

**Economic Development & State Intervention  
in the Newly Industrializing Countries:  
A Comparative Study Between Taiwan and Mexico**

**Chung-chian Teng**

In the post-war period, the economic development of Taiwan and Mexico has been quite remarkable. Between 1960 and 1979, average annual growth rate of Gross Domestic Product (GDP) were 9% and 6% respectively. Their economic structure changed radically and rapid industrialization is the common feature. In Taiwan, between 1960 and 1985, agriculture's share of GDP declines from 37% to about 6%, while the share of manufacturing increased from under 17% to 46%. Although less dramatic than Taiwan, the change was equally positive in Mexico, where agriculture's share of GDP dropped from 16% to 8%, and the share of manufacturing increased from 19% to 35% in the same period.

Their unprecedented growth and industrialization parallel

with strong impetus toward social equality. These socio-economic achievements have elevated Taiwan and Mexico to the status of the Newly Industrializing Countries (NICs). Scholars of political economy are interested at the mechanisms of their success and most of them credited the state with playing an outstanding and generally positive role in fostering rapid economic development (Lake, 1987; Cumings, 1984; Skidmore & Smith, 1984; Barrett & Whyte, 1982; Crane, 1982; Graham, 1982; Amsden, 1979; Ho, 1978; Lopez, 1967).

A comparative study on economic development between Taiwan, a country located in East Asia with scarce natural resources, and Mexico, a Latin American nation with rich mineral resources, would provide some insights on how they achieve the NICs' status and what kinds of strategy they apply. Furthermore, I am going to address the following questions: How can they initially set the stage for rapid economic development? What are those policies conducive for and stimulating their development? How do those policies work?

### **State Autonomy**

In order to set the stage for development, state must have

sufficient power to overcome challenges from both domestic and foreign groups. In other words, it must have relative autonomy.

### **One-Party System**

Both countries have a strong one-party system. In a one-party system, other parties may exist, but they have little effect on the course of events. With a strong one-party system, the ruling party may to a large extent perform three functions: (1) the legitimation of the political system; (2) the recruitment of political leadership; and (3) interest aggregation and policy making (Huntington, 1970). In Mexico, the ruling party, Partido Revolucionario Institucional (PRI), received about 80 per cent of the vote in the past national elections. The PRI's candidate for President is certain to be elected; the overwhelming majority of members of the federal and state legislatures and state governors are members of the PRI (King, 1970). In the similar situation, Taiwan's ruling party, Chinese Nationalist Party or Kuomintang (KMT), has always won national and provincial elections by a margin of 3 to 1 in popular vote. Members of the KMT have a safe majority controlling national and provincial legislature. Under these

circumstances, the state is able to implement policies without worrying about outside opposition. In fact, they did virtually ignore the other parties (Huntington, 1970).

### **Revolution and Political Ideology**

Furthermore, both parties style themselves "revolutionary" (Clough, 1978) and have a quite strong political ideology developed during the revolutionary period. In an effort to get popular supports, a set of blueprints for national development, based on this dominant ideology, has also been formulated. With this ideology and blueprints, the state is able to have its own identity and independence from challenges of both internal and external pressure groups. In view of both cases, the state can resist pressures from interest groups to a significant extent and carry out its own plans for the benefits of the nation as a whole.

The ideology which emerged from the Revolution did set basic principles for Taiwan's development, although the 1911 Revolution in China did not have direct and immediate effects on Taiwan. For the political leaders in Taiwan, the highest principles guiding Taiwan's development lie in Dr. Sun Yat-sen's Doctrine of San Min Chu I or The Three

Principles of the People, which was written into 1946 Constitution (Wei, 1979).

This doctrine was first conceived and developed during the period when he led a revolutionary movement against the Chinese Empire. With regard to economic development, he identified two basic principles: equalization and wealth. Equalization means to "check the growth of large private capital and prevent the social disease of extreme inequality between the rich and the poor" (Sun, 1953). Wealth means "state can control and develop capital and promote industry" in order to increase national wealth (Sun, 1953). Under these two principles, he spoke of welcoming foreign trade and capital as long as that development could be organized in such a manner as to ensure the mutual benefits of China and of the countries cooperating with it (Sun, 1927; Sun, 1953). What sounds most important is his strong tendency toward an interventionist role for the state in economic activities (Gregor, et al., 1981).

The 1910 Mexican Revolution has customarily been regarded as a turning point in Mexican history through which the antiquated institutions of the previous order were destroyed and new directions established for Mexico's development. What the Revolution searched for was social justice and equality in general, agrarian problem in particular. For all

rivalry revolutionary groups, their leaders committed themselves to the agrarian reforms and even carried out extensive reforms (Hamilton, 1982). The cause for agrarian reform was furthered by the fact that these groups were formed chiefly of peasants and rural workers. As a result, these revolutionary leaders or new breed of decision makers almost fanatically proud to be Mexican, committed to established social justice and equality, and determined to drive that nation into the modern world.

Despite differences withing the Constitutionalist Army led by Venustiano Carranza, leaders were all imbued with a sense of decency and humanism which led them to reject the basic tenets upon which the Diaz regime was based (Cumberland, 1968). In this sense, they were truly revolutionary. After consolidating its control over the government, this group started to work for its legitimacy. In order to uphold its cause, Carrazan set limits on candidate for constituent assembly by prohibiting candidacy to any man who had "aided with arms or served public office under the governments of factions hostile to the constitutionalist cause" (Cumberland, 1968). Therefore, constituent assembly was consisted of delegates who were good orthodox constitutionalists. All members of the assembly accepted instituting social and economic changes as necessary for the eventual

good of the nation.

However, a bitter debate between the moderates and the radicals erupted and was concerned with whether the future constitution should stress the well-being of the social organism even at the sacrifice of individual liberty. In the end, the radicals won and awarded Mexican people a strong interventionist state, expanding its functions to encompass measures to secure national sovereignty over national resources, the access of peasant communities to land, and the rights of labor. Equally important, the ideology of the Mexican revolution was incorporated in its 1917 Constitution. First of all, it required the destruction of latifundia and the redistribution of land among the populace. Second, labor legislation was required to be enacted by state and national governments, but all such legislations had to conform to a set of specific guidelines. Third, it limited Church's authority and autonomy over primary education and ownership of real estates (Hamilton, 1982). Even though those "revolutionary" provisions remained unenforced in 1924, every major political figure had sworn loyal to the basic concepts. The Constitution was the law of the land. During the following decade and a half successive governments put into effect all the revolutionary provisions (Cumberland, 1968).

### **Mercantilistic Policies**

To stimulate economic development, government must take steps other than traditional interventions. What we mean by traditional interventions is an active state in infrastructural construction, such as transportation system, power system, and the like. In other words, public funds have been allocated mainly to investment in the economic infrastructure needed to augment general productivity and to induce expansion of private enterprise throughout the economy (Lopez, 1967). But, a mercantilistic government should adopt policies more than investment into infrastructural constructions and further extend its intervention in economy.

Today, mercantilistic policies are consisted of (1) export promotion and import restrictions; (2) economic planning; (3) state enterprises; (4) foreign investment and industrialization; (5) development of human resources.

#### **Export Promotion and Import Restriction**

Contemporary mercantilism is concerned with creating a balance of payment surplus by means of reducing imports,

stimulating home production, and promoting exports. After reviewing the process of economic development, it can be said that both Taiwan and Mexico have used similar devices dealing with foreign trade problems.

In the first place, they started with an import substitution strategy, reflected in the adoption of a foreign exchange policy and in the implementation of pricing policy to encourage domestic production of substitutes for imported goods (Kuo, 1983). This strategy would encourage domestic industrial production as well as put limits on exports. Taiwan adopted this in the 1950s and Mexico from 1930s to 1960s (Skidmore and Smith, 1984; Ho, 1978). However, this strategy could not last for long, because it had costed too much. Later, they shifted their focus to export expansion, although imports of certain products remained restricted by quotas and high tariffs.

Under export-oriented strategy, some economic and financial measures are taken. Most important measures are concerned with custom duties and tax. In Taiwan, exporters are permitted the rebate of custom duties paid on raw material imports used in the manufactured exports and, furthermore, they are exempted from certain tax for the manufactured exports (Ho, 1978). In case of Mexico, manufactured exports are not subject to export duty. A variety of other exemptions

from taxes are offered, some of which are available to all Mexican exporters of manufactures, and others only to those in the zone bordering the United States. When exemptions have expired, tax reductions follow (King, 1970). Second, loans to exporters are provided at low preferential rates by several public financial institutions, such as the Export-Import Bank of China. In Mexico, export credit is provided for financing of export sales and financing production and stocks of goods that will be exported. In 1963, a Fund for Exports of Manufactured Products was established to promote manufactured goods exports by offering export credits and guarantees to manufacturers against political risks. At last, many export promotion institutions have been set up assisting sales and marketing around the world. In Taiwan, the China external Trade Development Council was established in 1970 with the full support of both the business community and the government. As Taiwan's largest and most active trade promotion organization CETDC's major activities are to survey overseas markets, to collect, compile and disseminate trade information; to organize trade missions and participate in trade fairs. Similarly, Mexico has a number of promotional institutions. Among these are an information center on foreign trade, set up in 1965, and an export promotion fund started in 1966 to finance participation in trade fairs, trade missions,

market research, and to give direct aid to a few products that are difficult to export, or are handicrafts. Both the center and the fund are run by the National Foreign Trade Bank.

However, there is one difference between them which concerns mineral resources. Taiwan has never faced the problem with the exploitation of mineral resources, because it is poor in this regard. In Mexico, export restrictions are put on mineral resources. The economic case for restricting exports rests on one of three arguments. In the first place, restricting supply of exports is to maximize export receipts. The second argument is to limit the exploitation of non-renewable raw materials. A third one is that raw-material processing should take place in Mexico (King, 1970).

### **Economic Planning**

In view of their late development and competition with other developing nations, Taiwan and Mexico must utilize their resources effectively and efficiently. Economic planning is the most important device to serve this purpose. It provides guidelines for economic development coordination the allocation of resources in an effective and efficient manner. Ever since 1953 when the Republic of China (ROC) government

launched the First Four-Year Economic Development Plan, economic planning has been essential to Taiwan's economic progress (Li, 1976). According to the plan, targets for both overall national economy and each individual sector are set first. For the purpose of fulfilling those targets, the plan, further, regulates certain economic activities, such as capital formation, inter-sectoral and intra-sectoral development relationship, development of human resources, utilization of natural resources and so on. For example, in order to upgrade its industry, the economic plan would allocate more resources to education and professional training for technicians and to the research and development of technology-intensive and higher value-added industries.

Although a General Planning Law was published in 1930, no national plan emerged from this legislation until 1948 when National Investment Commission was set up to coordinate public investment in Mexico. In the successive governments, many efforts have been made to improve the planning and to be more comprehensive. Planning in Mexico is now perhaps reaching the stage where the large number of public investment projects are being coordinated and controlled in the light of technically well-calculated estimates of future development (King, 1970).

## State Enterprises

It is argued that state capital is the dynamic underlying the development of those developing countries, because it is the only part which can fully be used for the benefits of the people as a whole (Crane, 1982; Amsden, 1979). There are ways to stimulate state capital formation directly and indirectly. Needless to say, entering the economy in the form of state enterprise would be the most direct and immediate one (Caporaso, 1982).

The existence of state enterprise has something to do with the dominant ideology. The political leadership on Taiwan, at the very beginning of their development, invoked the economic programs of Dr. Sun Yar-sen as their policy rationale (Gregor et al., 1981). According to the doctrine developed by Sun, to build up state capital is simply the development of state industries. If the industries, he argued, are carried on by the state, the rights and privileges which they bring will be enjoyed by all the people and the unequal distribution of wealth and property would be avoided (Sun, 1927). What increased the weight of the state enterprises further in Taiwan's economy was the take-over of those corporations left by the Japanese after 1945 (Crane, 1982; Little, 1979; Amsden, 1979). In 1952, as much as 56 percent

of total industrial production, as well as 56 percent manufacturing output, were accounted for by state enterprises (CEPD, 1981). These two figures reflected the importance of state enterprises in early stage of development. As we discussed earlier, in the 1977 Mexican constituent assembly, one basic principle was set up, i.e., an active government. Thereafter, it could be expected that decision-makers would allow or, at least, would not oppose an interventionist state in economy. Furthermore, the technocrats in Department of Treasury would usually agree to have strong presence of the state in economy in view of a weak entrepreneurial class (Bennett and Sharpe, 1982). They argued the need for vigorous action by the state to create the conditions for private sector investment and to do what the private sector would not or could not. As a result, the door to a more active role of state was opened. Ever since then, the continuing expansion of state enterprises in any form has become a phenomenon in its economic development.

However, principles should be set for the development of state enterprises. First, the state not only manages important public utilities and enterprises directly, but also helps carry through the development of important industries under private ownership (Li, 1976). Second, the state ought to invest in productive projects, not in real estate speculation,

commercial credit, jewelry, and the like (FitzGerald, 1982). Under these principles, the state has transferred the ownership of some industries into private hands. In Taiwan, on the one hand some transfers were done during the land reform period (1949-1953) and shares of stock in each of the four government enterprises designated for transfer to private ownership was given to the landlords as payments for the purchase of land, which was resold to the tenant farmers later (Ho, 1978); on the other hand, in some new industries the government has built new factories which, once in the black, have been transferred to private owners (Amsden, 1979). But, the importance of state enterprises in economy remained unchanged with regard to capital formation. State enterprises sector constituted 42.6 percent of gross domestic capital formation in 1952; 33.9 percent in 1960; 28.7 percent in 1970; 37.1 percent in 1980 (CEPD, 1981). These figures reveal that the relative position of state enterprise sector in domestic capital formation does show an important force in economy, in spite of fluctuations. In addition, state enterprises are concentrated on heavy industry, public utilities, petrochemical industry, and financial institutions. In similar vein, we have observed the Mexican government's involvements into the management and investment of steel industry, auto industry, mining industry, and financial institutions. Its expanded role in

economy resulted from several factors (King, 1970). At the beginning, public sector invested in a range of basic industries, because of their magnitude or because of the long-term character of their expected returns. Later, a last-resort character of the interventions by the state in Mexican economy could be seen in the efforts of state institutions to promote and finance projects of critical importance to national industrialization which were beyond the capabilities of the private sector. In the end, state involvement into economy had something to do with the Mexicanization project, which required foreign investors to share majority ownership with Mexican partners. For a variety of reasons, it has often proved difficult to locate willing and able Mexican private investor. Therefore, the state has promoted Mexicanization by itself acting as an investor of last resort.

### **Foreign Investment and Industrialization**

The ROC government on Taiwan intervenes in foreign investment so as to make sure that foreign capital and technology are necessary and suitable for its upgrading industrialization. Taiwan, like most developing countries, needs foreign capital and technology for its development. In fact,

a unanimous consensus among political leaders is that rapid economic development must rely on foreign investment for the moment. In the 1950s, Taiwan did not worry about foreign investment, because it received a large amount of U.S. aid (Jacoby, 1966). For example, in the first four-year economic development plan (1953-1956), the United States aid constituted 41 percent of total amount of investment; 37.9 percent in the second four-year plan (1957-1960) (Yeh, 1981). Overall, the U.S. aid did make significant contribution in the early stage of development.

In the early 1960s, knowing that U.S. aid would be terminated in a short period, Taiwan started to search for alternative sources of development capital. International financial institutions, such as World Bank, International Development Association, International Financial Corporation, and Asian Development bank, were contacted by the ROC government. From 1961 to 1971, these institutions provided 447 million grants and loans for public and private enterprises with governmental guarantee (Yeh, 1981). In addition, it obtained loans from Japan in 1965 and in 1972 respectively (Yeh, 1981). After all, it was getting harder and harder to obtain favorable loans, owing to Taiwan's performance in economic development. For example, it took three and a half years to negotiate a loan from Japan. As a consequence,

direct foreign investment became the best alternative. More important, the inflow of foreign investment was instrumental in solving other two problems; the first one was the infusion of new technology and the other was to solve the problem of marketing (Wu and Yeh, 1978). From 1959, several vital legislations have been enacted so as to create favorable investment environment and attract foreign investors. Foreign investments are concentrated in electronics, chemicals, and textiles destined for export (Amsden, 1979). Moreover, foreign investment increased from 14.3 million in 1961 to 465.9 million in 1980 (CEPD, 1981).

In the case of Mexico, the Diaz Administration (1876-1911) initially started to encourage foreign investment in the late nineteenth century. Owing to generous offers, foreign capital swept into Mexico on a massive scale. It is estimated that from 1870 to 1908 United States investment amounted to \$800 million. In 1911, an American observer calculated that United States capital there reached 1044 million, representing approximately 40 percent of total foreign investment (Hurtado, 1967). Then, foreign investment focused on extractive operations and the associated transport facilities. However, both the scale of this activity and its sectoral focus on extractive industry created a hostile reaction against foreign capital following revolution (Graham, 1982). From 1940

onward, the relative importance of direct foreign investment has declined in relation to gross national product (Dominguez, 1982). But, foreign-investment based industries retain an important role in Mexican exports (Evans and Gerefi, 1982). In comparison with Taiwan's experiences, Mexico had suffered the negative effects of foreign investment, as evidenced by almost no improvement of standard of living at all during Diaz rule, long before it took steps to regulate direct foreign investment.

Both Taiwan and Mexico enacted much legislation regulating direct foreign investment. According to them, foreign investments are confined to certain manufacturing industries and some basic industries are reserved exclusively for the state (IDIC, 1982; Touche Ross International, 1979). In addition to traditional incentives such as tax holidays and accelerated depreciation, certain important privileges and protections are concerned with government expropriation, remission of profits and interest earnings, repatriation of invested capital, and so on.

### **Development of Human Resources**

One problem left behind by the colonists was the

problem of human resources, i.e., the lack of skilled human resources. During colonial period, the indigenous people were not permitted to occupy and senior positions above county level and managerial positions in big corporations. In this regard, the indigenous people were hampered very much. Furthermore, they had received little education. Consequently, the departure of those colonists had left a vacuum, which resulted in chaotic conditions in immediate post-colonial period. In post-colonial period, one major effort made by the state was to develop human resources.

In order to produce qualified human resources from almost nothing, governmental efforts have been very huge. In the first place, their efforts are reflected in the provisions in respective constitutions which stress not only free and compulsory education, but also state supervision over education (Cumberland, 1968; Wei, 1973). These provisions represent the state's commitment education or development of human resources. In addition, their education budgets in relation to gross domestic product illustrate a high priority on human resources.

## Conclusion

Among the NICs, both Taiwan and Mexico have been the most visible and influential instances of the pattern, and enjoy particular standing and prestige. Therefore, a comparative study between two NICs, Taiwan and Mexico, would help us understand how the process of development has worked.

They are quite different with each other in background, concerning colonial experiences, culture, and natural resources. Mexico had experienced Spanish colonial rule much longer than Taiwan in a margin of 6 to 1. Another difference was that in Mexico the indigenous culture and civilization had been destroyed by the colonial power and replaced by the Latin civilization. The Chinese culture and civilization in Taiwan, on the contrary, survived the Japanese colonization. Furthermore, Mexico was and is very rich in mineral resources; on the contrary, Taiwan was and is extremely poor in this regard.

Despite those differences, they have implemented similar policies in their process of development and, as a result, reached high economic growth rate. From preceding analysis, their rapid industrialization relied on skillful management of their economies. Skillful management was concerned with

three key elements: (1) the capability of the state; (2) the state's economic policies; (3) the quality of human resources.

In both cases, the state has been able to manage their economy without completely bowing to pressures from domestic and foreign interest groups. Their autonomy has strong correlation with their political system and ideology fostered during the revolutionary period. With regard to their economic policies, its chief objective is to have high-level industrialization compatible with industrial countries. Those policies have performed the following functions: (1) obtaining advanced or high technology; (2) consolidating the necessary capital for development; (3) enlarging the scale of economy of existing industries. More importantly, they have paid much attention to educational and training programs and their commitments on education could be reflected by both the provisions in the constitution and educational budget. In fact, they have produced a big pool of quality human resources, which has been very conducive for their development.

While juxtaposing these two cases (Taiwan and Mexico) and making comparison, it could be said that Taiwan has enjoyed higher growth rate and more equal income distribution. For example, the Gini coefficient for Taiwan was .558 in 1953; .44 in 1959; .288 in 1978 (Kuo et al., 1981). That for Mexico was .432 in 1950; .437 in 1957; .57 in 1975

(Felix, 1982). From these figures, while Taiwan's income distribution was becoming more equal, that of Mexico was becoming less although at a slow pace. In this regard, Mexico has performed worse than Taiwan. In terms of GDP growth rate, Mexico also has been less dramatic than Taiwan.

These differences might be concerned with two factors: land reform and human resources. Scholars have largely attributed Taiwan's performance on income distribution on its land reform. It was a two-plunge and consistent program. On the one hand, it did increase tenants' income by reducing their contribution to landlords. On the other hand, it forced landlords give up most of their land and divert their capital from real estates speculation to industrial development. To the contrary, Mexico does not have a coherent land reform program. In addition, Taiwan, as a nation poor in natural resources, must heavily rely on human resources. In the last three decades, development of human resources has been put on a very high priority in policy agenda. According to one report, over the 1968-89 period, the proportion of total work force with a less than junior high school education will decline from 86% to 66%; over the same period, the proportion having received senior high school and vocational school education will rise from 10% to 22%; and the proportion with advanced education (college or above) will increase from 4% to 12%

(Kuo, 1983). These figures can represent the high quality of its human resources. With quality human resources, Taiwan can quickly move into higher-level development and build up its own technology-intensive and higher value-added industry where it can garner very high returns and come across far less competitions from fellow NICs and non-NIC less-developed countries (LDCs). In a word, human resource is an important factor making Taiwan's performance better than that of Mexico.

Unlike the OPEC, their success can be modeled by the non-NIC LDCs and the emergence of the second-tier NICs is the best supporting evidence. A strong presence of the state in economy will be the center of their initial efforts to rescue their economy. As a result, they will be able to ward off any challenge from within and without, and have independent development.

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摘 要

# 新興工業化國家的經濟發展 及國家干預 ——中華民國與墨西哥之比較研究

鄧 中 堅

一九七〇年代後，少數東亞及拉丁美洲國家。由於經濟結構高度的工業化，為國際社會譽之為「新興工業化國家」(NIC)，成為國際學術界爭相研究的對象。本文係從國家干預及重商主義政策之模式來分析中華民國及墨西哥的發展。

中、墨兩國在戰後的經濟發展及工業化均有十分優異的表現，同時也致力於追求社會的平等及公正。它們之所以能超越大多數開發中國家，應歸因於：(1)國家享有相當的自主性，不輕易受到外來力量對其發展的不當干預；(2)全力推行重商主義的經濟政策。

中華民國及墨西哥能享有相當的自主性，是基於下列因素：(1)一黨獨大的制度使政府得以有效執行其政策；(2)執政黨具有「革命」的特質，且在革命時期即孕育出特有之意識形態及未來發展之藍圖。

在重商主義政策方面，中、墨兩國側重在：(1)促進出口、抑制進口，以累積發展的資本；(2)計劃型的經濟，有效利用資源；(3)發展以國家利益為主之國營企業；(4)外資及技術的引進，突破發展之瓶頸；(5)重視人力資源，提昇發展層次。

中華民國及墨西哥的成長類型可使我們更瞭解發展過程是如何運作，亦可供第三世界國家參考學習。

