2005 2 25

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한국은행
THE BANK OF KOREA

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2005.2

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Ⅰ. ····· 1

Ⅱ. ····· 2

1. ····· 2
2. ····· 5

Ⅲ. ····· 7

1. : ····· 7
2. : ····· 10
3. : ····· 11

Ⅳ. ····· 13

1. ····· 13
2. · · ····· 14

Ⅴ. ····· 16

Ⅵ. ····· 20

1. ····· 20
2. ····· 21
3. ····· 23
4. : → ····· 24

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( )

□ , IT
38%(2003), 46%(2004.1~11)

— ,
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- , -

□
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— , , FTA

□
, ,
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( )

□

(interdependence) (circularity)

,

— ,

(high-tech equilibrium)

—

(low-tech equilibrium)

□

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( )

— ,

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□

( )

□ , ,

□ 1988 29% 2004 46%(1~11
)

IT

— IT (· · , ,)
2000 0.47~0.55 (0.13) 4

,
0.28 (0.10~0.13) 2~3

□ ,

— (1)
(1992~1997) 11.6% (1997~2002)
5.4% (15.9% → 12.5%)

—

11.2% 3.3% (
18% → 9.2%),
7.1% 4.1% (6.2% → 6.6%)

□ . .

—

, 99%

— , IT,
,

( )

□ 1980

— ,

— 1950

,

□ 2001 ‘ ,

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□

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— WTO

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o

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o -

(Network Loan)

o

(‘

’(The Valley of Death))

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Ⅰ.

□ 1970 ,

— , .

— ,

□

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,

— , , FTA

□

, ,

,

Ⅱ.

1.

□

-

, - (spill-over)

—

(deep division of labor)

(Rodríguez-Clare 1996)

□

(interdependence) (circularity)* ,

(multiple equilibria) (Ciccone and Matsuyama 1996; Rodríguez-Clare 1996; Rodrik 1996)

*

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—

( )

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(high-tech equilibrium)

—

(low-tech equilibrium),

‘ (underdevelopment trap)’

□

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((coordination))

— (skill),

(knowledge),

o

(non-transferability) (non-tradability)

— ,

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*

*

o

□

(Okuno-Fujiwara 1987)

— ,

— ,

o (economy of scale)
(economy of scope),

*

* .
,
, -
,

2.

□ * 38%(2003),
46%(2003), 46%(2004.1~11)

* 2001 ‘ ·
’(‘ ’) ,
①
, ②
, ③

		2000	2001	2002	2003
( )	(A)	214.3	217.7	243.3	257.0
	(B)	564.8	583.8	634.2	676.3
	A/B(%)	37.9	37.3	38.4	38.0
( )	(A)	121.3	120.5	122.9	126.0
	(B)	265.3	264.8	269.6	272.1
	A/B(%)	45.7	45.5	45.6	46.3

: , ; ,

(, %)

	1988	1993	1995	1997	2000	2001	2002	2003	2004. 1~11
(A)	177.6	332.0	591.7	624.1	818.8	634.1	695.5	858.1	1,055.9
(B)	607.0	822.4	1,250.6	1,361.6	1,722.7	1,504.4	1,624.7	1,938.2	2,306.4
(A/B)	29.3	40.4	47.3	45.8	47.5	42.1	42.8	44.3	45.8

: ‘ ’ MTI
: , KITA.NET

□ , ,

— 1 (2003) 2
(2.5)* 80%

o (GDP)
1997 100 32 (76)
(44) (Ark and Timmer 2003)

—

, IT

o 10 (HS 4 , 2004)
24% (20%)
, * (0.011) (0.006) 2

* - 10

o 10
(24%) 20%*

* 2004 1~11 229.6 ,
248.6

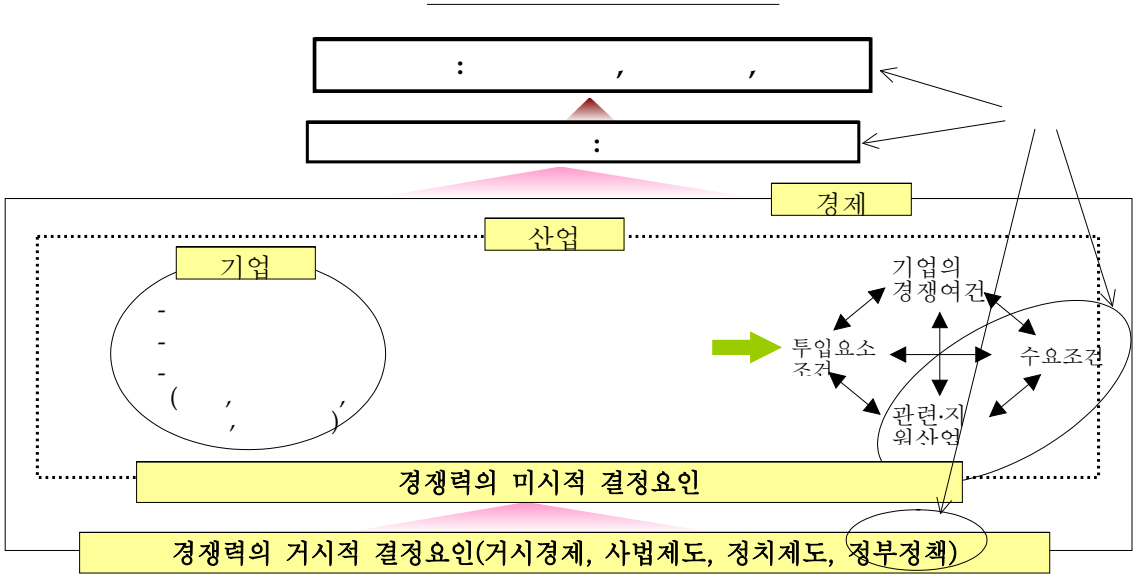
Ⅲ.

< >

□ ,

— , ,

(Ⅳ)



: Porter(2003), KDI(2003), (2002)

1. :

□ 1988~2003 11%

1980 20% 1990

40% *

40%

* 2000~2003 43%(04.1~11 62%)

— IT *

* 2003 ,
22%, 50%(1988 10%, 36%)

o * , ,

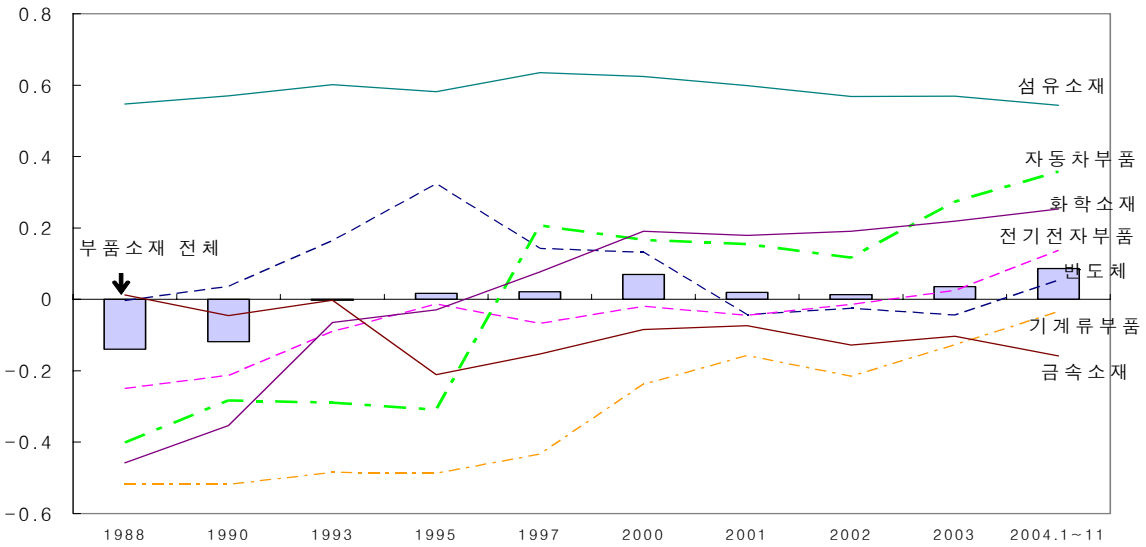
0

* $(x_i - m_i)/(x_i + m_i)$, x_i m_i i

· , LCD
, , , LCD
*

* (2004) DVD 70%, 50%,
65%, 82%, 91%, 2
91%

*



: , KITA.NET

□

*

* : 1990 1.3% → 2003 26%(04.1~11 29.3%)
: 1990 40% → 2003 30%(04.1~11 29.4%)

—

2000

*

* (,) 1990~2000
30% 2001~2004 54%

— , 70~80%
40%
IT

.

(, %)

		1990	1995	2000	2003	2004.1~11
	(A)	−69.5	−121.2	−123.8	−148.5	−158.8
	(IT)*	−29.7	−49.2	−54.4	−64.1	−63.3
	(B)	−59.4	−155.6	−113.6	−190.4	−223.3
	A/B	117	77.9	109.0	78.0	71.1
	(A)	−3.0	12.0	49.8	123.8	178.3
	(B)	−16.8	17.4	56.6	132.0	186.6
	A/B	17.9	69.0	88.0	98.8	95.6

: +
: , KITA.NET

⇒

IT

2. :

□ * (1
) (1992~1997) 11.6%
(1997~2002) 5.4% (15.9% → 12.5%)

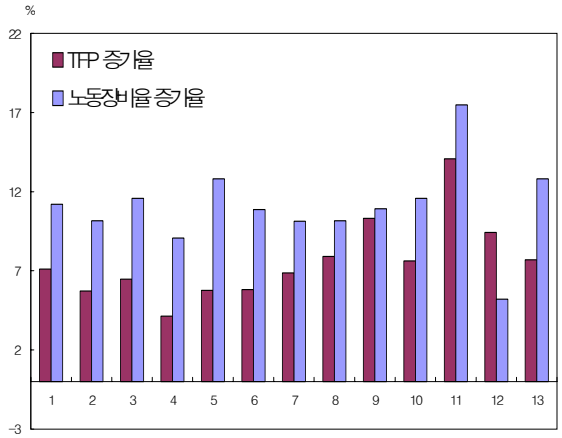
* 5

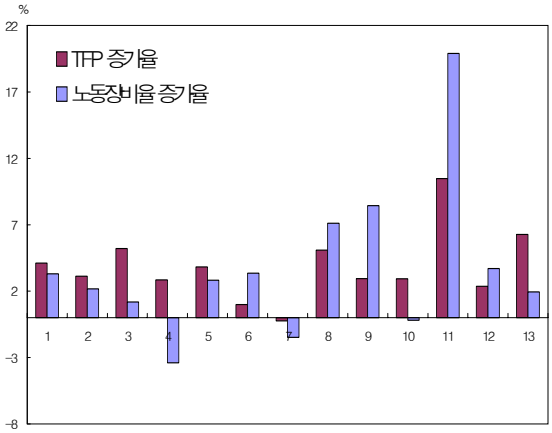
— ( )

o
11.2% 3.3% (18% → 9.2%)

o 7.1%
4.1% (6.2% → 6.6%)

< > < >





: **1-** , 2- , 3- , 4- 5-
, 6- 1 , 7- , 8- , 9- , 10- , 11-
, · · , 12- , 13-

— , , · · IT

⇒ IT

3. :

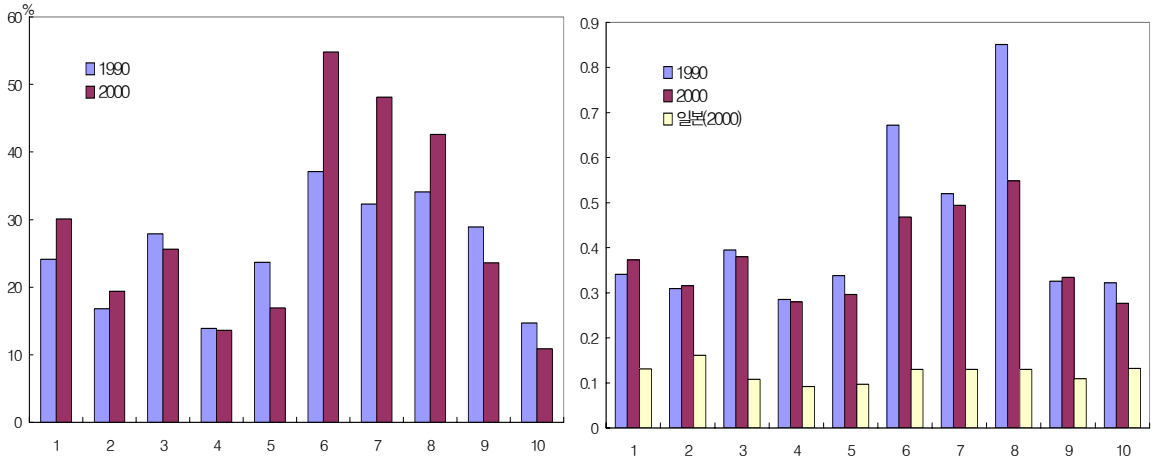
□ IT

— , ,
, 1990
30% 2000 40%

o , LCD, (37.1%→54.8%)
· · (32.3%→48.1%)

— , IT (· · , ,)
(1−) 2000 0.47~0.55 (0.13)
4

,
0.28 (0.10, 0.13) 2~3



: **1-** , 2- , 3- , 4- , 5-- , 6- , 7- , 8- , 9- , 10-

□

—

— IT

⇒

IT

Ⅳ.

1.

□

— *

,

* (CPU,), (,), (,),
(,), (,)

□

— -

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□ ,

,

□ 3 (5)
99%

2. · ·

□ 10 · · 3

—

(Trade Complementarity Index; TCI)* · ·

-

* k j $(C_{k,j}) = 100 - \sum(|x_{i,j} - m_{i,k}| \div 2)$
($x_{i,j}$ j i , $m_{i,k}$ k i)

o - TCI 1990 44 2003 50 , -
1998 47 2003 54

—

o 60%
1990 36% 2003 53%

o (1990 26% → 2003 49%)

49% 68%

□ · · , ·

— IT (,)
(: 1992 2.6% →
2000 8.2%, : 13.1% → 11.8%)

— ,

(2.9% → 6%)

(1.9% → 2.8%)

□ ,

. .

— . . 100

76.5, 110.5 3.8

(2004)

99 100

87.6, 65.1, 52.5

2.1 (2004)

⇒ , -

—

,

,

V.

□ 1980

1980

—

,

(< > ‘ ’

)

1970 :	– – ,	– : – :
1980~90 :	– (1979~1999) : (93) – (1987 ~95), (1995 ~99)	– : 4200 – : (1)
2000 : (‘ ’, 2001)	– –19 –	– : , , , – : , , ,

□ ‘ ’(2001)

—

, ,

o , 1 ,

—

*

o

* 1960 1
1970 1
, (, 1997)

—

o

,

□ 2001 ‘ ’

— (: ‘5

1 300 ’*)

* , ’ · ‘(2005.1.17)

⇒

, ,

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□

,

— ‘ ’(1952)
, (鶴田俊正 1982)

— 1960~90

o , , ,

7 ,

o , ,
(1999)

⇒ ,
,

□ WTO
1990
, ,

— 1990 ‘
’(‘ ’, 1999~2008)*

* ,
, , 40%
, , 10 ,

o - ,
- LCD , LCD

Ⅵ.

◇ , 40~50%

( )

◇ -

—

— WTO

.

o

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,

— , ,

1.

□

— 2000 ,

o
(,)

□ . .
* , R&D
,

* 2003.8 (TV/ , , , ,
, , , /SW
, , / 10)

— , .
,
R&D ,

o 2001 , ,
, ,

2.

□

—

,

o

*
,

**

* WTO (① ②
③ [, ,])
③
50~75%

** 30%
5

□ -
(Network Loan) *

* 04.7

‘04 1,076 1,335 ( )

—

, ,
(0.3%)

— (Network
Loan)

3.

□ ,

, ,

— WTO

o 19

(, IT, ,)

□

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—

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□ .

—

(Technology Licensing Office, TLO)* . .

* 1980

(Bahy-Dole)

. . (

2002)

□

4. **:** →

□ · ,

·

·

□

(‘ (The Valley of Death)’)

— , (risk money)

o ‘ ’ ‘ ’

,

— , ·

— (

)

o ‘ ’(2000)

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