

The Evolutionary Logic of Chen Yun's Economic Thought after 1949

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Abstract

Chen Yun's economic thought ran through the long course of economic construction in the People's Republic of China and reform and opening up. This article asks which elements of that thought remained continuous after 1949, which changed substantively, and how changing policy problems and institutional constraints shaped those changes. Grounded in Marxist political economy, the study uses intellectual-history and contextual documentary analysis of Chen's published speeches, reports, selected works, official documentary materials, and relevant scholarship. During national economic recovery and socialist transformation, Chen developed ideas of overall balance, construction commensurate with available fiscal, material, and human resources, and "three main components and three supplements." During the twists and turns of socialist construction, he upheld economic laws, elaborated overall balance and resource constraints, and investigated private plots, household sideline production, and crisis-era forms of household management within collective ownership; these discussions were not institutionally equivalent to the later household contract responsibility system. In the reform era, he supported readjustment and gradual experimentation and developed the "birdcage economy" metaphor. Across the three stages, the article compares four dimensions: the policy problem, perceived resource constraint, proposed institutional instrument, and temporal status of the proposal. It argues that continuity lay in overall balance, livelihood, investigation, and risk control, whereas substantive change lay in the permitted scope of decentralized and market activity. The contribution is to explain this development as problem-driven and historically bounded adaptation, rather than as a linear anticipation of the later socialist market economy.

Keywords

Chen Yun; economic thought; evolutionary logic; overall balance (zonghe pingheng); planning and market adjustment

I. Introduction

Chen Yun was an important member of both the first generation of the Party's central collective leadership, with Mao Zedong at its core, and the second generation, with Deng Xiaoping at its core. He worked for many years in charge of national financial and economic affairs and played a major role in economic construction and reform and opening up. At the founding of the PRC he confronted a weak economic base, acute material shortages, and a complex domestic and international environment; after the Cultural Revolution he again faced an economy in severe difficulty. His ideas did not arise from abstract study alone. They were formed in the course of addressing concrete economic problems—from stabilizing prices through the "silver-dollar struggle," to drafting the First Five-Year Plan, readjustment after the Great Leap Forward, and his later discussion of the "birdcage

economy." [1]

This study examines the internal logic of the post-1949 evolution of Chen Yun's economic thought and its place in the historical adaptation of Marxist political economy to Chinese conditions. Its central question is: which ideas demonstrate continuity, which represent substantive change, and how did changing policy problems, resource constraints, and institutional settings affect that development? It focuses on three moments: the initial establishment of the planned economy, the period of setbacks including the Great Leap Forward, and the reform era. In each stage, the analysis compares four dimensions—the policy problem, perceived resource constraint, proposed institutional instrument, and whether the proposal was temporary, supplementary, or intended as a durable principle. "Evolutionary logic" is therefore used analytically rather than as a synonym for chronological succession.

The subject has both theoretical and practical significance. Theoretically, Chen Yun's thought was an important achievement in adapting Marxist political economy to China; his discussions of overall balance, construction within available fiscal, material, and human resources, and planning and market adjustment enriched that tradition. The article's specific contribution is to distinguish continuity in Chen's governing criteria from change in his policy instruments and institutional boundaries. Practically, principles such as seeking truth from facts, proportional development, concern for people's livelihood, and prudent experimentation may still offer analytical reference, but their contemporary relevance must be assessed together with the different institutional role now assigned to markets and law. [2]

II. Literature Review

1. Research on Chen Yun's Economic Thought

Research on Chen Yun's economic thought began relatively early and has produced a substantial body of work. Early publications, especially *Selected Works of Chen Yun* and biographies of Chen, supplied important historical materials. Existing scholarship can be grouped broadly into documentary and biographical studies, doctrinal studies of concepts such as overall balance and "three main components and three supplements," and political-economy studies of planning, market adjustment, and reform. Scholars generally identify "overall balance," "proportional development," and seeking truth from facts as central themes. A recent review covering research from 1978 to 2022 confirms both the breadth of the field and the relative weakness of cross-period analytical integration; other studies reconsider the philosophical structure of Chen's economic thought and the institutional boundaries of the "birdcage economy." [2][3][4][5][21][22]

2. Perspectives and Methods

Existing studies usually employ historical inquiry and documentary analysis, reconstructing the formation and development of Chen's thought through his writings, speeches, and related historical materials. Their strengths are rich evidence and careful argument. The principal debate is not whether Chen valued planning and balance, but how far his acceptance of market adjustment altered the hierarchy of the planned system. Some accounts emphasize coherence and foresight; others stress that the supplements remained subordinate to public ownership, state planning, and state leadership and therefore cannot be equated with the later socialist market economy. English-language political-economy research also places Chen's ideas

within wider debates over elite politics, gradual reform, and alternative institutional blueprints. [22][23] Yet some accounts treat his views statically, give insufficient attention to their changing interconnections across periods, or inadequately analyze their interaction with major events in Party history.

3. Focus of This Study

On this basis, the present study approaches the evolution of Chen Yun's economic thought from the combined perspectives of Marxist political economy and Party history. Rather than merely listing propositions, it traces the process and logic through which his ideas were adjusted, deepened, and developed along with socialist construction. The research gap addressed is not the absence of descriptions of Chen's major ideas, but the lack of a consistent framework for separating continuity of criteria from change in institutional instruments without reading the earlier periods retrospectively through the outcome of later reform. The post-1949 period is divided into three stages; for each, the historical setting, central problems, resource constraints, policy instrument, and temporal status of the proposal are considered.

4. Sources, Periodization, and Method

The primary-source base comprises Chen Yun's published speeches, reports, and selected works, supplemented by officially published documentary and chronological materials. Secondary sources include Chinese- and English-language studies of Chen, central planning, rural reform, and the transition from planning. Texts and events are selected when Chen made a documented intervention, when an episode altered the boundary between centralized allocation and decentralized activity, or when later scholarship treats it as evidence of continuity or change. Primary sources establish Chen's own position; later scholarship is used for interpretation rather than as indirect proof of authorship.

The three stages correspond to changes in the governing economic regime and Chen's policy role: 1949–1956 covers stabilization, socialist transformation, and the establishment of the planned system; 1957–1978 covers the Great Leap crisis, economic readjustment, and prolonged political constraint; and 1978–1995 covers reform-era readjustment and the redefinition of planning and market adjustment. For each stage, the article identifies the concrete problem, reconstructs perceived constraints, classifies the proposed instrument, and determines whether it was emergency, supplementary, or durable. The evidence is limited by the selective nature of published collections, uneven access to internal deliberations, and the risk that later vocabulary may distort earlier concepts.

III. Theoretical Origins and Foundations

1. Marxist Political Economy

Chen Yun was an outstanding Marxist whose economic thought was rooted primarily in Marxist political economy. Traditional economic wisdom, his apprenticeship at the Commercial Press in Shanghai, and his financial and economic work in the Shaanxi-Gansu-Ningxia Border Region and Northeast China also mattered; nevertheless, Marxist political economy was the principal intellectual influence on his post-1949 work.

Marx's analysis of social reproduction holds that the production of means of production and consumer goods, as well as the links within each department, must maintain objective proportional relations. It supplied an important theoretical context for Chen's idea of overall balance (*zonghe pingheng*), although the connection between a particular policy and that theory must be established from Chen's own dated texts. He repeatedly stressed that finance, credit, materials, foreign exchange, and labor form an organic whole and must be coordinated. This commitment enabled him to oppose unrealistic high targets during the Great Leap Forward and to argue that the scale of construction must accord with available fiscal, material, and human resources. [6]

Lenin's New Economic Policy also offered an important reference. It showed how a proletarian state could use commodity-money relations, the market, and forms of state capitalism while retaining control of the economic commanding heights. Chen consequently understood that market mechanisms were not exclusive to capitalism and could be used in a socialist country with underdeveloped productive forces. This perspective informed his later proposal to retain limited space for market adjustment within a planned framework. [7]

2. Inheritance and Development of Mao Zedong Thought

Chen's economic thought was continuous with Mao Zedong Thought while developing it in distinctive ways. Seeking truth from facts was both the essence of Mao Zedong Thought and Chen's methodological foundation. Chen summarized his approach as: "Do not follow superiors blindly; do not follow books blindly; follow only reality—exchange, compare, and repeat." The first part rejects dogmatism and subjectivism; the second calls for listening to different views, comparing alternatives, and making decisions after repeated reflection. [8]

Chen also accepted the basic judgment that China was a populous agricultural country with a weak foundation and low levels of economic and cultural development. He therefore insisted that construction

must be commensurate with fiscal, material, and human resources. This article uses "resource-bearing capacity" as a concise label for that requirement; it does not mean "comprehensive national power." He emphasized agriculture as the foundation, warning that without agriculture there is no stability and without grain there is disorder, and advocated arranging the national economy in the sequence of agriculture, light industry, and heavy industry. [9]

3. Practical Experience in Revolutionary Base Areas

Chen's ideas also grew out of long revolutionary practice. During the War of Resistance against Japanese Aggression, he directed financial and economic work in the Shaanxi-Gansu-Ningxia Border Region. Under blockade and encirclement, he helped develop self-sufficient production and stabilized finance and markets through currency issuance, material allocation, and price stabilization. These experiences taught him how to manage an economy under scarcity and balance supply and demand.

In the late civil war he also participated in the takeover and economic administration of major cities, including Shenyang and Shanghai. In the celebrated struggles over the silver dollar and over grain and cotton, the state combined administrative measures against currency speculation with economic measures: it mobilized grain and cotton yarn and released them at opportune moments. The resulting defeat of speculative capital and stabilization of prices provided practical preparation for his later national financial and economic leadership. [10]

IV. Economic Thought during the Establishment and Exploration of the Planned Economy (1949–1956)

1. Unified Purchase and Marketing and Price Stabilization

At the beginning of the PRC, Chen Yun headed the Central Financial and Economic Commission amid grave economic difficulties. In 1949 and early 1950, speculative capital centered in Shanghai repeatedly drove prices upward. In the silver-dollar struggle, the government closed the securities exchange and prohibited free circulation of gold, silver, and foreign currency. In the more consequential struggle over grain and cotton, it coordinated national supplies and released large quantities simultaneously when prices peaked. These actions demonstrated Chen's flexible use of both administrative and market instruments to achieve macroeconomic objectives. [11]

With the First Five-Year Plan and large-scale industrialization, urban demand for grain grew sharply. The dispersed nature of smallholder agriculture and speculative activity made procurement difficult and

intensified market fluctuations. In 1953 Chen proposed planned purchase and planned sale for grain, later extended to cotton, oil crops, and other important agricultural products. In its historical context, this system—commonly rendered as "unified purchase and marketing" (tonggou tongxiao)—concentrated scarce resources, secured urban supply and foreign-exchange earnings, and supported industrialization. Its costs must also be stated: compulsory procurement narrowed rural marketing choices, weakened price and production incentives, and reinforced an urban-centered allocation structure. The policy should therefore be understood as a historically conditioned response rather than as an unqualified institutional achievement. [12]

2. "Three Main Components and Three Supplements"

After socialist transformation was basically completed in 1956, Chen recognized possible disadvantages of a unitary ownership structure and highly centralized planning, including limited product variety, declining quality, and weak market vitality. At the Eighth Party Congress he advanced the "three main components and three supplements": state and collective operations should be the main component of industrial and commercial management, supplemented by a limited amount of individual operation; planned production should be the main component of production planning, supplemented by free production permitted within the state plan; and the state market should be the main component of the unified socialist market, supplemented by a free market under state leadership. [13]

This proposal was an early attempt to combine planning and market adjustment in a socialist framework. Chen did not treat the two as absolute opposites; while upholding public ownership and planning as primary, he sought limited room for individual activity and market adjustment to add flexibility and vitality. The boundaries were explicit: all three supplements remained subordinate to public ownership, the state plan, and state leadership of the market. The subsequent Great Leap Forward and people's commune movement prevented the proposal from being fully implemented. Its significance lies in recognizing rigidity and seeking bounded correctives, not in providing a blueprint for the later socialist market economy.

V. Adjustment and Persistence during a Period of Twists and Turns (1957–1978)

1. Calm Reflection during the Great Leap Forward

The Great Leap Forward, launched in 1958, generated serious imbalances in the national economy. Chen questioned the escalation of steel-production targets

and, after investigation, stated at a 1959 Politburo meeting that the target was unattainable and should be reduced. In an atmosphere of intense political pressure, this position reflected his commitment to facts and economic law. [14]

In response to excessive capital construction and the crowding out of agriculture and light industry, Chen further developed his analysis of resource-bearing capacity and overall balance. He held that the scale of construction must accord with the country's financial and material capacity; whether it does so is the boundary between economic stability and instability. He again stressed balance among finance, credit, and materials, and advocated giving priority to production, tapping existing potential, innovation, and renovation before new construction. [9][15]

2. The 1961 Qingpu Investigation and the 1962 Household-Management Discussion

During the early-1960s economic readjustment, some farmers in Anhui and elsewhere experimented with "responsibility fields" and household-based output arrangements to address food shortages. These practices must be distinguished from Chen Yun's Qingpu investigation of 27 June–11 July 1961. In Qingpu, Chen examined procurement burdens, private plots, household sideline production, pig raising, rural commerce, and production incentives; his recommendations treated limited individual or household activity as a supplement within the people's-commune and collective-ownership framework. [16][25]

A separate issue is the discussion in 1962 of redistributing or managing production through households during an acute crisis. That proposal remained embedded in collective ownership and the people's-commune context and was not adopted as a stable national institution. It should therefore be described as a crisis-era alternative under discussion, not as the household contract responsibility system (jiating lianchan chengbao zeren zhi) institutionalized after 1978. The continuity lies in concern for livelihood and incentives; institutional equivalence does not. [16]

3. Persistence during the Cultural Revolution

During the Cultural Revolution Chen was sidelined politically, yet remained concerned about disorder in economic affairs. He criticized disruptions to production where possible and supported restoring necessary rules, production, and supply. His investigations in factories and rural areas while in Jiangxi gave him a more direct understanding of grassroots conditions. Because his formal policy role was sharply reduced, claims about this period should be tied to dated records rather than presented as an uninterrupted line of policy leadership. He remained convinced that economic laws are objective and that violations of them inevitably carry costs.

VI. Deepening and Development in the Reform Era (1978–1995)

1. The Policy of Readjustment, Reform, Consolidation, and Improvement

After the Third Plenum of the Eleventh Central Committee, China faced both the legacy of the Cultural Revolution and the excessive external-import projects sometimes called the "foreign leap forward." Chen, together with Deng Xiaoping, Li Xiannian, and others, supported the policy of "readjustment, reform, consolidation, and improvement." He argued that readjustment was a prerequisite for reform: without restoring proportional relations, reform could not proceed smoothly. He favored reducing oversized capital construction, especially projects that exceeded national capacity, and returning the economy to steady development. [17]

Chen supported the household contract responsibility system that emerged in rural areas, recognizing that it responded to China's conditions and could release productive forces. This post-1978 system was a nationally institutionalized arrangement with a different policy status, scope, and legal environment from the 1961 Qingpu recommendations and the emergency alternatives discussed in 1962. He also favored cautious, pilot-based experimentation, including in special economic zones: practices should be tested, evaluated, and extended only after experience had been gained. This gradual approach—not a claim that he coined the phrase "crossing the river by feeling for stones"—was characteristic of his reform thinking. [18]

2. The "Birdcage Economy"

In 1982 Chen used the metaphor of a "birdcage economy" (niaolong jingji) to explain his view of planning and the market. Economic activity should be enlivened, he argued, but excessive decentralization could produce disorder. Market adjustment should operate within the scope permitted by the plan. The bird must be allowed to fly rather than held tightly in the hand, but it should fly within a cage: if the bird represents an active economy, the cage represents the state plan. Planning therefore retained institutional primacy; the metaphor did not assign the market the later role of the principal mechanism of resource allocation. [19][22]

The metaphor presented planning and market adjustment as a dialectical unity. Planning supplied the macro framework and boundaries, while the market supplied micro-level vitality and a supplementary adjustment mechanism. It was neither a rejection of markets nor identical to the later formulation of a socialist market economy. Its historical contribution was to enlarge the legitimate sphere of market adjustment while preserving a plan-led hierarchy;

its limitation was that the size and rules of the "cage" remained dependent on administrative planning rather than a fully developed market and legal framework.

3. Later Reflections on Reform

Chen consistently placed people's livelihood at the center of economic work. His principle, "first food, then construction," meant that basic needs such as food and clothing should be secured before resources were allocated to construction. This expressed the socialist purpose of production and anticipated the contemporary emphasis on people-centered development. [6]

In his later years, Chen also warned of social problems that could accompany reform, including money worship, corruption, and deteriorating conduct. He stressed the need to advance material and cultural-ethical progress together and regarded the conduct of the governing party as a matter bearing on its survival. These concerns show that he evaluated economic reform from the perspective of the Party's and country's long-term stability. [20]

VII. Main Logic and Core Features of the Evolution

1. From Plan-Led Development to Exploring a Combination of Planning and Markets

Across more than four decades, Chen Yun's thought displayed continuity without following a predetermined or uniformly progressive line. While upholding basic Marxist principles, he explored different forms of coordination and bounded market adjustment in response to the policy problems of each historical stage. Unified purchase and marketing, the "three main components and three supplements," crisis-era rural proposals, and the birdcage economy differed in purpose and institutional status; they should not be placed on a single ascending scale of marketization. The continuity lay in overall balance, resource constraints, livelihood, investigation, and risk control, while change lay in the instruments and permissible scope of decentralized activity.

This was not a smooth or linear process. Chen's ideas deepened through lessons drawn from positive and negative experience and under changing political constraints. Some measures were emergency responses, some were bounded supplements, and others were intended as longer-term principles. The causal mechanism identified here is problem-driven institutional learning: scarcity and instability strengthened demands for coordination; overcentralization exposed information and incentive problems; and reform uncertainty favored pilots, evaluation, and reversibility. This formulation explains change without claiming that later institutions were already contained in earlier proposals.

2. Pragmatism, Dialectics, and a People-Centered Orientation

Pragmatism was Chen's most distinctive quality. His insistence on following reality rather than superiors or books, his criterion of resource-bearing capacity, and his emphasis on the three major balances reflected a conscious respect for objective economic laws. His thought was also dialectical: he sought to coordinate planning and markets, construction and livelihood, and central leadership and appropriate local flexibility rather than treating these relationships as zero-sum choices.

Finally, his thought was people-centered in its value orientation. He took improvement in people's lives as the ultimate purpose of economic work, gave sustained attention to food security and farmers' livelihood, and placed "food first, construction second." His concern with Party conduct and social ethos likewise stemmed from the protection of the people's fundamental interests.

VIII. Contemporary Value and Implications

1. Improving the Socialist Market Economy

The birdcage economy continues to illuminate the question of how macro-level rules condition decentralized economic activity, but not as a model to be transferred intact. Its original problem was how to introduce vitality while retaining planning primacy. The present socialist market economy assigns a fundamentally different role to market allocation. The valid comparison is therefore limited to the need for clear regulatory boundaries and macroeconomic coordination; it does not justify restoring the early-1980s hierarchy between plan and market.

Chen's preference for prudence and experimentation also remains instructive where reforms involve uncertainty, localized knowledge, and potentially irreversible costs. Its original purpose was to learn from practice while containing spillovers. The limit of transfer is equally important: pilot projects cannot substitute for legal authorization, transparent evaluation, or timely nationwide action where delay itself creates systemic risk.

2. Promoting High-Quality Development

Chen's insistence on acting in accordance with national conditions requires development strategies to begin from concrete realities and to respect economic constraints. The original problem was investment and production targets that exceeded fiscal, material, and human-resource capacity. The contemporary comparison is strongest where expansion outruns financing, resources, or supporting capacity; it is weaker where modern prices, capital markets, and regulatory institutions provide information unavailable

in the original planning environment.

His idea of overall balance also has analytical value because fiscal, financial, industrial, social, and environmental objectives can constrain one another. It cautions against evaluating development through a single output target while ignoring bottlenecks and distributional costs. It does not, however, generate ready-made solutions to current regional, ecological, or technological problems, which require contemporary evidence and institutions.

3. Upholding People-Centered Development

Chen's principle of "first food, then construction" connected investment choices to basic welfare. Its original problem was acute scarcity and the crowding out of consumption by construction. In a contemporary setting, the comparable question is whether development strategies protect essential services and distribute adjustment costs fairly. The historical principle supports a people-centered evaluative criterion, but a modern social-protection or common-prosperity policy cannot be derived from a scarcity-era formulation without independent institutional and empirical analysis. [6]

IX. Conclusion

This article has traced the evolution of Chen Yun's economic thought after 1949 by distinguishing continuity in governing criteria from change in institutional instruments. Overall balance, construction within available fiscal, material, and human resources, livelihood protection, investigation, and risk control supplied continuity. The acceptable scope of individual production, household incentives, and market adjustment supplied change. The three-stage comparison shows that this process was driven by recurring problems of scarcity, imbalance, information, incentives, and reform uncertainty rather than by a linear movement toward the later socialist market economy. The theoretical contribution is to define "evolutionary logic" as the relationship among policy problems, constraints, instruments, and the temporary or durable status of proposals.

The analysis is based mainly on publicly available published materials and remains a macro-level account. Published collections are curated, retrospective memoirs can compress chronology, and page-level verification depends on the editions available to the author. Future research could make greater use of meeting records and archival sources to examine the concrete formation, contestation, and implementation of Chen's views. Comparative research with the economic thought of other contemporary Chinese leaders or with reform thought in other socialist countries would further clarify his theoretical characteristics and historical position.

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