

Original Paper

The Current Status, Challenges and Solutions for the Development of China's New Rural Collective Economy

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Abstract

This paper takes China's new rural collective economy as its subject of study, systematically analysing its current state of development, spatio-temporal evolution, practical challenges and pathways for optimisation. By reviewing policy developments and statistical data, and employing spatio-temporal analysis methods, the paper reveals the temporal changes and spatial differentiation characteristics of the collective economy in recent years. The study finds that, whilst the scale of rural collective economies nationwide continues to expand and the revenue structure at the village level is steadily improving, regional development disparities remain pronounced. Furthermore, the sector faces challenges such as insufficient deepening of property rights reforms, severe industrial homogenisation, and a shortage of specialised talent. This paper aims to provide empirical support and theoretical guidance for local authorities in formulating differentiated development strategies and promoting comprehensive rural revitalisation.

Keywords

New rural collective economy, Spatio-temporal evolution, Rural revitalisation

1. Introduction

The new rural collective economy is a key pillar for achieving rural revitalisation and common prosperity. As a vital manifestation of socialist public ownership in rural areas, the new rural collective economy serves not only as an engine for stimulating the endogenous momentum of rural development, but also as the institutional foundation for safeguarding farmers' property rights and narrowing the urban-rural divide. Since the 18th National Congress of the Communist Party of China, China has continued to deepen rural reform. From the 2016 "Opinions on Steadily Advancing the Reform of the Rural Collective Property Rights System", which first defined the concept (Ministry of Agriculture and

Rural Affairs, 2026), to the Third Plenary Session of the 20th Central Committee, which emphasised the establishment of a mechanism featuring “clear property rights and reasonable distribution” (Xinhua News Agency, 2026), and on to the 2025 Central Document No. 1, which proposed development “tailored to local conditions” (Xinhua News Agency, 2026), the national emphasis on the collective economy has steadily increased, charting a clear blueprint for its high-quality development.

There has been extensive academic debate regarding the nature of the new rural collective economy. Most studies argue that the new rural collective economy differs from traditional models and is characterised by its multi-tiered and diversified nature. Peng et al. (2025) point out that its core lies in establishing regional cooperative organisations through property rights reform, thereby achieving asset preservation and mutual benefit for members (Peng & Yue, 2025); Du (2026), meanwhile, further defines its “novel” characteristics across five dimensions: property rights systems, governance structures, business models, distribution mechanisms, and drivers of development. Although various models—such as property leasing, shareholding cooperation and Party-led development—have been explored across different regions (China Economic Net-Economic Daily, 2026), scholars including Xu (2023) and Gao (2022) have also highlighted that practical challenges such as unclear rights and responsibilities, a shortage of talent and industrial homogenisation continue to constrain its deeper-level development (Xu & Du, 2023; Gao, Li, & Lei, 2022).

Adopting a spatio-temporal coupling perspective, this paper aims to address the gap in existing research regarding the insufficient attention paid to dynamic evolution. In contrast to previous studies that have focused on qualitative descriptions, this paper utilises macro-level statistical data to systematically characterise the temporal characteristics and spatial patterns of China’s new rural collective economy. It identifies the institutional, market and human capital factors constraining its development and proposes targeted policy measures, with a view to refining the analytical framework for the rural collective economy and enhancing the practical explanatory power of the research.

2. Spatio-temporal Patterns in the Development of China’s Rural Collective Economy

2.1 Evolution Over Time: Expanding Scale and Enhancing Quality and Efficiency in Tandem

China’s rural collective economy has exhibited a pattern of rapid asset accumulation accompanied by periodic fluctuations in growth rates. Data shows (Figure 1) that between 2015 and 2022, the total revenue of the national rural collective economy rose from 0.41 trillion yuan to 0.72 trillion yuan, an increase of 75.6%; total collective assets surged from 2.86 trillion yuan to 9.61 trillion yuan, a 2.36-fold increase. The pace of asset accumulation has significantly outstripped revenue growth, reflecting substantial progress in the revitalisation and revaluation of existing rural collective assets. In terms of growth trajectories, driven by the policy dividends of the ‘separation of three rights’ in 2019, the growth rate peaked at 15.7%; although the growth rate moderated somewhat between 2020 and 2022 due to fluctuations in the external environment, it remained consistently positive, demonstrating remarkable resilience and a steady recovery trend (Zhang & Du, 2023; Chen, 2025).

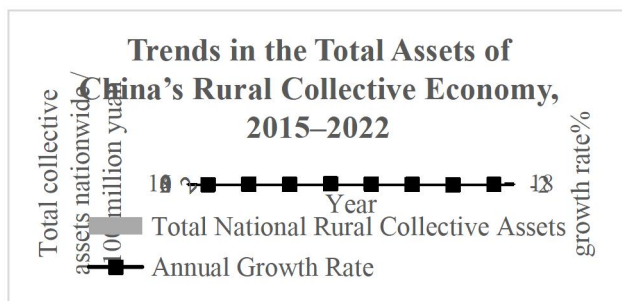


Figure 1. Trend in Total Assets

The evolution of the rural collective economy between 2015 and 2022 was characterised by expansion in scale, growth in assets and stable fluctuations. Policy reforms provided the impetus for development, whilst the external environment led to short-term fluctuations; however, the overall upward trend remained unchanged. This not only corroborates academic conclusions regarding the steady development of the new rural collective economy (Ou, Yang, & Yao, 2025; Sun, Zhang, Liu et al., 2024), but also lays a solid foundation for rural revitalisation and common prosperity.

The optimisation of village-level income structures signifies that the collective economy is shifting from “eliminating shell villages” to “enhancing quality and efficiency”. Between 2015 and 2021, the proportion of “shell villages” (villages with no operating income) nationwide fell sharply from 53.62% to 21.09%, whilst the proportion of villages with operating income rose to 78.87% (Zhang, 2025). More crucially, the distribution of income is shifting from the lower end of the scale towards the middle and upper ranges: the proportion of low-income villages (earning less than 50,000 yuan) has halved, whilst the proportion of medium-income villages (earning between 100,000 and 500,000 yuan) has expanded significantly. This structural optimisation has not only enhanced the capacity for village-level public services but has also laid a solid grassroots foundation for the goal of common prosperity through “joint construction and shared benefits” (Sun, Liu, Wang et al., 2025; Li, W. J., & Li, R., 2023).

2.2 Spatial Distribution: Distinct Gradients and Significant Regional Variations

The scale of China’s rural collective economy exhibits significant regional variations, generally forming a tiered pattern characterised by “the East leading the way, the Northeast operating on a large scale, the Central region being balanced, and the West lagging behind”. Each region has developed distinctive characteristics based on its own resource endowments. Specifically:

2.2.1 Differences in the Scale of Rural Collective Enterprises across Regions in China

Benefiting from its advantageous geographical location adjacent to the coast and convenient transport links, as well as the robust economic foundation accumulated as a frontier of reform and opening-up, coupled with a continuously improving macro-policy support system and a dynamic market environment, the eastern region not only leads the nation in terms of the scale of its rural collective enterprises, but has also achieved the highest national standards in terms of intensification, modernisation of management and market integration capabilities. Between 2012 and 2023, provinces

such as Guangdong and Shanghai recorded average levels of development in the new rural collective economy that were significantly higher than the national average; Guangdong's development level was approximately seven times that of Qinghai Province, whilst the overall scale of operations in coastal provinces generally reached 1.5 to 2 times that of the central regions. These regions have generally achieved high rates of land consolidation through well-established land transfer markets and service platforms. The reform of the shareholding cooperative system has been implemented in a relatively thorough and comprehensive manner, whilst the expansion into non-agricultural sectors—such as warehousing and logistics, rural tourism, and property leasing—has effectively driven the diversification and high-value-added development of the collective economy. Consequently, collective economic organisations have demonstrated robust vitality and significant economies of scale in terms of resource allocation, risk mitigation, and sustained income growth (Gao & Cui, 2023). As a key national base for commercial grain production, the Northeast region, with its vast and fertile plain arable land resources, generally maintains a collective farming scale at the national average level, with its development model centred on large-scale, contiguous land cultivation. Provinces such as Heilongjiang and Jilin have an average level of development higher than that of most provinces in the west. The concentrated transfer of land management rights is relatively widespread through new entities such as family farms and cooperatives; the rate of large-scale cultivation has exceeded 60 per cent, and investment in the purchase and application of large-scale agricultural machinery is relatively high, resulting in a high level of mechanisation. However, the region's industrial structure remains relatively monolithic, with the economy heavily reliant on the cultivation of traditional bulk agricultural commodities. The scale, level of development and diversification of non-agricultural industries remain inadequate, thereby constraining the growth potential and risk-resilience of the collective economy (Zhang & Mu, 2023).

The scale of collective farming in the central region is slightly smaller than that in the north-east, placing it at the lower-middle level nationally; moreover, there is marked disparity in development not only between provinces within the region but also between counties and cities within the same province. Provinces such as Henan and Hubei have average development levels lower than those of the eastern and northeastern regions, exhibiting characteristics of multi-polar differentiation internally; most areas remain dominated by traditional, small-scale, dispersed farming operations. The degree of marketisation in land transfers and the proportion of households engaged in large-scale farming are low, resulting in a long-term accumulation deficit of collective assets and a lack of momentum for future development. However, in certain provinces—such as parts of the plains or suburban areas in Hunan and Jiangxi—effective utilisation of distinctive agricultural resources or locational advantages has enabled localised, scaled-up and intensive development in sectors such as specialised crop and livestock farming and agricultural product processing. This has resulted in an internal development disparity coefficient of 0.35 for the region, indicating a significant internal gradient (Yuan, 2024).

The scale of collective operations in the western regions is the smallest nationwide, and overall

development is the most lagging. Constrained by relatively unfavourable complex geographical environments such as mountainous and plateau areas, as well as a relatively weak historical economic foundation and infrastructure development, the average development levels of provinces such as Guizhou and Qinghai are far below the national average. Agricultural production conditions in these regions are relatively poor, with farming still predominantly characterised by small-scale, dispersed household operations. Land transfer rates are low, and the rate of large-scale farming generally remains below 30%. Collective asset accumulation is relatively weak, business models are relatively traditional, market integration capabilities are limited, and operational efficiency is relatively low. The overall scale of these regions is approximately only one-third that of the eastern regions, and the task of catching up remains arduous (Lu & Yang, 2022).

2.2.2 Differences in Village-level Structures in the Development of Rural Collective Economies

There are significant differences in the economic structure of villages across the four major regions, which are closely linked to fundamental factors such as the scale of operations and resource endowments in each area. The village-level structure in the eastern region exhibits distinct characteristics of diversification, with non-agricultural industries accounting for a high proportion of the economy, forming a clear pattern where “agriculture is secondary and non-agricultural activities are primary”. On average, non-agricultural income accounts for as much as 65 per cent, far exceeding that of other regions; Local village-level organisations have successfully established diverse business models by revitalising collective assets and actively introducing external capital, demonstrating robust development vitality and outstanding risk-resilience. In contrast, the village-level structure in the Northeast remains dominated by traditional agriculture, with non-agricultural industries lagging behind and exhibiting a monolithic structure; agricultural income accounts for over 70%, whilst non-agricultural activities are largely confined to the primary processing of agricultural products; Constrained by multiple factors such as a shortage of specialised talent and limited market access, the operational capabilities of village-level organisations are generally weak, and the process of industrial restructuring is slow; this over-reliance on agriculture has led to a lack of stability in overall development (Ma & Shi, 2025). The village-level economy in the Central Region generally exhibits the characteristic of “agriculture as the mainstay, with non-agricultural activities serving as a supplement”, but internal regional disparities are very pronounced. Most villages still rely primarily on traditional agricultural production, whilst non-agricultural industries remain limited in scale and yield low returns; however, some suburban villages adjacent to cities are able to leverage their locational advantages to actively develop industries such as property leasing and rural tourism. Organisational capabilities vary significantly between villages, with a structural disparity coefficient reaching 0.42; the gap in non-agricultural income between remote villages and suburban villages exceeds 40%. The village-level structure in the western region is the most monolithic and underdeveloped; over 80% of village economies rely primarily on traditional agriculture, with non-agricultural income generally accounting for less than 10%, and some villages even lack stable sources of income. Constrained by development

bottlenecks such as weak infrastructure and a shortage of skilled personnel, village organisations suffer from a marked lack of economic vitality and low operational efficiency, with the majority still struggling to merely “maintain basic subsistence” (Zhang & Luo, 2023).

3. Key Issues in the Development of China’s Rural Collective Economy

3.1 At the Institutional Level: Delays in Property Rights Reform and Inadequate Governance Mechanisms

Reform of the rural collective property rights system forms the institutional foundation for the healthy development of the new rural collective economy. However, in some regions, issues such as unclear property rights boundaries, ambiguous identification of membership, and inadequate quantification of operational assets persist.

In 2022, the total revenue of the national rural collective economy stood at 671.139 billion yuan, whilst the total amount distributed to farming households was merely 84.381 billion yuan, accounting for approximately 12.57 per cent. In 2014, this proportion stood at 12.33 per cent, indicating that there has been virtually no substantial improvement over the past eight years. These figures reflect the persistence of institutional obstacles, such as an imperfect collective revenue distribution mechanism, low transparency in distribution, and a lack of close alignment between the interests of the collective and those of the farming households. At the same time, many villages have yet to achieve the “separation of government and economic functions”; there is an overlap of roles and unclear delineation of powers and responsibilities between the village Party branch, the village committee and the collective economic organisation, leading to inefficient decision-making and a lack of oversight mechanisms. Even in some villages where shareholding economic cooperatives or collective economic organisations have been established, there remains a lack of standardised articles of association, transparent financial systems and scientific decision-making mechanisms; the awareness of some grassroots cadres and the public needs to be improved, as they face issues of “daring not to act, not wanting to act, and not knowing how to act”, and public participation remains low (Wen, 2024). Furthermore, a significant proportion of village-level collective economic organisations still rely on fiscal transfer payments to maintain their operations, with a severe lack of endogenous development momentum.

3.2 Market-level: Industry Homogenisation and a Lack of Self-sustaining Capacity

From the perspective of industrial development, the rural collective economy is generally characterised by low industrial standards, a monolithic structure and severe homogenisation. Data shows that between 2015 and 2020, although the overall income of the new rural collective economy showed an upward trend, the proportion of operating income continued to shrink; by 2020, operating income accounted for only 30.6 per cent. In stark contrast, the proportion of revenue derived from subsidies has risen year on year. If this trend continues, subsidy revenue will surpass operating revenue in the short term. This implies that the “substance” of collective economic development is not particularly

robust—while revenue appears to be growing on the surface, it is in fact reliant on continuous financial support from higher-level authorities rather than improvements in the collective’s own operational capabilities.

Furthermore, collective economic organisations generally possess weak capabilities for participating in market competition. Most villages lack professional market operations teams; their products have low added value and limited brand influence, making it difficult to effectively connect with the wider market. In some regions, the development of the collective economy suffers from strong external dependence and insufficient capacity for self-sustained development. When such development is reduced to mere “tasks” and “targets”, it gives rise to projects driven by formalism, leading to waste of resources and the accumulation of debt (Pan & Dai, 2023).

3.3 In Terms of Human Resources: A Shortage of Skilled Personnel and a Lack of Incentive Schemes

The inability to attract and retain talent is a bottleneck hindering the leapfrog development of the collective economy. The development of the rural collective economy relies heavily on professionals who understand business operations and are skilled in management; however, the current cadre of village officials generally lacks market experience and management expertise. The root causes of this predicament lie in the absence of incentive mechanisms, inadequate remuneration systems and limited career progression opportunities, making it difficult for external talent to put down roots in rural areas, whilst existing talent faces the risk of attrition.

Simply injecting capital without the corresponding talent support makes it difficult to convert external resources into tangible business results. Capital can provide a short-term lifeline, but without professional talent to mobilise resources, implement projects and open up markets, the collective economy will merely spin its wheels, with investment yielding no output. More alarmingly, in some regions, due to a shortage of talent, the operational activities of collective economic organisations are effectively dominated by a handful of individuals. This development model, which relies heavily on individual capabilities, carries significant uncertainty; should these individuals depart, the collective economy could well grind to a halt (Xu & Yu, 2023).

4. Advice

Based on the analysis of the issues outlined above, promoting the high-quality development of the new rural collective economy requires systematic and coordinated institutional innovation. The following specific recommendations are proposed:

4.1 At the Institutional Level: Deepening Property Rights Reform and Improving Governance Structures

Accelerate the work of clarifying ownership rights and registering collective assets, as well as verifying members’ status; building on a comprehensive inventory and valuation of assets, steadily advance the quantification of operational assets down to individual households and individuals, clarify ownership, and properly address the rights and interests of special groups such as married-out daughters and

sons-in-law; Establish a nationwide unified collective asset information management platform to achieve the digitisation and standardisation of asset registration, changes and supervision. This will fundamentally resolve the dilemma of unclear rights and responsibilities caused by ambiguous property rights, laying a solid foundation for the standardised operation of the collective economy.

Improve the collective revenue distribution system by clarifying revenue allocation ratios and member dividend standards, ensuring a steady increase in the proportion of total distributions allocated to farming households. Implement financial transparency reforms within collective economic organisations by establishing a regular disclosure system to make core information—such as asset status, revenue distribution and project expenditure—public to all members. Strengthen interest-linkage mechanisms by exploring distribution models such as “guaranteed minimum returns plus dividends based on shareholding”, enabling farmers to genuinely share in the dividends of collective economic development and effectively enhancing the public’s sense of gain and enthusiasm for participation.

Steadily advance the reform to separate the functions of the village “Two Committees” from those of collective economic organisations, clarifying the boundaries of their respective powers and responsibilities as well as their operating rules. Launch pilot schemes for the separation of government and economic functions in villages with a solid foundation in collective economy, and gradually roll them out after summarising the experience; Establish the legal person status of collective economic organisations and grant them independent operational and management authority; improve corporate governance structures by establishing and refining the “three-meeting” system comprising the Shareholders’ General Meeting, the Board of Directors and the Board of Supervisors, thereby achieving a system of checks and balances between decision-making, execution and supervision, and effectively resolving inefficiencies caused by overlapping functions. Guide all collective economic organisations to formulate standardised articles of association, clearly defining core provisions such as the organisation’s purpose, governance structure, scope of operations and profit distribution; Advance the institutionalisation of financial management, appoint professional accounting staff, and implement transparent accounting practices and democratic financial management; refine decision-making procedures for major matters, ensuring that all issues involving the disposal of collective assets, project investments and large-scale expenditures are subject to democratic deliberation and approval.

Addressing the issues of some grassroots cadres being “reluctant to act, unwilling to act or unable to act”, strengthen ideological guidance and update mindsets; organise grassroots cadres to study the development experiences of advanced regions to break away from conservative thinking; Refine the error-tolerance and correction mechanism, clarifying the circumstances and conditions under which errors are permitted during reform and innovation; establish a differentiated performance appraisal system to stimulate enthusiasm for work and entrepreneurship; strengthen capacity building by employing methods such as “hands-on” mentoring and case-based teaching to enhance grassroots cadres’ practical capabilities and innovative thinking in developing the collective economy.

4.2 Market Level: Optimising the Industrial Structure and Enhancing Self-sustaining Capacity

To address the issues of low industrial standards, a monolithic structure and severe homogenisation, we will draw on each village's resource endowments and locational advantages to formulate differentiated industrial development plans, thereby avoiding blind imitation and homogenised competition. We will encourage the development of diverse business models, such as specialised crop and livestock farming, deep processing of agricultural products and rural e-commerce, to extend the agricultural industrial chain. We will promote the integrated development of the primary, secondary and tertiary sectors, planning and constructing modern agricultural industrial parks or industrial clusters to form integrated industrial chains encompassing production, processing and sales. We will guide village collectives to cultivate leading industries based on local distinctive resources, creating a "one village, one industry" development model to effectively enhance industrial competitiveness and resilience.

Focus on enhancing the collective economy's own operational capabilities to gradually reduce reliance on fiscal subsidies. Support village collectives in revitalising idle resources and assets to develop stable income-generating sectors such as property management and service industries; encourage collective economic organisations to undertake rural public welfare projects and government-purchased services to expand sources of operating revenue; optimise the income structure by gradually increasing the proportion of sustainable income from operations and investment returns, thereby shifting the collective economy from a "blood transfusion" model to a "blood generation" model.

Establish a project feasibility assessment mechanism, conduct thorough market research on proposed projects, and eliminate "prestige projects" that are divorced from reality; establish and improve a performance evaluation system for fiscally supported projects, linking the effectiveness of fund utilisation to the level of subsequent support; establish a debt risk early warning mechanism, strictly control the scale of village-level debt, prevent reckless borrowing without regard for consequences, and ensure the healthy and sustainable development of the collective economy.

4.3 Talent Development: A Dual Focus on Recruitment and Development, and the Establishment of Incentive Mechanisms

Deepen the reform of support policies to shift from "blood transfusion" to "blood generation", with a focus on talent development. Implement the Rural Revitalisation Talent Attraction Programme, channelling various support resources towards talent development, technology introduction and management upgrades, and attracting university graduates, veterans and migrant workers to return home to start businesses or take up positions; improve supporting policies for talent, providing convenient services such as housing, children's education and healthcare for recruited talent; Establish a mechanism for the two-way flow of talent between urban and rural areas, encouraging urban professionals to participate in the development of rural collective economies through part-time work, consultancy, or technical equity participation.

Refine the remuneration incentive mechanism for leaders of collective economic organisations, linking pay levels to operational performance; establish special commendation and reward schemes to offer

substantial rewards to units and individuals who have achieved significant results in developing the collective economy; explore a professionalised management system for village officials to enhance the attractiveness and stability of these posts, ensuring that outstanding talent is willing to come, stay and perform well.

Cultivate specialised market operations teams to introduce or train multi-skilled professionals with market acumen and marketing expertise for collective economic organisations; support village collectives in registering their own trademarks and applying for product quality certification to build regional brands; leverage platforms such as trade fairs and agricultural product exhibitions to enhance product visibility and market share. Guide collective economic organisations to integrate with new sales channels such as e-commerce platforms and community group buying to expand product distribution, thereby effectively increasing product value-added and market competitiveness. At the same time, a mechanism for monitoring and evaluating the effectiveness of support measures should be established. Regular assessments of the return on investment should be conducted, and support strategies adjusted in a timely manner to ensure that public funds are utilised to their fullest potential.

5. Conclusion

Building on existing research, this paper systematically examines the patterns of evolution in China's new rural collective economy from a spatio-temporal perspective, refining the analytical framework for assessing development levels and regional disparities, and thereby enriching the theoretical body of knowledge on rural collective economies. The study confirms that China's new rural collective economy is steadily improving in quality and efficiency, exhibiting a spatial gradient pattern of relative strength in the east and relative weakness in the west, with institutional frameworks, markets and talent being the key influencing factors. The study proposes policy recommendations in three areas—property rights reform, industrial upgrading and talent development—which hold significant practical guidance value. However, the study lacks sufficient exploration of micro-level mechanisms and long-term pathways; future research could combine typical case studies with long-term tracking data to further deepen the investigation of regional heterogeneity and driving mechanisms.

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