

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191号 (2025年3月)

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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。

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。

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1. *Tokyo-Cambridge Gazette*: グローバル戦略編第191号

超大国米国の大統領が変わり、国際政治経済の様相も大きく変わろうとしている。

米国新政権の発足以来、地名、国名、更には人名までが変わった—米国が Gulf of Mexico を Gulf of America へ、People's Republic of China (PRC) を China へと変更した一方で、中国もルビオ国務長官の苗字(漢字表記)を卢比奥(Lúbǎo)から魯比奥(Lǔbiào)へ変えた(魯は“粗野で愚か”という意味)。呼称が変わるだけで、国際政治上実質的な意義が変わらなければ問題ないが、そういうわけにはいきまい。

新政権による変更は呼称のみならず組織や人事に及ぶ。驚いたのは軍幹部の更迭だ。ブラウン統合参謀本部議長やフランケッティ海軍作戦部長と新政権との対立は、新政権発足以前から予想されていたが、2月22日夕刻公表された突然の説明無き更迭に驚いている。

ブラウン議長の就任は、2023年9月、連邦議会上院で賛成83対反対11により承認された。しかし、反対票を投じた人の中に当時上院議員であったヴァンス副大統領やルビオ国務長官がいたのだ。またフランケッティ作戦部長を更迭したヘグセス国防長官は、小誌1月号で触れた著書(*The War on Warriors, June 2024*)の中で「戦場に女性是不適切だ」と強調している事から、必然的対立は予想されていた。

ブラウン議長の前任であるミラー議長は、2021年1月、連邦議会議事堂襲撃の際に、「君達が目にした光景は、将来更にひどい事の前触れかも知れない(What you might have seen was a precursor to something far worse down the road)」と語ったと伝えられている。ミラー議長のこの警告が(正しい警告であっても、誰も信じないという)カサンドラのコムプレックス状態に陥る事にならないよう願っている。

先月も友人達と AI・ロボット関連の海外情報を議論する毎日だった。

2月3-4日、ストックホルム国際平和研究所(SIPRI)は、AIの軍事利用に関する workshop を開催し、6日にはモルガン・スタンレーが、最新のヒューマノイドに関する資料を公表した。また10-11日、仏印両国政府はパリで AI Action Summit を共同主催した(PDF版2を参照)。

パリの会合では、冒頭Stanfordの専門家、李飞飞氏やFrontier AI: From Understanding the World to Shaping Itと題する講演を行い、その後、多くの分科会が開催され、今川拓郎総務審議官、村上明子 AI Safety Institute (AIS) 所長、Sakana AI の伊藤練氏等が日本から参加している。

これに関連し筆者は友人達と online を通じて意見交換をした。内容は AI 開発に際し重要な database と application に関する最新統計だ。Open Source Databases の言語を見ると英語が56%で次に中国語が5%。続くのは仏語が3.4%、スペイン語が2.8%、露語が2.4%だ。そして日本語が2.2%だ。また applications が利用する Open Source Datasets の言語に関する単一言語アプリ上位5言語は英仏露西葡で、日本語は第13位。また多言語アプリでは首位が中国語、2位が英語、次にズールー語、スウェーデン語、独語、仏語が続く(PDF版図1-3を参照)。

AI 開発は各国とも国際的学術交流を通じて行っており、どの外国に知識依存するかは当然ながら各国によって異なる。日本の導入先別で見た AI 知識は米国、イスラエル、中国、そして自国だ。米国は AI 知識の大半を自給して、インド・タイ・カナダ・英国からの知識も吸収している。中国も先ず国内、次いで米国、インド、イスラエル、ロシアだ。アジアの AI 新興国シンガポールも首位が国内の知識で、フランス、イタリア、ドイツ、オランダが続く。このほか英仏独韓の AI 知識に関しても海外の友人達と議論した。以上の8カ国について比較すると、日本の“知識自給率”の低さに驚いている。優れた日本の若者達の今後の活躍に期待したい(PDF版の図5-12を参照)。

また Morgan Stanley の資料についても意見交換を行った(“The Humanoid 100: Mapping the Humanoid Robot Value Chain”)。この資料に依れば、注目すべき16社の humanoid robots の国別分布は、中国6、米国5、そして日加独の各国とノルウェーとイスラエルがそれぞれ1である。Value chain については、川上分野に NSK や Nidec 等の日本企業が散見されるが、中国企業の抬頭が注目される。そして海外の友人達は、「Humanoid robots と言えば ASIMO を開発した本田等日本企業が最先端だと思っていた。だが、日本の現在の存在感は希薄だ」と語った。

これに関連し先月中旬に開催されたミュンヘン安全保障会議(MSC)の際に提出された資料についても友人達と日本の課題を語り合った。PDF版の図13が示す通り critical technologies, number of universities in the top 200, gender equality の3点、即ち科学技術、高等教育と女性の地位向上が課題だ(PDF版は資料“Multipolarization”から直接転載したため文字が読み難い。関心のある読者は直接資料にあたる事をお勧めする)。

世界が1930年代の“苦い教訓”として既に学んだ貿易政策が、米国新政権によって復活しそうだ。

米国共和党系の think tank、American Enterprise Institute (AEI) のデズモンド・ラックマン氏は2月21日、関税政策に関し小論を公表した(“The Economic Consequences of Mr. Tariff Man”)。筆者は海外の友人達に対し、Dartmouth 大学のダグラス・アーウィン教授の著書に触れつつ、「何年も前に Cambridge で読んだ教授の本を、トランプ大統領のお陰で思い出すとは思わなかった」として悲観論と楽観論を語った。

悲観論として「教授が著書(*Peddling Protectionism*)の中で“不名誉な烙印(stigma)”と称した1930年のスムート=ホーリー法に似た政策が復活しそうだ。しかも中国や欧州が報復して、世界経済が苦境に陥るかも知れない。興味深い事に1930年関税法は農村地帯の荒廃を背景として共和党の議員が積極的だった。他方フーバー大統領は1,028名の経済学者や J.P. Morgan のトーマス・ラモントが反対するために消極的だった。今回は大統領が主導している点が対照的だ。また著書(*Trade Policy Disaster: Lessons from the 1930s*)の中で1930年関税法の如き政策が復活する危険性は、戦後の多様化した政策手段や貿易構造の変化により低下したと教授は述べたが、その予想を裏切っている」と語った。

楽観論として「多くの専門家が指摘する通り、経済政策ではなく外交交渉手段として採用した関税政策が、経済に混乱と停滞をもたらし、早晩国民の政権に対する信頼が低下するであろう。そうすれば軌道修正を図る政策ないし政権が出現する可能性が高まる」と語った。

繰り返しになるが米国新政権の登場で先行きが益々不透明になっている：果たして平和への解決策は?

或る友人が大統領就任演説に関し感想を求めた。筆者は「分かり易い演説。もしもボクが米国のトウモロコシ畑で働く18歳の純粋で勤勉な青年だったら大感激するだろう。でも Harvard-MIT Complex や Aspen Strategy Group の友人達は別の感想を持っているかも知れない」と。大統領は「洪水戦略(flood-the-zone strategy)」として矢継ぎ早に大統領令を出し、ヴァンス副大統領はミュンヘンでの会議で喧嘩腰の演説を行い、またマスク氏はドイツ政治に挑発的発言をしている。こうして米国のイメージは嘗ての benevolent hegemon から tight-fisted hegemon へと一変したため、世界中に猜疑心と敵愾心が蔓延している。かくして今、我々は海外情報を慎重に精査する必要に迫られているのだ。

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最も優れた将校の一人は…私に「参謀本部に「部局」があつてはならない」と言った。つまり彼は、分業による細分化は恐らく避けられないだろう。だが、危険を孕んでいると言いたかった。何故なら全体の中の各部局は、殆ど宿命的な傾向として部局自体が一つの孤立した全体だと考える危険性を持つ上に(部局という)小さな閉じた社会は、自己中心的思考を生み出すからだ。
(マルク・ブロック)

One of the most remarkable officers... once said to me; 'There should never be any *branches* in a Headquarters Staff.' He meant by this that any such subdivision, though perhaps inevitable, was always fraught with danger. For each part or branch is almost bound to slip into the fallacy of substituting itself for the whole, and the small enclosed world of the staff to regard itself as synonymous with the nation.
[L'un des plus remarquables officiers... m'a dit un jour: «Dans un état-major, il ne devrait pas exister de *bureaux*». Par quoi il entendait que ce sectionnement, peut-être inévitable, est gros de dangers. Car chaque partie du tout risqué, par un penchant presque fatal, de se prendre elle-même pour un tout et la petite société close se croit une patrie.] (Marc Bloch)

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

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- Deutscher Industrie- und Handelskammertag (DIHK) (Association of German Chambers of Industry and Commerce), 2025, „Steuerlast deutscher Unternehmen im internationalen Vergleich zu hoch“, Berlin, February 10.
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- McKinsey Global Institute (MGI), 2025, "Dependency or Depopulation? Confronting the Consequences of a New Demographic Reality," January.
- Sever, Can, 2025, "Government Debt and Growth: The Role of R&D," Working Paper WP/25/36, Washington, D.C.: International Monetary Fund (IMF), February.
- Wall Street Journal (Editorial), 2025, "Trump Inherits a So-So Economy," January 30.
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- Wall Street Journal (Editorial), 2025, "Trumponomics and Rising Inflation," February 13.

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

- February 11: (Washington, D.C.) Congress, Senate Committee on Banking, Housing, and Urban Affairs: "The Semiannual Monetary Policy Report to the Congress."
- February 13: (an online event, Washington, D.C.) Peterson Institute for International Economics (PIIE): "Is 'Twin Peaks' the Future of Financial Supervision?"

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

- Wall Street Journal (Jon Emont), 2025, "The New Weapon against China's Mineral Dominance: Plants [对抗中国矿物主导地位的新武器: 植物]," January 25.
- Wall Street Journal (Scott Patterson), 2025, "Clean-Energy Program Fueled by Biden Takes Deep Staff Cuts under Trump," February 16.

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

- January 28: (an online event, Washington, D.C.) Center for Strategic and International Studies (CSIS): "Energy Emergency: Interpreting Executive Orders on Energy and Climate."
- February 5: (an online event, Washington, D.C.) Center for Strategic and International Studies (CSIS): "Resilient Allied Energy Cooperation in the Indo-Pacific."
- February 13: (an online event, Washington, D.C.) Resources for the Future (RFF): "After Implementation: Impacts and Effects of Federal Environmental Regulations."
- February 25: (a hybrid event, Brussels) Bruegel: "Public Support for Climate Action: Can Governments Deliver on Citizens' Expectations?"

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

- Australian Broadcasting Corporation (ABC) (Stephen Dziedzic and Andrew Greene), 2025, "Australia and New Zealand Working Together to Monitor Chinese Naval Presence Declared 'Provocative' by Coalition," February 20.
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かくして、かつては冷静で優れた専門家は、一種の預言者に、 Then, the former first-rate specialist changes into a kind of prophet, into an enthusiast, perhaps even into a fanatic and
熱狂者に、或いは狂信者や偏執者に変化するのだ。 こうして、 monomaniac. Thus arises the type of man who wants to reform the world.
世界を改革する者というタイプの人間が出現する。 [Dann verwandelt sich der bisherige nüchterne Fachmann in eine Art Propheten, in einen Schwärmer, vielleicht gar Fanatiker
(フリードリヒ・マイネッケ) und Monomanen. Der Typus des Weltverbessers also entstehe.] (Friedrich Meinecke)

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新理論は、危機に対する直接的な反応として出現すると思う。… 危機の解決方法は少なくとも部分的には、危機の到来以前、既に予想されていたのだ。… 危機の到来が無ければそのような予想は無視される。… 危機到来の意義とは、解決手法の改編が遂に到来したという事を示唆する点にあるのだ。(トーマス・クーン) The novel theory seems a direct response to crisis. ... [T]he solution ... had been at least partially anticipated. ... and in the absence of crisis those anticipations had been ignored. ... The significance of crises is the indication they provide that an occasion for retooling has arrived. (Thomas S. Kuhn)

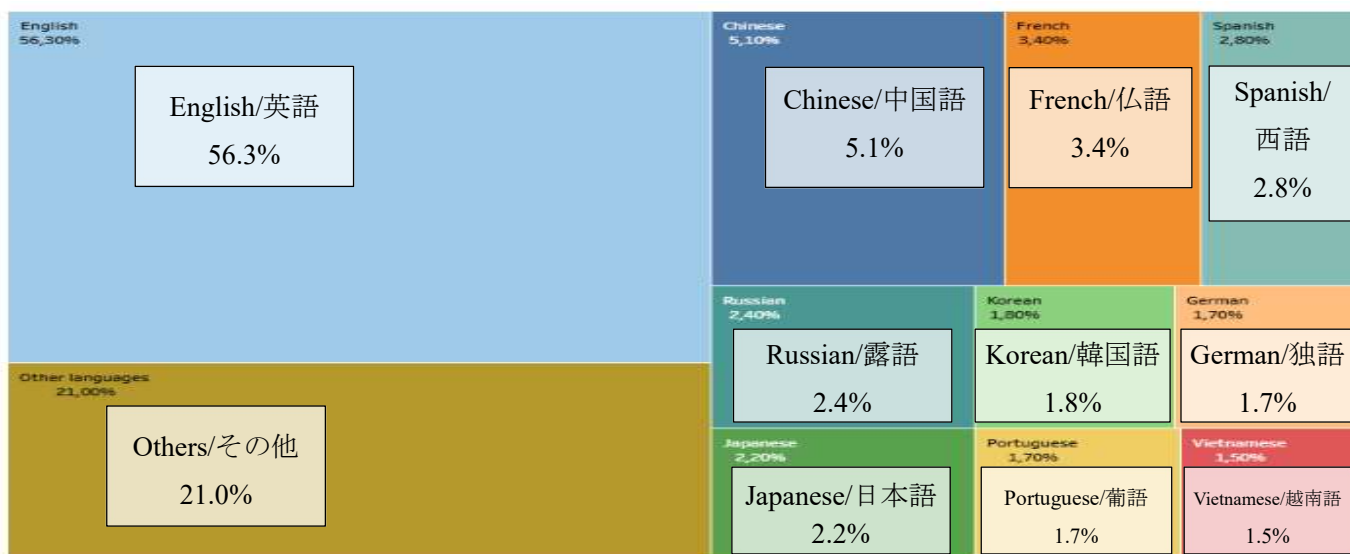
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3. 編集後記

或る友人が「トランプ大統領(Mr. Tariff)は偉大だ。歴史を学ばない事が如何に恐ろしいかを教えてくれた」と語った。2月4日、米国 think tank, Aspen Institute が昨年設立 75 周年を迎えた事に関する資料を公表した(A Milestone Year: Aspen Institute at 75)。同所は、ゲーテ生誕 200 周年の年に米国の財界人が出資し、医師・神学者のシュヴァイツァーや哲学者のオルテガ等を招き、設立を盛大に祝った。筆者は 18 年前に初めて訪れ、故スコークロフト将軍や Harvard のナイ教授と米中関係、そして Stanford の科学者と AI の可能性について意見交換をした。以来 Aspen で知り合った友人達と意見交換を続けているが、世界の平和と繁栄に何も貢献してこなかった自らの非力を深く反省している。それでも慎重なる楽観主義を抱きつつ、引き続き毎日努力を続けてゆこうと思っている。以上

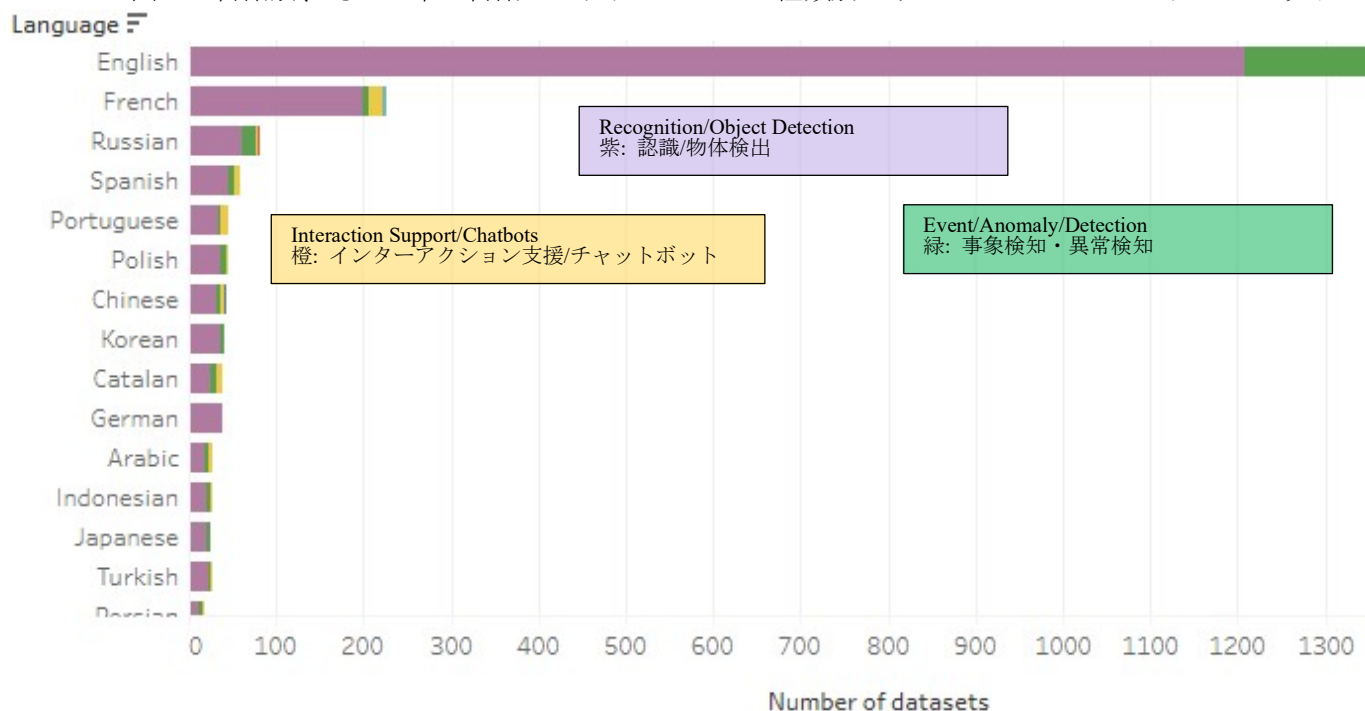
Table with 2 columns: Contact information for Jun Kurihara (Editorial Director) and his affiliation with Canon Institute for Global Studies. Includes address, phone, and email.

Figure 1 Percentage of Open Source Datasets by Language
 図 1 言語別にみたオープンソース・データセットの比率



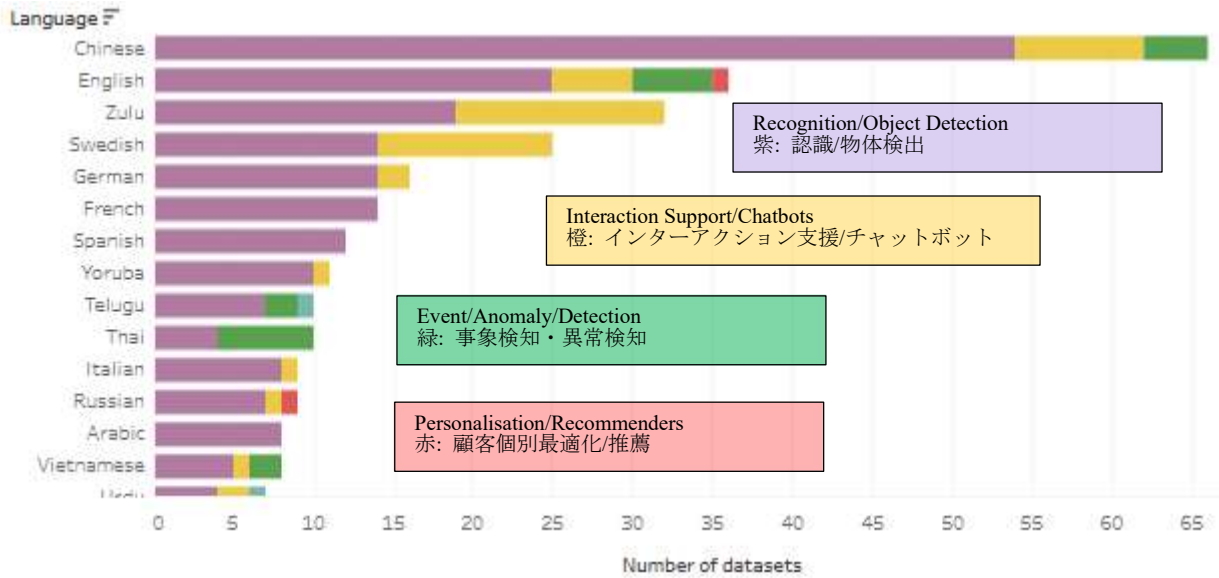
Source: Organisation for Economic Co-operation and Development (OECD), "OECD.AI, Visualisations Powered by JSI Using Data from Hugging Face," accessed on 22/4/2024, <https://oecd.ai/en/data?selectedArea=ai-models-and-datasets&selectedVisualization=percentage-of-open-source-datasets-from-hugging-face-by-language>.

Figure 2 Open Source Datasets by Language and Application Task (Monolingual)
 図 2 言語別、そして単一言語アプリケーションの種類別にみたオープンソース・データセット



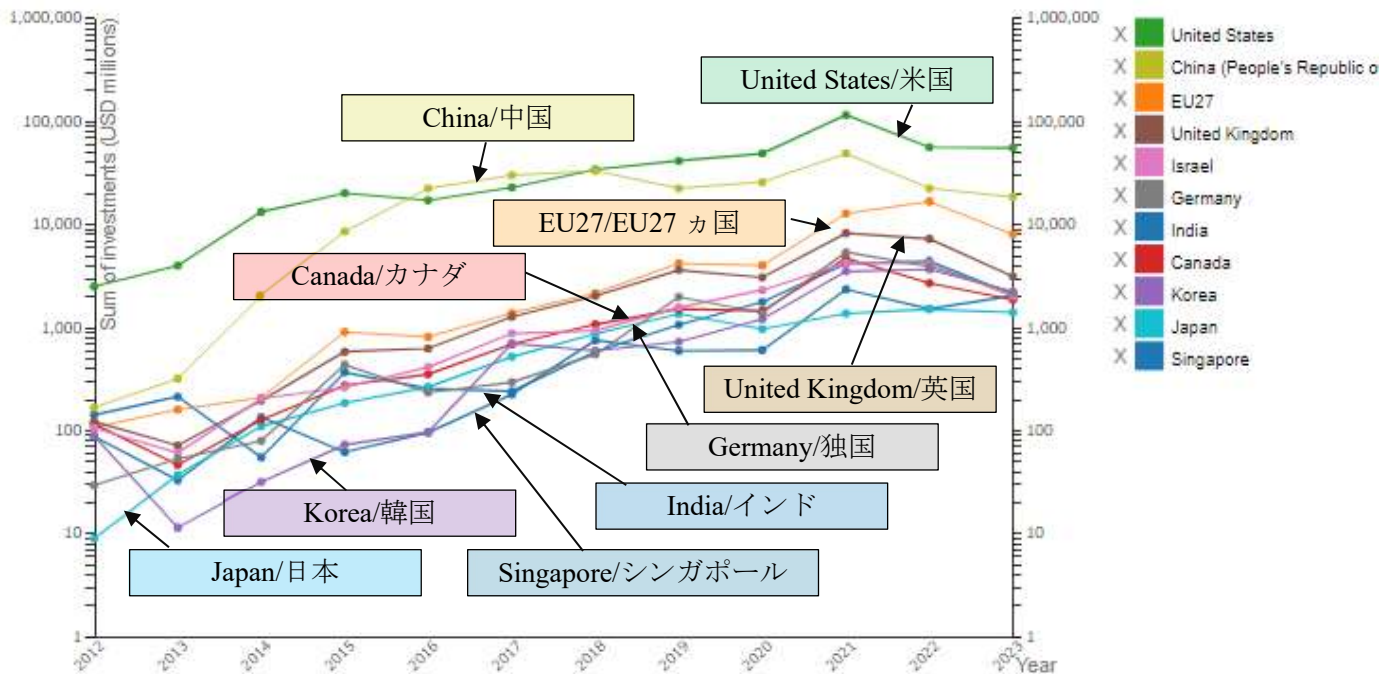
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Figure 3 Open Source Datasets by Language and Application Task (Multilingual)
 図 3 言語別、そして多言語アプリケーションの種類別にみたオープンソース・データセット



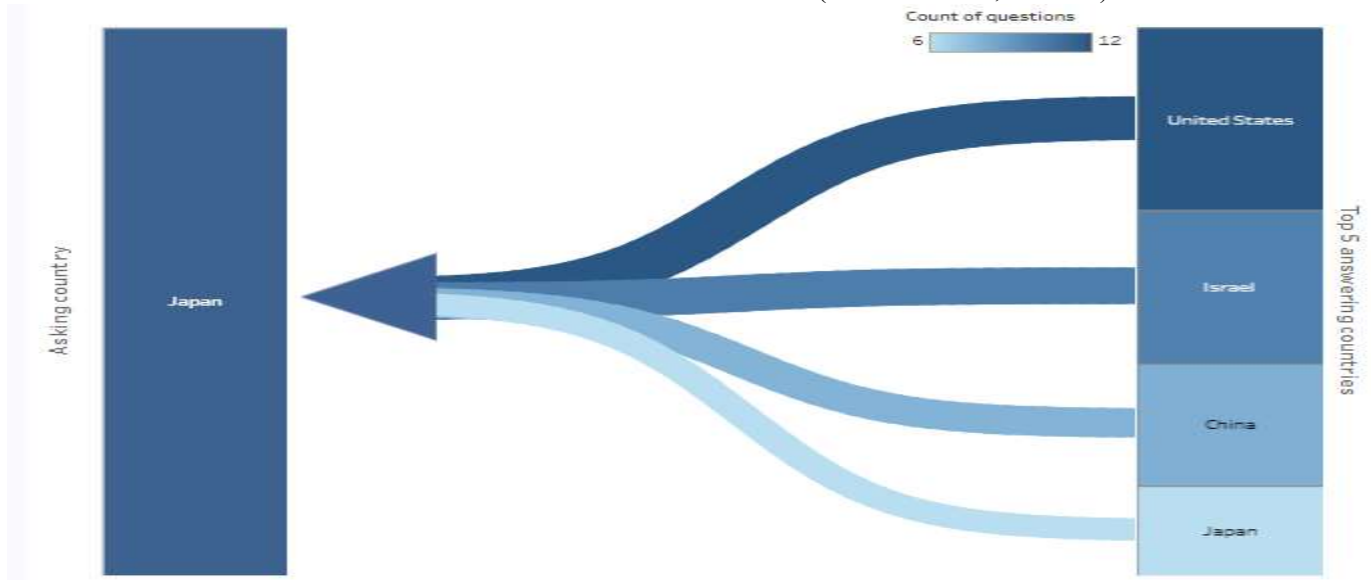
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Figure 4 VC Investment in AI by Country (USD millions, Log Scale)
 図 4 主要国のベンチャー・キャピタルによる AI 投資額 (100 万米ドル、対数目盛)



Source: Organisation for Economic Co-operation and Development (OECD), "OECD.AI, Visualisations Powered by JSI Using Data from Preqin," accessed on 8/2/2025, <https://oecd.ai/en/data?selectedArea=investments-in-ai-and-data&selectedVisualization=vc-investments-in-ai-by-country>.

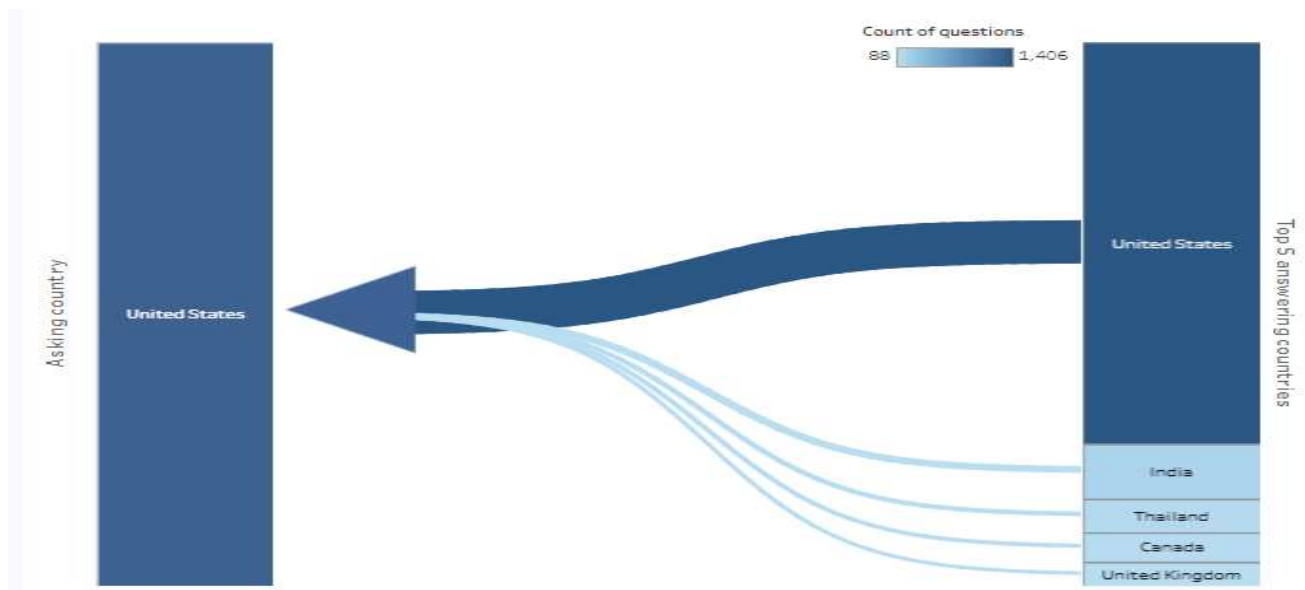
Figure 5 Japan: Incoming AI Knowledge Flow by Country (the Top 4 Countries, 2022)
 図 5 日本への AI 関連知識の流入(主要国 4 カ国, 2022 年)



Explanation: This chart shows the knowledge flow to a country asking questions answered by the top 5 countries on Stack overflow. The bar chart of countries answering questions is ranked by percentage of answers. Color corresponds to the count of answers provided by each country.

Source: Organisation for Economic Co-operation and Development (OECD), "OECD.AI, Visualisations Powered by Tableau using data from Stack Overflow," 2023, accessed on 8/2/2025, <https://oecd.ai/en/data?selectedArea=knowledge-flows&selectedVisualization=incoming-ai-knowledge-transfer-by-country>.

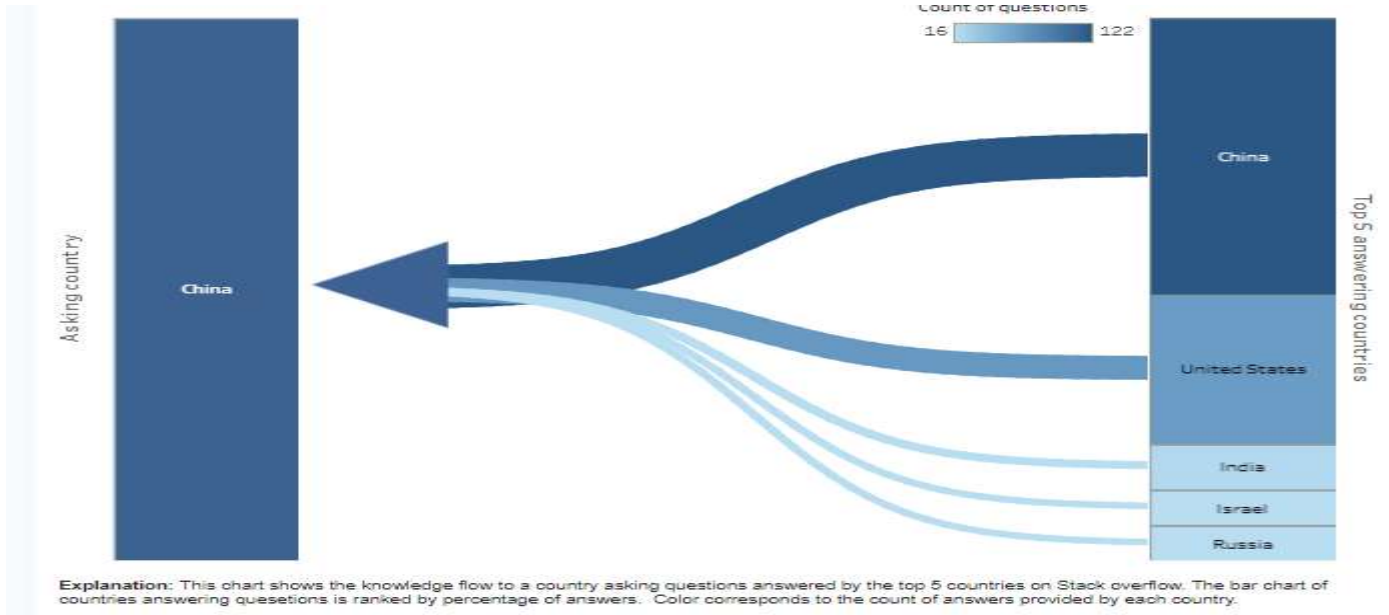
Figure 6 USA: Incoming AI Knowledge Flow by Country (the Top 5 Countries, 2022)
 図 6 米国への AI 関連知識の流入(主要国 5 カ国, 2022 年)



Explanation: This chart shows the knowledge flow to a country asking questions answered by the top 5 countries on Stack overflow. The bar chart of countries answering questions is ranked by percentage of answers. Color corresponds to the count of answers provided by each country.

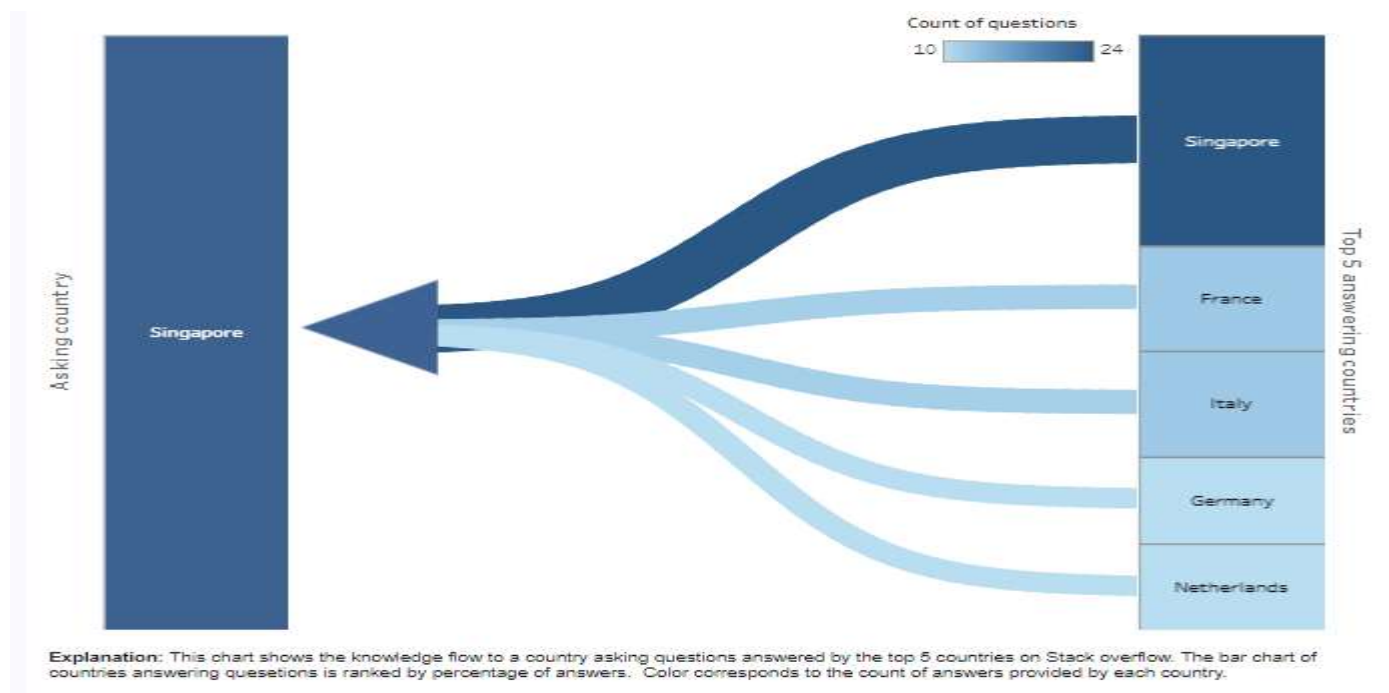
Source: Organisation for Economic Co-operation and Development (OECD), "OECD.AI, Visualisations Powered by Tableau using data from Stack Overflow," 2023, accessed on 8/2/2025, <https://oecd.ai/en/data?selectedArea=knowledge-flows&selectedVisualization=incoming-ai-knowledge-transfer-by-country>.

Figure 7 China: Incoming AI Knowledge Flow by Country (the Top 5 Countries, 2022)
 図 7 中国への AI 関連知識の流入(主要国 5 カ国, 2022 年)



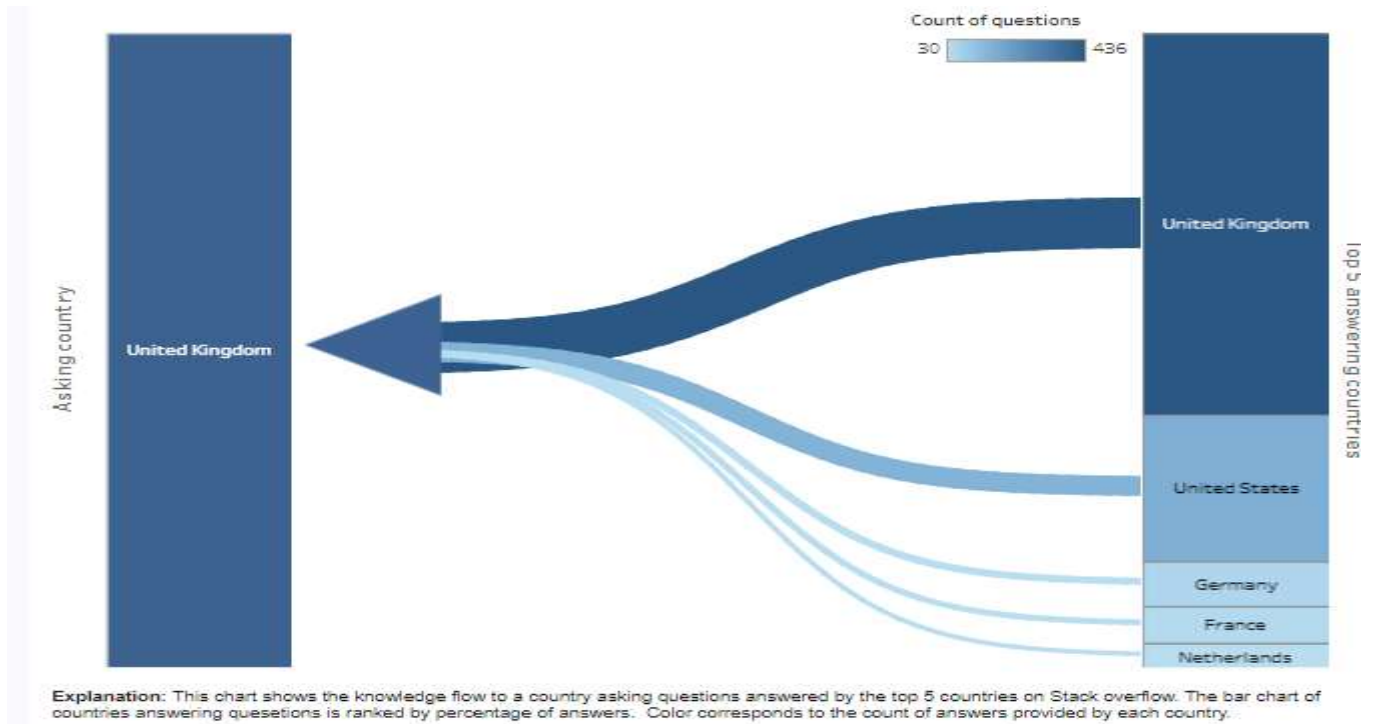
Source: Organisation for Economic Co-operation and Development (OECD), "OECD.AI, Visualisations Powered by Tableau using data from Stack Overflow," 2023, accessed on 8/2/2025, <https://oecd.ai/en/data?selectedArea=knowledge-flows&selectedVisualization=incoming-ai-knowledge-transfer-by-country>.

Figure 8 Singapore: Incoming AI Knowledge Flow by Country (the Top 5 Countries, 2022)
 図 8 シンガポールへの AI 関連知識の流入(主要国 5 カ国, 2022 年)



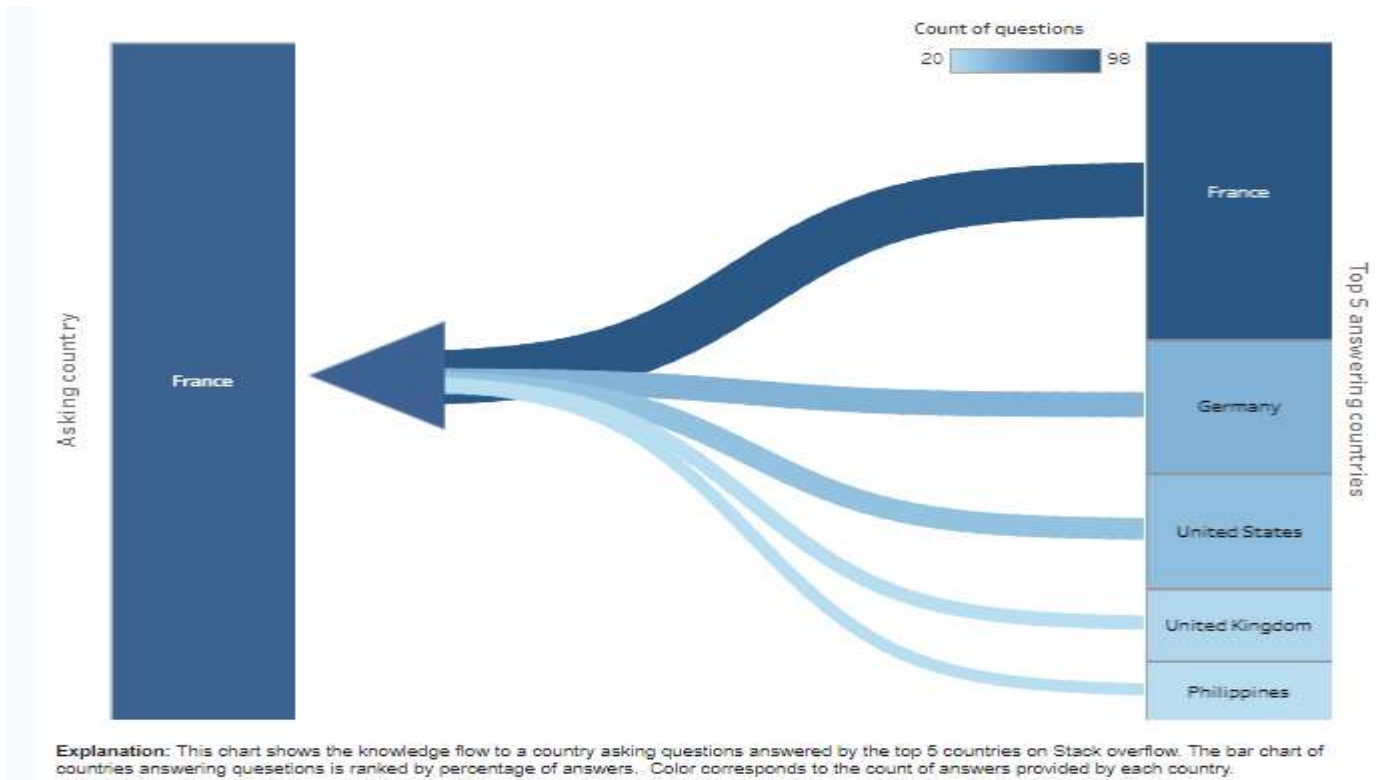
Source: Organisation for Economic Co-operation and Development (OECD), "OECD.AI, Visualisations Powered by Tableau using data from Stack Overflow," 2023, accessed on 8/2/2025, <https://oecd.ai/en/data?selectedArea=knowledge-flows&selectedVisualization=incoming-ai-knowledge-transfer-by-country>.

Figure 9 United Kingdom: Incoming AI Knowledge Flow by Country (the Top 5 Countries, 2022)
 図 9 英国への AI 関連知識の流入(主要国 5 カ国, 2022 年)



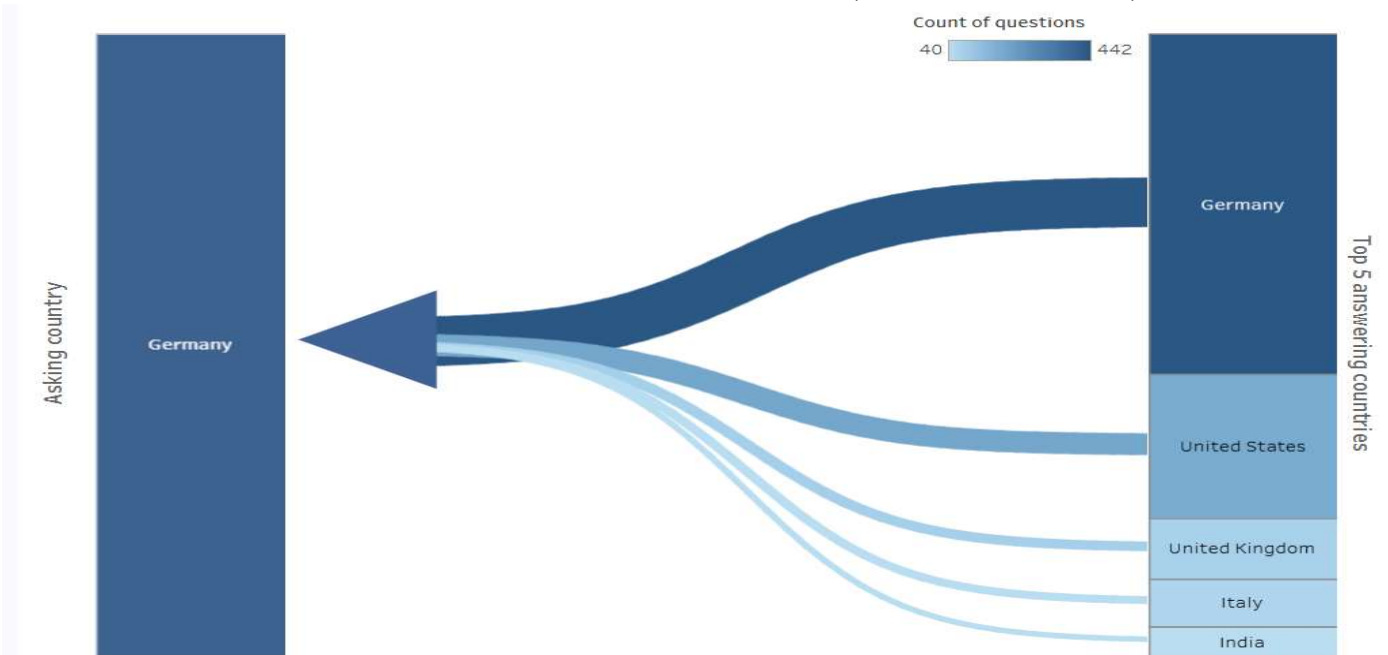
Source: Organisation for Economic Co-operation and Development (OECD), "OECD.AI, Visualisations Powered by Tableau using data from Stack Overflow," 2023, accessed on 8/2/2025, <https://oecd.ai/en/data?selectedArea=knowledge-flows&selectedVisualization=incoming-ai-knowledge-transfer-by-country>.

Figure 10 France: Incoming AI Knowledge Flow by Country (the Top 5 Countries, 2022)
 図 10 フランスへの AI 関連知識の流入(主要国 5 カ国, 2022 年)



Source: Organisation for Economic Co-operation and Development (OECD), "OECD.AI, Visualisations Powered by Tableau using data from Stack Overflow," 2023, accessed on 8/2/2025, <https://oecd.ai/en/data?selectedArea=knowledge-flows&selectedVisualization=incoming-ai-knowledge-transfer-by-country>.

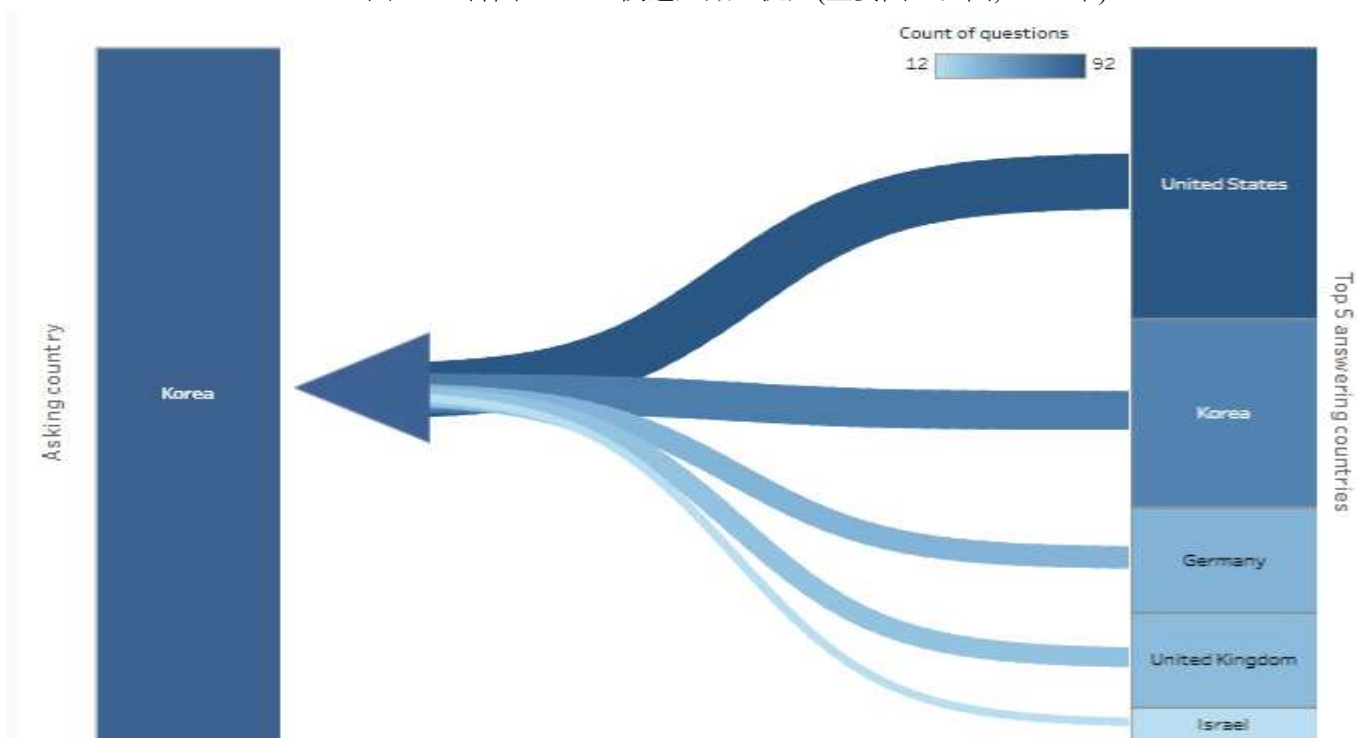
Figure 11 Germany: Incoming AI Knowledge Flow by Country (the Top 5 Countries, 2022)
 図 11 ドイツへの AI 関連知識の流入(主要国 5 カ国, 2022 年)



Explanation: This chart shows the knowledge flow to a country asking questions answered by the top 5 countries on Stack overflow. The bar chart of countries answering questions is ranked by percentage of answers. Color corresponds to the count of answers provided by each country.

Source: Organisation for Economic Co-operation and Development (OECD), "OECD.AI, Visualisations Powered by Tableau using data from Stack Overflow," 2023, accessed on 8/2/2025, <https://oecd.ai/en/data?selectedArea=knowledge-flows&selectedVisualization=incoming-ai-knowledge-transfer-by-country>.

Figure 12 South Korea: Incoming AI Knowledge Flow by Country (the Top 5 Countries, 2022)
 図 12 韓国への AI 関連知識の流入(主要国 5 カ国, 2022 年)

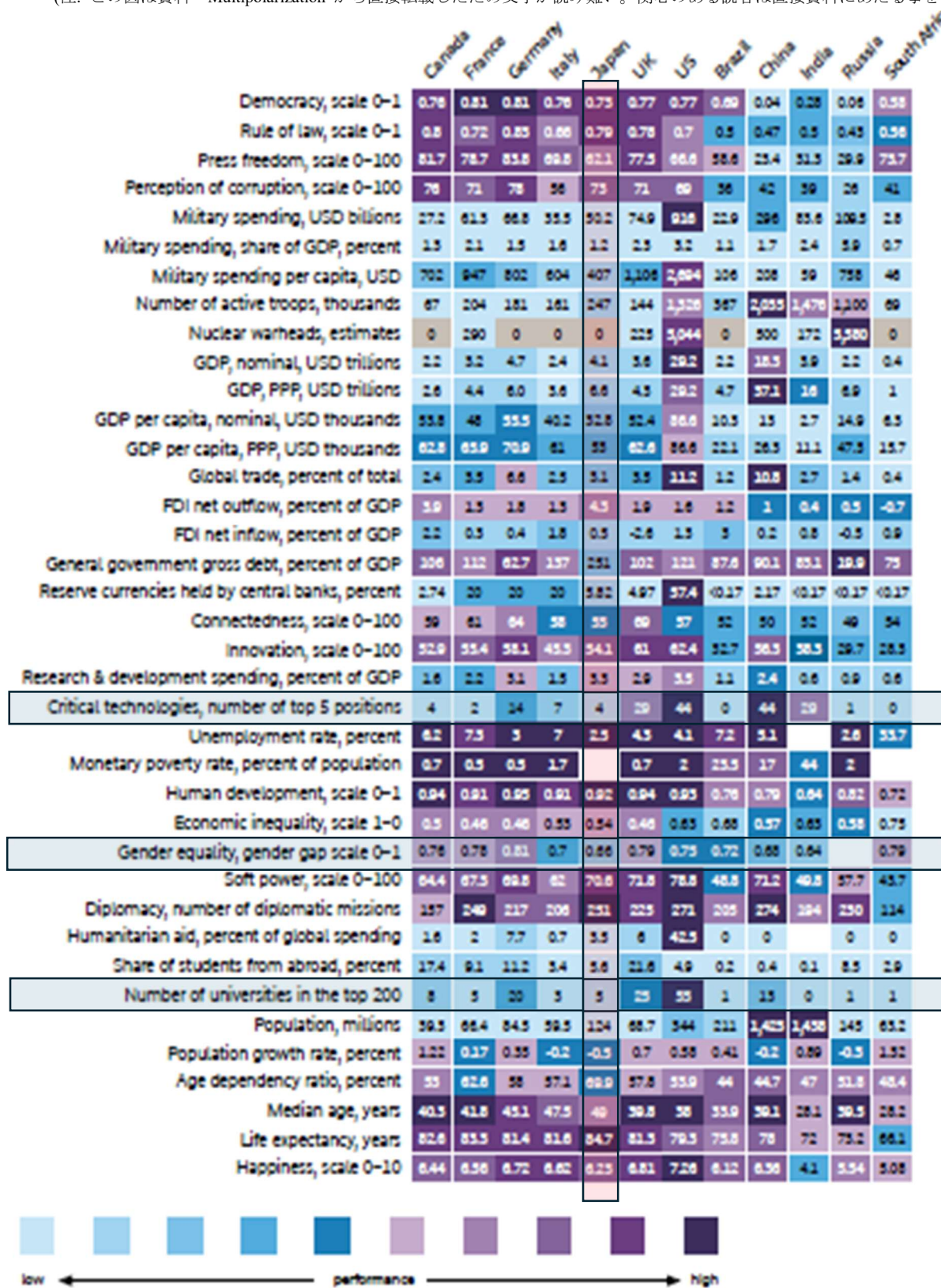


Explanation: This chart shows the knowledge flow to a country asking questions answered by the top 5 countries on Stack overflow. The bar chart of countries answering questions is ranked by percentage of answers. Color corresponds to the count of answers provided by each country.

Source: Organisation for Economic Co-operation and Development (OECD), "OECD.AI, Visualisations Powered by Tableau using data from Stack Overflow," 2023, accessed on 8/2/2025, <https://oecd.ai/en/data?selectedArea=knowledge-flows&selectedVisualization=incoming-ai-knowledge-transfer-by-country>.

Figure 13 Comparison of the G7 and BRICS across Various (Great Power) Indicators
 図 13 様々な(大国基準)指標で比較した G7 と BRICS

(注: この図は資料 “Multipolarization”から直接転載したため文字が読み難い。関心のある読者は直接資料にあたる事をお勧めする)



Source: , Munich Security Conference (Stiftung Münchner Sicherheitskonferenz), “Multipolarisation,” Munich Security Report, Munich, February, 2024, p. 16.