

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姉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 192 号 (2025 年 4 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。

Know the enemy and know yourself; In a hundred battles you will never be in peril.

彼れを知らずして己れを知れば、一勝一負す。

When you are ignorant of the enemy but know yourself; Your chances of winning or losing are equal.

彼れを知らず己れを知らざれば、戦う毎に必ず殆うし。

(孫子)

If ignorant both of your enemy and of yourself; You are certain in every battle to be in peril. (Sunzi/Sun Tzu)

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1. *Tokyo-Cambridge Gazette*: グローバル戦略編第 192 号

世界は濃い霧に包まれている。視界が再び開けて、平和と繁栄へと回帰するために我々が為すべき事とは？

3 月 17 日に OECD が公表した経済見通し(“Economic Outlook, Interim Report, Steering though Uncertainty”)のタイトルが示す通り、世界経済は不確実性の中にいる。しかも主要 20 カ国の成長率を見ると、日独両国がそれぞれ 18 番目と 19 番目に示されている!! (PDF 版図 1 参照)。また 20 日に公表されたドイツ連邦銀行の『月報』は、最初のページで「政治経済的な不確実性が投資意欲を減退させている(Die hohe Unsicherheit über wirtschaftliche und politische Rahmenbedingungen dämpft die Investitionsneigung)」と述べた。尚、『月報』2 月号には、computational text analysis に基づく貿易政策に関する不確実性を示す図が掲載されている。これに依れば、不確実性は第一次トランプ政権時代の 2018~19 年以降の高まりを示し、しかもその水準を超えて過去 10 年間で最高となっている(PDF 版図 2 参照)。

現在の閉塞状態から脱却するには、ケインズ先生が語る animal spirits が企業部門に不可欠で、しかもシュンペーター先生が語る innovation が社会の中に出現しなくてはならない。しかし、innovation を出現するための主要な要素—研究者、組織、国家の政策と制度、そして市場—が上手く組み合わされて ecosystem が誕生しない限り、innovation は“偽り夢”に終わってしまう。これに関し筆者は昨年 12 月、井上悟志東京理科大学教授が担当されている授業で、生徒である優良企業の中堅企業人の前で筆者の考えを述べさせて頂いた。筆者は優れた研究者だけでは innovation は実現不能だとした上で、優れた研究者をまとめて研究組織を円滑に運営する指導者や研究組織を制度的・資金的に支援する上部機構が不可欠である事を述べた。そして小誌で過去に触れた米国の DARPA や DIU を具体例として挙げて説明を行った。

これに関して気になるのは海外の動きだ。特に研究活動の経済的支援は米中両国が飛び抜けている。OECD の資料に依れば、日本の R&D 支出額は米国の 5 分の 1、中国の 4 分の 1 だ! 質を重視する R&D 故に、計量的比較を単純に信じると危険だが、これほど規模が違えば、やはり問題であろう。特に 1990 年代は中国よりも多く、米国と比べても遜色がなかっただけに残念だ。また知的財産権の収入で見ても、日本は米英両国と大きな差をつけられている。これに関し井上教授をはじめ優れた人々と活気に満ちた日本の将来を夢見て語り合いたい。特に AI・ロボットの社会実装問題や海洋開発技術の可能性に関し、その組織・制度を論じてみたい(PDF 版図 3、4 参照)。

2 月 23 日の独連邦議会選挙は予想通りの結果だった。小誌 179 号(2024 年 3 月)で *Frankfurter Allgemeine Zeitung* 紙が「ショルツ氏のお陰で社会民主党(SPD)は前回の選挙で勝利したが、次回は彼の存在故に敗北が予想される(Die SPD hat wegen Scholz die vergangene Bundestagswahl gewonnen. Jetzt hat sie Angst, die nächste seinetwegen zu verlieren)」と語った記事に触れたが、2 月の選挙結果はまさしく SPD の後退、AfD の躍進となった。こうした状況下で米露接近に危機感を強めたドイツは 3 月 21 日に憲法を改正し、国防とインフラ整備に向けた支出拡大が可能となった。憲法改正の目途が立った 14 日、CDU/CSU 率いるメルツ氏は「ドイツ復活(Deutschland ist zurück)」を宣言し、欧州の平和と繁栄に貢献する意思を示した。筆者は欧州の友人達と共にホッとしている。憲法改正直前、危機感を感じたドイツの友人達との知的会話は、或る意味で緊迫感があつたために面白かった。例えば 2 月 27 日、独 think tank のキール世界経済研究所(IW Kiel)はドイツの国防費増額を訴える小論を発表したが、それを読んで筆者は大笑いをした —「1930 年代の英国の失敗を繰り返すな(Fehler Großbritanniens der 1930er Jahre nicht wiederholen)」と。即ち 1930 年代、Nazi Germany の動きに鈍感だった英国の失敗を繰り返すなというのだ。当時の英国大蔵省は財政赤字を嫌悪し、空軍省やチャーチルの要請にもかかわらず、防空予算の拡大に反対した。この結果、英国は独空軍による本土空襲で甚大なる損害を被つたのだ。90 年前の独英関係を現在の露独関係に置き換えて議論している点に筆者は笑ってしまった。また独報道番組(Tagesschau)が 3 日、「(国防のための)必要資金は一体何処から?(Woher soll das Geld kommen?)」と報じた時、「(1930 年代、ヒトラーの軍拡を助けるためにメフオ手形で資金を捻出し、日本の高橋是清に似た役割を果たした)シャハト・ライヒスバンク総裁みたいな人が出現するかも?」と友人達に冗談交じりに語った。

米国は長年の同盟国である欧州諸国から距離を置かれるようになっていく。

最近、米欧の識者の意見が厳しい論調に変わってきた。英 *Financial Times* 紙は 2 月 26 日、同紙の解説者であるマーティン・ウルフ氏の小論(“The US Is Now the Enemy of the West”)を、また 3 月 7 日、ジョセフ・ナイ Harvard 大学教授の小論(“Trump and the End of American Soft Power”)を掲載した。そして 2 月下旬に届いた米国政治評論家のロバート・カプラン氏による著書(*Waste Land*, Feb. 2025)の目次を見ると、第 1 章の表題は“*Weimar Goes Global*”という表題だ。Hitler の抬頭直前のヴァイマル体制が世界に蔓延すると言いたいのだろうか!! 筆者の心に突き刺さった著者の言葉は“Don't assume that cool heads always prevail”だ。確かに如何なる時でも皆が冷静に物事を判断出来るとは限らない。また驚いた事に、メルツ氏は“仏英の核の傘”にドイツが入る事に関し議論する事を 2 月 21 日に初めて認めたと報じられた。

2 時間半にわたるトランプ=ブーチンの電話会談の直前、露大統領はモスクワの戦没遺族関係者の前で「相手の所有物は必要ない。だが、我々のものは決して手放すつもりはない(Нам ничего чужого не нужно, но мы своё не отдадим)」と語ったらしい。この言葉を知った筆者は、欧州の友人達にドイツの優れた精神分析学者アレクサンダー・ミッチャーリヒの言葉を思い出した事を告げた—「ロシアという国は—共産国家であれ、帝政時代であれ—戦争の後には領土拡張を為し、勢力拡大を力て要求する(Daß Rußland, ob bolschewistisch oder zaristisch, nach einem gewonnenen Krieg Gebietsforderungen stellen und eine Ausweitung seiner Einflußzone mit Nachdruck verfolgen würde)」と。即ち戦争は終わらないのだ。

政治経済問題に加え社会問題でも米国は世界を悩ませている。我々は気を緩めてはいけないのだ。

我々にとっては米中関係が最大の関心事だが、これまで小誌で殆ど取り上げてこなかったのが人権問題だ。しかし、ルビオ国務長官が、2022 年 6 月施行の「ウイグル強制労働防止法(Uyghur Forced Labor Prevention Act (UFLPA)「防止強迫维吾尔人劳动法」)」に深く関わっているため、我々も注視する必要がある。人権問題を重視する友人達は消極的な筆者を厳しい眼で見つめる。それに対する筆者の理由は次の通りだ。重要な問題である事は理解している。だが、外交交渉で解決策が見出せるかどうか、疑問を持っている。例えばバイカー国務長官は钱其琛外相と交渉し苦労した事を回顧録で記している。更に時代を遡れば、1944 年夏、ウオレス副大統領がルーズヴェルト大統領に、国民党政権下の中国でもウイグル人と漢人との緊張関係が存在していた事を、訪中報告で伝えている。また故キッシンジャー氏も生前、対中国関係で人権を取り上げる事は外交関係全体を勘案すれば相応しくない、と語っていた。繰り返すが、軽視していないが、解決策が見当たらないのだ。

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1929 年、1930 年、そして 1931 年、英国は世界経済の安定装置としての役割を果たす事が出来ず、米国は果たそうとしなかった。全ての国が個々の自国の利益を擁護する事に転じた時、世界の公共的

利益は減少し、それに伴い、各国の個別的利益も減少したのであった。

(チャールズ・P・キンデルバーガー)

In 1929, 1930, and 1931 Britain could not act as a stabilizer, and the United States would not. When every country turned to protect its national private interest, the world public interest went down the drain, and with it the private interests of all.

(Charles P. Kindleberger)

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。

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February 26: (an online event, Washington, D.C.) Peterson Institute for International Economy (PIIE): “The Trump Administration’s Policies and Global Financial Risk.”

March 13~14: (New York) New York University (NYU): “2025 Credit Opportunities Symposium.”

March 27~28: (a hybrid event, Washington, D.C.) Brookings Institution: “BPEA (Brookings Papers on Economic Activity) Spring 2025 Conference.”

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Bilal, Adrien and James H. Stock, 2025, “Macroeconomics and Climate Change,” NBER Working Paper No. 33567, March.

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Burilkov, Alexandr and Guntram Wolf, 2025, „Europa ohne die USA verteidigen: eine erste Analyse, was gebraucht wird“, Policy Brief No. 183, Kiel: Kiel Institut für Weltwirtschaft (IfW Kiel) (Kiel Institute for the World Economy), February.

「いまだき、誰が戦後の事を考えているでしょうか。今の事で “Who is thinking about peace-time now? We have other concerns.” ... “Something big! Something big! You schmock, 精一杯ですよ」... 「貴方もなかなかスミに置けませんな。大物 survival is the name of the game.” ... “Completely true. I have had it up to my neck with the increasing whining about war. です。ガッツリ稼げますよ」... 「仰る通り。反戦だ、戦争は Yes, some things have gotten dearer—but that’s the name of the game. I’m telling you, a lot of those whiners who are going on ダメだって! こうした戯言には吐き気がしますな。本当に物価 about things now will be moaning even more when the peace comes.” “Absolutely. Right now, we are in this body and soul.” は高くなりました。何も高くなっています。当たり前です。 [»Wer denkt jetzt an Frieden, jetzt sind andere Sorgen.« ... »Große Sache, Schmock was Sie sind, große Sache. Ma bringt 戦争終結なんて事を耳にしたなら、ずいぶん落胆する連中が沢山 sach durch.« ... »Das ist aber ja wahr. Das fortwährende Geschimpfe am Krieg wächst mir schon zum Hals heraus. Manches いるんですからね」。「勿論、その通りですね。我々は今こそ全身 is ja teurer geworden—aber das gehört dazu! Ich versicher Sie, da wern noch viele sein, die heut so tun, da wird ihnen noch sehr 全霊を込めて...」。(カール・クラウス) mies wern, wenn sie hörn wern, es kommt Frieden.« »Gewiß, wir sind doch heute mit Leib und Seele dabei—«.) (Karl Kraus)

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Chinese Government, 2025, “Xi Jinping zài Zhōnggòng Zhōngyāng Zhèngzhìjú Dì-shíjiǔ-cì Jítǐ Xuéxíshì Qiángdiào: Jiāndìng Bùyí Guānchē Zōngtǐ Guójiā Ānquán-guān Bǎ Ping'ān Zhōngguó Jiànshè Tuīxiàng gèng Gāo-shuǐpíng [Xi Jinping emphasized at the 19th collective study session of the Political Bureau of the CPC Central Committee: Unswervingly implement the overall national security concept and push the construction of Safe China to a higher level/习近平在中共中央政治局第十九次集体学习时强调：坚定不移贯彻总体国家安全观 把平安中国建设推向更高水平],” March 1.

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Economist, 2025, “AI Unleashes a Weird New Genre of Political Communication,” February 28.

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井蛙(セイア)には以て海を語る可からざるは、虚(キョ)に拘(か)わればなり。
夏虫(カチュウ)には以て氷を語る可からざるは、時に篤(あつ)ければなり。
曲士(キョクシ)には以て道を語る可からざるは、教(きょう)に束(つか)ねらるればなり。
(莊子)

You cannot speak of ocean to a frog in the well; it's the creature of a narrower sphere.
You cannot speak of ice to a summer insect; it's the creature of a season.
You cannot speak of the Way to a tunnel-visioned pedagogue; his scope is too restricted.
[井龜不可以語於海者、拘於虛也。夏蟲不可以語於氷者、篤於時也。曲士不可以語於道者、束於教也。]
(Zhuāngzǐ/莊子)

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春くれば 散りにし花も さきにけり あはれ別れの かからましかば。(具平親王)	Spring has come; the cherry blossoms that had fallen, have bloomed again. With a sense of pathos, I wish the relations with my departed friends could be like this.	(Japanese imperial prince Tomohira)
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The Tokyo-Cambridge Gazette (In Search of Japan's Global Strategies)

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学校(だけ)で学んだ者にとって、敵味方の配置に関し、如何なる形にも自分勝手に出来る図上演習で、敵の側面を包囲し、或いは連絡線を脅かす作戦計画を立案する事は、極めて簡単な事だ。しかし、敵が熟達した開将で画期的な作戦を立案する相手であったなら、神出鬼没の敵の動きに対して彼はたちまち難局に陥る。そして我々は天賦の才を欠いた凡将の無能の姿を見せつけられる事になるのだ。
(アントワヌ=アンリ・ジョミニ)

It is a very easy matter for a school-man to make a plan for outflanking a wing or threatening a line of communications upon a map, where he can regulate the positions of both parties to suit himself; but when he has opposed to him a skillful, active, and enterprising adversary, whose movements are a perfect riddle, then his difficulties begin, and we see an exhibition of the incapacity of an ordinary general with none of the resources of genius.

[Il est toujours ais , en sortant des bancs d'une acad mie, de faire un projet pour d border une aile, pour menacer les communications de l'arm e, lorsqu'on agit pour les deux partis en m me temps et qu'on les dispose   son gr , soit sur une carte g ographique, soit sur un plan de terrain simul ; mais quand on   affaire   un adversaire habile, actif, entreprenant, et dont tous les mouvements son t ne  nigme, alors l'embarras commence, et, c'est ici que se montre toute la m d corit  d'un general ordinaire, d nu  de toute  tude des principes.]
(Antoine-Henri Jomini)

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- X nhu  W ng/Xinhua Wang (Xinhuanet/ 新华网), 2025, "W gu o z  3-yu e 20-r  Q  du  Yu nch n y  Ji n d d  B f n J nk u Sh ngp n Ji zh ng Gu nshu i [Our country additionally imposes tariffs on some imported goods originating from Canada, starting on March 20/我国自 3 月 20 日起对原产于加拿大的部分进口商品加征关税]," March 8.
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3. 編集後記

ロシアのウクライナ侵攻は既に 3 年を過ぎたが終結の目途は立っていない。一体いつまで続くのか?

2 月 23 日はロシアの祖国防衛の日(День защитника Отечества)だ。2022 年 2 月 24 日に始まったウクライナ侵攻が 4 年目を迎える事になったのだ。2 月 23 日は日本にとっても記憶すべき日だ。1938 年 2 月 23 日、蒋介石率いる国民党政府を支援するソ連軍の爆撃機が、当時日本領だった台湾の日本軍基地を空襲したのだ(「Z 作戦( Операции Зет)»)。勿論、日本も中国に大規模な空襲を実施している。当時、Harvard 大学を優等で卒業して、燕京研究所から奨学金を受けて中国留学を目指した 23 歳のセオドア・ホワイトは、重慶到着早々に日本軍の空襲で大変な経験をしている。

敗戦 80 周年の今年、筆者は恥ずかしながら初めて「東京大空襲・戦災資料センター」を訪れた。米国の知人が訪れたと聞いて、遅ればせながら訪問した次第だ。米 Yale 大学の提案により、2022 年から同学の大学院生が訪問する制度が設立されたとの事。歴史の教訓を学ぶ事は大切だ。

1944 年 11 月に中島飛行機武蔵製作所に対する空襲で始まった東京空襲。1945 年 1 月に第 21 爆撃集団司令官に就任したカーチス・ルメイ少将は無差別爆撃を実施する。これに関し東京空襲の様子を綴った永井荷風先生の日記『断腸亭日乗』が興味深い。1944 年 6 月 29 日、「戦争はいつまで續くにや。来るぞ来るぞといふ空襲もいまだに來らず。國內人心の倦怠疲労今正にその極度に達せしが如し」と記したが、翌年 3 月 10 日の大空襲の時には、六本木に在る荷風先生の自宅「偏奇館」が焼失した事や増上寺に逃げ込めば安全と考えたものの焼死した人々の悲惨さを記している。

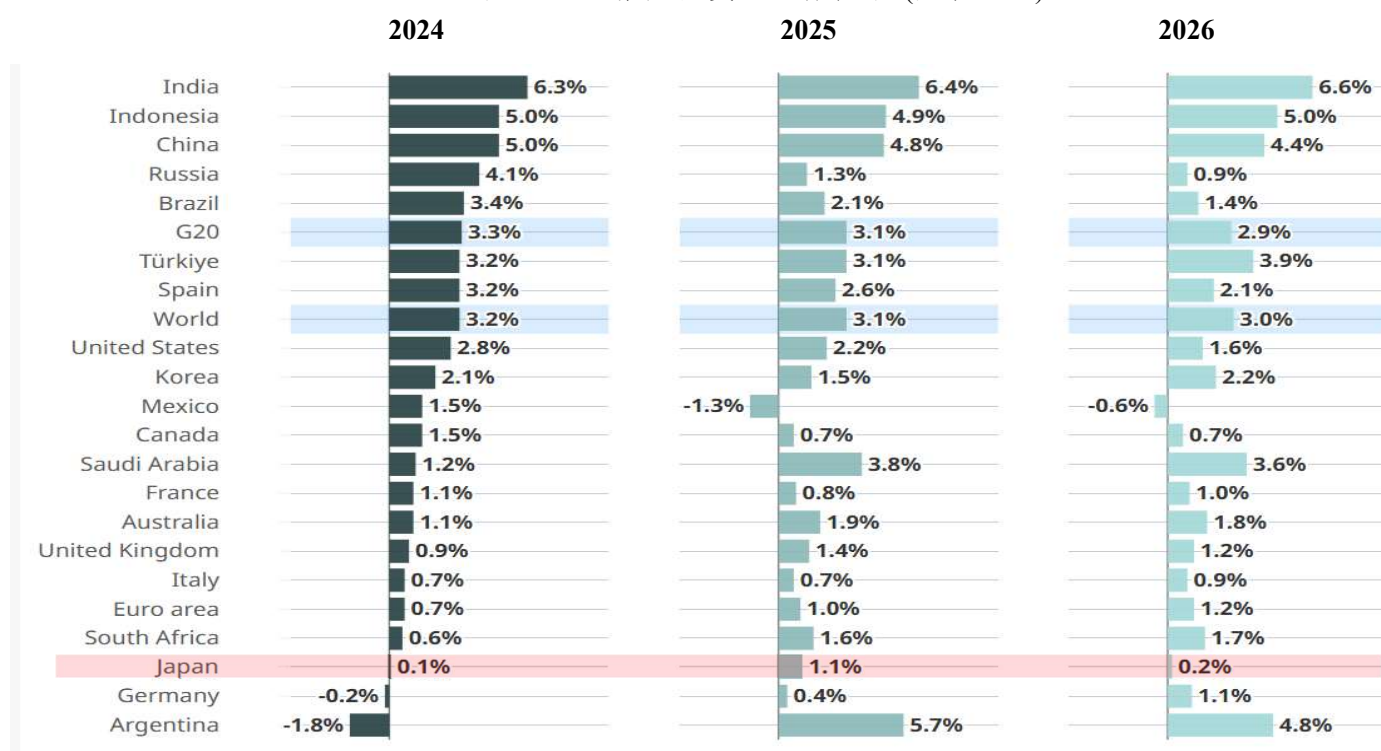
大戦終結 80 周年を迎えても人類は未だ戦争の悲惨さを悟っていないようだ。小誌の第 1 ページでカブラン氏がこの世で冷静な頭脳(cool heads)が必ずしも支配的にならない事を語った言葉に触れた。筆者はアルフレッド・マーシャル先生の「冷静な頭脳と暖かき心(cool heads but warm hearts)」という表現が大好きだ。だが今は残念な事に hot heads and cool hearts が支配的になっているのかも知れない。何という世の中だろう!!!

世界が濃い霧に包まれる中、cool heads but warm hearts の大切さを忘れないで生きてゆこうと思う。 以上

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過去の Cambridge Gazette はネット上で見る事が出来、ダウンロードも出来ます。ネット上でキャノ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 Real GDP Growth Projections for 2024, 2025 and 2026 (% , Year-on-Year)

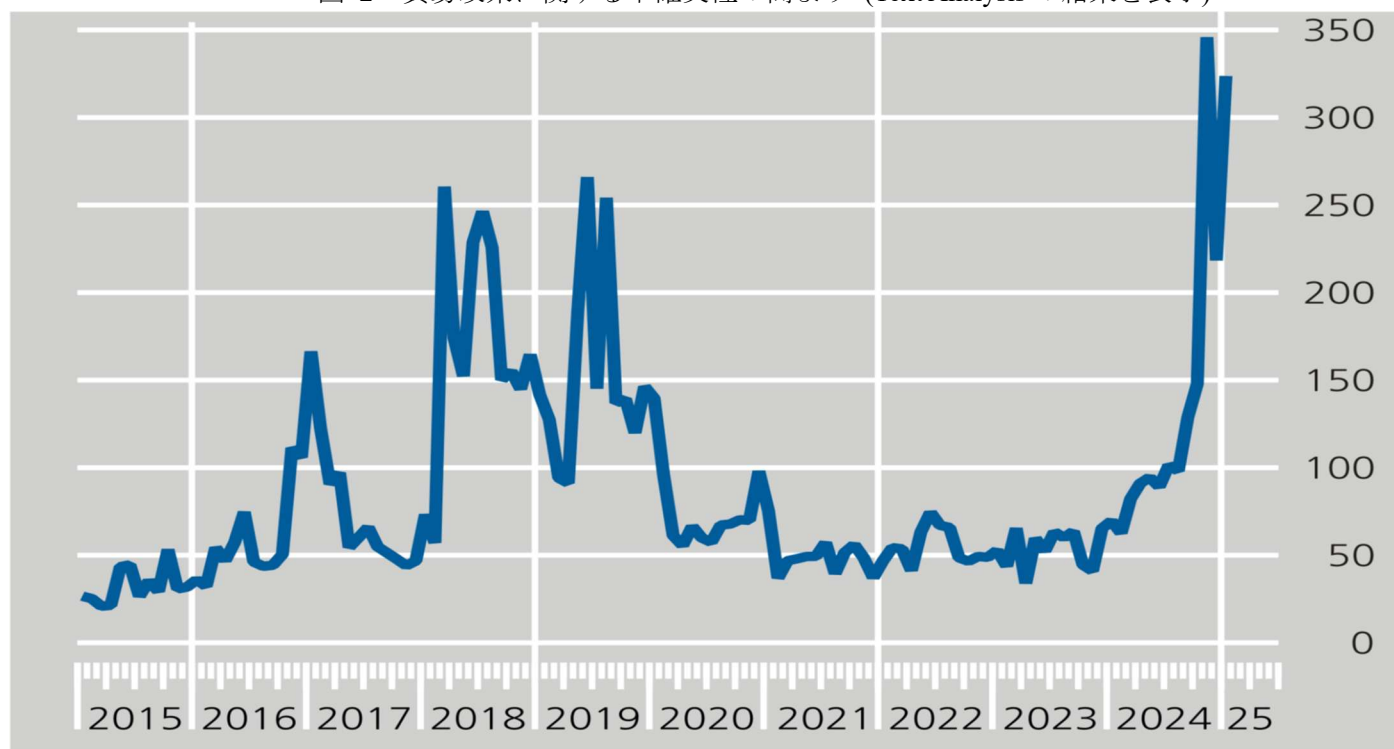
図 1 主要国の実質 GDP 成長率 (前年比 %)



Source: Organisation for Economic Co-operation and Development (OECD), "Economic Outlook, Interim Report March 2025: Steering through Uncertainty," Paris, March 17, 2025, https://www.oecd.org/en/publications/oecd-economic-outlook-interim-report-march-2025_89af4857-en.html.

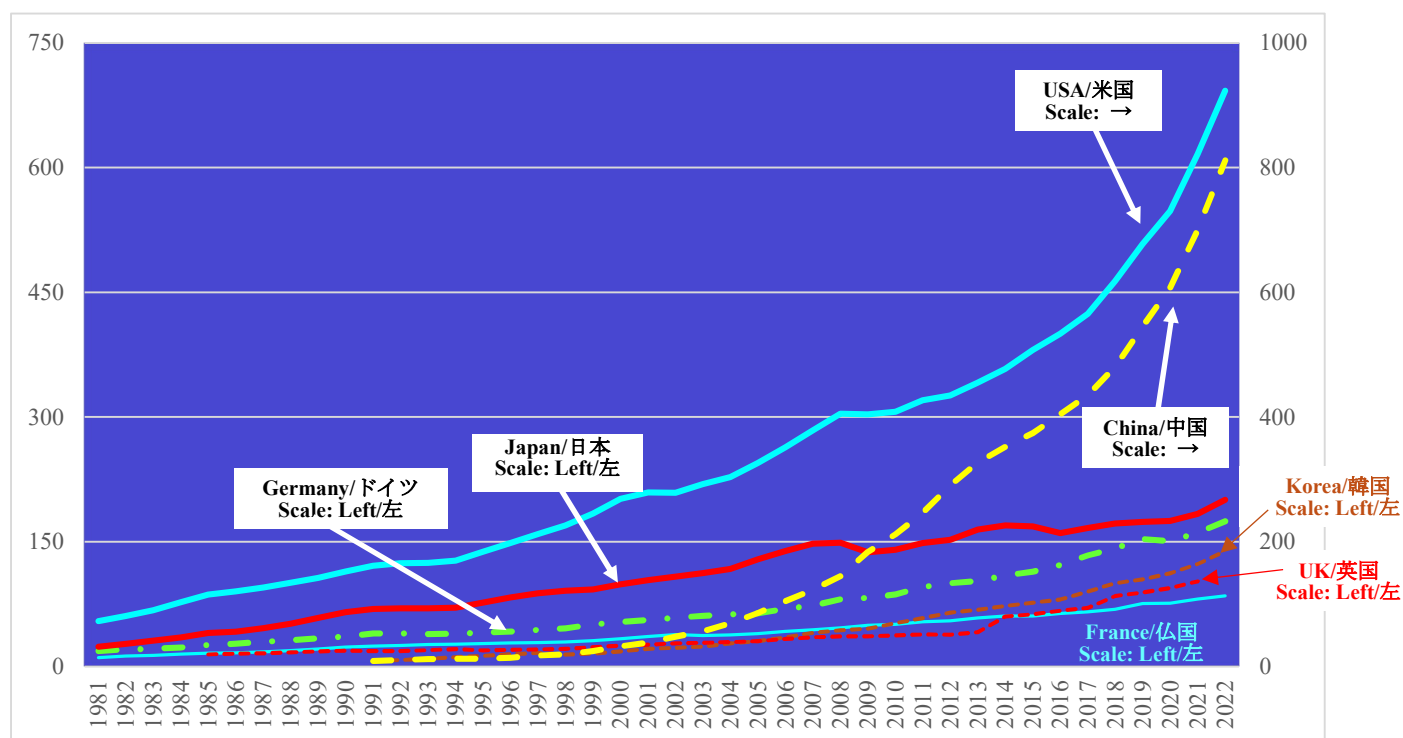
Figure 2 Trade Policy Uncertainty (Handelspolitische Unsicherheit)

図 2 貿易政策に関する不確実性の高まり (Text Analysis の結果を表示)



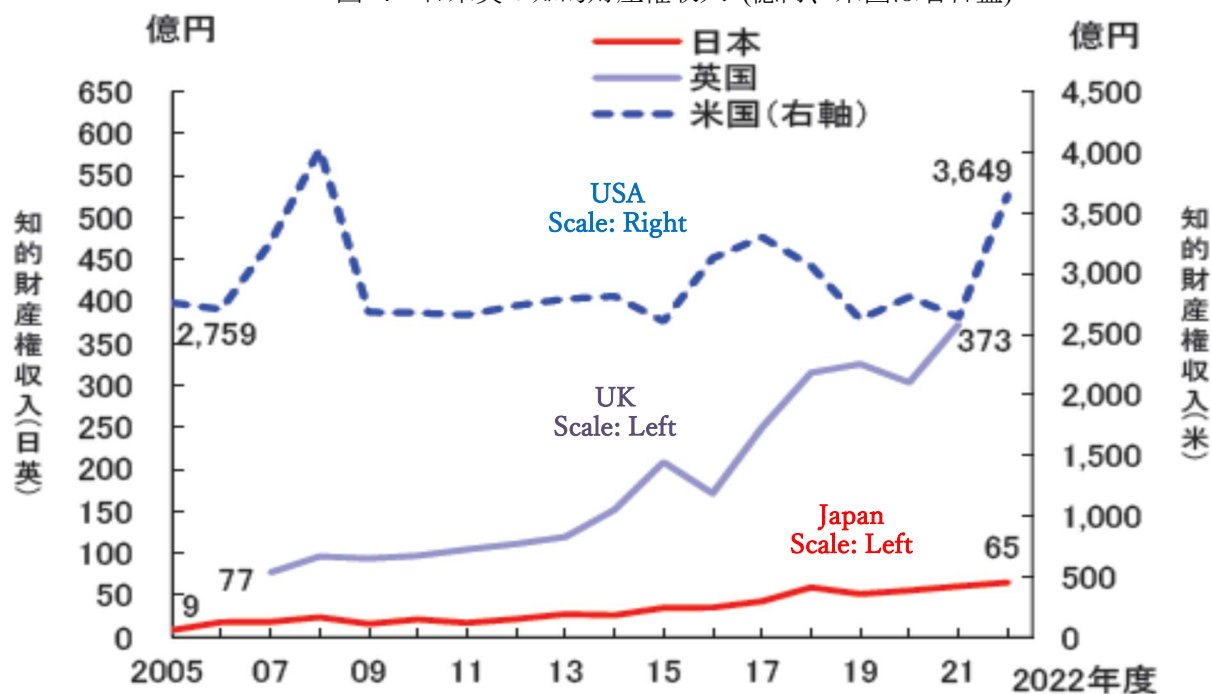
Note: Based on text analysis of selected English-language daily newspapers. A value of 100 means that 1% of all newspaper articles were on the topic of trade policy uncertainty.
Source: Deutsche Bundesbank, „Monatsbericht“, Frankfurt am Main, February 24, 2025, p. 21.

Figure 3 R&D Expenditure (PPP, Billion US\$)
 図 3 R&D 投資額 (購買力平価、10 億米ドル)



Source: Organisation for Economic Co-operation and Development (OECD), "Main Science and Technology Indicators (MSTI database)," Paris, July 2024.

Figure 4 Japan, USA and UK: Intellectual Property Rights Revenue (100 Million Yen)
 図 4 日米英の知的財産権収入 (億円、米国は右目盛)



Source: Source: National Institute of Science and Technology Policy (NISTEP) (科学技術・学術政策研究所), "Japanese Science and Technology Indicators 2024" (「科学技術指標 2024」), Tokyo, August 2024, p. 203.