of the DPRK;
  - Russian companies were allowed to make a mineral exploration in the territory of North Korea. Pyongyang Governing authorities announced that they would like to take TU-204 airplane from Russia, and in return, they would approve Russia to exploit its gold mine. In details, as mentioned in the Minutes of this Intergovernmental Commission Session, it has been agreed in advance that 'Chondin' North Korean

<sup>1</sup> Referred on the news dated on 9<sup>th</sup> of June, 2014, by "ITAR Tass" Agency

<sup>2</sup> Yury Trutnev, Presidential Envoy to the Far Eastern Federal District, and Rho Doo Chol, Deputy Prime Minister and Head of the State Planning Committee, agreed to make bilateral trade in Ruble during Yury Trutnev's visit to the DPRK.

Company and 'Severnie Priisky' Russian Company would co-operate a gold mine that is located in Pyoktong County, in the province of North Pyongyang.

- Oleg Vladimirovich Deripaska, Chairman of the Supervisory Board of Basic Element Company, received several economic cooperation proposals from North Korea. He was offered with the maintenance and restructuring of the Thermal Power Station in east Pyongyang, and copper and anthracite mining exploitations.
- Finally, North Korean Governors revealed their interest to import coking coal from Russia for the Kim Chaek Iron and Steel Complex, Chongjin, North Hamgyong Province. If it is agreed, the initial coal import will be 50,000 tons a month. Furthermore, the Russian companies are likely to get involved in the Kaesong Industrial Park, which is co-operated by the North and South Korea.

As the Russian economic cooperation proposals, Russian "TAIF" Company is supposed to build a fuelling station chain in the territory of North Korea based on the permission of DPRK.

- Russia has been obliged to complete the list of companies, by October 1, 2014, that will cooperate on the exploitation of North Korean mining sites such as graphite, zircon, limonite, vermiculite, granite and phosphorus mining sites in Dancheon, South Hamgyeong Province of North Korea. The final decision making process related to the joint mining development is expected to be accelerated so that to get a result before the end of this year as the mining experts were exchanged between two countries.

The concluding observation is that Russian and North Korean Governments have agreed to develop and implement a special mechanism that supports their intergovernmental projects and significant negotiations. In fact, the intergovernmental commission will work directly to make these various negotiations. As the parties have agreed to make all the relevant settlements and payments in ruble, their first transaction in ruble is expected to start from June. One critical statement was given by Alexander Galushka, Minister for the Development of the Russian Far East, where he concluded the session by stating that "These significant economic proposals are dedicated for only the Russian investors. Any other country's investors and economic entities, particularly China's investors, will be unable to be involved in it".

The previous governors' Intergovernmental Commission Session was conducted in August 2011. But Ludmila Zakharova, a Senior Researcher at the Center for Korean Research Institute of Far Eastern Studies, said "Our former

session did not contribute to the bilateral trade and economic cooperation development as much as we expected". Actually, these countries' trade volume was just around \$110 million at the time of the former session; and the sole project concluded by the parties was the railway line that connects the countries. Today a double-track railway between Khasan and Rajin and Freight Terminal Construction in Rajin port with the length of 54km that was built by the Russian investment of \$250 million is about to be opened.

Khasan - Rajin Railway can be considered as the beginning of the connection between North - South Korea Railway and Trans - Siberian Railway. When the project is fulfilled completely, it will become the main gate for Russia to attract massive economic profits from the DPRK. On the other hand, South Korea's decision and attitude is an imperative aspect on the project implementation. But it remains doubtful due to the two Koreans' complicated relationship. Another influential project is a gas that will be delivered into South Korea from Russia through North Korea<sup>3</sup>. However, as the Russian, South and North Korean experts are expressing, the project is sluggish because of its security risk. In such circumstance, Russia made a big political decision to boost their economic and commercial ties with North Korea in 2014.

Although bilateral relationship is intensifying in the economic field, obviously, some difficulties are still persistent in the reality. In the past, the bilateral trade turnover has been declining year by year. It can be said bluntly that their total trade turnover has not exceeded over \$100 million in the past decade. Compared to the international trade volume, it is insignificant amount, whereas the trade turnover between China and the DPRK was \$6.5 billion. Thus, an investment for such an unsustainable economy is still a risk-bearing process for the Russian companies.

Eventually, this new bilateral economic cooperation blossoming between the DPRK and Russia will be dominantly dependent on their immutable effort and diligence; moreover it will be affected by the UN's sanctions against North Korea, as well as the international communities' attitude.

#### **Why does North Korea build a friendship with Russia?**

Since the beginning of 2014, the economic development was being attained by the North Korea as a top priority for relations with Russia. It has several reasons. The North Korean authorities have been adhering to a policy to enhance relations with Russia in order to prevent coming under the Chinese economic influence. Especially the resignation and execution of the 67 year old Jan Son Teak, who was an influential politician of the country, brought a fracture into the relations between China and North Korea. Fuel export into North Korea has been discontinued by

<sup>3</sup> The considerable time spent since the project of gas pipe routed between the Russian Federation - DPRK - PRK had been confirmed. When Kim Jong Il, the Supreme Leader of DPRK visited Russia in August 2011; he initially discussed with the former Russian President, Medvedev, about gas pipe routed from Russia into PRK through DPRK and reached a common expectation. The gas pipe will be 1100 km long and with its prevailing part in DPRK; it is expected to transfer the gas of 10 billion m3 per year. Construction of the gas pipeline between North and South Korea will require \$3.5 billion. Thus, "Gasprom" will contribute to the project.

China for 6 months since January 6<sup>th</sup> 2014. Moreover Xi Jinping's visit to the South Korea at first in July was considered as a "neglectful attitude" that violated the tradition to visit the DPRK first. Thus, according to Alexander Galushka, Minister for the Development of the Russian Far East, an increasing Russia's influence is a profitable choice which also could contribute to getting rid of the North Korean economic crisis; even though the intended target to reach \$1 billion of bilateral trade between Russia and North Korea by 2020 is a small amount compared to the trade and economic relations between China and North Korea.

Finally, about the trilateral railway project: "Korali" Co., Ltd of South Korea reported its request to a party of North in 2014 to build a trilateral training center between Russia, DPRK and South Korea to share experience on railway transportation. The proposal had been expressed by Choi Hyun Hi of the company, but on the last day of the meeting the North side has expressed that it can be promoted. But, "Korali" Co., Ltd has reported that in the future this issue will be discussed with the North. In addition, they reported that Russian "RJD" Trans-Siberian railway will carry out connection of Rajin port of North Korea from the West Siberia. Thus, the trilateral cooperation in railway sector will be greatly facilitated in the case of the proposal of "Korali" Co., Ltd will be promoted.

#### Conclusion

Russia has been working to boost its economic relationship with the Asian countries, particularly with the

DPRK, more than ever before. However, it is useful for both of the parties, as the beginning of a massive regional and geopolitical restructure in Asia. According to Russian experts<sup>4</sup>, Russian economic relationship with the DPRK should be based on the following principles, such as:

1. To maintain the relationship with North and South Korea equally, despite the gap between two Koreas in economic capacity and political regime; to support any measure/event for their conciliation;
2. To fulfill trilateral economic cooperation and joint projects between Russia, DPRK and ROK as much as possible.
  - To connect Trans — Siberian railway with the North — South Korea Railways.
  - To build oil and gas pipeline (*Yakutsk, Kovyktinskoye, South Sakhalinsk versions*)
  - To implement projects that are intended to improve the North Korea's industry based on the investments of the ROK and Japan, and the Russian technical capacity.
  - To build free commercial zones in the territories of Russia and DPRK.
3. To support DPRK to settle a policy ruling for an open economy and cooperate with other international organizations for that purpose.
4. To persuade North Korea to be free of nuclear weapons.
5. To cooperate with the 'great four' countries, North and South Korea and Mongolia to develop a multilateral mechanism on Northeast Asian security and economy.

## 北朝鮮・ロシア・韓国間の経済協力

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#### 要旨

ウクライナ危機に対する西側諸国の対ロ制裁によって、モスクワは「新しい金融パートナー」をアジアに求め、極東・アジアに経済的影響を及ぼそうとしている。その結果、ロシアは経済関係分野における中国との協力を強化し、同時に北朝鮮との間で、経済的・商業的交渉を活発化させている。北東アジアの安全保障専門家として、筆者はこれを大きな問題として捉えている。そのため、本稿では、ロシアと北朝鮮の経済関係並びに北朝鮮・ロシア・韓国間の経済協力の現状を明らかにしたい。

ロシアと北朝鮮の経済貿易の協力関係は2014年に入って急速に進展し、6月には両国の政府間委員会を開き、ロシア・ルーブルでの貿易を始めた。さらに、北朝鮮に進出するロシア企業への支援措置において合意している。本稿では、両国の経済関係強化の要因と背景、そして今後の発展過程についても述べてみたい。

<sup>4</sup> "The Potential Future Scenarios and Russia's Policy" International Fund of Socio-Economic and Political Research (The Gorbachyev Fund)

# *Steps Taken by Mongolia to Join the NEA Regional Cooperation: Together toward the future*

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## **Introduction**

Becoming an active player in regional economic interaction has always been a foreign policy priority of Mongolia. There were two major aspects in this policy development.

1. The Soviet legacy: During the socialist period Mongolia had to cooperate only with the CMEA / Council of Mutual Economic Assistance/ countries that kept Mongolia apart from not only the Northeast Asian economic cooperation, but the world economy as well. So to join the present NEA regional cooperation, Mongolia had to reorient its economic priorities, opting for the free market.
2. The 1994 Mongolian Foreign Policy Concept states that Mongolia will take appropriate steps to get engaged into the regional integration. In doing so, Mongolia expressed its intentions to become a member economy of the APEC and develop bilateral economic ties with related regional countries.

Being an Asia-Pacific country with a growing economy, Mongolia has an enduring aspiration to become a member of APEC - the premier forum for facilitating economic growth, cooperation, trade and investment in the Asia-Pacific. This is one of our foreign policy priorities.

## **Membership in APEC**

It was back in 1993 when Mongolia made its official application for the APEC membership. Mongolia is located in the Asia-Pacific region. It is landlocked between two APEC economies, China and Russia. The Pacific Ocean is Mongolia's only gateway to sea. Mongolia's being part of the Asia-Pacific region is not just a geographical, but also a political fact. It belongs to the Asia-Pacific regional group in all international fora and organizations, including the UN.

Mongolia has substantial and broad-based economic linkages with the existing APEC members. In particular, the value of Mongolia's trade with APEC members, as a percentage of its international trade, is not just relatively high; it is overwhelmingly high. The APEC economies account for 89.5% of Mongolia's foreign trade turnover and 50.62% of total FDI inflows to Mongolia since 1990. If we look at Mongolia's exports, its main export partners are China, Canada and Russia. These 3 APEC economies make up 96.4% of Mongolia's total exports. The same is true for Mongolia's imports. Our main import partners are Russia, China, US, Japan and the ROK. These 5 APEC economies account for 76.8% of Mongolia's total imports. The APEC economies also dominate FDI inflows to Mongolia. China, Singapore, Canada, ROK, US, Russia, Hong Kong,

Australia and Japan are among the top 12 investment partners.

Mongolia will continue to supply commodities primarily to the APEC economies and will substantially increase the supply in the future. The above numbers make an overwhelming case for Mongolia's membership in APEC. Those numbers will also grow further, as we are now expanding our rail and road networks to better connect to the APEC economies. This will also serve the broader goal of expanded trade in the Asia-Pacific region.

The need is stern to diversify Mongolia's economy. A lot needs to be done to bring our economic development levels in line with those of the APEC economies. But, what is important is that we are on the right path. We can best advance on this path as a member of APEC.

There is no doubt that with its growing economy and friendly political relations with every single country in the Asia-Pacific region Mongolia would bring added value to APEC. Mongolian Foreign Minister's participation during the last year's Bali summit in the work of APECC for the first time was an encouraging step for Mongolia to accomplish her aspirations to become an APEC member.

## **PECC**

In 2008 Mongolia became a full member of the Pacific Economic Cooperation Council (PECC) as it found that her membership in the PECC would serve as a bridge towards becoming an APEC member economy. Since 2000 Mongolia worked with PECC as an associate member. Founded in 1980, PECC brings together leading thinkers and decision makers from the governments and businesses in an informal setting to discuss and formulate ideas on the most significant challenges facing the Asia Pacific region. It regularly develops and advocates regional policy initiatives to support the stable economic development of the region.

PECC's regional community building efforts led to the establishment of the official APEC process in 1989, the Council is one of the three official observers of the APEC process.

Participation in the PECC Process depends on a commitment to economic cooperation in the Pacific. PECC participants seek to achieve increased and open regional economic cooperation and interaction, while recognizing both the realities of, and the benefits accruing from, global interdependence and continue to encourage increased economic cooperation and interaction with other nations and regions.

## **East Asia High Level Meeting**

Today there are two complementing structures in East Asia: ASEAN+3 and ASEAN+8 /East Asia High Level

Meeting/. Some observers say that there is a real perspective that they may be reunited in the future to become one single entity. In 2011 the Russian Federation and the USA became its new members increasing its membership to 18. Some call this structure as ASEAN+8. Within the framework of ASEAN+8 important political, economic as well as cultural issues are discussed; thus Mongolia is interested in getting engaged too. Mongolia joined the ASEAN Peace and Cooperation Treaty in 2005, which is one of three conditions to become a member of ASEAN+8.

#### **Mongolia as a Dialogue Partner of ERIA**

The first ever meeting between Mongolia and ERIA was held for the first time on 30<sup>th</sup> of May, 2014 at ASEAN Secretariat in Jakarta. This meeting represented another important step by Mongolia to approach the East Asia High Level Meeting. A congratulatory message to the participants of the meeting was sent by the President of Mongolia H.E. Ts. Elbegdorj. At the meeting, Mongolia was represented by Mongolia President's Foreign and Security Policy Adviser L. Purevsuren and Ambassador S. Khurelbaatar. ERIA was represented by the ASEAN Secretary General Le Luong Min, ERIA's Executive Director J. Nishimura and members of the Council of Directors, designated by the ASEAN member states.

The Economic Research Institute for ASEAN and East Asia or ERIA is an international organization established in Jakarta, Indonesia in 2008 by a formal agreement among the Leaders of 16 countries in the East Asian region to conduct research activities and make policy recommendations for further economic integration in the East Asia. ERIA works very closely with both the ASEAN Secretariat and 16 Research Institutes to undertake and disseminate policy research under the three pillars, namely "Deepening Economic Integration", "Narrowing Development Gaps", and "Sustainable Development" and provide analytical policy recommendations to Leaders and Ministers at their regional meetings. ERIA provides intellectual contributions to East Asian Community building and serves as a Sherpa international organization. ERIA ranks the 28th among the world's "Top 50 International Economic Policy Think Tanks" (the 1st in ASEAN) according to the 2012 Global Go To Think Tanks Index Report conducted by the University of Pennsylvania.

#### **Shangai Cooperation Organization /SCO/**

Mongolia aspires to actively participate in the political and economic process in Central Asia and became an observer state of SCO in 2004 considering that this organization would give Mongolia an extra opportunity for its participation in the Central Asian regional economic cooperation, such as pipelines, road and railway infrastructures, energy cooperation and banking sector as well. Since 2004, Mongolia is taking part in all the meetings at levels of the Ministers for Foreign Affairs, Prime Ministers and the Presidents of this regional organization.

#### **Conclusion**

For Mongolia joining the regional economic, financial and political institutions has been her utmost goal for the last 20 years. This goal was reflected in a number of official documents, including the Foreign Policy Concepts of 1994 and 2011. Nevertheless it is too early to affirm that this goal was accomplished. For instance, Mongolia is trying to join APEC since 1993. In this regard some positive developments are underway. The USA and Canada recently confirmed that they are supporting Mongolia's bid for APEC membership. China, which will be hosting the APEC summit this year and the Russian Federation are also supporting Mongolian willingness to be an APEC member.

A number of factors played its role in Mongolia's lagging behind the regional developments. The first reason was that Mongolia self-isolated from these processes during the Soviet era. So, de-sovietization and democratization of Mongolia's foreign relations has been the number one premise to be integrated into the regional integration. The second reason was the lack of free market experience and the conduct of market economy. The third and very important factor was the economic underdevelopment and the undiversified economy. Once all these challenges accomplished, Mongolia is ripe to be integrated into the regional developments.

Mongolia is home to vast resources of coal, copper, rare earth minerals, uranium, gold and silver and had 17.3% growth rate in 2011 and 12.3% in 2012. It is forecasted that the growth rate in 2014 is going to be around 7%. Mongolia has a potential to strongly influence the political, economic and environmental atmosphere of the Northeast Asian region and it has also a strong potential to be an integral part of the regional developments.

# 北東アジア地域協力参画へのモンゴルのステップ： その将来に向けて

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## 要旨

21世紀初頭、鉱物資源の豊富なモンゴルは、北東アジアの発展に欠かせない国として、国際政治および金融投資社会から注目を集めている。この20年間、モンゴル外交は、地域の経済、金融および政治制度に積極的に参画することを最大の目標とし、1994年と2011年に策定された外交コンセプトにも反映されている。しかし、この目標が達成されたと断言するのは時期尚早である。例えば、モンゴルは1993年以来、APECへの加盟を目指しているが、まだ正式に加盟国にはなっていない。ただし、この点については、最近いくらかの進展が見られ、米国およびカナダがモンゴルのAPEC加盟国入りを支持し、また、ロシアと2014年のAPEC議長国である中国も、モンゴルの加盟を支持している。

地域的发展にモンゴルが遅れてきた背景には、主に次の要因がある。第一は、社会主義時代のモンゴルが国際社会から孤立していたことである。そのため、モンゴルはソ連への依存から離れ、民主的な展開を推進することによって統合に参画することを最大の目標としてきた。第二は、自由市場における経験と市場経済活動が欠如していた点である。第三の非常に重要な要因は、未発展で多様化されていない経済である。これら全ての課題を解決することができれば、モンゴルは地域統合に参画する可能性を見出すことになるだろう。

石炭、銅、レアアース、ウラン、金および銀などの膨大な鉱物資源を保有するモンゴルは、2011年に17.3%、2012年に12.3%の経済成長率を示した。2014年における見通しは約7%である。北東アジア地域の政治、経済、環境分野における動向に強力な影響を及ぼすモンゴルは、地域開発の発展に不可欠な存在になる可能性を秘めた国であると言える。

# *Mongolia's Possibilities and Approaches for Joining Regional Cooperation Mechanisms*

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Mongolia's history of membership in international organizations began when the country became a member of the United Nations (UN) in 1961. The Article 3.2.5.4 of the National Security Concept of Mongolia states that *"The decisions on joining regional or international integration arrangements and concluding free trade agreements shall be made upon research and studies concerning Mongolia's economic security and economic development objectives."* Also, the Foreign Policy Concept of Mongolia underlines that in *"...seeking to accede in international and regional economic integration and infrastructure network"* *"Mongolia shall be promoting bilateral friendly relations and develop cooperation with the countries of the region. Within the framework of this objective, greater attention shall be given to Asia and the Pacific region, in particular to Northeast and Central Asia. Mongolia shall take an active part in the process of initiating policy and activities on the issues of strengthening strategic sustainability and regional security"*(Article 3.21.4 and Article 2.14.3).

Currently, Mongolia maintains membership and observer statuses in 9 cooperative organizations in the political, security and economic fields (Table 1).

## **In the security field**

Mongolia actively participates in the Defense Ministers' Meeting on Regional Security Cooperation, the

Conference on Interaction and Confidence-Building Measures in Asia (CICA), the Council for Security Cooperation in the Asia-Pacific (CSCAP) and has coordinated several meetings and events in Mongolia.

Moreover, Mongolia has been promoting cooperation with many countries in order to secure its own security and development. For instance, the initiative by the Mongolian President Tsakhiagiin Elbegdorj, called the "Ulaanbaatar Dialogue on the Northeast Asia Security", aims to make a contribution in creating conditions of security and sustainable development in the region and supports countries to participate in the dialogue. Furthermore, its purpose lies upon initially acknowledging various issues such as, the regional integration, environmental protection and non-traditional threats, by scientific researches and cooperation<sup>1</sup>. Mongolia has organized a meeting between Japan and North Korea in Ulaanbaatar. The women members of the Mongolian Parliament have also organized the "Northeast Asian Women Parliamentarians' Forum".

As illustrated in Table 1, Mongolia participates actively not only in the security type of regional cooperative organizations, but also those aimed at developing economic cooperation, such as being an observer in SCO and member of ASEAN Regional Forum (ARF). In fact, Mongolia is interested in participating more profoundly in the economic cooperation organizations.

**Table 1 Mongolia's Membership and Observer Statuses in Regional Organizations**

Organization Name	Organization Type and Status		Mongolia's Participation Status
<b>In security field</b>			
CSCAP (The Council for Security Cooperation in the Asia Pacific)	Formal and Informal	Permanent	Member
OSCE (The Organization for Security and Cooperation in Europe.)	Formal	Permanent	Member
The Shangri-La Dialogue	Formal	Permanent	Member
<b>In economic field</b>			
PECC (The Pacific Economic Cooperation Council)	Informal	Non-permanent	Member
<b>Requested membership</b>			
APEC (Asia-Pacific Economic Cooperation)	Formal and Informal	Permanent	Officially requested membership
<b>Other</b>			
SCO (Shanghai Cooperation Organization)	Formal and Informal	Permanent	Observer
ARF (ASEAN Regional Forum)	Formal and Informal	Permanent	Member
FEALAC (The Forum for East Asia-Latin America Cooperation)	Formal	Permanent	Member
Boao Forum for Asia (BFA)	Formal	Permanent	Initial member
ACD (The Asia Cooperation Dialogue)	Informal	Permanent	Member

<sup>1</sup> <http://www.president.mn/eng/newsCenter/viewNews.php?newsId=1172> Speech by H.E. Ts. Elbegdorj, President of Mongolia at the Summit of the Conference on Interaction and Confidence Building Measures in Asia.

### In the economic field

Currently, Mongolia is seeking to actively participate in the regional cooperation mechanisms that promote economic cooperation. In this sense, Mongolia is effectively taking part in the process of initiating policy and activities on the issues of strengthening strategic sustainability and regional security in the Asia and the Pacific region, in particular in the Northeast and Central Asia.

Due to Mongolia's geographic location, which belongs to Central Asia and Northeast Asia, integration or economic cooperation in these regions are important for Mongolia. In East Asia, owing to the differences of political regime, conflict of interests in economic cooperation, competition between great powers and issues on the Korean Peninsula, Northeast Asian cooperation integration has not been able to proceed effectively. For example, the Tumen River Project, which includes North Korea, has not moved forward. China, Japan and South Korea are considering and researching opportunities for establishment of a free trade agreement. It resembles how serious their attitude towards this integration is. Thus, to determine which cooperation is progressive, it comes down to the ASEAN. Furthermore, World Bank announced that East Asia has the fastest growing region in the world.<sup>2</sup>

ASEAN has become one of the ongoing integrations in the East Asia and the core of the integration includes ASEAN+3, ASEAN+6 and ASEAN+Japan. Only 25% of the total ASEAN trade is domestic trade, while trade with ASEAN+3, ASEAN+6 account for 75% of total. Consequently, there is an opportunity to become the third neighbor in Mongolia's foreign trade sector. Hence, Mongolia should seek developing cooperation with ASEAN not only depending on East Asian security cooperation, but also see ASEAN as an opportunity of economic cooperation. Mongolia implements certain steps in this field as becoming a member of ASEAN Regional Forum in 1998, a member of cooperation dialogue in 2004 and signed the Treaty of Amity and Cooperation (TAC) in 2005.

Mongolia has also active economic cooperation with China, Korea and Japan. Mongolia is in the process of signing a treaty of establishing economic partnership agreement with Japan, while Mongolia has a certain level of economic cooperation with Korea. In 2013, Mongolia's imports originated from 137 countries. Import from Russia accounted for 24.6% of total, while those from China, the U.S., Japan and Korea accounted for 28.1%, 8.1%, 7% and 8% of total respectively<sup>3</sup>. In July 2014, Mongolia has substantively agreed to establish a treaty of economic partnership with Japan. If Mongolia could manage to show the world that a large economy can successfully implement economic cooperation with a small economy, Mongolia will have the opportunity to increase participation in multilateral economic cooperation mechanisms with such experience.

Mongolia is making a great effort in acceding to the Asia Pacific Economic Cooperation (APEC) and Mongolia

made an official request for APEC membership in 1993. According to the Mongolian Foreign Minister Luvsanvandangiin Bold's speech at the Foreign Ministers' Meeting of APEC, "APEC accounts for almost 90 % of the total trade volume and 50% of Foreign Direct Investment (FDI) of Mongolia". Consequently, deepening relations with an organization that account for more than half of the global production is of a great importance to Mongolia. On the other hand, owing to Mongolia's advantage in natural resources and geographical location, the projects in transportation system could play a vital role for developing the regional economic infrastructure, which increases trade volume and travel and reduces the scarcity of energy consumption. Therefore, it could be win-win cooperation for Mongolia by joining the APEC<sup>4</sup>. Mongolia has to consider the criteria of membership as stated in the Guidelines of the Ministerial Conference in 1997, such as:

- To be situated in the region of Asia Pacific Ocean;
- To have active economic relations within the region;
- To have market economic preference;
- To recognize the vision and the principles of APEC.

China will lead the APEC's annual meeting from 2014. China plans to implement more than hundred conferences and activities during this period. Hence, there is an optimistic perspective that Mongolia's neighbor China will make a progress in the field.

From the research of the Chinese scholars on APEC, customs duty has decreased from 15.4% to 6.95% during the years from 1988 to 2008. Specifically, the customs duties of the developing countries have dramatically decreased compared to those of the developed countries. However, for some health, environmental and social security concerns, APEC has no zero-rate duties and never announces the duty rates transparently.

Some members of APEC limit the requirements at the level of foreign investments and transfer of technologies. Thus, the developing countries with small economies, like Mongolia, should carefully plan ahead on participation process and focus on certain directions.

Mongolia not only engages in the regional multilateral cooperation, but also participates in regional cooperation mechanisms initiated by China, such as the SCO, Asian Infrastructure Investment Bank, New Silk Road Economic Zone etc.

Mongolia is an observer to the SCO. The SCO still cannot determine its priorities of main functions, whether to be security or economic cooperation, and Mongolia is still observing the process. If certain benefits are provided, there will always be a chance to participate.

China's finance minister, Lou Jiwei said that the Asian Infrastructure Investment Bank (AIIB) will be as "1+10" upon learning a lesson from the composition of the cooperative mechanism between China and ASEAN and is planning to practice it in other Asian countries. As a result, apart from the ASEAN countries, Mongolia and Pakistan were invited to join it as the co-founding members. The

<sup>2</sup> <http://www.worldbank.org/mn/news/press-release/2014/04/07/east-asian-economies-expected-to-grow-at-a-stable-pace-in-2014>

<sup>3</sup> Mongolian Foreign Trade Statistical Analysis and Report (The 4th Quarter of 2013)

<sup>4</sup> <http://bold.parliament.mn/news/categories/929/pages/8837> Mongolia's wish to Accede to the APEC get a step forward.



bank is expected to mostly be funded by China, with \$50 billion and aims to support the infrastructure and investments of Asian countries. Based on the experiences of the similar organizations, the initial investment of the bank will be around 10% of total. The "New Silk Road Economic Zone" that is initiated by Xi Jinping is aiming to be funded by the Asian Infrastructure Investment Bank and Mongolia is interested to participate in the process and seeks export opportunities to the third markets and to develop transit transportation corridors.

### Conclusion

According to the international relations theory, small states indeed face the difficulties of their small economy, heavy external dependence and little influence on

multilateral or bilateral relations as compared to the great powers' participation in the regional cooperation mechanisms. Consequently, Mongolia should implement a plan that considers effective ways to cooperate. From the researcher' point of view, upon engaging in regional economic cooperation mechanisms, Mongolia will be able to benefit from the advantages, such as:

- Create new markets;
- Diversify economic sources and reduce dependency on a single country's economy;
- Increased role in the international economic cooperation organizations; and
- Increased supply of products and reduced dependency on great powers.

## モンゴルの地域協カメカニズムへの参画の見通しと 取り組み

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### 要旨

モンゴルの国際機関への参加は、1961年の国連加盟が最初である。とりわけ、中央アジア並びに東アジアで行われる安全保障と経済協力に関する様々な動きは、この地域の一員であるモンゴルにとって非常に重要である。

モンゴルの外交コンセプトは、次のとおり言及している。「モンゴルの外交活動の第三の方向性として、アジア内における自国の立場を強め、この地域における政策的・経済的統合過程に積極的に参加する。この目的の枠組みの中で、アジア太平洋地域、とりわけ北東・中央アジアに一層目を向けなければならない。モンゴルは、地域の安全保障の強化と集団的な安全保障制度の創造に向けた対話と交渉を始める過程において積極的に関与する」(第2.14.3条)。

しかし、モンゴルは様々な地域協力会議の安全保障会合に定期的に出席してはいるが、経済分野における効果的な協力活動はまだ実現されていない。

世界銀行の調査によれば、東アジアは今もなお経済成長のスピードが最も速い地域である。東アジアの多くの国々と友好関係を持ち、東アジア諸国との2国間貿易のシェアが中国・ロシアに次いで多いモンゴルには、地域の経済協力を積極的に参加する将来性がある。実際、モンゴルは積極的に地域協力に参加し、安全保障問題における地域協力分野で確実に前進している。

[英語原稿をERINAにて翻訳]

# *Opportunities and Challenges of the Greater Tumen Initiative (GTI)*

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Familiarity with the name of the GTI, Greater Tumen Initiative, is limited. Like the other Regional Cooperation Institutions (RCIs), such as the Greater Mekong Sub-region Economic Cooperation Program (GMS), the Central Asia Regional Economic Cooperation (CAREC) Program and the South Asia Sub-regional Economic Cooperation (SASEC) Program, administered by the ADB, GTI is one of the sub-regional cooperation mechanisms with four member countries: China, Mongolia, Republic of Korea and Russia Federation. North Korea used to be one of the original members, but withdrew its membership in 2009. Nevertheless, all members have kept trying the North Korea to re-engage in the GTI cooperation.

The GTI was originated from the UNDP's Tumen River Area Development Programme (TRADP) in 1991 in order to develop so-called the Tumen river basin delta area in which China, North Korea and Russia share their borders.

In 2005, the original programme, Tumen River Area Development Programme (TRADP), was reformulated with the new name of GTI. Geographical scope was expanded from the original Tumen river basin delta area to the wider area that covers the area from Mongolia's eastern provinces, China's three Northern provinces and Inner Mongolia, Russian Far East to South Korea's eastern coastal cities. Governance was also changed. The ownership of the programme moved from UNDP to the member governments, meaning that the GTI is no longer a sub-regional programme under the UNDP's direct control, but a member-driven cooperation mechanism. Last year, in order to further strengthen execution capacity, the member governments agreed to transform the GTI into an independent legal entity by the end of 2015. In October this year, we expect the member governments will adopt an official roadmap for the transformation.

As widely recognized, the GTI region have its huge growth potential with abundant natural resources, huge population and market, complementarities of industries among neighboring countries and, among other things, strategic geographic location that can connect the Eurasian continent with the Asia-Pacific, and vice versa. However, the performance of the past 20 year-long cooperation seems not that satisfactory. Sensitive and delicate geo-political situation and different levels of economic development have been identified as the main bottlenecks hindering advancement of cooperation among the nations. Besides, mismatching policy priorities between the national and regional levels can also be pointed out one of the reasons behind low performance of the GTI for the past years.

20 years ago, in the early 1990s, when the Tumen programme had been initiated, all member countries had to concentrate their resources on the development of their core regions and core areas: the eastern coastal areas in China,

for example. Naturally they had no capacity, if any, to allocate their limited resources to the periphery like Greater Tumen River (GTR) region. We could say that the time was premature then.

However, time is different now. The member governments of both the central and local levels are now ready to input their resources to regional cooperation projects. Political commitment to development of the region has been upgraded. For example, just a few years, leadership in all member states, including North Korea, has been changed. The new leaders of all member countries have been moving their eyes on the Greater Tumen Region, which, of course, aims to explore new growth engine in that region.

With all these favorable political backdrops, GTI is now actively working on, in particular, developing the comprehensive and integrated transport network, trade facilitation and promoting multi-destination tourism, as well as offering various capacity building programmes in 5 priority sectors, together with its strategic partners like the UNDP, UNESCAP and GIZ - the German International Development Assistance agency.

Indeed, GTI has to face challenges to mobilize resources to conduct priority projects on infrastructure construction project, which is similar to that of other sub-regional programmes in Asia. But, the situation of GTI seems more complicated and serious. While most of the sub-regional programmes have been administered and funded by the ADB, GTI cannot fully access to the ADB resources due to some technical and political reasons. Russia is not an ADB member. Three member countries, except for Mongolia, do not hold eligibility status for both the bilateral and multilateral development assistances.

To overcome financial constraint, GTI has been developing two unique strategies: local cooperation and public banks' flagship in large scale infrastructure projects. Since local provinces in the region share common interests to develop regional cooperation, the GTI offers those provinces a Governor-level cooperation platform so that provinces could identify projects and jointly conduct the projects through close consultation with the central government of each member.

The first Governor-level inauguration meeting was held in Changchun, Jilin province and this could bring some meaningful outcomes on some urgent cooperation issues, which include sea-land route connection, railway construction between the bordering cities in eastern Mongolia, Far Eastern Russia and Northern China, as well as the possibility to establish free economic zones in some border cities in the region.

One of the chief processes of the GTI's financial resource mobilization could be integrating and involving the member countries' development and Exim banks. In this

context, the GTI needs to institutionalize the Exim Bank Association that has launched in 2013, which could play an active role in implementing large scale projects and regional public goods by utilizing their own resources and making use of their wide global financial network.

In this sense, potential projects amounting to \$3.5 billion specified in the GTI integrated transport corridor study, which was completed earlier this year, would be the first target for the review of the Northeast Asia (NEA) EXIM Bank Association. The active engagement of these banks will be moved upon the reveal of bankable projects from each member banks either bilaterally or multilaterally. Just recently, BRIC nations announced to establish its own integrated powerful development bank to fund priority projects within its scope and regions and further to finance potential projects from other nations who has expressed interests. The first down installment is \$50 billion with further injection, where there is a possibility if GTI Exim bank association become a one, has a tremendous opportunity in this region with vast potential from

extractive to infrastructure industry. But this would require efforts from each of the banks or the state level to make it happen and most importantly, GTI should engage actively through its every possible channels.

Investment comes when the market is open, government is stable and opportunities are available. Now, this region has different system of politics but open to all investors with stable governments and vast opportunities. Foreign Direct Investment (FDI) has been the major source and major scene in this region for a few decades. But, the increasing competitions from other regions, including the Southeast Asia, decrease of FDI are occurring in this region due to various reasons including political and non-political. Therefore, it is important indeed, to promote this region with full capacity together and there GTI should play the executive role.

Finally, the GTI has undeniable potential to become the center of this unique region to boost economic paradigm between those nations involved if upgraded and peak levels of participation by the member states are occurred.

## 大図們江イニシアチブ（GTI）の可能性と課題

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### 要旨

国連開発計画（UNDP）は、中国・北朝鮮・ロシアが国境を接する、いわゆる図們江流域デルタ地帯の開発を目的として、1991年に図們江地域開発計画（TRADP）を打ち立てた。2005年には新しくGTIとして改編され、主導権はUNDPから各メンバー国政府へ移ったが、それは、GTIがもはやUNDP直轄下の小地域計画ではなく、メンバー国主導の協力体制であることを意味する。

周知のとおり、GTI地域には、豊富な天然資源、膨大な人口と市場、隣国間の産業相補性、そして、とりわけ、ユーラシア大陸とアジア太平洋とを結びつける戦略的地理的立地条件が存在する。しかし、過去20年間の協力活動は、それほど満足できるものではなかった。微妙で繊細な地政学的立場と、レベルの異なる経済発展が、各国の協力推進を阻む大きなボトルネックとなっている。

しかし、今や時代は変わった。メンバー国の中央及び地方の政府には、地域協力プロジェクトに各々の資源を投入する準備ができています。地域開発に対する政治的関与も改善されている。このように、もし、財政的制約を打開し、状況の改善によってメンバー国の参加がより活発になれば、GTIがこの特殊な地域において、関係各国間の経済的パラダイムを高める中心となる可能性があることは疑いようもない。

[英語原稿をERINAにて翻訳]

# Measurement of the Non-Observed Economy in Mongolia

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## 1. Background

Similar to other countries, the National Statistical Office of Mongolia (NSO) has implemented a number of projects to reflect the activities of informal sector in the national economy to the GDP estimation step by step.

Since 1997, estimations of the size of the non-observed economy have been carried out with the support of international organizations. The first survey was conducted in 1999 under the recommendations of the World Bank consultant Mr. Bill Bikales and the informal activities in retail trade sector (kiosk, small retailers operating in streets and markets), transportation (taxi drivers), and food services were added to the official GDP of 2000 for the first time. Since then, the value added of informal sector was estimated by extrapolation on the basis of CPI changes and number of people working with licenses.

The operators who have undeterminable income that is not required to report to the tax authority were covered in the Establishment Census of Mongolia, which was conducted in 2006 and a database of their activities was created. Based on the census results, the activities of those operators were classified by the types of economic activities and their output was reflected to the estimation of GDP of 2006. Also, the previous years' calculations were updated according to the census results.

For the first time, the NSO has estimated the size of non-observed economy in the frameworks of N1-N7 applying the "Handbook for Measurement of the Non-observed Economy, 2002" and the "System of National Accounts, 2008".

Within the framework of the estimation of the non-observed economy of Mongolia, the NSO carried out a number of surveys and calculations. The Survey of the Household Unincorporated Enterprises producing for the Market (HUEMs) was conducted in 2012 at the national level and the survey results were used to determine the total production of informal sector. In addition, the other frameworks of non-observed activities, such as illegal and underground productions were estimated on an annual basis using the associated administrative data sources.

## 2. Conceptual Framework of the Non-observed Economy

The non-observed economy (NOE) refers to all activities that may not be captured in the basic data sources used for national accounts compilation. The following activities are included: underground, illegal, informal, production by household for their own final use, and other activities omitted due to deficiencies in the basic data collection programme. The term 'non-observed economy' encompasses all of these activities and the related statistical estimation problems. The measuring the non-observed economy means that these activities are covered in the system of national account.

Four main indirect methods or approaches are

therefore used here to measure the NOE. These are: (a) the GDP approach, where the discrepancy between national expenditure and income statistics is calculated; (b) the monetary approach; (c) the estimates on electricity consumption approach; and (d) labor input approach based on productivity.

(a) With regard to the first approach, it is to be noted that the usual estimation of GDP may be based on either production, expenditure or income measures. In the national accounting system, all three measures should yield the same aggregates. However, the existence of the NOE may cause discrepancies among the three and make the income (and production) measure of GDP the highest. As such, the discrepancy between an independent production measure of GDP and an independent expenditure measure of GDP can be used as an indicator in measuring extent of the NOE.

(b) Meanwhile, the second approach - the monetary approach - consists of a simple currency ratio method (SCR), the transaction advanced method and currency demand method.

The SCR method basically assumes that all payment transactions in the NOE are realized by using only cash or currency. The SCR method depends on this comparative advantage and based on other assumptions such as (a) the ratio of currency to demand deposits remaining constant except for changes induced by the growth of unreported income, and (b) the income velocity of money being the same in the NOE and in the (official) registered economy, the SCR is able to compute for and determine the size of the NOE by using known parameters of the economy.

The transaction advanced method, on the other hand, assumes the existence of a constant relation over time between the volume of transactions and the official GDP. Relating total nominal GDP to total transactions, one can calculate the GDP of the NOE by subtracting the official GDP from the total nominal GDP.

For the currency demand method, a fundamental reason found to cause the existence of the NOE is the tax burden, such as high tax rates. The main point of the approach is that the shadow economy is nonexistent, when tax rate is zero. The assumption is that velocity of money in the shadow economy is the same as in the official economy

**Table 1 Models based on Different Indicators**

		Price index		Note
		CPI	GDP deflator	
Interest rate	Deposit rate	1-1	1-3	Based on the indicators four different estimation possibilities can be created at the regression equation.
	Loan rate	1-2	1-4	

and computing for a currency demand equation to determine the excess demand part of the money demand (which is assumed to grow as the NOE expands) helps estimate size of the NOE.

(c) The third indirect approach employed by the study - the electricity consumption approach - suggests that the growth of total electricity consumption is an indicator for representing a growth of both the official and unofficial GDP. The difference between the gross rate of registered (official) GDP and the gross rate of total electricity consumption may be attributed to the growth of the NOE.

(d) Finally, the main idea of the fourth approach is that the not-working population (those worked possibly) is working in shadow economy with the same productivity of the official economy.

An analytical framework needs to provide a finer breakdown, incorporating additional characteristics of the non-observed activities. The characteristics by which the non-observed activities may be subdivided into 7 groups (N1-N7) as described in Table 2.

**Table 2 The N1-N7 Framework of the Non-observed Economy**

Classification of the NOE	Framework
1. Underground production	N6 - Producers deliberately misreporting
2. Illegal production (drugs, prostitution etc)	N2 - Producers deliberately not registering - illegal
3. Informal sector production	N1 - Producers deliberately not registering - underground N5 - Registered entrepreneurs not surveyed
4. Household production for own final use	N3 - Producers not required to register
5. Other missed productive activities	N4 - Legal persons not surveyed N7 - Other statistical deficiencies

### 3. Related Survey Estimation and Results

The NSO conducted the following surveys in accordance with the international framework (N1-N7) of the non-observed economy.

1. Survey of household unincorporated enterprises producing for the market;
2. Survey on Experts opinion of intentional distortion of business accounting;
3. Estimation of illegal production.

For estimation of the non-observed economy, several data sources of different periods were used and additional calculations were made in order to have the same base. The survey and estimation periods were as follow:

1. The NUEMs were conducted in the third and fourth quarters of 2012 and it covered 2011 data. The survey on artisanal mining was conducted in the second half of 2012 and it covered 2011 data.

2. The assessments and estimations of legal entities that hide their business income were made on the basis of 2010 data source.

3. The estimation of illegal activities was based on 2010 data.

According to the "Statistical Law" of Mongolia, we measured the size of non-observed economy into 2010 and made the associated calculations in order to use them for the Supply and Use Table /SUT/ and Input and Output table /IOT/ of 2010.

#### 1. Household Unincorporated Enterprise for the Markets (HUEMs)

The sampling of the Survey on Household unincorporated enterprises for the market (HUEMs) was based on the sampling of the Labor Force Survey /LFS/ and it was covered by the following criteria illustrated in Figure 1.

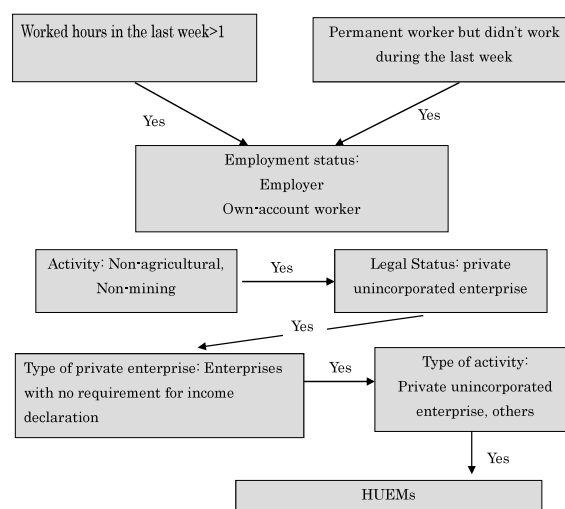
The sampling frame was prepared by aimags (provinces), the capital city, soum<sup>1</sup>, districts, bags<sup>2</sup> and khoroo<sup>3</sup> based on population data and housing census at the end 2010.

The estimated sample size complies with survey budget. The sampling design with an error probability did not exceed 4 percent at the national level and the design sampling effect did not exceed 1.5 percent. Sampling of the LFS covered 12,820 HUEMs; and the Survey on Household Unincorporated Enterprises producing for Market that was conducted by the National Statistical Office of Mongolia covered about 3,008 HUEMs.

We took khoroo<sup>s</sup> of all districts of the Ulaanbaatar city and bags of aimags as Primary Sampling Unit (PSU). The secondary sampling units (SSU) were households.

We collected information on activities of the HUEM, duration of engaging in business, type and condition of the place of business; ownership and registration of the business; keep a financial record; selling or bartering some goods and services on the market.

**Figure 1 Flowchart for Identifying HUEMs from Units Covered by the LFS**



<sup>1</sup> Administrative division of *aimags*

<sup>2</sup> The smallest administrative division of *soums*

<sup>3</sup> The smallest administrative division of *districts*

According to the survey results, there were 163,600 HUEMs conducting industrial, trade and service activities, of which 129,500 units or 79.1% were working in urban areas and 34,100 units or 20.9% working in rural areas. Among the surveyed HUEMs, 18.2% were carrying out industrial activity, 8.0% had construction activity, 44% had trade activity, and 29.8% were engaged in other service activities. The majority of other service activities were transportation that accounted for 66.1% of total.

In terms of the number of household member of the boss and operators of the HUEMs, 10.1% of total had 1-2 household members, 20.6% had 3 household members, 33.1% had 4 household members, 22.6% had 5 household members, and the other 13.5% had 6 and more household members. Accordingly, the HUEMs were providing living sources for almost 700,000 people, whereas 95.9% of total HUEMs were carrying out this business as their primary activity and only 4.1% of them were carrying out this business as their secondary activity. In the manufacture sector, the HUEMs of secondary activity were the highest and accounted for 2,620.

One of the main indicators that show economic sustainability and coverage is the availability of professional premises. 49.1% of all HUEMs were working without professional premises or in streets, improvised post on the road, garbage area, and at the customer's home or in his/her own home. But 50.9% of all HUEMs were working at their professional premises or in shops, public markets and restaurants etc.

209,900 persons worked in the HUEMs, whereas 68% of them were own-account workers, 16.6% wage earners, 9.9% boss/employers, 4.6% unpaid family workers, 0.7% partner workers and 0.2% paid apprentices.

According to the survey results, the HUEMs made

**Table 3 Annual Gross Outputs Intermediate Consumption and Value-Added by ISIC**

Economic activity	Gross output (mln.tog)	Intermediate consumption (Million MNT)	Value added (Million MNT)	Value added per HUEM ('1,000 MNT)	Percentage of the total value added of HUEMs by ISIC
Total	1,663,925.0	645,359.1	1,018,565.9	6,224.6	100.0
Manufacturing	188,651.3	95,699.2	92,952.1	3,214.7	9.1
Water supply; sewerage,waste management and remediation activities	1,064.2	494.3	569.9	721.6	0.1
Constructions	104,405.5	22,818.1	81,587.4	6,240.7	8.0
Whole trade and retail trade; repair of motor vehicles and motorcycles	787,522.5	228,556.8	558,965.6	7,757.4	54.9
Transportation and storage	426,023.1	216,003.3	210,019.8	6,504.6	20.6
Accommodation and food service activities	64,601.4	35,274.8	29,326.6	7,998.1	2.9
Other services	91,656.9	46,512.5	45,144.4	3,513.5	4.4

Source: The Report on Measuring the Non-observed Economy 2010, NSO, 2013

sales of MNT 2,799.2 billion annually. 68.2% of total sales of the HUEMs were generated from wholesale, retail trade and repair of motor vehicles and motorcycles, 15.2% - in transportation and storage activities, 6.8% - in manufacturing activity, 3.7% - in construction activity, 2.5% - in accommodation and food service activities, and the other 3.6% from other activities.

Also, the value added of the HUEMs was MNT 1,018.6 billion annually. Industrial activity contributed to 17.2% of total value added, while trade activity and other service activities were responsible for 54.9% and 17.9% of total respectively. Moreover, in 2011, the artisanal miners produced MNT 19,806.1 million of gross value added and spent MNT 5,583.6 million the intermediate consumption(Table 3).

## 2. Illegal Production

The illegal production shows the N2 framework of the non-observed economy and it is divided into the following 2 categories by their activity type that:

- Produces, transports, sell, stores and transfers to others the goods and services which are illegal;
- Runs the activities illegally or without permissions even though the activities are legally accepted.

The illegal activities, such as drug trade, smuggling of goods and prostitutions which are negotiated between the two sides of the retailers and purchasers are included in the production boundaries. But the other illegal activities, such as robberies which are not negotiated between the two sides, are excluded from the production boundaries. Therefore, the illegal activities that are not negotiated between the two sides are defined as the special type of external factor and their values are not included in the national accounts. The drug trade and prostitutions, which were dominated in the illegal activities, were included in the current estimations.

*Drug trade and consumption:* The calculations of the drug trade were made based on the associated information and surveys from police organizations and some administrative data of the Customs Office and health organizations.

*Prostitution:* Several surveys conducted by the NSO and other organizations were used in the data source of calculating the prostitution activities. For instance, NSO conducted a "Survey on Sex workers and Sexually Exploited Children" in 2010. The estimations were made based on information such as, the total number of prostitutes, the number of prostitutes who serve foreigners, and their monthly average income.

## 3. Underground Production

The underground production represents the N6 framework of the non-observed economy. These are the goods and services that are produced legally, but misreported in the official statistics due to several reasons as follow:

- To avoid income, value added and other taxes;
- To avoid social security contributions;
- To avoid adhering the statutory standards (for example, to evade to adhere to the minimum wage, maximum working time, labor safety and the hygienic standards);

d) To avoid the administrative rules and regulations (for example, evade the statistical questionnaires and administrative registration).

According to the recommendations of SNA-2008, the hidden or underground economy will cover the activities that evade the administrative regulations and duties and the felonious activities will be included in the illegal activities. For this estimation, the parts who avoid paying the taxes and social security contributions and hiding their incomes were covered.

In 2010, 35,276 establishments were carried out their activities, whereas tax inspections were made at 9,465 establishments. Those establishments were divided into several groups by their income interval. As a result, MNT 615.4 billion of underestimated output was estimated in 2010 and it was revealed that 48.6% of mining and quarrying production and 29.6% of trade sector's production were underestimated (Table 4).

**Table 4 Underground Production of Entities that Hide Business Income, 2010**

Sectors	Total Production (MNT Million)	Share of Total, %
Total	615,385.8	100.0
Agriculture	8,060.2	1.3
Mining and quarrying	299,119.6	48.6
Manufacturing	22,490.6	3.7
Electricity, gas and steam and air conditioning	1,454.2	0.2
Water supply; sewerage, waste management and remediation activities	1,443.4	0.2
Construction	35,991.3	5.8
Wholesale and retail trade; repair of motor vehicles and motorcycles	182,378.1	29.6
Transportation and storage	8,275.5	1.3
Accommodation and food service activities	10,190.4	1.7
Other	45,982.5	7.5

Source: The Report on Measuring the Non-observed Economy 2010, NSO, 2013

#### 4. Size of the Non-Observed Economy in Mongolia

We stated earlier, data sources for the estimation of the non-observed activities were of different periods. Therefore, we made additional calculations to transfer the HUEMs results that were conducted in 2011 into 2010. The estimations of illegal and underground production were made through direct method based on 2010 data.

In 2010, size of the non-observed economy of Mongolia was MNT 1,332.1 billion and its share of GDP was 13.7%. 50.9% of the non-observed economy accounted for informal sector's production, 46.2% for underground production, 2.1% for illegal production and the other 0.8% was used for the own final consumption (Table 5).

The size of NOE in construction sector accounted for 35.9% of total that was the highest rate among the industries. Also, this rate was 34.1% for the accommodation and food service activities, 28.8% for wholesale and retail trade, 22.1% for transportation and storage, 13.4% for

**Table 5 Size of the Non-Observed Economy in Mongolia, 2010 (MNT Million)**

Economic activity	Value Added of NOE	Informal Sector Production	Illegal Production	Household Production for Own Final Use	Underground Production
Total	1,332,093.1	678,505.7	27,178.0	11,023.6	615,385.8
Agriculture	8,060.2				8,060.2
Mining and quarrying	305,661.8	6,542.2			299,119.6
Manufacturing	84,089.5	61,598.9			2,2490.6
Electricity, gas, steam and air conditioning supply	1,454.2				1,454.2
Water supply; sewerage, waste management and remediation activities	2,230.2	768.8			1,443.4
Construction	82,511.7	39,292.1		7,228.3	35,991.3
Wholesale and retail trade; repair of motor vehicles and motorcycles	528,875.9	340,643.9	5,853.9		182,378.1
Transportation and storage	186,841.2	178,565.7			8,275.5
Accommodation and food service activities	28,266.1	18,075.7			10,190.4
Other services	104,102.3	33,000.4	21,324.1	3,795.3	45,982.5
Share of NOE	100.0	50.9	2.1	0.8	46.2

Source: The Report on Measuring the Non-observed Economy 2010, NSO, 2013

**Table 6 Share of the Non-Observed Economy of Total Economy in 2010**

Industries	NOE (MNT Million)	GDP (MNT Million)	Total Economy (NOE+GDP)	Share of NOE of Total Economy, %
Total	1,332,093.1	8,414,504.5	9,746,597.6	13.7
Agriculture	8,060.2	1,203,348.0	1,211,408.2	0.7
Mining and quarrying	305,661.8	1,981,970.1	2,287,631.9	13.4
Electricity, gas and air conditioning supply	1,454.2	174,302.8	175,757.0	0.8
Water supply; sewerage, waste remediation activities	2,230.2	33,051.7	35,281.9	6.3
Construction	82,511.7	147,178.0	229,689.7	35.9
Wholes and retail trade; repair of motor vehicle and motorcycles	528,875.9	1,310,622.1	1,839,498.0	28.8
Transportation and storage	186,841.2	659,297.7	846,138.9	22.1
Accommodation	28,266.1	54,553.4	82,819.5	34.1
Other services	104,102.3	2,141,249.1	2,245,351.4	4.6

Source: The Report on Measuring the Non-observed Economy 2010, NSO, 2013

mining and quarrying sector 10.6% for the manufacturing. In terms of the NOE composition, wholesale and retail trade accounted for 39.7% of total, while those of

manufacturing, transportation and storage, construction, accommodation and food service activities were 30.1%, 14.0%, 6.2% and 2.1% respectively. The remaining 7.9% of the NOE accounted for the other sectors (Table 6).

### 5. Summary and Recommendation

In order to conduct this survey, the informative issues of the previous surveys were revised and all the main frameworks of the non-observed activities were covered. Thus, it can be said that this survey was more advanced than the others. Based on the HUEMs, estimation of illegal production and assessments of the entities, which hide their incomes were carried out and the results were combined in order to estimate size of the non-observed activities.

It was estimated that the size of non-observed economy of Mongolia reached MNT 1,332.1 billion in 2010 and it accounted for 13.7% of GDP, whereas 50.9% of the non-observed economy was the informal sector's production and the underground production accounted for 46.2% of total, while those of the illegal production and own final consumption were 2.1% and 0.8% respectively.

Hereafter, the HUEMs should be conducted every 5 years. Thus, value added of the informal sector in the intermediate years can be calculated based on the previous survey results and the number of units identified by the

LFS. Also, it became possible to estimate size of other non-observed activities annually. At the same time, this study recommends the need for simultaneous use of the electricity consumption approach and monetary approach as well for better estimating the Mongolian NOE.

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## モンゴルの未観測経済の計測

モンゴル国家統計局統計情報・研修・支援センター長 A. デンベレル

### 要旨

モンゴル国家統計局は、他国同様、国内経済の非公式部門における活動をGDP推計に反映させるため、着実に多くの事業を実施している。モンゴルの未観測経済推定の枠組みの中で、NSOは調査・算定を何回か行った。2012年には、市場を形成する個人事業主（NEUM）の調査が国レベルで行われ、その結果は非公式部門の生産総額の決定に使われた。

さらに、非合法の地下生産などその他の未観測活動の枠組みも、関連する行政データを利用して年間ベースで推測した。

1. NEUMは2012年の第3、第4四半期に行われ、2011年のデータを含めた。採掘業調査は2012年後半に行われ、2011年のデータを含めた。
2. 事業所得を隠した法人に対する評価・推定は、2010年のデータを元に算出した。
3. 非合法活動は2010年のデータを元に算出した。

モンゴル「統計法」に従って、2010年の未観測経済規模を測定し、2010年の「供給使用表」や「産業連関表」の編集に適用した。2011年は、223,300人が非公式部門に従事し、そのうちの67%が自己勘定労働者であった。2010年までのモンゴルの未観測経済規模は13,321億トゥグルグで、経済全体の13.7%を占めた。未観測経済の50.9%が非公式部門の生産、46.2%が地下生産、2.1%が非合法生産、0.8%が自己最終消費であった。

[英語原稿をERINAにて翻訳]



# 会議・視察報告

## 国際会議「北東アジア安全保障に関するウランバートル対話」の報告

ERINA 調査研究部主任研究員 新井洋史

モンゴル政府は、北東アジアの全ての国との良好な関係を維持していることから、地域の安全保障において独自の役割を果たそうとしている。その一環として、エルベクトルジ大統領の提唱により、2014年6月17日にウランバートル市において標記の国際会議が開催された。政府系シンクタンクのモンゴル戦略研究所が主催し、会場はモンゴル外務省内の大会議室が利用された。北東アジア6カ国のほか、欧米などからも含めて約40人が対話に参加したほか、多くの地元聴講者がいた。

会議は、セッション1「北東アジアの安全保障状況：傾向、課題及び機会（北東アジアの安全保障の全般的レビュー）」、セッション2「北東アジア安全保障問題に対応することを目的とした取組、域内に安全保障機構が存在しない理由」、セッション3「地域協力及び信頼の強化促進における経済、環境等の要素の役割」及びセッション4「将来展望：北東アジアにおける信頼醸成と緊密な地域協力を促進するために何をなすべきか」という4つのセッションから構成された。

以下では、当日の議論のうち、印象に残った点などを中心に紹介したい。まず、何人かの発言者が、北東アジアの安全保障の現状はおおむね良好であるとの見解を示していた点が興味深かった。確かに、世界各地で紛争が起きている状況では、世界全体の中で見れば、北東アジアの状況は比較的良いと言えるのかもしれない。他方、多くの発言者は、北東アジアの国々の間では相互不信が強まり、緊張が高まっていることを指摘していた。近年の状況を見れば、こういった評価の方がしっくりくる。会議の中では、信頼醸成の仕組みづくりが必要だとの提案もなされた。

各セッションの質疑応答の場面では、日中の参加者の中で尖閣諸島や軍備増強などの問題に関するやり取りが繰り返された。特に中国側の政府系シンクタンク関係者の発言は、原則論を繰り返し、議論がかみ合う状況ではなかった。こうした状況に対して、会議終了近くには、他の参加者か

ら、二国間関係を超越して多国間で考えることの必要性と難しさを指摘したり、問題点を指摘するよりも実績に着目して議論した方が建設的ではないかといった意見が出されたりしていた。

こうした観点から見て、最も建設的だったのは筆者も発言者の一人だった第3セッションだと思う。ゼロサムゲームを越えようとの意見や、エネルギー分野でのプロジェクトなどの経済分野での協力を進めることを提案する発言などが続いた。セッションモデレータは、取りまとめの中で、大図們江イニシアチブなどでの協力の進展が進んでいる実態を評価していた。

背景などがよくわからず、当日初めて聞いたテーマの発表も多くあったため、重要な論点を見落としているかもしれないし、会議の趣旨を十分に理解できたとは言えないかもしれない。ただ、普段参加している経済関係、あるいは運輸やエネルギーといった実務的な個別分野の会議とは違う趣で大いに刺激を受けた。1日の会議を終えて、かなり疲れを感じたものの、同時に、経済面での協力が地域の安全保障の向上に建設的な役割を果たしうるのではないかという思いを強くした。今後は、こうした視点を持ちながら様々なテーマに取り組んでいきたい。



筆者撮影

## 陸海複合一貫輸送を推進～第4回GTI運輸部会会合の概要～

ERINA 調査研究部主任研究員 新井洋史

運輸分野は、大図們江イニシアチブ（GTI）の5つの優先分野の一つで、各国の運輸政策担当官庁から構成される「運輸部会」が設置されている。同部会の会合は、毎年1回各国持ち回りで開催されており、今年は6月19日に中国の内モンゴル自治区満洲里市で開催された。満洲里市は、中口国境最大の鉄道駅を擁する国境都市であり、北東アジア地域における陸上交通の要衝である。部会の会合自体は約2時間だったが、その前に「北東アジア運輸協力セミナー」を開催して、政府メンバー以外の専門家らとの意見交換が行われた。全体を通して、各国政府代表者のほか、国連アジア太平洋経済社会委員会（UN/ESCAP）関係者や筆者を含むシンクタンクなど約25名の参加があった。会議は、ホスト国である中国交通運輸部国際合作司の張曉杰氏とGTI事務局長の王維娜氏の共同議長により進行された。

「北東アジア運輸協力セミナー」は、3セッションで構成された。第1セッションの主題は、北東アジアにおける輸送インフラ整備への資金供給であった。GTIが外部コンサルタントに委託して行った調査結果の概要紹介と、それに対する質疑応答が行われた。委託調査では、鉄道、道路、港湾といった交通インフラ整備に関して、世界各地で様々な手法が活用されている状況やそれらの成否、教訓等の分析を行ったことが紹介された。世界各地で民間資金を利用したプロジェクトが展開されているが、必ずしもすべてが成功しているわけではない。輸送需要予測やコスト計算など事前の準備をきちんと行うことが重要だと指摘がなされた。GTIで進めようとしている輸送回廊（「Trans-GTR輸送回廊」）に関しては、最も経済規模が小さいモンゴル

### 満洲里駅



筆者撮影

において、最も多額の資金を必要としているという状況などを指摘していた。今回の調査は、どちらかと言えば一般論であり、GTIの枠内での個別プロジェクトについての具体的な資金スキームの提案が無かったことは残念である。

第2セッションは、輸送の円滑化を視野に、運輸・輸送にかかわる制度などをテーマとした議論が行われた。ここでもGTIが外部委託した調査の報告があった。これは、2012年に実施したTrans-GTR輸送回廊総合調査にも参画したジーンフランシス・ガトリン氏が行ったもので、輸送回廊の実現に向けたソフト面の取り組みについて論じた。これまでたびたび問題になってきた国境手続きの円滑化問題を取り上げ、大メコン圏（GMS）における「越境交通協定（Cross-Border Transport Agreement: CBTA）」はじめ、世界各地の事例を分析した。結論としては、GTIにおいても同様のCBTAを締結するという方策のほか、既存の2国間協定を修正する方策や琿春～ザルビノルートだけに限った協定を締結する案などを併記した。

二つ目の報告として、UN/ESCAP北東アジア地域事務所キラパルチ・ラマクリシナ所長は、ESCAPの枠内で展開されている国際道路輸送の円滑化に関する取り組みを紹介した。中でも、アジアハイウェイ4号線（AH4）に関して、ルート上のロシア、モンゴル及び中国の3か国が通過交通についての協定を準備しているとの情報は興味深かった。これまで約14年という非常に長期間の作業を続けてきており、ようやく協定案のたたき台が示されようとしているとのことである。この3か国の当事国はGTIメンバー国でもあり、この取り組みが進展すればGTIでの協力にも寄与するものと期待できる。

三つ目の報告では、中国交通規画研究院の高美真氏が中国におけるインフラ整備の状況等を紹介した。ハルビン～チチハル、吉林～琿春及び牡丹江～綏芬河などの区間で、ここ1～2年の間に鉄道新線が完成する見込みであることなどや、中口政府間で同江～ニジニレンスコエ間の鉄道橋建設プロジェクトの作業グループが設置されたことなどが紹介された。その上で、輸送円滑化のためには関係国との調整や通関制度の改善などが必要だと指摘した。

第3セッションの主題は、陸海複合一貫輸送であった。このセッションの冒頭では、GTIの委託により韓国海洋研究院（KMI）が実施した委託調査の概要を、同研究院のキム・ユンウ主任研究員が報告した。境港～ドンヘ～ウ

ラジオストックを結ぶDBS フェリー航路など既存の航路のレビューのほか、GDP 成長率を用いた将来貨物量予想もを行っている。2030 年までの間、韓国～ロシア間のフェリー航路の貨物量は、中古自動車や重機が平均年率 6.6%、コンテナは同 1.9%、バルク（雑貨）貨物は 5.0% 増加するといった試算結果であった。中古車や重機の長期予測を行うのに、GDP 成長率を説明変数として用いることには疑問も感じるが、一つの参考にはなろう。結論として、地方政府の支援によりコスト削減を図ることや国際ロジスティクス情報センターを設置することなど、6 点を提案している。

この報告に続き、筆者が、日本と GTI 地域とを結ぶ海上ルートである DBS クルーズフェリー航路や新潟～ザルビノ航路の現状やこれらを支援する鳥取県や新潟県の取り組みなどを紹介した。続いて、ロシアの極東海運研究所（FEMRI）のミハイル・ホロシャ運輸発展部長が、沿海地方政府が推進する国際輸送回廊「プリモリエー 1」、「プリモリエー 2」に関する動きとして、スナグループによる「大ザルビノ港」プロジェクトやスホドール湾における新たな港湾整備構想などを紹介した。さらに、韓国鉄道技術研究院のナ・ヘソン主任研究員が朝鮮半島縦貫鉄道の推進という文脈の中で、「羅津～ハサンプロジェクト」（鉄道・港湾改修）の進展状況や、同研究院が進めてきたフリーゲージトレイン技術の紹介などを行った。

以上の「北東アジア運輸協力セミナー」に続き、政府関係者の協議の場である第 4 回 GTI 運輸部会合が開催された。この中では、各国におけるインフラ整備や国際物流体制整備の進展状況が報告された。中国及びモンゴルからは、モンゴル東部のピチクトから渤海湾の錦州に向かうルートについての言及があった。インフラ整備に関する詳細な情報提供は無く、まだ検討・協議の段階であると思われるが、双方が十分な関心を持っていることが理解できた。モンゴルからの出海ルートとして、有望な選択肢になる可能性があり、注目してきたい。中国及びロシアの参加者からは、両国政府間委員会の運輸分科会の下で黒河～ブラゴベシチェンスク、同江～ニジニレニンスコエなどの国境交通路の整備に向けた作業が進んでいることが紹介された。ロシア側の説明では、同江～ニジニレニンスコエ間の鉄道橋の輸送能力は第 1 期工事完成時点で年間 520 万トン、第 2 期工事完成後は年間 2,000 万トンと計画されているとのことだった。ロシア代表団に随行してきたポートトランス社のアンドレイ・ザゴルスキー社長は、同社が属するスナグループが進めている「大ザルビノ港」プロジェクトの

紹介を行った。同プロジェクトは、既存のザルビノ港に隣接して大規模な港湾整備を行おうとするものである。2020 年には、3,000 万～4,000 万トンの貨物を取り扱うことを想定しており、現在は「投資意向表明」に向けた検討作業を行っているとのことであった。また、スナグループと吉林省との間で協力覚書を交わしたことも紹介された。韓国代表団は、北朝鮮の交通インフラに関する共同研究を行うことを提案したが、今回の会議では本件についての突っ込んだ議論は行われなかった。

続いて、「運輸協力セミナー」で報告があった三つの調査のフォローアップに関する議論及び 2013～14 年の活動計画についての議論が行われた。インフラ整備資金の関連では、各国からの具体的な案件提示を待つことや GTI 輸出入銀行協会との連携を図ることなどが確認された。輸送回廊のソフト面の改善については、既存の二国間ルールの改善を図りつつ、その適用範囲を広げ、将来的には地域全体をカバーする仕組みづくりを目指していくこととなった。海陸複合一貫輸送に関しては、2014 年にかけての 1 年間の活動計画の一環として、複合一貫輸送を促進するためのセミナーを開催することを決定した。このセミナーには、民間企業関係者の積極的な参加を求めている。

最後に、第 5 回会合はモンゴルが議長国となり、2015 年 6 月最終週に同国で開催されることが決まった。

これまでに GTI が開催してきた運輸部会や関連セミナーに参加してきたが、回を重ねるごとにソフト面についての議論が深まってきている。今回の主題は、金融であり、国境通過手続等の問題だった。ソフト面では、既存のインフラをいかに有効に組み合わせることで輸送サービスを提供するかという視点が重要である。その意味で、この問題が最も典型的かつ先鋭的に表れるのが海陸複合一貫輸送である。上述の通り、GTI ではこのテーマの委託調査を実施したほか、複合一貫輸送を促進するためのセミナーを開催することを決定するなど、海陸複合一貫輸送を重視している。委託調査を実施した KMI やロシアの FEMRI も強い関心を持っている。積み替え拠点として期待されるザルビノ港の整備プロジェクトも、ロシアの有力企業グループの一つであるスナグループが主導する形で、実現の可能性が高まってきた。ERINA としても、ロシア沿海地方港湾を利用して中国東北地方と日本の日本海沿岸地域とを結ぶ複合一貫輸送の促進に取り組んでおり、GTI はじめ関係者との協力を深めていきたい。

# 北東アジア動向分析

## 中国

### 東北三省の経済成長率は全国平均を下回る

2014年上半期の東北三省の地域内総生産（GRP）は、遼寧省が前年同期比7.2%増の1兆3,207.5億元、吉林省が同6.8%増の5,141.7億元、黒龍江省が同4.8%増の5,672.3億元となり、三省とも全国平均（同7.4%増）を下回った。『中国企業報』2014年8月12日の記事によれば、全国31省・直轄市・自治区のうち、遼寧省のGRP成長率は25位、吉林省は28位、黒龍江省は最下位であった。

工業生産の動向をみると、2014年上半期の一定規模以上の工業企業（本業の年間売上2,000万元以上）の付加価値額では、遼寧省が前年同期比8.3%増、吉林省が同5.9%増、黒龍江省が同2%増であった。黒龍江省は全国平均（同8.8%増）を大きく下回った。遼寧省の4大基幹産業である装備製造、冶金、農産品加工、石油化学の付加価値額の伸び率はそれぞれ10.7%、9%、8%、3.9%となり、石油化学の伸び率が低かった。

投資動向を示す2014年上半期の固定資産投資額（農家除く）をみると、遼寧省は前年同期比13.1%増の1兆2,656.7億元となり、産業別では第1次産業が同4.6%増、第2次産業が同14.5%増、第3次産業が同12.3%増となり、第2次産業の増加が高かった。吉林省は前年同期比17.0%増（4,155.7億元）、黒龍江省が同1.6%増であった。三省の伸び率はいずれも全国平均水準（同17.3%増）を下回り、黒龍江省は特に低かった。

消費の動向をみると、2014年上半期の社会消費品小売総額は、遼寧省が前年同期比12.4%増（5,637.7億元）、吉林省が同12.1%増（2,843.6億元）、黒龍江省が同12.3%増となり、全国平均（同12.1%）とほぼ同じ水準であった。吉林省では、一定規模以上（1億元以上）の社会消費品小売総額の成長率は同11.9%増（2,564.4億元）で、それ以外の中小企業による小売総額の増加率は同13.6%増（279.2億元）

となり、一定規模以上を上回った。

2014年上半期の貿易動向をみると、輸出の伸び率は、遼寧省が前年同期比0.4%増（305億ドル）と全国平均（同0.9%）に近い数字となったが、吉林省は同20.0%減（26.79億ドル）、黒龍江省が同39%減（341.4億ドル）と大幅に後退した。輸入の伸び率は、遼寧省が13.6%増（273.7億ドル）、吉林省が10.6%増（98.61億ドル）と全国平均（同1.5%増）を上回ったが、黒龍江省は10.9%減（637.5億ドル）と全国平均を大きく下回った。

2014年上半期の消費者物価指数（CPI）については、遼寧省が前期比1.7%上昇、吉林省が同2.1%上昇、黒龍江省が同1.6%上昇となり、全国平均値（同2.3%上昇）とほぼ同程度であった。遼寧省の物価変動を製品別でみると、食品類は同2.6%上昇、居住は同1.5%上昇、医療保健及び個人用品は同1.3%上昇、煙草・酒及び関連製品は同0.2%上昇、衣類は同2.1%上昇となり、食品の上昇率が高かった。

### 国務院は東北振興に新たな支援策を公表

東北経済は昨年からの低迷状態が続いており、2014年に入って全国平均を下回り、特に黒龍江省の成長率は全国最下位となったことから、国務院は8月8日に新たな支援策として「近頃の東北振興を支援するための若干の重要な政策と措置の意見」を打ち出した。既存の東北振興策は「工業構造の転換」、「経済体制改革」、「インフラ整備」、「産業の空間的構造の改善」などを強調していたが、新しい支援策では「市場の活力」、「国有企業改革」、「イノベーション」、「産業競争力」、「農業の持続的発展」などを重要視しているように思える。東北振興政策が実施されて十年余り経過したが、東北経済は資源・エネルギー依存、重工業依存から脱却できたとは言い難い。今後、政府投資による経済成長ではなく、市場の力を育成し、民間資本や外資系企業が活躍できる環境整備に取り組むことが求められよう。

（ERINA調査研究部研究主任 穆堯芋）

		2011年				2012年				2013年				2014年1-6月			
		中国	遼寧	吉林	黒龍江	中国	遼寧	吉林	黒龍江	中国	遼寧	吉林	黒龍江	中国	遼寧	吉林	黒龍江
経済成長率(実質)	%	9.3	12.2	13.8	12.3	7.7	9.5	12.0	10.0	7.7	8.7	8.3	8.0	7.4	7.2	6.8	4.8
工業生産伸び率(付加価値額)	%	13.9	14.9	18.8	13.5	10.0	9.9	14.1	10.5	9.7	9.6	9.6	6.9	8.8	8.3	5.9	2.0
固定資産投資伸び率(名目)	%	23.8	30.2	30.3	33.7	20.3	23.5	30.5	30.0	19.6	15.1	20.0	24.0	17.3	13.1	17.0	1.6
社会消費品小売額伸び率(名目)	%	17.1	17.5	17.5	17.6	14.3	15.7	16.0	15.9	13.1	13.7	13.7	13.8	12.1	12.4	12.1	12.3
輸出入収支	億ドル	1,551.0	61.2	▲120.5	▲31.7	2,311.0	119.1	▲126.1	▲89.5	2,592.0	148.0	▲123.4	▲64.2	1,209.0	31.3	▲71.8	▲296.1
輸出伸び率	%	20.3	18.4	11.7	8.5	7.9	13.5	19.7	▲18.3	7.9	11.4	12.9	12.4	0.9	0.4	▲20.0	▲39.0
輸入伸び率	%	24.9	19.6	37.8	130.0	4.3	2.5	8.9	12.2	7.3	7.8	2.8	▲2.2	1.5	13.6	10.6	▲10.9

(注) 前年同期比

工業生産は、一定規模以上の工業企業のみを対象とする。2011年1月には、一定規模以上の工業企業の最低基準をこれまでの本業の年間売上高500万元から2,000万元に引き上げた。

2011年1月以降、固定資産投資は500万元以上の投資プロジェクトを統計の対象とするが、農村家計を含まない。

(出所) 『中国統計年鑑』2013年版、『遼寧統計年鑑』2013年版、『黒龍江統計年鑑』2013年版、『吉林統計年鑑』2013年版、『遼寧日報』2014年7月29日付、『吉林日報』2014年7月25日付、中国国家统计局、遼寧省統計局、吉林省統計局、黒龍江省統計局、黒龍江省商務庁および国家発展改革委員会東北振興司の資料より作成

## ロシア（極東）

### 鉱業がリードする極東経済

2014年上半期の極東の鉱工業生産は対前年同期比9.2%の増加で、全国平均の1.5%を大きく上回った。連邦構成主体単位で見ると、チュコト自治管区が87%増という著しい伸びを示しているが、経済規模から考えて極東の鉱工業生産の増加に大きく寄与しているのはサハリン州（16.9%増）だと考えられる。そのサハリン州では、鉱工業の構成部門のうち、鉱業部門が17.9%増加しており、製造業部門（2.0%）、電気・ガス・水道部門（5.2%）を大きく上回っている。石油（ガスコンデンセートを含む）が12.9%、天然ガス（随伴ガスを含む）が7.7%増加していることなどが貢献している。このほかに、より大きく増加して全体の増加に貢献している産品があるはずだが、国家統計局のデータからは確認できなかった。その他の連邦構成主体でも鉱業部門が好調である地域が多く、極東全体として鉱業部門は14.0%増加したのに対し、製造業部門は0.1%、電気・ガス・水道部門は2.7%それぞれ減少している。

固定資本投資は相変わらず減少傾向にあり、小売売上高の伸びも小さい。実質貨幣所得が減少しつつある状況下で、外需、特に資源輸出に依存する傾向が強まることが予想される。したがって、極東経済が資源依存から脱却することは、ますます難しくなっているのではないかと考える。

### 「経済制裁」の影響

ウクライナにおける政治混乱に端を発した紛争が深刻化する中、欧米を中心とする西側諸国の対ロシア制裁と、ロシア政府による対抗措置がロシア経済に影響を及ぼしつつある。

仮にそもそも制裁が無かったとしても、外資の流出、あるいは国内資産の海外流出という個々の経済主体の行動と、その結果としての通貨ルーブルの下落という展開は見られたし、相当の期間続いたはずである。このことは、活力を失いつつあったロシア経済にとって相当の重荷となっ

たものと思う。その上さらに、欧米が金融面などでの制裁措置を導入した。いわば資金面での「兵糧攻め」開始が宣言されたわけであり、制裁措置が長引けば、その効果はじわじわと効いてくることになる。

これに対して、西側の制裁措置への対抗措置として発動された欧米等からの農産品の禁輸は、より即効性が高い措置である。皮肉なのは、西側の制裁措置はロシア国民にとって間接的な影響であるのに対し、ロシアの対抗措置がより直接的に市民生活に影響を及ぼすことである。極東もその例外ではない。8月13日版コメルサントデイリー（ウラジオストク版）によれば、沿海地方の食肉加工業者らは、「自分たちが輸入品に90%依存しており、原料のストックは2カ月分しかなく、新しい契約の締結と物流の整備に半年は必要」だと述べている。ロシア国内では、これを機に国内農業生産を高めるべきだとの議論が広くなされている。

ロシア科学アカデミー極東支部経済研究所のパーベル・ミナキル所長はこうした展開が実現することには懐疑的である<sup>1</sup>。国内生産を高めるためには、新規投資の資金が必要であり、またその成果が表れるためには時間も必要である。他方、成果が表れるころには制裁措置や対抗措置が解除されている可能性もある。したがって、合理的な企業経営者はそのような投資を行わないであろうとの考え方である。

ミナキル氏はさらに、問題のカギはロシア政府が握っていると指摘した。ロシア社会は、西側の制裁措置に耐えることは十分可能だが、それへの対応としてロシア政府が採る措置によっては深刻な事態になりかねないとの危惧を持っている。

極東地域は、公共投資の減額というリスクも抱える。ロシア政府はクリミア半島等でのインフラ整備を積極的に進める方針であり、そのあおりで極東向け投資が縮小される可能性がある。今のところ、減額するとの決定はなされていないが、注視していく必要がある。

（ERINA調査研究部主任研究員 新井洋史）

<sup>1</sup> 2014年9月3日、ハバロフスク市内でのインタビューによる。

## 鉱工業生産高成長率（前年同期比％）

	2006	2007	2008	2009	2010	2011	2012	2013	13・1-3月	13・1-6月	14・1-3月	14・1-6月
ロシア連邦	6.3	6.8	0.6	▲9.3	8.2	4.7	2.6	0.3	0.0	0.1	1.1	1.5
極東連邦管区	4.2	35.1	▲0.2	7.6	6.5	8.8	3.1	3.0	▲1.9	1.8	10.5	9.2
サハ共和国	0.0	0.5	4.2	▲13.6	17.6	11.4	6.6	4.2	1.2	5.2	6.7	2.4
カムチャッカ地方	1.6	0.6	0.9	▲0.2	8.6	20.1	8.9	3.0	1.1	2.0	▲1.1	3.0
沿海地方	12.6	2.1	14.6	▲2.7	13.6	19.6	12.2	5.2	2.0	10.2	▲8.7	▲6.2
ハバロフスク地方	▲10.7	10.1	▲7.4	▲6.8	21.3	15.8	11.2	1.7	▲0.1	2.7	1.1	0.7
アムール州	4.7	2.6	11.4	11.4	0.1	25.6	9.0	10.4	21.0	16.1	8.5	6.2
マガダン州	▲11.2	▲9.0	2.1	5.8	3.3	7.7	7.4	3.6	10.9	5.8	▲9.6	3.6
サハリン州	31.1	2.3倍	▲9.2	26.6	0.0	2.9	▲4.1	0.4	▲7.4	▲3.2	20.0	16.9
ユダヤ自治州	4.2	22.7	18.6	▲18.8	2.3	4.1	2.0	▲4.2	5.6	▲1.9	8.7	15.3
チュコト自治管区	▲9.1	▲2.3	77.4	16.3	▲9.7	▲6.5	▲1.7	18.0	▲3.7	▲1.8	81.7	87.0

(出所)『ロシア統計年鑑（2012年版、2013年版）』；『ロシアの社会経済情勢（2013年3、6、9、12月；2014年3、6月）』（ロシア連邦国家統計庁）

## 固定資本投資成長率（前年同期比％）

	2006	2007	2008	2009	2010	2011	2012	2013	13・1-3月	13・1-6月	14・1-3月	14・1-6月
ロシア連邦	16.7	22.7	9.9	▲15.7	6.3	10.8	6.6	▲0.2	0.1	▲1.4	▲4.8	▲2.8
極東連邦管区	2.3	18.9	11.7	7.1	6.1	26.5	▲14.8	▲19.5	▲21.5	▲20.9	▲7.0	▲6.7
サハ共和国	2.1	92.2	14.0	9.4	▲36.2	36.9	10.2	▲10.4	▲26.0	▲13.9	7.2	1.7
カムチャッカ地方	5.2	33.5	5.4	27.7	18.7	▲4.0	5.8	▲10.0	▲59.2	▲44.2	20.6	▲15.3
沿海地方	6.4	20.6	41.5	74.3	21.3	34.1	▲41.0	▲45.2	▲50.6	▲51.1	▲6.8	8.6
ハバロフスク地方	8.7	22.9	9.9	8.1	52.2	7.8	▲11.3	▲26.2	▲8.2	▲18.0	▲4.6	▲5.5
アムール州	5.1	38.9	24.1	▲11.4	19.5	31.3	▲20.0	▲2.9	▲14.5	▲2.1	▲40.8	▲31.3
マガダン州	23.9	28.7	15.1	▲0.2	▲0.1	4.6	21.3	8.9	72.2	32.5	▲38.3	25.4
サハリン州	0.3	▲18.1	▲5.5	▲24.6	11.2	32.6	▲8.1	▲2.5	▲3.4	▲11.2	0.8	▲10.8
ユダヤ自治州	▲1.2	20.3	4.5	▲16.3	2.0倍	21.6	▲11.5	▲52.3	▲69.1	▲55.0	29.9	▲11.6
チュコト自治管区	▲38.6	1.6	29.5	61.9	▲66.1	70.3	51.6	▲44.3	15.4	23.0	▲13.2	▲65.3

(出所)『ロシア統計年鑑（2012年版、2013年版）』；『極東連邦管区の社会経済情勢（2013年）』；『ロシアの社会経済情勢（2013年4、7月；2014年4、7月）』（ロシア連邦国家統計庁）

## 小売販売額成長率（前年同期比％）

	2006	2007	2008	2009	2010	2011	2012	2013	13・1-3月	13・1-6月	14・1-3月	14・1-6月
ロシア連邦	14.1	16.1	13.7	▲5.1	6.5	7.1	6.3	3.9	3.9	3.7	3.5	2.7
極東連邦管区	12.9	11.2	10.6	0.7	3.7	5.3	4.8	4.9	4.2	4.5	2.8	2.3
サハ共和国	8.6	7.4	7.6	2.1	3.6	2.7	2.6	4.5	0.9	2.4	2.3	2.0
カムチャッカ地方	10.8	12.8	9.4	1.6	3.1	5.0	2.6	0.1	0.4	0.2	0.8	▲0.9
沿海地方	12.9	11.8	9.9	▲2.3	2.2	3.5	4.4	8.3	5.6	7.3	3.6	3.3
ハバロフスク地方	13.3	15.3	7.9	3.6	6.2	6.4	4.9	4.3	5.9	5.8	4.2	4.2
アムール州	13.7	12.0	12.8	▲2.5	6.0	18.7	14.3	5.4	7.2	5.7	4.4	2.4
マガダン州	9.6	10.0	3.1	▲0.3	4.4	5.5	6.3	6.2	9.3	8.9	▲1.4	2.6
サハリン州	22.1	7.9	20.0	2.5	1.3	2.2	1.4	2.1	0.7	▲0.3	0.5	▲0.2
ユダヤ自治州	5.4	6.1	8.1	1.9	2.7	▲5.8	4.2	▲0.9	2.3	0.6	▲1.7	▲2.8
チュコト自治管区	6.4	12.9	55.9	3.2	8.2	1.6	▲8.6	▲9.6	▲5.0	▲8.2	▲4.4	▲8.3

(出所)『ロシア統計年鑑（2012年版、2013年版）』；『ロシアの社会経済情勢（2013年3、6、9、12月；2014年3、6月）』（ロシア連邦国家統計庁）

## 消費者物価上昇率（前年12月比％）

	2006	2007	2008	2009	2010	2011	2012	2013	13・1-3月	13・1-6月	14・1-3月	14・1-6月
ロシア連邦	9.0	11.9	13.3	8.8	8.8	6.1	6.6	6.5	1.9	3.5	2.3	4.8
極東連邦管区	8.8	9.6	13.6	9.7	7.7	6.8	5.9	6.6	1.9	3.4	1.7	3.7
サハ共和国	11.9	9.0	12.5	8.2	6.0	7.0	5.4	6.0	1.6	3.0	1.7	3.5
カムチャッカ地方	11.6	10.1	14.8	10.7	10.2	5.8	5.6	6.3	1.0	2.5	1.2	3.0
沿海地方	7.1	9.7	13.5	9.5	7.0	5.6	6.0	6.3	2.1	3.4	1.9	4.1
ハバロフスク地方	8.7	9.8	14.1	9.5	8.1	7.9	5.4	6.3	1.9	3.5	2.0	4.0
アムール州	9.1	9.6	14.1	9.6	9.4	7.6	7.2	7.7	1.8	3.7	1.5	3.4
マガダン州	8.1	13.3	19.3	13.4	8.5	9.2	8.7	9.0	2.8	4.3	▲1.0	1.1
サハリン州	10.4	11.8	13.1	10.7	10.0	6.4	6.0	6.5	1.8	4.0	1.6	3.6
ユダヤ自治州	5.5	11.7	15.0	12.2	9.5	8.9	6.5	8.5	2.5	4.1	1.7	3.8
チュコト自治管区	11.2	7.5	9.9	17.2	1.4	5.4	6.0	5.2	2.8	2.9	2.7	4.0

(出所)『ロシア統計年鑑（各年版）』；『ロシアの社会経済情勢（2013年3、6、9、12月；2014年3、6月）』（ロシア連邦国家統計庁）

## 実質貨幣所得成長率（前年同期比％）

	2006	2007	2008	2009	2010	2011	2012	2013	13・1-3月	13・1-6月	14・1-3月	14・1-6月
ロシア連邦	14.1	13.1	3.8	1.8	5.4	1.2	5.8	3.7	5.0	5.2	▲1.8	▲2.3
極東連邦管区	12.1	10.6	3.4	4.0	3.5	1.5	4.9	4.7	6.1	5.7	▲3.8	▲1.7
サハ共和国	6.1	5.1	8.6	1.7	2.9	3.4	5.9	2.6	2.9	1.1	2.9	▲4.4
カムチャッカ地方	7.1	8.8	4.9	3.9	3.2	▲0.8	3.6	0.6	4.4	4.9	▲5.5	▲5.7
沿海地方	15.0	10.6	4.0	6.5	5.5	2.9	5.1	5.9	8.0	8.9	▲3.8	4.0
ハバロフスク地方	14.3	12.1	▲4.9	8.4	4.7	▲2.8	2.7	4.5	6.6	5.5	▲12.7	▲0.9
アムール州	10.3	19.6	11.5	▲5.5	4.4	12.9	13.3	2.6	4.0	3.6	1.7	▲3.9
マガダン州	9.1	6.8	1.0	2.5	3.8	▲2.0	10.5	6.2	2.0	7.2	▲7.4	▲2.2
サハリン州	14.1	12.4	6.8	▲0.6	▲2.2	▲3.1	▲1.3	12.7	11.9	8.5	2.0	▲6.3
ユダヤ自治州	8.3	5.5	12.0	4.7	3.5	▲3.2	2.2	▲0.7	0.6	1.5	1.5	▲9.5
チュコト自治管区	7.2	4.4	5.2	▲8.1	6.0	9.5	5.9	▲15.6	▲2.5	▲2.2	▲5.8	▲6.1

(出所)『ロシア統計年鑑（2010年版、2012年版、2013年版）』；『ロシアの社会経済情勢（2013年4、7月；2014年1、4、7月）』（ロシア連邦国家統計庁）

\*斜体：速報値

## 平均月額名目賃金（ルーブル）

	2006	2007	2008	2009	2010	2011	2012	2013	13・1-3月	13・1-6月	14・1-3月	14・1-6月
ロシア連邦	10,634	13,593	17,290	18,638	20,952	23,369	26,629	29,960	28,788	27,339	30,057	31,509
極東連邦管区	13,711	16,713	20,778	23,158	25,814	29,320	33,584	37,357	35,608	33,876	37,704	39,469
サハ共和国	16,168	19,409	23,816	26,533	28,708	34,052	39,916	46,162	43,411	39,825	45,844	49,139
カムチャッカ地方	18,541	21,815	27,254	31,570	35,748	39,326	43,552	48,591	47,641	43,812	49,577	52,284
沿海地方	10,903	13,174	16,805	18,997	21,889	24,423	27,445	29,970	28,419	27,282	30,488	31,693
ハバロフスク地方	12,888	15,884	18,985	20,455	22,657	26,156	31,076	33,819	32,095	30,707	33,352	34,835
アムール州	11,111	13,534	16,665	19,019	21,208	24,202	26,789	29,895	28,797	28,037	30,015	31,449
マガダン州	17,747	22,102	28,030	32,657	36,582	41,934	49,667	57,101	55,374	52,797	55,446	58,812
サハリン州	18,842	23,346	30,060	32,626	35,848	38,771	44,208	48,438	46,509	45,792	52,810	53,238
ユダヤ自治州	9,529	11,969	15,038	16,890	19,718	22,928	25,067	27,154	26,117	24,869	27,305	28,591
チュコト自治管区	25,703	30,859	38,317	42,534	46,866	53,369	60,807	70,191	67,783	65,035	71,352	75,399

(出所)『ロシア統計年鑑（2010年版、2012年版、2013年版）』；『ロシアの社会経済情勢（2013年4、7月；2014年1、4、7月）』（ロシア連邦国家統計庁）

## モンゴル

モンゴル経済は引き続き拡大しているが、そのペースはスローダウンしている。月次の鉱工業生産額は6月から低下を始めている。通貨の減価は継続し、輸入品をはじめとする消費者物価の上昇をもたらしている。

### マクロ経済指標

2014年第2四半期のGDP成長率は前年同期比3.8%で、前期の同7.5%から低下した。季節調整値では前期比2%の増加となった。これによって2014年上半期の成長率は前年同期比5.3%となった。鉱業を除くほとんど全ての経済部門が低調であった。固定資本形成は前年同期の3分の1減となった。これは固定資本形成の大部分を占める対内直接投資(FDI)の減少によるものである。第2四半期の対内直接投資は前年同期比56%減となっている。

鉱工業生産額は6月から低下を始め、前年同月比14減、7月に同4.1%減、8月に同11.8%減となった。ほとんど全ての製造業と公益事業で生産額は前年同期を下回っている。鉱業部門は、金属鉱石(銅及び金)と原油の生産増によって、成長を継続してきた。しかしその生産額も、8月には石炭の生産減少によって前年同月比12.2%減となった。1-8月期の原油生産は前年同期を55.5%上回り470万バレルであった。また同時期に銅精鉱の生産は前年同期を42%上回り、655,400トンであった。

登録失業者数は2014年6月末で33,900人、8月末で32,900人であった。これは主に、建設業及び工業における夏の季節雇用の増加によるものである。

消費者物価上昇率は2014年6月に前年同月比12.9%、7月に同14.9%、8月に同13.7%であった。消費者物価を構成する全ての品目で価格が上昇している。通貨トゥグルグの主要通貨に対する減価が、輸入品の価格上昇をもたらしている。2014年7月の対米国ドル平均為替レートは1ドル=1,844トゥグルグで、前年同月比25%の減価であった。8月はさらに同1,862トゥグルグに減価している。

2014年上半期の国家財政収支は2,410億トゥグルグの赤字であった。しかし、7月は800億トゥグルグ、8月は80億トゥグルグのそれぞれ黒字を記録した。1-8月期の累

積では1,530億ドルの赤字となった。同期間中、財政収入は前年同期を6.7%上回ったが、財政支出も前年同期を10.3%上回った。経済活動の低迷により、1-8月期の法人所得税は前年同期を13.3%下回った。財政支出の増加は、財・サービスへの支出、移転・補助金、借り入れに対する金利支払いなどの増加による。借り入れに対する金利支払い額は前年同期を90.4%上回り、1,162億トゥグルグ、650万ドルとなった。

### 通貨及び金融

2014年6月末の貨幣供給量(M2)は10.1兆トゥグルグ、55.4億ドルで、前年同期を21%上回った。

2014年6月末の融資残高は前年同期を43%上回る12.3兆トゥグルグ、67.4億ドルとなった。しかし、融資残高の伸び率は金融引き締め政策により、7月末には34%、8月末には26%と低下している。モンゴル銀行(中央銀行)に決定する政策金利は、7月31日に1.5ポイント引き上げられて12%となった。8月末の不良債権比率は5%に止まっているが、不良債権の額は前年同期をトゥグルグ建てで33.4%、米ドル建てで12.5%、それぞれ上回っている。

### 外国貿易

2014年1-8月の貿易総額は72億ドルで、前年同期を3.1%上回った。輸出は銅精鉱と原油の輸出増に支えられて、前年同期を32.3%上回ったが、輸入はFDIの減少と通貨の減価による輸入価格の上昇により、前年同期を15.4%下回った。結果として貿易収支の赤字は前年同期の16億ドルから、2,300万ドルに縮小した。

中国との貿易額は44億ドルで、全体の61.2%を占めた。ロシアとの貿易額は11億ドルで、全体の15.1%であった。鉱業品の輸出増加によって中国との貿易額は前年同期比25%増加した。ロシアとの貿易額は5%増であった。

モンゴルは二つの巨大な隣国との経済的結びつきを強化しようと図っており、最近の習近平、プーチン両首脳とのモンゴル訪問は、そのための重要な一里塚であった。モンゴルと中国は「包括的戦略連携協定」に調印し、2020年までに両国間の貿易額を100億ドルに拡大することに合意した。

(ERINA調査研究部主任研究員 Sh. エンクバヤル)

	2010年	2011年	2012年	2013年	2014年1Q	2014年2Q	2014年1-6月	2014年6月	2014年7月	2014年8月
実質GDP成長率(対前年同期比:%)	6.4	17.5	12.6	11.7	7.5	3.8	5.3	—	—	—
鉱工業生産額(対前年同期比:%)	10.0	9.7	7.2	16.1	4.6	—	—	▲ 4.0	▲ 4.1	▲ 11.8
消費者物価上昇率(対前年同期比:%)	10.1	9.2	14.3	10.5	12.3	13.5	12.9	14.6	14.9	13.7
登録失業者(千人)	38.3	57.2	35.8	42.8	34.3	33.9	33.9	33.9	34.7	32.9
対ドル為替レート(トゥグルグ)	1,356	1,266	1,359	1,526	1,746	1,807	1,777	1,825	1,844	1,862
貨幣供給量(M2)の変化(対前年同期比:%)	63	37	19	24	36	26	26	26.27439431	25	21
融資残高の変化(対前年同期比:%)	23	73	24	54	54	43	43	43	34	26
不良債権比率(%)	11.5	5.8	4.2	5.0	5.0	4.6	4.6	4.6	4.9	5.0
貿易収支(百万USドル)	▲ 292	▲ 1,781	▲ 2,354	▲ 2,089	▲ 9	▲ 135	▲ 144	54	▲ 64	185
輸出(百万USドル)	2,909	4,818	4,385	4,269	987	1,494	2,481	559	460	636
輸入(百万USドル)	3,200	6,598	6,738	6,358	996	1,628	2,624	505	524	451
国家財政収支(十億トゥグルグ)	42	▲ 770	▲ 1,131	▲ 297	▲ 159	▲ 82	▲ 241	▲ 134	80.0	8
国内貨物輸送(%)	34.5	34.7	1.7	▲ 1.3	18.2	21.5	18.1	—	—	—
国内鉄道貨物輸送(%)	31	11	6.3	▲ 0.5	▲ 2.6	▲ 7.0	▲ 6.7	▲ 13.0	▲ 1.5	11.0
成畜死亡数(%)	495.5	▲ 93.7	▲ 34.1	84.8	▲ 64.0	▲ 46.0	▲ 53.0	▲ 59.0	—	—

(注) 消費者物価上昇率、登録失業者数、貨幣供給量、融資残高、不良債権比率は期末値、為替レートは期中平均値。

(出所) モンゴル国家統計局「モンゴル統計年鑑」、「モンゴル統計月報」各号ほか



## 韓国

### マクロ経済動向

韓国銀行（中央銀行）が9月4日に公表した2014年第2四半期の成長率（速報値）は、季節調整値で前期比0.5%（年率換算2.0%）で、前期の同0.9%から低下した。需要項目別に見ると内需では、最終消費支出は同▲0.2%で前期の同0.1%からマイナスに転じた。固定資本形成は同▲0.2%で、やはり前期の同3.2%からマイナスに転じた。その内訳では、建設投資は同0.4%で前期の同5.1%から大きく低下した。一方、設備投資は同1.1%で前期の同▲1.9%からプラスに転じた。外需である財・サービスの輸出は同1.7%で前期の同1.5%を上回った。

2014年第2四半期の鉱工業生産指数の伸び率は季節調整値で前期比▲1.1%となり、前期の同0.3%からマイナスに転じた。月次では季節調整値で、2014年6月は前月比2.7%、8月は同1.2%となっている。

2014年第2四半期の失業率は季節調整値で3.7%となり、前期の同3.6%を上回った。月次では同じく季節調整値で、2014年6月は3.6%、7月は3.4%、8月は3.5%となっている。

2014年第2四半期の貿易収支（IMF方式）は264億ドルの黒字であった。月次では、2014年6月は66億ドル、7月は69億ドルのそれぞれ黒字である。

対ドル為替レートは2014年3月に1ドル=1,071ウォン、4月に同1,043ウォン、5月に同1,024ウォンと推移している。

消費者物価上昇率は6月に前年同月比1.7%、7月に同1.6%、8月に同1.4%と推移している。生産者物価上昇率は6月に前年同月比0.1%、7月に同0.2%と推移している。

### 今後の展望

韓国銀行は7月10日に経済見通しを発表し、2014年の成長率を3.8%とし4月時点の4.0%から下方修正した。また

2015年の成長率は4.0%で、やはり4月の4.2%から下方修正している。

2014年の予測成長率を需要項目別に見ると、内需は民間消費が2.3%で前年の2.0%を上回ると見込んでいる。また、投資では設備投資が5.7%で、前年の▲1.5%からプラスに転ずるとしている。建設投資は1.7%で、前年の6.7%から大きく低下するとしている。外需である輸出は6.1%で、前年の4.5%を上回るとしている。

また、2015年の予測成長率を需要項目別に見ると民間消費は3.6%と堅調に伸びるとしている。また、投資では設備投資が6.3%で、2014年を上回り、建設投資は7.0%で2014年並みの水準を維持するとしている。外需である輸出は7.5%で、2014年を上回るとしている。

失業率は2014年には3.5%で2013年の3.1%から上昇するが、2015年には3.3%に低下するとしている。雇用者数の増加は2013年39万人から、2014年は50万人、2015年は45万人と拡大すると見込んでいる。

一方、消費者物価上昇率は前年の1.3%から高まり、2014年には1.9%となり、2015年にはさらに上昇して2.7%となると予測している。

### 迷走続く政治状況

4月の旅客船セウォル号沈没事故を契機に、韓国の政局は混迷を深めている。

遺族の求める「真相調査特別委員会」への捜査・起訴権の付与を巡り、国会の与野党は対立を続けており、このため5月3日以降、新たな法案は一件も成立していない。

朴政権が景気対策として打ち出した41兆ウォン規模の財政支出を含む景気対策関連法案も、成立の見通しが全く立っておらず、経済運営にも直接的な影響が生じかねない状況となっている。

（ERINA調査研究部主任研究員 中島朋義）

	2009年	2010年	2011年	2012年	2013年	13年7-9月	10-12月	14年1-3月	4-6月	2014年6月	7月	8月
実質国内総生産(%)	0.3	6.3	3.7	2.3	3.0	1.1	0.9	0.9	0.5	—	—	—
最終消費支出(%)	1.2	4.1	2.3	2.2	2.2	0.9	0.6	0.1	▲0.2	—	—	—
固定資本形成(%)	▲1.0	5.8	▲1.0	▲0.5	4.2	1.1	▲0.7	3.2	▲0.2	—	—	—
鉱工業生産指数(%)	▲0.1	16.3	6.0	1.3	0.4	0.1	1.9	0.3	▲1.1	2.7	1.2	—
失業率(%)	3.6	3.7	3.4	3.2	3.1	3.0	3.0	3.6	3.7	3.6	3.4	3.5
貿易収支(百万USドル)	47,814	47,915	29,090	49,406	80,569	23,877	24,618	17,745	26,428	6,647	6,860	—
輸出(百万USドル)	363,534	466,384	555,214	547,870	559,649	136,791	146,367	137,590	—	—	—	—
輸入(百万USドル)	323,085	425,212	524,413	519,584	515,586	126,034	133,062	132,378	—	—	—	—
為替レート(ウォン/USドル)	1,276	1,156	1,108	1,127	1,095	1,111	1,062	1,069	1,029	1,019	1,021	1,025
生産者物価(%)	▲0.2	3.8	6.7	0.7	▲1.6	▲1.4	▲0.9	▲0.6	▲0.1	0.1	0.2	—
消費者物価(%)	2.8	3.0	4.0	2.2	1.3	1.4	1.1	1.1	1.6	1.7	1.6	1.4
株価指数(1980.1.4: 100)	1,683	2,051	1,826	1,997	2,011	1,997	2,011	1,986	2,002	2,002	2,076	2,069

(注) 国内総生産、最終消費支出、固定資本形成、鉱工業生産指数は前期比伸び率、生産者物価、消費者物価は前年同期比伸び率、株価指数は期末値

国内総生産、最終消費支出、固定資本形成、鉱工業生産指数、失業率は季節調整値

国内総生産、最終消費支出、固定資本形成、生産者物価は2005年基準、消費者物価は2010年基準

貿易収支はIMF方式、輸出入は通関ベース

(出所) 韓国銀行、統計庁他



## 朝鮮民主主義人民共和国（北朝鮮）

### 北朝鮮における従業員福利厚生重視の流れ

2014年5月15日付『朝鮮新報』によれば、北朝鮮では2013年5月ころより、企業や軍部隊において労働者や軍人の生活環境改善の努力が強化されているとのことだ。

2014年4月30日発『朝鮮中央通信』によれば、金正恩第1書記は2013年10月に金正淑平壤紡織工場を訪問した際に、労働者寮の建設について発言を行い、寮の敷地や建設に動員する人民軍の労働力についても具体的に指導を行い、2014年4月30日には完成した労働者寮を視察している。このほか、『朝鮮中央通信』は同年5月21日発で金策工業総合大学教育者住宅の建設現場視察、同月29日発で科学者休養所の建設現場視察を報じている。

### 平壤科学技術大学で卒業式

2014年6月4日付『朝鮮新報』によれば、同年5月21日、平壤科学技術大学で卒業式が行われ、修士課程を終えた43人が卒業し、同大学初の卒業生が輩出された。

同大学は、北朝鮮政府の認可を受けて、南の東北亜教育文化協力財団が設立したいわば「北南／南北協働の大学」である。情報通信学、農生命科学、国際金融経営学の3コースに約400人、修士課程に約110人の学生が在籍しており、外国人教授の講義はすべて英語で行われているとのことだ。

### 江原道・洗浦地区で畜産拠点開発が進行中

2014年6月11日付『朝鮮新報』によれば、2012年12月から始まった、江原道の洗浦郡、平康郡、利川郡一帯を開墾して合計5万数千ヘクタールの膨大な牧草地をつくり、牛、羊、ヤギ、豚、ウサギ、アヒルなどを育てて食肉を生産する畜産拠点を建設するプロジェクトが、2015年10月の朝鮮労働党創建70周年までの完成を目指して進められている。完成後の食肉生産目標は2017年に年間5千トン、2020年に年間1万トンで、さまざまな食肉加工品と乳製品も生産することが予定されている。

### 朝鮮子ども後援協会が創設

2014年6月12日発『朝鮮中央通信』によれば、子どもの基本的権利を擁護し、健康、栄養、知能発育、生活関連のサービスを改善し、子どもを健康で幸せに育てて強盛国家の担い手として準備させる政府の活動を援助することを目的として、朝鮮子ども後援協会が創設された。同年6月30日付『朝鮮新報』によれば、創立は2013年11月21日。

同協会は、現地事務所と子ども診療所、移動診療所、情報普及室、栄養剤製造工程を運営し、平壤の玉柳児童病院と各道内の育児院(乳児院)と託児所を段階別の計画に従って後援する予定とのことだ。本部は、玉柳児童病院内に置

かれている。

### 貿易省と合併投資委員会、国家経済開発委員会が合併し対外経済省へと改組

2014年6月18日発『朝鮮中央通信』によれば同日、貿易省に合併投資委員会、国家経済開発委員会を統合し、貿易省を対外経済省とする最高人民会議常任委員会の政令が発された。

### 羅先市と吉林省・琿春市間の新国境橋共同建設の協定締結

2014年6月27日発『朝鮮中央通信』によれば、朝鮮政府と中国政府との間の元汀(咸鏡北道)～圈河(中国・吉林省)の新しい国境の橋の共同建設と管理および保護に関する協定が6月27日、平壤で締結された。北朝鮮側から朴明国外務次官が、中国側から劉洪才駐朝大使がそれぞれ自国政府の委任によって協定文に署名した。

ERINAの現地調査によれば、現在設計や現地の地質調査等が進行中で、2014年10月頃から本格的に工事が開始されるとのことであった。

### 各地に自動気象観測機を設置

2014年7月9日付『朝鮮新報』によれば、北朝鮮では近年、天気予報を科学化するために気象観測機器の現代化が進められているとのことだ。今年、平壤と地方の80余カ所に自動気象観測装置が設置される見込みで、今後近いうちに設置場所を数百カ所に拡大していくという。一方、昨年に平壤と平安南道温泉郡に設置された雨雲レーダーが効果的に利用されているそうだ。

北朝鮮はまた、世界気象機関(WMO)と国際連合教育科学文化機関(UNESCO)傘下の国際水文学計画プログラム(IHP)、政府間海洋学委員会(IOC)など、国際機関との連携・協力も強化している。

### 特殊経済地帯の追加

2014年7月23日発『朝鮮中央通信』によれば、2013年11月21日の最高人民会議常任委員会政令で平安北道新義州市に設けた特殊経済地帯を「新義州国際経済地帯」とする最高人民会議常任委員会政令が同日発表された。

平壤市恩情区域の衛星洞、科学1洞、科学2洞、裏山洞、乙密洞の一部の地域を「恩情先端技術開発区」に、黄海南道康翎郡康翎邑の一部の地域を「康翎国際緑色示範区」に、南浦市臥牛島区域の進島洞、火島里の一部の地域を「進島輸出加工区」に、平安南道清南区竜北里の一部の地域を「清南工業開発区」に、同肅川郡雲井里の一部の地域を「肅川農業開発区」に、平安北道朔州郡の清城労働者区、方山里の一部の地域を「清水観光開発区」とする最高人民会議常任委員会政令も同日、発表された。

(ERINA調査研究部長・主任研究員 三村光弘)

# 研究所だより

## 職員の異動

### <退職>

平成26年9月30日付

調査研究部研究主任 朱永浩

## セミナーの開催

▽平成26年度第2回賛助会セミナー

平成26年9月10日(水) 朱鷺メッセ3階中会議室302

『人口・農村問題から中国の「いま」を考える』

【講師】同志社大学大学院

グローバル・スタディーズ研究科教授

巖善平氏

## 編集後記

本号では、北東アジア地域内での経済規模は最小ながらも、成長が最も早いモンゴルを取り上げた。しかし、その経済は鉱物資源に大きく依存し、採掘業からの収益を不適切使用していることが、経済基盤の多様化の潜在力を弱めている。このことはまた、経済を地域並びに世界経済と融合させようとする国の努力を妨げることになっている。さらに、モンゴルは、隣国である中国とロシアの地域・世界経済への参入戦略とその過程を観察することが重要である。ウランバートルで開催したワークショップで発表された論文は、これらの課題に何らかの知見を提供しようと試みている。

同時に、デンベレル論文にあるように、モンゴルの採掘・砕石部門に属する企業の約半数は、収入の隠ぺい、もしくは過少申告をしている。これは、国が取り組まなければならない、もう1つの大きな課題である。

最近、習近平・中国国家主席とプーチン・ロシア大統領が、2週間を待たず続けてモンゴルを訪問したことは、モンゴルの隣国との経済的連携をさらに強化する大きな出来事であった。このことを、モンゴルの（中ロ以外の日本など第三国に対する）「第三の隣国」政策の弱体化の兆しと指摘する国際評論家もいる。しかし、むしろこれはモンゴルが隣国を通して道を開くことによって「第三の隣国」政策を強化するためのさらなる一歩だと言うべきであろう。(E)

発行人 西村可明  
 編集委員長 三村光弘  
 編集委員 新井洋史 中島朋義 Sh. エンクバヤル  
 朱永浩 穆克苧  
 発行 公益財団法人環日本海経済研究所©  
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 URL: http://www.erina.or.jp/  
 発行日 2014年10月15日  
 (お願い)  
 ERINA REPORTの送付先が変更になりましたら、  
 お知らせください。

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