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FDI、国际产业转移与非洲制造业发展

FDI、International Industrial Transfer and the  
Development of Manufacturing Industry in Africa

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## 摘 要

从国际产业转移的规律来看,产业跨国转移已成为全球经济发展和各国产业结构升级的必然趋势和重要动力。随着全球经济一体化进程的加快,国际产业转移正在沿着全球价值链的方向演变,价值链分工逐步将各国生产环节纳入到全球制造业的一体化生产中。从日本、德国战后的经济崛起,到亚洲“四小龙”的腾飞,再到中国改革开放后的快速发展的经验来看,一国主动抓住国际产业转移的机会,才能实现成功转型。近年来,非洲国家在反思过去几十年的工业化发展战略后,开始意识到在全球经济一体化的大背景下,充分利用国际产业转移规律,抓住世界产业结构调整 and 转移的机遇,主动承接国际产业转移,是其加快制造业发展、提升制造业竞争力的必要途径。大多数非洲国家正处于工业化早期阶段,制造业门类众多,技术和产业梯度水平各异,充分利用非洲制造业与中国及其他国家的产业梯度差距,主动承接国际产业转移,既是非洲经济对外开放的要求,也是制造业加快发展的必要途径。

论文第一章为导论,在提出研究背景和研究意义的基础上对相关文献进行了梳理与述评,从中获得本文研究思路与方法的启示。第二章到第四章为本论文的基础部分。第二章分析了非洲经济发展特征及其制造业发展战略,主要从非洲的经济发展和国际经济地位、产业结构及制造业发展状况、非洲制造业发展战略及反思等三个方面展开。第三章主要对非洲 FDI 流入及中国对非投资的特征事实做了归纳梳理,探讨了非洲承接产业转移的现状和趋势。第四章主要讨论国际产业转移的趋势和中国对非洲产业转移,着重分析了现阶段中国产业对外转移的主要因素和区位选择以及非洲承接产业转移的现实基础。前四章的内容层层递进、前后衔接,为后文实证研究模型的构建与分析提供现实依据。

第五章到第八章是本论文的主体部分。第五章就国际产业转移对非洲制造业发展水平的影响分析做了实证检验,结果显示 FDI 的流入对非洲国家制造业发展起到了助推作用,说明以 FDI 为载体的国际产业转移对非洲制造业发展水平的提高有积极的影响效应。第六章研究了 FDI 对非洲本地企业的技术溢出效应,研究结果表明当前外资企业促进非洲东道国技术进步主要依赖于其自身要素生产率的提高,而不是外资企业对非洲东道国本地企业的技术外溢效应。第七章分

析了国际产业转移与非洲国家产业集聚状况，该章以对埃塞俄比亚的分析为例，探究了其制造业行业的产业集聚状况，并对产业集聚效应做了因素分析；同时从非洲设立“经济特区”的实践，案例分析了“经济特区”的产业集聚效应。第八章探讨了国际产业转移与非洲制造业国际竞争力的关系，具体探究非洲制造业的国际竞争力状况及其影响因素，并实证研究了国际产业转移与非洲制造业国际竞争力的因果关系。第九章是本论文的总结部分，为结论与政策建议。

本文的实证结果表明，总体来说以 FDI 为主要载体的国际产业转移对非洲制造业发展水平的提高有正向的促进作用，外国直接投资流入对非洲国家制造业人均产值的增长起到了助推作用。FDI 主要通过直接效应促进非洲国家的技术进步，没有显现出正的技术溢出效应，外资企业技术进步的直接效应要大于其对非洲东道国本地企业技术溢出的间接效应，大部分非洲国家外资流入对技术进步的综合效应为正。从埃塞俄比亚的研究来看，其制造业分行业已基本具备一定产业集聚经济效应，制造业产业逐步呈现多元化发展的局面，但部分新兴成长制造业企业在做大过程中存在“规模不经济”的现象，且配套产业链可能还不完善。技术进步、产业集聚、规模效应等能够提高非洲国家制造业的国际竞争力，但实证研究结果表明国际竞争力是引起 FDI 变动的 Granger 原因，但后者并不是引起前者变动 Granger 原因。究其原因，一方面这反映出非洲本地企业与跨国公司之间的前向与后向联系还不够紧密，影响了 FDI 的技术外溢效应的发挥，另一方面，这可能与 FDI 存在门槛效应有关。

结合研究结论，为更好地承接国际产业转移，促进非洲制造业发展，本文提出如下政策建议：一非洲东道国应发挥能动性，促进制造业发展，具体从优化承接制造业转移的政策环境、通过合理的产业政策引导产业转移的方向和领域、完善基础设施建设、推动非洲一体化建设、扩大产业规模，形成产业集聚获得规模效应、产业转移和技术转移相结合等方面进行；二中非应推进产能合作，促进非洲制造业发展，具体从在轻工、电力、基础设施等领域对接合作，弥补非洲制造业产能缺口、坚持人力资源本地化、积极开展教育培训，促进中非产能合作项目中的技术转移和技术溢出、以中非经贸合作区为平台，形成产业集聚效应、优化非洲投资和营商环境，促进非洲一体化建设，提高非洲国际竞争力等方面进行。

**关键词：**制造业；国际转移；非洲；中国

## Abstract

From the regular pattern of international industrial transfer, we can see that international industrial transfer has become an inevitable trend and important power for the development of global economy and the upgrading of national industrial structure. With the speeding up of the global economic integration, international industrial transfer is evolving in the direction of global value chain, value chain specialization is gradually bringing the production processes among countries into the integration of the global manufacturing production. From the experience of the post-war economic rise of Japan and Germany, the rapid development of "Asian Tigers", and the economic booming of China after the reform and opening up, we can find that the country actively seizing the opportunity of international industrial transfer can realize the successful transformation. After the reflection on development strategy of industrialization in the past decades, in recent years African countries begin to consciously make full use of the international industrial transfer law, seize the opportunity of the world industrial structure adjustment and transfer and take the initiative to undertake international industrial transfer under the background of global economic integration, which are all the necessary way for Africa to accelerate the development of manufacturing industry and enhance the competitiveness of manufacturing. Most African countries are in the early stage of industrialization, manufacturing category is numerous, the gradient levels in technology and industry are different. Therefore, making full use of the gradient gap in manufacturing between Africa and China or other countries, taking the initiative to undertake international industrial transfer, which are both the requirement for Africa to economic opening up and the necessary way to speed up its manufacturing development.

Chapter one is introduction, on the basis of research background and research significance it analyzes and comments the literature and gains the idea and research method to this paper. Chapter two to Chapter four are the fundamental part of this paper. Mainly from three dimensions of the economic development and its

international economic status, the industrial structure and manufacturing development, the manufacturing development strategy and its reflections, Chapter two analyzes the characteristics of economic development and manufacturing development strategy in Africa. Chapter three summarizes the fact and characteristics of FDI inflows to Africa and Chinese investment in Africa, discussing the current situation and trend of undertaking industrial transfer in Africa. Chapter four discusses the new trend of international industrial transfer and Chinese industrial transfer to Africa, emphatically analyzing the key factors affecting Chinese industrial outward transferring, and the realistic foundation of Africa to undertake industrial transfer. The former four chapters provide a realistic basis for building empirical analysis in later research chapters.

Chapter five to Chapter eight are the main part of this paper. Chapter five does empirical test on the impact of international industrial transfer on the development of the manufacturing in Africa, the results show that FDI inflows to African countries plays an important role in boosting the development of the manufacturing, indicating that FDI as the carrier of international industrial transfer to Africa has positive effects on improving the level of manufacturing development. Chapter six analyzes the technology spillover effect of FDI inflows on local enterprises in Africa, the results show that the current foreign-funded enterprises depend on improving their own factor productivity to promote technological progress in Africa, rather than the technology spillover effect of foreign-funded enterprises to local African enterprises. Chapter seven analyzes international industrial transfer and the industrial agglomeration of African manufacturing, in this chapter we first choose Ethiopia as a case study to explore the status and factors of its industrial agglomeration in manufacturing; then making a case study to analyze the industrial agglomeration effect from the practice of setting up "special economic zone" in Africa. Chapter eight explores the relationship of international industrial transfer and the international competitiveness of African manufacturing, specifically to explore the international competitiveness of the manufacturing in Africa and its influencing factors, and to empirically examine the causal relationship between international industrial transfer

and the international competitiveness of African manufacturing. Chapter nine is the summary of this paper, which is the conclusions and policy recommendations.

The empirical results show that: FDI as the main carrier of international industrial transfer has a positive role to improve the level of African manufacturing, FDI inflows to African countries has played an active role in boosting the growth of output per capita in the manufacturing. FDI promotes technological progress of African countries mainly through direct effects and no positive technology spillover effect, direct effects on technological progress from foreign-funded enterprises are greater than its indirect effect of technology spillovers on the African local enterprises, so the comprehensive effect of FDI inflows technological progress in most African countries is positive. From the study of Ethiopia, the subsectors of its manufacturing have certain industrial agglomeration economic effects, manufacturing is gradually diversified developing, but still existing the "diseconomies of scale" phenomenon in the bigger process of some emerging growth manufacturing companies, and also the supporting industrial chain may not be complete. Technological progress, industrial agglomeration and scale effect can increase the international competitiveness of manufacturing in African countries, but the empirical results show that international competitiveness is the Granger cause of the changes in FDI, but the latter is not the Granger cause of the former. On one hand, the reason may be the forward linkages and backward linkages between African local enterprises and multinational corporations are not close enough, which affects the technological spillover effects of FDI; on the other hand, this may be related to the presence of threshold effects related to FDI.

Combined with the research conclusion, to better undertake the international industrial transfer and to promote the development of African manufacturing, this paper puts forward the following suggestions: First, Africa should actively promote the development of manufacturing, including to optimize the policy environment of undertaking manufacturing transfer, to guide the direction and field of the industry transfer through the reasonable industrial policies, to improve the infrastructure construction, to promote the construction of African integration, to expand the



industry scale and gain the economies of scale from the industrial agglomeration, to combine the industrial transfer and technology transfer, etc; Second, China and Africa should enhance the cooperation capacity to promote the development of African manufacturing, including to cooperate in the areas such as light manufacturing, electricity and infrastructure aiming at shortening the gaps in African manufacturing capacity, to insist the human resources localization and to actively carry out education and training aiming at promoting the capacity of technology transfer and technology spillover in China-Africa cooperation projects, to form the industrial agglomeration effect based on the China-Africa economic and trade cooperation zone, to optimize African investment and business environment and to promote the construction of African integration aiming at improving its international competitiveness, etc.

**Keywords:** Manufacturing; International Transfer; Africa; China

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