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『ケンブリッジ・ガゼット：グローバル戦略編』

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彼れを知りて己れを知れば、百戦して殆(あや)うからず。
彼れを知らずして己れを知れば、一勝一負す。
彼れを知らず己れを知らざれば、戦う毎に必ず殆(あや)うし。
(孫子)

Know the enemy and know yourself; In a hundred battles you will never be in peril.
When you are ignorant of the enemy but know yourself; Your chances of winning or losing are equal.
If ignorant both of your enemy and of yourself; You are certain in every battle to be in peril.
(Sunzi, an ancient Chinese strategist)

小誌は大量の資料を網羅的かつ詳細に報告するものではない。ハーバードに居る一研究者である筆者が接した情報や文献を①マクロ経済、②資源・エネルギー、環境、③外交・安全保障の分野に関し整理したものである。紙面や時間の制約に加えて筆者の限られた能力という問題は有るが、小誌が少しでも役立つことを心から願っている。

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2. 情報概観—①マクロ経済、②資源・エネルギー、環境、③外交・安全保障
3. 編集後記

1. *Cambridge Gazette*: グローバル戦略編第 10 号

米国連邦議会上院が 1 月 28 日にベン・バーナンキ連銀議長の再任を承認したが、その直前ポール・クルーグマン教授が 25 日付 *New York Times* に発表した小論(“The Bernanke Conundrum”)は示唆的だ。同議長を優れた経済学者として評価する一方で、連銀という「組織」が内包する性格—うぬぼれ・独り善がり(complacency)—に彼が染まってしまったと警告している。リーマン・ショックの真っ只中、議会証言に立ったバーナンキ議長は「我々はやるべきことを行なっている。だから『我々を信じて頂きたい(Trust us)』」と言わんばかりだったとクルーグマン教授は手厳しい。

凡そ人間は、筆者を含めて程度の差こそあれ、うぬぼれ・独り善がりに弱い存在だ。その意味で昨年 11 月に開催された関西経済同友会のボストン・シンポジウムは意義深いものであった。参加者の 1 人、ロバート・ローレンス教授は、「厳しい状況下で我々は謙虚にならねばならない。例を挙げれば 2000 年と現在の国際貿易の様相は大きく違う。しかも我々はそれを完全に理解している訳ではない」と語られた。その時、筆者はエルハナン・ヘルプマン教授の NBER 論文(“Trade, FDI, and the Organization of Firms,” NBER WP No. 12091)を思い出していた—「世界経済は国際貿易・直接投資の新理論を求めている。個々の企業が国境を超えた活動を発展させるか故に、個々の企業の組織再編こそが世界経済を大きく変化させている」、と。かくして優れた研究者と最前線で活躍する企業家・政策担当者は、互いに直接的・継続的・多層的な情報交換を行わない限り共に「木を見てばかりで森の全体像を忘れ、或いは木の進化を忘れて森の将来像を見失う」危険性に陥りかねない。もしその危険に陥ったとすれば、研究者は「浅薄な理論家(armchair strategist や Monday morning quarterback)」と揶揄され、企業家や政策担当者もまた「不適格な実践家(inept practitioner)」の誇りを免れない。

2. 情報概観 紙面の制約上、原則、参考になると筆者が判断した最新情報のみを掲載し解説や関連資料は一切省略。

マクロ経済: Macroeconomics—Books, Papers, and Articles

- Aruoba, S. Boragan and Francis X. Diebold, 2010, “Real-Time Macroeconomic Monitoring: Real Activity, Inflation, and Interactions,” NBER WP No. 15657, January.
- Feldstein, Martin, 2010, “U.S. Growth in the Decade Ahead,” Paper prepared for presentation at the AEA Annual Meeting, Atlanta, January 3 in a session of The Risk of Post-recession Stagnation.
- Frankel, Jeffrey A. and Daniel Xie, 2009, “Estimation of De Facto Flexibility Parameter and Basket Weights in Evolving Exchange Rate Regimes,” NBER WP No. 15620, December.
- Reinhart, Carmen M. and Kenneth S. Rogoff, 2010, “Growth in a Time of Debt,” NBER WP No. 15639, January.
- Rogoff, Kenneth S., 2010, “Grandmasters and the Future of Global Growth,” *Japan Times*, January 7.
- United States Government, White House, Council of Economic Advisors (CEA), 2010, “The Economic Impact of the American Recovery and Reinvestment Act of 2009 Second Quarterly Report,” January 13.
- Yu, Yongding, 2009, “China’s Policy Responses to the Global Financial Crisis,” Melbourne: Productivity Commission, November 25.

力強さは思慮を欠くと、自らの重みで崩れてしまう。
力強さに節度が伴えば、その力は更に増すであろう。
(ホララーティウス)

Strength, mindless, falls by its own weight; strength, mixed with mind, is made stronger.
[vis consili experts mole ruit sua, vim temperatam di quoque provehant.]
(Horace, a Roman lyric poet)

マクロ経済: Macroeconomics—Conferences, Workshops and Seminars

January 3: (Atlanta) American Economic Association (AEA) Annual Meeting: Ben Bernanke (Fed Chairman): “Monetary Policy and the Housing Bubble.”

January 3: (Atlanta) American Economic Association (AEA) Annual Meeting: Peter Diamond (Prof. MIT), Alan Auerbach (Prof., U.C. Berkeley), Thomas Sargent (Prof. New York U.), Martin Feldstein (Prof. Harvard U.), and Robert Barro (Prof. Harvard U.): “Deficit.”

January 14~15: (Manila) Asia Development Bank (ADB): “Regional Forum: Impact of the Global Economic and Financial Crisis.”

資源・エネルギー、環境: Resources, Energy, and Environment—Books, Papers, and Articles

Aspen Strategy Group, 2009, “The Global Economic Crisis and Potential Implications for Foreign Policy and National Security,” Washington, D.C.: Aspen Institute, December.

Zhang, Youguo, 2010, “Supply-side Structural Effect on Carbon Emission in China,” *Energy Economics*, Vol. 32, No. 1 (January), pp. 186-193.

Zheng, Siqi, *et al.*, 2009, “The Greenness of China: Household Carbon Dioxide Emissions and Urban Development,” NBER WP No. 15621, December.

資源・エネルギー、環境: Resources, Energy, and Environment—Conferences, Workshops and Seminars

January 27: Harvard U. (Center for Business and Government (CBG)): Robert Stavins (Prof. Harvard U.): “Climate Change Policy After Copenhagen.”

February 9: Harvard U. (Center for Business and Government (CBG)): “Global Climate Policy after Copenhagen: Seeking a Way Forward” Michael Froman (Deputy Assistant to the President and Deputy National Security Adviser) and Bo Lidegaard (Permanent Under Secretary of State, Office of the Prime Minister of Denmark).

外交・安全保障: Diplomacy and National Security—Books, Papers, and Articles

Cha, Victor D., 2010, “Powerplay: Origins of the U.S. Alliance System in Asia,” *International Security*, Vol. 34, No. 3 (Winter), pp. 158-196.

Crisp, Michael, 2010, “The Great China Sea Power Debate: A Review Essay,” *Journal of Contemporary China*, No. 63 (January), pp. 201-212.

Feigenbaum, Evan A. and Robert A. Manning, 2009, *The United States in the New Asia*, New York City, NY: Council on Foreign Relations Press, November.

Green, Michael J., 2010, “Japan's Confused Revolution,” *Washington Quarterly*, Vol. 33, No. 1 (January), pp. 3-19.

Kraska, James, 2010, “How the United States Lost the Naval War of 2015,” *Orbis*, Vol. 54, No. 1 (Winter), pp. 35-45.

Medeiros, Evan S., 2009, *China's International Behavior: Activism, Opportunism, and Diversification*, Santa Monica, CA: RAND Corp., October.

Medeiros, Evan S., 2009, “The New Security Drama in East Asia: The Responses of U.S. Allies and Security Partners to China's Rise,” *Naval War College Review*, Vol. 62, No. 4 (Autumn), pp. 37-52.

Nye, Joseph S., Jr., 2010, “An Alliance Larger than One Issue,” *New York Times*, January 7.

Overholt, William H., 2010, “China in the Global Financial Crisis: Rising Influence, Rising Challenges,” *Washington Quarterly*, Vol. 33, No. 1 (January), pp. 21-34.

RAND Corp., 2009, “RAND Project Air Force, Annual Report 2009,” Santa Monica, CA, November.

外交・安全保障: Diplomacy and National Security—Conferences, Workshops and Seminars

January 20~21: (Washington, D.C.) Institute for Foreign Policy Analysis (IFPA) and the Chief of Staff of the Air Force's Strategic Studies Group with the support of the Defense Threat Reduction Agency. “38th IFPA-Fletcher Conference.”

January 21: U.S. Congress Hearing (Senate Cmte on Foreign Relations): “Principles of U.S. Engagement in Asia,” Witnesses including Kurt Campbell (Asst. Sec. of State for East Asia and Pacific Affairs), Robert Sutter (Visiting Prof. Georgetown Univ.), Robert Herman (Dir. of Programs Freedom House)

その他—Information in Other Fields

Asia Development Bank (ADB), 2009, *ADB's Pacific Approach 2010-2014*, Mandaluyong City (Philippines), December.

Battiston, Stefano, *et al.*, 2010, “Liaisons Dangereuses: Increasing Connectivity, Risk Sharing, and Systemic Risk,” NBER WP No. 15611, January.

Bauerlein, Monika, 2009, “Too Big to Jail?: Time to Fix Wall Street's Accountability Deficit,” *Mother Jones*, Vol. 35, No. 1 (January/February), p. 4.

Bertaut, Carol C. and Laurie Pounder, 2009, “The Financial Crisis and U.S. Cross-Border Financial Flows,” *Federal Reserve Bulletin*, November, 2009

Federal Reserve Bank of Kansas City, 2009, “Resolution Process for Financial Companies that Pose Systemic Risk to the Financial System and Overall Economy,” (www.kc.frb.org/SpeechBio/ResolutionProcess.09.03.09.pdf).

Hall, Bronwyn H., *et al.*, 2009, “Measuring the Returns to R&D,” NBER WP No. 15622, December.

Manell, Lewis, *et al.*, 2009, “Real Savings+: An Automatic Investment Option for an Automatic IRA,” Washington, D.C.: Aspen Institute, December.

Stiglitz, Joseph E., 2010, *Freefall: America, Free Markets, and the Sinking of the World Economy*, W. W. Norton, January.

千丈の堤も蟻蟻(ろうぎ)の穴を以って潰(つい)え、
 百尺(ひやくせき)の室も突隙(とつげき)の烟(けむり)をもって焚(や)かる。
 (韓非)

A dike ten thousand foot begins its crumbling with an ant hole,
 A room one hundred feet square begins its burning with a spark. .
 (Han Fei, an ancient Chinese philosopher)

Stiglitz, Joseph E., 2010, "Moral Bankruptcy," *Mother Jones*, Vol. 35, No. 1 (January/February), pp. 28-31.
 Wakasugi, Ryuhei and Ayumu Tanaka, 2009, "Firm Heterogeneity and Different Modes of Internationalization: Evidence from Japanese Firms," Paper prepared for presentation at the 2010 AEA Annual Meeting, Atlanta, January 3-5, 2010.
 World Economic Forum (WEF), 2010, "Global Risks 2010: A Global Risk Network Report," Cologny/Geneva: January 14.
 Event: December 15, 2009 (New York) Aspen Institute: "Conversations with Great Leaders in Memory of Preston Robert Tisch with Jamie Dimon (CEO of JP Morgan Chase)," Moderated by Walter Isaacson (CEO, Aspen Institute).
 Event: January 3: (Atlanta) American Economic Association (AEA) Annual Meeting: David Colander (Prof. Middlebury College), Benjamin Friedman (Prof. Harvard U.), Raghuram Rajan (Prof. U. of Chicago), Robert Shiller (Prof. Yale U.), and Alan Blinder (Prof. Princeton U.): "How Should the Financial Crisis Change How We Teach Economics?"
 Event: January 26: Harvard U. (Kennedy School (HKS), Ash Center for Democratic Governance and Innovation): Haruo Hayashi (林春男) (Prof. Kyoto U.): "Long-term Disaster Recovery Process"; Shigeo Tatsuki (立木茂雄) (Prof., Doshisha U.): "Social Capital Enrichment and Its Impact on Community Safety and Security."
 Event: January 27~31: (Davos-Klosters) World Economic Forum (WEF) Annual Meeting 2010: "Improve the State of the World: Rethink, Redesign, Rebuild."; January 30: "Japan in Transition."
 Event: February 4: Harvard U. (Center for Business and Government (CBG)): Ben Heineman (Senior Fellow at HKS and HLS): "Corporate Governance and Accountability: The Six Essential Tasks."
 Event: February 4: Harvard U. (Fairbank Center for Chinese Studies): William C. Kirby (Prof. Harvard U.): "Consumerism and Education in China's New Middle Class"; Deborah S. Davis (Prof. Yale U.): "Post-Socialist Marriage and Divorce."
 Event: February 8: Harvard U. (Asia Center): "In the Service of State and Nation: Religion in East Asia," Peter J. Katzenstein (Prof. Cornell U.) and Joseph S. Nye, Jr. (Prof. Harvard U.).
 Event: February 11: Harvard U. (Fairbank Center for Chinese Studies): "Chimerica versus Superfusion: Debating the Future of US-China Relations," Niall Ferguson, Prof. Harvard U.), Zachary Karabell (President, River Twice Research).

3. 編集後記

ナイ本校教授の説明は極めて簡潔明瞭であり、その見事さにいつも驚きと尊敬を感じている。*New York Times* に掲載された1月7日の小論でも表題("An Alliance Larger than One Issue")で日米同盟を基地問題だけで瓦解させる危険性を指摘し、最後の1行(a victory on Futenma could prove Pyrrhic)で冷静な戦略的計算の重要性を米国知識層に訴えておられる(古代ギリシアのピュロス王(Pyrrhus)はローマに勝利したが、多くの犠牲者を出した)。多忙な読者は最後の1行以外読まなくても良いかのようにも思えるほど素晴らしい(上の2参照)。また昨年秋からホワイトハウス国家安全保障会議(NSC)の中国・台湾・モンゴル問題担当部長となったメデイロス氏も、*Naval War College Review* に載せた論文の冒頭で知的な比喩を用いて読者に語りかける—東アジアで展開する「新たなドラマ」は、端役(bit player)が多い『マクベス(*Macbeth*)』ではなく『リア王(*King Lear*)』だ、と(上の2参照)。東アジアという舞台上で日米中等関係各国が行う政治・経済的な駆け引きは、智恵と勇気を傍らにして慎重さと大胆さを冷静に織り交ぜる作業であり、政策決定者の責任は重い。しかも日本の今日の行為は日本の明日の針路に影響を与える。マックス・ヴェーバーはこのことを「歴史に対する我々の責任(unserer Verantwortlichkeit vor der Geschichte)」と呼び、「我々には今の奮励努力が実を結ぶかどうかを知ることとは出来ない。また我々の子孫が誇るべき祖先だと我々を認めてくれるかどうかも知ることが出来ない(Nicht unserer Generation ist beschieden zu sehen, ob der Kampf, den wir führen, Früchte trug, ob sich die Nachwelt zu uns als ihren Ahnen bekennt.)」と後世に評価を任せ謙虚に努力することを主張している。

以上

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