

The Tokyo-Cambridge Gazette

In Search of Japan's Global Strategies

2010年秋から筆者の活動の中心を東京に移した。ケンブリッジの研究者との関係を維持しつつも、米中両国、東南アジア、そして欧州の研究者との関係を強化し、グローバルな視点から読者諸兄弟と共に日本の将来を考えてみたい。従ってタイトルも *Tokyo-Cambridge Gazette* に変更する。

『東京=ケンブリッジ・ガゼット：グローバル戦略編』

第190号 (2025年2月)

キャノングローバル戦略研究所 研究主幹 栗原 潤

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。

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/Sun Tzu)

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—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。

今月号 «目次»

1. *Tokyo-Cambridge Gazette*: グローバル戦略編第190号
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. *Tokyo-Cambridge Gazette*: グローバル戦略編第190号

年初から AI・ロボット技術に関する海外情報を巡り、友人達と意見交換を行っている。

Stanford 大学が1月17日に公表した連邦政府の AI 活用に関する評価報告書(“Assessing the Implementation of Federal AI Leadership...”), また1月27日以降、中国系の AI 開発企業(DeepSeek; 深度求索)による技術革新に関する一連の報道、そして1月29日、欧州委員会が公表した産業競争力強化政策に関する報告書(“A Competitiveness Compass for the EU”)等の資料を巡って意見交換を行っている(PDF版の2参照)。

米国は AI 分野で猛追する中国に対し警戒心を高め、法的規制の強化や AI 技術秘匿等の対策を検討している。欧州は米中両国との innovation gap 解消のため、欧州商工会議所協会(Eurochambers)等の財界と協議しつつ政策を練っている。突如出現した“DeepSeek Shock”は、既に米国の諸団体に多大なる衝撃を与えている。他方、中国側には「科学技術分野における米国の“無敵”の地位を揺り動かした事(動揺了美国科技行业的“无敌”地位)」を喜んでる様子が窺える。日本では通常限られた中国情報しか得られないが、その中に旧友の名前を発見した。そして彼等と北京や上海、更には Cambridge で議論した事が懐かしい(或る友人は AI 関連の“データ标注(data annotation)”に携わっている教授だ)。こうした中国の友人達との直接的な意見交換が難しくなった事が残念だ。自由な学術交流が出来る時代に再び戻る事を願っている。

また Carnegie Mellon 大学(CMU)の研究者達が設立した AI・ロボット開発会社 Skild AI 社についても議論している。同社は昨年夏頃から注目を集め、*Financial Times* 紙が1月28日、SoftBank Group も出資する事を報じた。同社と日本の関係を或る友人から聞かれたが、残念ながら筆者の手に詳細はない。日本の優れた若者達が同社との積極的な情報交換を深めてくれる事を願っている。

中国の政治経済政策に関する情報収集過程で、国際秩序の不安性を毎日のように感じている。

中国経済の正確な情勢判断は非常に難しい。日本との経済制度の違いに加えて、統計の信憑性や専門家による発言に対する政治的制約のために、情勢判断が難しいのだ。昨年夏、訪日中の姚洋北京大学教授から戸籍(戸口)制度変更について解説を受け、また友人のトニー・セイチ Harvard Kennedy School (HKS)教授による著書(“Institutional Change and Adaptive Efficiency: A Study of China's Hukou System Evolution, Nov. 2023”)を読了した。現在の戸籍制度改革が、低成長期において経済の活性化に対し有効かつ即効的に果たして役立つのか、疑問を感じている。

小誌昨年9月号で触れた *The Economist* 誌の記事(“Nationalization of Ideas”)は、政府が提唱する“中国独自の知識体系(中国自主的知识体系)”に関し解説している。姚教授はその中で「中国における(西洋型)経済分析は、国外の学術雑誌への掲載を念頭にしているだけで役に立たない」と語ったが、彼に対し筆者が「ボクは何を信じて判断しているのか分からなくなったよ」と冗談交りに語った事を思い出している。1月8日、*Wall Street Journal* 紙は、優れた専門家の高善文氏が中国の GDP 統計と景気の問題を巡り米国で解説した事に対し、中国政府が厳しい態度を示した事を伝えた(PDF版2参照)。昨年東京で高氏と議論して彼の説明に納得してしただけに、この報道を知って不安を感じている。

米中間で緊張が高まる中、日本のシーレーンにも不安感を抱いている。中国の艦船が東シナ海(ECS)・南シナ海(SCS)・台湾海峡で頻繁に活動すれば、日本を含む周辺国は、当然の事ながらレベルの高い警戒態勢を敷く事を余儀なくされる。昨年12月に OECD が公表した資料(“Risks and Resilience in Global Trade”)に依ると、商品の輸出入に関し日本は米国や EU に比して海上輸送に依存する比率が高く、しかも chokepoints と呼ばれる海上輸送の要衝を通過する必要に迫られている。この状態を我々は忘れてはならない(PDF版の図1、2参照)。

このために台湾問題を中心に、西太平洋の安全保障問題を議論している。米国の友人達とは、米海軍大学中国海事研究所(China Maritime Studies Institute)の資料等について議論している(例えば *Chinese Amphibious Warfare: Prospects for a Cross-Strait Invasion, 2024*; *China's Maritime Gray Zone Operations, 2019*)。 “台湾有事”に関し昨年の Singapore 出張時、“特異”な経験をしたので簡単に紹介したい。容易に想像出来ると思うが、現地での会合は英中両言語で行われ残念な事だが日本語は使われない。こうした中、シンガポール国立大学(NUS)の友人が、日本戦略研究フォーラム(JFSS)による2021年夏の“政策 simulation”に関して筆者に質問した(概要は本『自衛隊最高幹部が語る台湾有事』(2022年5月発売)として公表されている。彼はその本の中国版(「台湾有事日本対策」2023年4月)に基づき質問をしたのだ!!! 印象に残っている点は、友人が「本の中の次の考えは日本人の中で如何なる程度共有しているのか?」と質問した事だ—その考えとは、①「無法拯救」旅中僑民和進駐中國企業(日本語原文: 在中邦人と中国進出企業は「救えない」)と②國家安全保障局現在仍処處於理論階段(同: 國家安全保障局はまだ「座学」)である。

かくして海外で“中国語化された日本情報”に関し討議がなされるという“珍”経験を(今後はこうした事態が支配的になると思う)。

残念な事にウクライナにおける悲劇は平和的な道筋を未だ見いだしていない。

グロテュウスの『戦争と平和の法(De jure belli ac pacis)』出版400周年を迎える今年は幾つかの行事が予定されている。残念な事に人類は未だ法の下で戦争を制御する方法を見いだしていない。昨年末に韓国で、突然ウクライナの戦場に送られて戦死した北朝鮮軍兵士の手記が知られた。それを *Wall Street Journal* 紙が1月11日付記事として伝えた。兵士は「祖国を離れ、愛する父母の抱擁を懐かしむ(그리운 조국, 정다운 아버지 어머니의 품을 떠나)」という言葉を残して、凍てついた異国の戦場で命を失った。

昨年ノーベル文学賞を受賞した韓江氏はスウェーデンでの講演の中で「世界は何故暴力的で痛々しいのか、同時に世界は何故美しいのか(세계는 왜 이토록 폭력적이고 고통스러운가? 동시에 세계는 어떻게 이렇게 아름다운가? Why is the world so violent and painful? At the same time, how can the world be so beautiful?)」と問いかけた。彼女の問いに共感すると同時に、世界を少しでも美しく、少しでも非暴力的で痛みのないように変えるため、ほんの少しかけ勇気を出してみたいと考えている。

今年日本の敗戦80周年だ。昨年秋、集鴨遺書編纂会の『世紀の遺書』が新字体の簡略版として出版された。筆者は初版本(1953年版)を約20年前に Harvard Yenching Library で発見して初めて読んだ。『世紀の遺書』には敗戦直後に戦犯として海外で命を失った帝国陸海軍将兵の手記が収録されており、それらを読むと目から汗が溢れ出てしまう。粗略な情報分析と根拠薄き情勢判断に基づき、大日本帝国は無謀な戦争を始め、しかも陛下が御聖断を下されるまで“負け戦(いくさ)”を長々と続け、自国を含む後世の全世界に悲劇を残したのだ。

敗戦80周年の今年、筆者は改めて敗戦の教訓を見つめ直し、自らの「平和ボケ(虚幻的和平)」を修正したいと考えている。

The Tokyo-Cambridge Gazette (In Search of Japan's Global Strategies)

No. 190 (February 2025)

戦争とは人と人との関係ではなく、国対国の関係だ。しかも個人の間で敵対するのは偶然でしかない。それは人間としてでもなく市民としてでもない。兵士として敵になるのである。祖国の一員としてではなくて、祖国を守る者として互いに敵となるのだ。
(ジャン=ジャック・ルソー)

War... is a relation, not between man and man, but between State and State, and individuals are enemies only accidentally, not as men, nor even as citizens, but as soldiers; not as members of their country, but as its defenders.
[La guerre n'est... point une relation d'homme à homme, mais une relation d'État à État, dans laquelle les particuliers ne sont ennemis qu'accidentellement, non point comme hommes ni même comme citoyens, mais comme soldats; non point comme membres de la patrie, mais comme ses défenseurs.]
(Jean-Jacques Rousseau)

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

- Andrews, Dan *et al.*, 2024, "From Decline to Revival: Policies to Unlock Human Capital and Productivity," Economics Department Working Paper No. 1827, Organisation for Economic Co-operation and Development (OECD), Paris, December.
- Center for Macroeconomic Analysis and Short-Term Forecasting (Центр макроэкономического анализа и краткосрочного прогнозирования (ЦМАКП)), 2025, «О динамике инфляции с 1 по 20 января 2024 г. [On the dynamics of inflation from January 1 to January 20, 2024]», Moscow, January 23.
- Deutschlandfunk, 2025, „Medienbericht: Bundesregierung erwartet 2025 geringes Wirtschaftswachstum“, January 24.
- Economist, 2025, "Will Elon Musk Dominate President Trump's Economic Policy?" January 2.
- International Monetary Fund (IMF), 2025, "World Economic Outlook Update: World Economic Outlook Update: Global Growth: Divergent and Uncertain," Washington, D.C., January.
- Litan, Robert E. and Peter M. Shane, 2025, "Trump's Regulatory Housecleaning Won't Be Easy," Washington, D.C.: Brookings Institution, January 20.
- United Nations, Economic and Social Council, 2024, "Report of the Intersecretariat Working Group on National Accounts," New York, December 18.
- United States Government, Department of the Treasury, 2024, "Artificial Intelligence in Financial Services: Report on the Uses, Opportunities, and Risks of Artificial Intelligence in the Financial Services Sector," Washington, D.C., December.
- Wall Street Journal (Liyan Qi), 2024, "The 'Invisible Wall' Amplifying China's Population Doom Loop [加剧中国人口危机的'无形之墙']," December 24.
- Wall Street Journal (Jacky Wong), 2025, "China Must Heed Lessons of Japan's Lost Decades [中国必须从日本'失去的几十年'吸取教训]," January 3.
- Wall Street Journal (Lingling Wei), 2025, "Xi Jinping Muzzles Chinese Economist Who Dared to Doubt GDP Numbers [中国经济学家高善文遭禁言, 质疑 GDP 数据惹怒习近平]," January 8.
- Wall Street Journal (Rebecca Feng and Chun Han Wong), 2025, "China Reins in Its Once-Freewheeling Finance Sector with Purges and Pay Cuts [中国逐步控制金融部门的方式: 整肃和降薪]," January 13.

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

- January 16: (Washington, D.C.) Congress, Senate Committee on Finance: "A Nomination Hearing for Scott Bessent."
- January 29: (an online event, Washington, D.C.) Peterson Institute for International Economics (PIIE) and Centre for Security, Diplomacy, and Strategy (CSDS), Vrije Universiteit Brussel: "Transatlantic Perspectives on US-China Geoeconomic Competition."

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

- Bloomberg (Saijel Kishan and Natasha White), 2025, "Wall Street's Top Banks Just Quit a Once Popular Alliance," January 4.
- Global Times, 2025, "Chinese Research Institutions Complete First Independent Sampling and Analysis of Seawater near Fukushima," January 22.
- Interfax (Интерфакс), 2025, «"Росатом" и вьетнамская EVN подписали меморандум о развитии атомной энергетики [Rosatom structure and Vietnamese EVN signed a memorandum on the development of nuclear energy]», January 14.
- Wall Street Journal (Collin Eaton *et al.*), 2025, "Trump Plans 'Energy Dominance' Executive Orders after Inauguration," January 14.

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

- January 16: (Brussels) Bruegel: "Clean Industrial Deal: A Conversation with EVP Teresa Ribera."

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

- Blanchard, Alexander and Laura Bruun, 2024, "Bias in Military Artificial Intelligence," Background Paper, Solna: Stockholm International Peace Institute (SIPRI), December.
- Blanchette, Jude and Ryan Hass, 2025, "Know Your Rival, Know Yourself: Rightsizing the China Challenge," *Foreign Affairs*, Vol. 104, No. 1 (January/February), pp. 88-101.
- Bloomberg (Josh Xiao), 2024, "China Launches Largest Amphibious Warship in Show of Naval Power," December 27.
- Bloomberg (Zoe Tillman and Hadriana Lowenkron), 2025, "Trump Weighs Jan. 6 Clemency with Congress Set to Ratify His Win," January 6.
- Bloomberg (Jake Bleiberg and Jamie Tarabay), 2025, "Chinese Hackers Accessed Yellen's Computer in US Treasury Breach," January 17.
- Bloomberg (Jake Bleiberg and Margi Murphy), 2025, "FBI Warned Agents It Believes Phone Logs Hacked Last Year," January 17.
- Bresnick, Sam, 2024, "The Obstacles to China's AI Power: Why the Chinese Military Struggles to Take Advantage of New Technology," *Foreign Affairs*, December 31.
- British Broadcasting Corporation (BBC) (David Mercer *et al.*), 2025, "UK's Chagos Deal on Old to Allow Trump Review," January 15.
- British Broadcasting Corporation (BBC), 2025, "Holocaust Survivors Recall Horrors of Auschwitz as Prince William and Kate Attend London Memorial," January 27.
- Cable News Network (CNN) (Sean Lyngaas), 2025, "Chinese Hackers Breached US Government Office That Assesses Foreign Investments for National Security Risks," January 10.
- Cable News Network (CNN) (Betsy Klein and Lex Harvey), 2025, "Trump Suggests His Plan for Gaza Strip Is to 'Clean Out the Whole Thing'" January 26.
- Cochran, Shawn, *et al.*, 2024, "Denial Without Disaster—Keeping a U.S.-China Conflict over Taiwan Under the Nuclear Threshold: Vol. 2, Surveying U.S. Conventional Joint Long-Range Strike Capabilities, Operational Objectives, and Employment Decisions," Santa Monica, CA: RAND Corporation, November.
- Curtis, Lisa *et al.*, 2025, "The Quad Plus the Philippines: A Strategic Partnership for a Peaceful South China Sea," Washington, D.C.: Center for a New American Security (CNAS), January.
- Der Spiegel, 2025, „Gedenkveranstaltung in Auschwitz“, January 27.
- Deutschlandfunk, 2024, „Elon Musk bezeichnet AfD als ‚der letzte Funke Hoffnung‘ für Deutschland“, December 28.
- Economist, 2025, "Tech Is Coming to Washington. Prepare for a Clash of Cultures," January 2.
- Economist, 2025, "The US Army Needs Inferior, Cheaper Drones to Compete," January 5.

The Tokyo-Cambridge Gazette (In Search of Japan's Global Strategies)

No. 190 (February 2025)

我が国にはドイツによるプロパガンダが凄まじい程の規模で蔓延しており、それは我が国の最高権力に関する誤情報なのだ。内容は誰もが容易に反証出来るものだが、既に巷間認められるものとなっており、一見矛盾している訳でもない。このために、それらの一部を事実として公衆が言及している。我が国の政策に同意している関係と国会議員はこうした事態に関し、不安を感じつつも忠実に勇猛な公衆に向かい、説明しなくてはならない。(ウィンストン・チャーチル)

There is an extraordinary volume of German propaganda in this country, of misstatements made on the highest authority—which everyone knows could be easily disproved—but which obtain currency, and which, because they are not contradicted, are accepted as part of the regular facts on which the public rely. Ministers and Members who are in agreement with the policy of the Government must exert themselves to explain these matters to an anxious, but loyal and courageous public. (Winston Churchill)

- Economist, 2025, “Women Warriors and the War on Woke: Trump’s Pentagon Pick Wants Women Off the Battlefield,” January 6.
- Economist, 2025, “The Putinisation of Central Europe,” January 7.
- Economist, 2025, “The Beginning of the End of the Trump Era,” January 19.
- Financial Times (Robert Wright *et al.*), 2024, “Azerbaijan and Kazakhstan Suspend Flights to Russia after Plane Crash,” December 27.
- Financial Times (Gideon Rachman), 2025, “Trump Risks Turning the US into a Rogue State,” January 13.
- Financial Times (Mehul Srivastava *et al.*), 2025, “How Israel Erased a Town of 200,000 People,” January 14.
- Financial Times (James Politi), 2025, “Donald Trump Vows New ‘Golden Age’ for US as He Moves to Unwind Joe Biden Era,” January 21.
- Financial Times (John Paul Rathbone), 2025, “Russian Spy Ship Found ‘Gathering Intelligence’ in UK Waters,” January 22.
- Financial Times (James Shotter and Heba Saleh), 2025, “Donald Trump Pressures Egypt and Jordan to Accept Gaza ‘Clean Out’ Plan,” January 27.
- Foreign Policy (Faine Greenwood), 2025, “China’s Top Drone Maker Removes Security Features at a Very Weird Time,” January 15.
- Fortune (Lionel Lim), 2025, “Singapore’s Prime Minister Warns of a ‘Third World War’ If U.S. and China Force Rest of the World to Pick Sides,” January 22.
- Handelsblatt (Dietmar Neuerer *et al.*), 2025, „Gastbeitrag von Elon Musk in der ‚Welt‘ löst Empörung aus“, December 29.
- Jakarta Post, 2025, “Indonesia Joins BRICS Bloc as Full Member,” January 7.
- Jane’s Defence Weekly (Akhil Kadidal), 2024, “Special Report: China Hones Capability to Conduct Encircling Attacks on Taiwan,” October 30.
- Jones, Erik and Matthias Matthijs, 2025, “The Biggest Threat to Europe: It’s Not Trump—It’s the EU’s Weak Defense Policy and Stagnant Single Market,” *Foreign Affairs*, January 13.
- Kyodo (共同通信社), 2024, “China Charged Japanese Woman with Espionage for Activities in Japan,” December 31.
- Le Monde, 2025, «La France exhorte la Commission européenne à agir contre les ingérences d’Elon Musk», January 8.
- Mead, Walter Russell, 2025, “American Exceptionalism Is Back,” *Wall Street Journal*, January 20.
- Medeiros, Evans, 2025, “Xi Has a Plan for Retaliating against Trump’s Gamesmanship,” *Financial Times*, January 5.
- Mohr, Cathrin and Christoph Trebesch, 2025, “Geoeconomics,” Working Paper No. 2279, Kiel Institut für Weltwirtschaft (IfW Kiel) (Kiel Institute for the World Economy), Keil, January.
- Newsweek (Micah McCartney), 2024, “North Korea Quietly Honors War Dead as Casualties in Russia Climb,” December 31.
- Newsweek (Micah McCartney), 2025, “China Prepares Military for Own ‘D-Day’ Invasion,” January 15.
- New York Times (Julian E. Barnes), 2025, “C.I.A. Now Favors Lab Leak Theory to Explain Covid’s Origins,” January 25.
- North Atlantic Treaty Organization (NATO), 2024, “NATO Launches ‘Baltic Sentry’ to Increase Critical Infrastructure Security,” Brussels, January 14.
- Paine, S.C.M., 2024, “When Russia Fights the Wrong Enemy,” Project-Syndicate.org, December 16.
- Rénmin Wǎng/Renmin Wang (politics.people.com.cn/人民网), 2024, “Xi Jinping tóng Ōuzhōu Lìshìhuì Zhǔxī Kēsītā Tōng Diànhuà [Xi Jinping had a phone call with European Council President Costa/习近平同欧洲理事会主席科斯塔通电话],” January 14.
- Reuters, 2024, “Cyber Attack on Italy’s Foreign Ministry, Airports Claimed by Pro-Russian Hacker Group,” December 28.
- Reuters (Kanishka Singh and Nandita Bose), 2024, “Trump Asks Supreme Court to Pause Law That Could Ban TikTok,” December 29.
- Reuters (Raphael Satter and A.J. Vicens), 2025, “US Treasury Says Chinese Hackers Stole Documents in ‘Major Incident,’” January 1.
- Reuters (Jasper Ward), 2025, “Greenland Important for the US, Says Trump’s Pick for National Security Adviser,” January 9.
- Reuters, 2025, “Predator Drone Maker Asks Musk’s DOGE to Cut Pentagon Red Tape, Letter Shows,” January 28.
- RIA Novosti (РИА Новости), 2025, «Россия и Иран подписали договор о стратегическом партнерстве [Russia and Iran signed a strategic partnership agreement]», January 17.
- Slaughter, Anne-Marie, 2025, “America’s New ‘Wolf Warrior’ Diplomacy Could Cause Lasting Damage,” *Financial Times*, January 19.
- Tagesschau (Philip Brost), 2024, „AfD-Politiker sollen sich mit Neonazis getroffen haben“, December 27.
- Tagesschau (Niels Bula), 2024, „Ukraine meldet erstmals nordkoreanische Kriegsgefangene“, December 28.
- Taipei Times (Fang Wei-li and Jake Chung), 2025, “Chinese Ship Cuts Cable near Keelung Harbor,” January 5.
- TASS (TACC), 2025, «Кабмин расторг меморандумы о работе японских центров по содействию реформам в РФ [The Cabinet of Ministers terminated the memorandums on the operations of Japan centers to promote reforms in the Russian Federation]», January 18.
- United Kingdom Government, Ministry of Defence, 2024, “British Soldiers Successfully Test Drone Killer Radiowave Weapon for First Time,” December 23.
- United States Congress, Congressional Research Service (CRS), 2025, “Democracy and Human Rights in U.S. Foreign Policy: Evolution, Tools, and Considerations for Congress,” Washington, D.C., January.
- United States Government, Department of Justice, 2025, “Justice Department and FBI Conduct International Operation to Delete Malware Used by China-Backed Hackers,” Washington, D.C., January 14.
- Wall Street Journal (Alistair MacDonald), 2024, “The New Frontier for Drone Warfare Is Deep Underwater [无人机作战的新前沿: 水下深处],” December 16.
- Wall Street Journal (Greg Ip), 2024, “The Hidden Threat to National Security Is Not Enough Workers,” December 19.
- Wall Street Journal (James T. Areddy), 2025, “China Adds to Sanctions of U.S. Defense Contractors over Taiwan Arms Sales [中国就对台军售问题扩大对美国防务承包商的制裁],” January 3.
- Wall Street Journal (Dustin Volz *et al.*), 2025, “How Chinese Hackers Graduated from Clumsy Corporate Thieves to Military Weapons [中国黑客如何从商业毛贼升级为军事利器],” January 4.
- Wall Street Journal (Max Colchester and Bertrand Benoit), 2025, “Elon Musk Is Roiling European Politics,” January 7.
- Wall Street Journal (Vivian Salama and Alexander Ward), 2025, “Trump Imagines New Sphere of U.S. Influence Stretching from Panama to Greenland [特朗普设想美国的新势力范围: 从巴拿马到格陵兰岛],” January 8.
- Wall Street Journal (Editorial), 2025, “Trump’s Bully Pulpit Diplomacy,” January 8.
- Wall Street Journal (Kejal Vyas and José de Córdoba), 2025, “Trump’s Panama Canal Threat Stirs a Nationalist Outcry: ‘Yankees Go Home!’” January 10.
- Wall Street Journal (Dasl Yoon and Jane Lytvynenko), 2025, “Diary of a Dead North Korean Soldier Reveals Grisly Battlefield Tactics,” January 11.
- Wall Street Journal (Joel Schectman and Dustin Volz), 2025, “Trump’s CIA Pick Expected to Push for Bare-Knuckle Spycraft against China [特朗普的 CIA 局长人选料将推动对华采取激进间谍行动],” January 13.
- Wall Street Journal (Editorial), 2025, “Biden Offers a Bitter Last Word,” January 16.
- Wall Street Journal (Bojan Pancevski), 2025, “Inside Elon Musk’s Attack on Germany’s Political Establishment,” January 24.
- Wall Street Journal (Michael R. Gordon and Dustin Volz), 2025, “CIA Now Favors Lab Leak Theory on Origins of Covid-19 [中情局现在支持新冠起源实验室泄漏论],” January 25.
- Warren, Elizabeth, 2025, “If Trump Wants to Unrig the Economy, I’m In,” *Wall Street Journal*, January 13.
- Washington Post (Pranshu Verma and Ellen Nakashima), 2024, “U.S. Treasury Says It Was Hacked by China-Backed Actor,” December 30.
- Washington Post (Abigail Hauslohner *et al.*), 2025, “Rubio Details What Trump’s ‘America First’ Foreign Policy Will Entail,” January 15.

現実の民主制では、程度の差こそあれ速やかな指導者の交代が存在する。確かに民主制下でも、指導者が自ら指導的地位の継続を主張する傾向がある。だが、…(民主制下のリーダーシップの合理的結論、即ち公開、批判、責任、指導者を選択する自由等が、指導者不変の状態を不可能にするのだ。(ハンス・ケルゼン)

Real democracy thus factually evidences a more or less rapid turnover of leaders. Certainly, a tendency on the part of the leader to assert the permanence of his position can be observed here as well. But . . . The rationalization of leadership and its consequences—publicity, criticism, accountability, and the belief that the leader can be freely chosen—make the permanence of the leader impossible. [Das Bild der realen Demokratie zeigt das Faktum eines mehr oder weniger raschen Führerwechsels. Gewiss kann man auch hier die Tendenz des Führers konstatieren, sich in der Führerstellung dauernd zu behaupten. Aber . . . Die Rationalisierung der Führerschaft mit ihren Konsequenzen: Publizität, Kritik, Verantwortlichkeit, die Vorstellung der freien Erzeugbarkeit des Führers machen es unmöglich, das der Führer amovibel wird.] (Hans Kelsen)

- Washington Post (Cleve R. Wootson Jr.), 2025, “Trump’s Executive Orders Already Face Pushback, Legal Challenges,” January 21.
Xinhua Wǎng/Xinhua Wang (Xinhuanet/«新华网»), 2025, “Guó Tái Bàn: Míngjìndǎng Dǎngjǔ Cǎonòng ‘FǎnZhōng KàngZhōng’ Bùzè Shǒuduàn, Háo Wú Dìxiàn [Taiwan Affairs Office of the State Council: The Democratic Progressive Party authorities use ‘Anti-China and against-China’ tactics at any cost and without any firm grounds/国台办: 民进党当局操弄‘反中抗中’不择手段, 毫无底线],” January 8.
Ziyóu Shibào/Ziyóu Shibào («自由時報») (方瑋立), 2025, “Zhōngguó Chuán tuōduàn Hǎilǎn ‘Huídài Zuòzhàn’ Qū Pínfán Hé Chénghuī: Kǒng Wèi Cèshì Zìxùn Fēngsuǒ [Chinese ship drag off submarine cables and ‘gray zone operations’ become more frequent, Ho Cheng-hui: It may be a test information blockade/中國船拖斷海纜「灰帶作戰」趨頻繁 何澄輝: 恐為測試資訊封鎖],” January 6.
Ziyóu Shibào/Ziyóu Shibào («自由時報») (林清泉), 2025, “Miánduì Zhōnggòng Shèntóu Wēixié Guó’ān Tìzhì Xū yǔ Shí Jùjìn [Facing the threat of CCP infiltration, the national security system needs to keep pace with the times/面對中共滲透威脅 國安體制需與時俱進],” January 23.
Zweites Deutsches Fernsehen (ZDF), 2025, „Drinnen Musk bei AfD, draußen Proteste“, January 26.

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

- January 14: (Washington, D.C.) Congress, Senate Armed Services Committee: “A Confirmation Hearing for Pete Hegseth for Secretary of Defense.”
January 14: (Washington, D.C.) U.S. Institute of Peace (USIP): “Passing the Baton 2025: Securing America’s Future in an Era of Strategic Competition.”
January 15: (Washington, D.C.) Congress, Senate Committee on Foreign Relations: “A Nomination Hearing for Marco Rubio.”
January 20–24: (Davos) World Economic Forum (WEF): “World Economic Forum Annual Meeting 2025.”
January 21: (Singapore) National University of Singapore (NUS): “The Singapore Dream and You.”
January 23: (an online event, Berlin) European Center for Foreign Relations (ECFR): “World Views on a Second Trump Presidency: Alliances, Adversaries, and Opportunities.”
January 23: (Berlin) Körber-Stiftung (Körber Foundation): “Körber Global Leaders Dialogue.”
January 30: (an online event, London) Chatham House: “How Is Hungary Changing Europe?”

その他—Information in Other Fields

- Auer, Raphael *et al.*, 2025, “Privacy-Enhancing Technologies for Digital Payments: Mapping the Landscape,” Working Paper No. 1242, Basel: Bank for International Settlements (BIS), January.
Bloomberg (Yian Lee), 2025, “Taiwan Says Chinese Ship Broke Subsea Cable in Alleged Sabotage,” January 6.
Bloomberg (Cagan Koc), 2025, “Europe’s Largest Pension Fund Sold Tesla Stake over Musk’s Pay,” January 13.
Bloomberg, 2025, “China Discusses Sale of TikTok US to Musk as One Possible Option,” January 14.
Bloomberg (Alfred Cang and Koh Yoshida), 2025, “Mitsubishi Corp. Quits China Metal Trading after Copper Fraud,” January 14.
Bloomberg (Joe Deaux), 2025, “Cliffs CEO Rips ‘Evil’ Japan and Lays Out New Plan for US Steel,” January 14.
Bloomberg, 2025, “US Bans Imports from 37 China Firms due to Alleged Forced Labor,” January 15.
Bloomberg (Jackie Davalos), 2025, “DeepSeek Leaned on OpenAI Models, White House AI Czar Sacks Sacks,” January 28.
Bulletin of the Atomic Scientists (Matt Field), 2024, “Scientists Urge Halt to Research on Creating Synthetic ‘Mirror’ Bacteria That Could Evade Human Immunity, Disrupt Ecosystems,” December 12.
Cable News Network (CNN) (Nectar Gan), 2025, “WHO Urges China to Share Covid Origins Data, Five Years on from Pandemic’s Emergence,” January 6.
Cevik, Serhan *et al.*, 2024, “Chasing the Dream: Industry-Level Productivity Developments in Europe,” Working Paper WP/24/258, Washington, D.C.: International Monetary Fund (IMF), December.
Chilukuri, Vivek and Hannah Kelley, 2025, “Biopower: Securing American Leadership in Biotechnology,” Washington, D.C.: Center for a New American Security (CNAS), January.
Chorzempa, Martin *et al.*, 2024, “The Rise of US Economic Sanctions on China: Analysis of a New PIIE Dataset,” Policy Brief 24-14, Washington, D.C.: Peterson Institute for International Economics (PIIE), December.
Economist, 2025, “Chinese AI Is Catching Up, Posing a Dilemma for Donald Trump,” January 23.
European Commission, 2025, “A Competitiveness Compass for the EU,” Brussels, January 19.
European Union Chamber of Commerce in China (中国欧盟商会), 2025, “Siloing and Diversification: One World, Two Systems [孤立与多元化: 一个世界, 两种体系],” Beijing, January.
Euronews.com (Kieran Guilbert), 2025, “Kenya Investigates Giant Piece of Space Debris hat Crash Landed in a Village,” January 3.
Financial Times (Chris Cook), 2024, “Russian Producers of Oreshnik Supermissile Used Western Tools,” December 27.
Financial Times (Tabby Kinder and George Hammond), 2025, “US Investors in China Venture Funds Race to Comply with New Tech Rules,” January 1.
Financial Times (Leo Lewis), 2025, “Why It’s Hard to Be a Friend of America,” January 2.
Financial Times (Michael Acton), 2025, “AI-Powered Devices Dominate Consumer Electronics Show,” January 11.
Financial Times (Anna Gross *et al.*), 2025, “What Is Starmer’s Plan to Turn Britain into an AI Superpower?” January 13.
Financial Times, 2025, “Is Corporate America Going Maga?” January 14.
Financial Times (David Pilling *et al.*), 2025, “Apple Hit by Belgian Probe over ‘Blood Minerals’ from Congo,” January 20.
Financial Times (Cristina Criddle *et al.*), 2025, “OpenAI’s Sam Altman Vows ‘Better Models’ as China’s DeepSeek Disrupts Global Race,” January 28.
Financial Times (Stephen Morris *et al.*), 2025, “SoftBank Set to Invest in Robotics Start-Up Skild AI at \$4bn Valuation,” January 28.
Forbes (Chris Westfall), 2024, “The Dark Side of AI: Tracking the Decline of Human Cognitive Skills,” December 18.
Georgieva, Vanya, 2025, “Production Network Features of Industrial Policy,” Working Paper WP/25/13, Washington, D.C.: International Monetary Fund (IMF), January.
Global Times, 2025, “Foxconn, UBTECH Form Alliance to Deepen Humanoid Robotics Research and Advance Intelligent Manufacturing,” January 15.
MarketWatch (James Rogers), 2025, “Apple Offers Rare iPhone Discounts in China as Foreign Smartphone Sales Drop [苹果公司罕见在中国推出 iPhone 折扣优惠],” January 3.
MIT Technology Review (James O’Donnell), 2024, “The Humans behind the Robots,” December 24.
New York Times (Michael J. de la Merced), 2024, “Britannica Didn’t Just Survive. It’s an A.I. Company Now,” December 20.
OpenAI, 2025, “OpenAI’s Economic Blueprint,” San Francisco, CA, January 13.
Organisation for Economic Co-operation and Development (OECD), 2024, “Understanding Skill Gaps in Firms: Results of the PIAAC Employer Module,” Paris, December.

- Organisation for Economic Co-operation and Development (OECD), 2024, "Risks and Resilience in Global Trade: Key Trends in 2023-2024," Paris, December.
- Organisation for Economic Co-operation and Development (OECD), 2024, "The Role of Incentives in Investment Promotion: Trends and Practices in OECD Member Countries," Paris, December.
- Rafaelof, Emma M. *et al.*, 2025, Charting China's Export Controls: Predicting Impacts on Critical U.S. Supply Chains," Special Report No. 115, Seattle, WA: National Bureau of Asian Research (NBR), January.
- Reuters (Katrina Hamlin), 2024, "Trump and Tesla Will Turbocharge Self-Driving Race," December 23.
- Reuters (Lisandra Paraguassu), 2024, "Exclusive: Brazil Yanks Temp Work Visas for China's BYD after Trafficking Claims," December 28.
- Reuters, 2025, "Apple's China Troubles Mount as Foreign Phone Sales Sink for 4th Month," January 3.
- Reuters, 2025, "Netherlands to Expand Export Controls on Semiconductor Equipment," January 16.
- Reuters (Alexandra Alper), 2025, "Exclusive: Chinese Tech Firm Founded by Huawei Veterans in the FBI's Crosshairs," January 17.
- Reuters (Philip Blenkinsop *et al.*), 2025, "EU to Target AI, Biotech, Cheap Energy in Global Competitiveness Push," January 24.
- United States Congress, Congressional Research Service (CRS), 2025, "Artificial Intelligence (AI) in Health Care," Washington, D.C., December.
- United States Congress, House Select Committee on the Chinese Communist Party, 2025, "Moolenaar, Krishnamoorthi Express Support and Call for Redlines against Doing Business with CCP-Affiliated Entities in Commerce's New AI Export Control Framework," Washington, D.C., January 6.
- United States Government, Export-Import Bank of the United States (EXIM), 2025, "Export-Import Bank of the United States Board of Directors Approves Supply Chain Resiliency Initiative to Protect U.S. Jobs and Shift Critical Mineral Supply Chains Back to the United States and Away from the People's Republic of China," Washington, D.C., January 8.
- Wall Street Journal (Jacky Wong), 2024, "America's Chip War with China Will Spread [中美芯片冲突的战火将蔓延开来]," December 21.
- Wall Street Journal (Raffaele Huang and Tracy Qu), 2024, "Don't Look Now, but China's AI Is Catching Up Fast [中国 AI 公司另辟蹊径快速追赶美国同行]," December 23.
- Wall Street Journal (Spencer Jakab), 2024, "Elite Colleges Have a Looming Money Problem," December 24.
- Wall Street Journal (Liyun Q), 2024, "Chinese Students in U.S. Warned to Stay Put Ahead of Second Trump Term [特朗普重返白宫之际，中国在美留学生被告诫避免出境]," December 26.
- Wall Street Journal (Liza Lin and Raffaele Huang), 2024, "Beijing Pushes to Use China-Made Chips in Its EVs [中国推动在电动汽车中使用国产芯片]," December 31.
- Wall Street Journal (Stu Woo), 2025, "U.S. Companies Vouched for China during Trump's First Term. Not Anymore [美企曾在特朗普首个任期帮中国说话，这一幕不会重演]," January 2.
- Wall Street Journal (Editorial), 2025, "U.S. Steel and the Corruption of Cfius," January 3.
- Wall Street Journal (Dylan Toker), 2025, "On the Front Lines of the Trade War: How Customs Officers Screen for Prohibited Goods at U.S. Ports [贸易战第一线：美国海关如何在港口筛查违禁品]," January 3.
- Wall Street Journal (Alexander Ward *et al.*), 2025, "Biden's National-Security Aides Wanted to Keep Steel Deal Alive," January 4.
- Wall Street Journal (Belle Lin), 2025, "How Are Companies Using AI Agents? Here's a Look at Five Early Users of the Bots," January 6.
- Wall Street Journal (Jacky Wong), 2025, "U.S. Companies and Investors in Japan Are at Risk from U.S. Steel Backlash," January 9.
- Wall Street Journal (Stu Woo and Raffaele Huang), 2025, "TikTok's Founder Has a Formula for Everything. Can It Crack the Supreme Court? [张一鸣善用公式走天下，这次他能破解 TikTok 美国之围吗?]" January 10.
- Wall Street Journal (Greg Ip), 2024, "Trump's New Economist Makes the Case for 20% Tariffs [特朗普的新经济顾问主张将平均关税提高到20%]," January 12.
- Wall Street Journal (Stu Woo), 2025, "China Officials Internally Discuss Option of TikTok Sale to Elon Musk [中国官员内部讨论向马斯克出售 TikTok 美国业务等选项]," January 14.
- Wall Street Journal (Jason Douglas), 2025, "China Has a \$1 Trillion Head Start in Any Tariff Fight [中国贸易顺差达万亿美元，在关税战中优势巨大]," January 16.
- Wall Street Journal (Chun Han Wong), 2025, "Trump Keeps China Guessing on Tariff Threats [特朗普在关税问题上‘卖关子’，中国只能不停猜]," January 22.
- Wall Street Journal (Raffaele Huang), 2025, "Silicon Valley Is Raving about a Made-in-China AI Model [中国公司 DeepSeek 的 AI 模型何以让硅谷惊叹不已]," January 27.
- Wall Street Journal (Stu Woo and Raffaele Huang), 2025, "How China's DeepSeek Outsmarted America [中国的 DeepSeek 如何在 AI 赛道追赶美国]," January 28.
- Wall Street Journal (Gregory Zuckerman and Raffaele Huang), 2025, "DeepSeek Chief's Journey from Math Geek to Global Disruptor [DeepSeek 创始人梁文锋：从数学怪才到全球 AI 领域颠覆者]," January 28.
- Wang, Jennifer *et al.*, 2025, "Assessing the Implementation of Federal AI Leadership and Compliance Mandates," Stanford, CA: Stanford University Human-Centered Artificial Intelligence (HAI), January.
- Washington Post (Jeff Stein and Cat Zakrzewski), 2025, "Trump Threatens Country after Country with U.S. Economic Weapons," January 27.
- Wired.com (Will Knight), 2024, "AI-Powered Robots Can Be Tricked into Acts of Violence," December 4.
- Wired.com (Verity Harding), 2024, "It's Time to Move Past AI Nationalism," December 26.
- Event: December 27~30: (Hamburg) Chaos Computer Club (CCC): "The 38th Chaos Communication Congress (38C3)."
- Event: January 20: (an online event, London) China Institute (中國研究院), School of Oriental and African Studies (SOAS): "The War for Chinese Talent in America."
- Event: January 22: (an online event, Piscataway, NJ) IEEE SA: "Standard for Safety Management of Autonomous and Semi-Autonomous Systems—Interventions in the Event of Anomalous Behavior."
- Event: January 23: (an online event, Piscataway, NJ) IEEE SA: "Aging and Longevity: IEEE AgeTech Activities."

3. 編集後記

繰り返しになるが今年には敗戦 80 周年。“歴史の教訓”を真剣に見つめ直す時を迎えている。

昨年 11 月、ストラスブールの街が 80 年前に独軍から解放された事(*la libération de Strasbourg*)を記念し、マクロン大統領は、偉大な歴史家マルク・ブロック先生をフランスの偉人が眠る Panthéon に埋葬した。仏軍の情報将校だった先生の著書(『奇妙な敗北(*L'étrange défaite*)』)を、故スタンリー・ホフマン Harvard 大学教授と共に読んだ時、筆者が「大戦時の敗戦国、日仏両国の体質は同じで情報軽視ですね」と語った事を懐かしんでいる。

先人が遺した貴重な教訓を学び直す事が大切だ。そうしなければ同じ過ちをおかしてしまうのだ。以上

(編集責任者) 栗原 潤

キャンングローバル戦略研究所 研究主幹

〒100-6511 東京都千代田区丸の内 1-5-1 新丸の内ビルディング 11 階 Tel: +81-(0)3-6213-0550 (代)

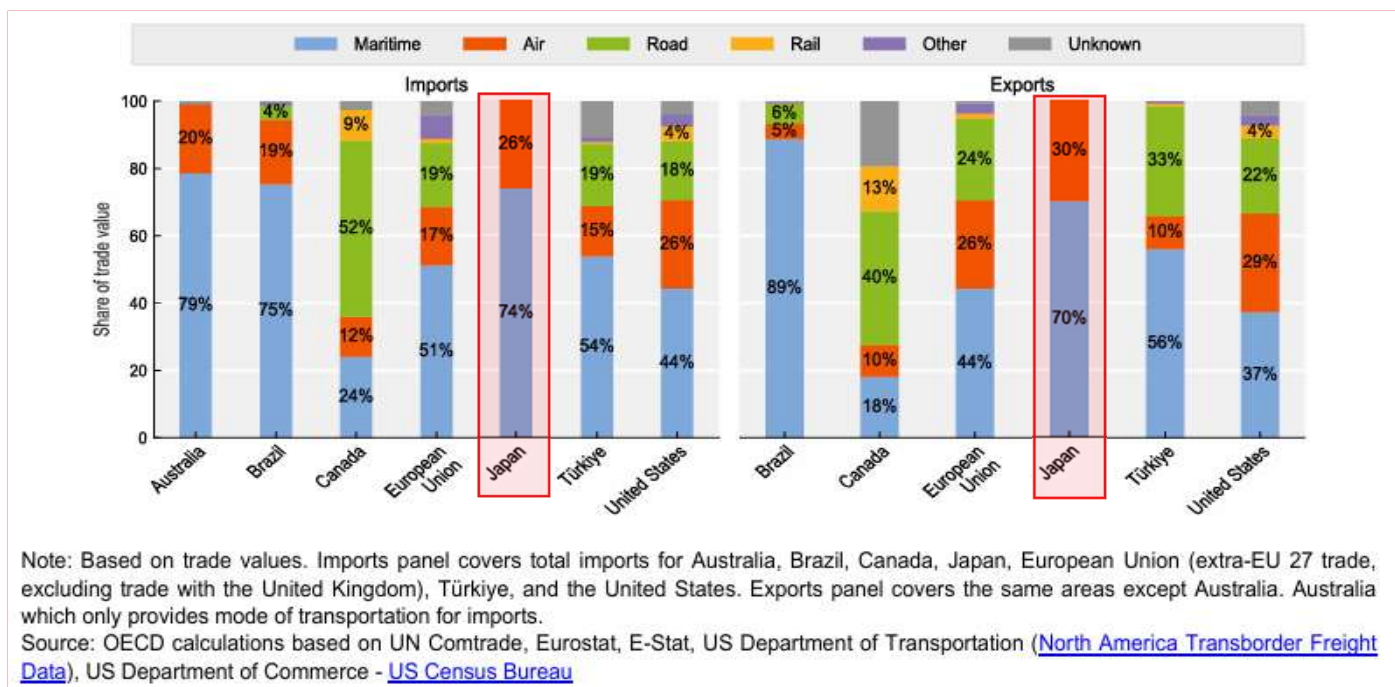
Jun KURIHARA

Research Director, Canon Institute for Global Studies

Kurihara.Jun@gmail.com

過去の Cambridge Gazette はネット上で見ることが出来、ダウンロードも出来ます。ネット上でキャンングローバル戦略研究所のウェブサイトに行き、そこで栗原のコラム・論文の欄をクリックして頂ければ、バックナンバー全てを見ることが出来ます。

Figure 1 Modes of Transportation for Merchandise Trade Vary Across Areas in 2023
 図 1 主要国の商品貿易における各種輸送手段 (2023 年)



Source: Organisation for Economic Co-operation and Development (OECD), "Risks and Resilience in Global Trade: Key Trends in 2023-2024," Paris, December, 2024, p.34.

Figure 2 Most of Maritime Trade Goes Through a Few Chokepoints
 図 2 世界の海上輸送における難所とも呼べる渋滞が危険視される要衝



Note: This map represents the list of chokepoints identified by the IMF for which the share of 2023 total maritime trade is higher than 5% as well as the Panama Canal. Shares were calculated as the ratio of the volume of trade going through each chokepoint to the 2023 total volume of maritime trade. The volume of trade going through each chokepoint is estimated by the IMF using AIS data transmitted from vessels and collected by the UN Global Platform. 2023 total volume of maritime trade was estimated using 2021 total maritime trade from UNCTAD database and yearly growth rates provided in UNCTAD maritime trade reports.
 Source: Author's elaboration based on IMF Portwatch (data extracted on 10 September 2024) and UNCTAD.

Source: Organisation for Economic Co-operation and Development (OECD), "Risks and Resilience in Global Trade: Key Trends in 2023-2024," Paris, December, 2024, p.37.