

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。

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。

『東京=ケンブリッジ・ガゼット：グローバル戦略編』 第 193 号 (2025 年 5 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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今米国で“政治経済的茶番劇(politico-economic farces)”が繰り返されているように映っている。

揺れ動く米国政治を観察する間に次のような印象を抱いた—リーダーには“大局観”が大切で「木を見て森を見ず(not see the wood for the trees)」という過ちを犯さない事が重要だ。翻って側近であるブレインは「森を念頭に置いていても、個々の木を詳細に観察する事」が不可欠だ、と。

国別関税一覧表が公表された日の前日(4 月 1 日)、マンキュー Harvard 大学教授は「トランプ氏は国際経済学の基礎を理解していないようだ。彼の論点の多くは、2 半世紀前にアダム・スミスが既に『国富論』の中で論駁している(Trump doesn't seem to understand basic international economics. A lot of the arguments he makes, Adam Smith was refuting two and a half centuries ago in 'Wealth of Nations')」と、米 *Washington Post* 紙を通じて語った。同時に同紙は「経済原論入門を受講すべきトランプ氏(Trump Needs an Economics 101 Class)」という“読者からの手紙”を掲載した。

また国別リスト発表直後の 3 日、ロゴフ Harvard 大学教授は「今、大統領は世界の貿易体制に核爆弾を投下した(He just dropped a nuclear bomb on the global trading system)」と英国 BBC 放送を通じて語った。これに対し 4 月 7 日、ナヴァロ米大統領上級顧問は英 *Financial Times* 紙に、小論「トランプ氏の関税政策は壊れた現在の経済体制を修復する(Donald Trump's Tariffs Will Fix a Broken System)」を寄稿した。その直後に、彼の見解に対するイエレン前財務長官の反論が 4 月 10 日付 *Wall Street Journal* 紙を通じて伝えられた(PDF 版の 2 参照)。

トランプ氏による関税政策が世界中の金融市場に衝撃を与え、関係各国だけでなく米国内の関連業界からの反発を招いた結果、税率が二転三転している。これはトランプ氏の“MAGA”達成という“目的”に関税政策という政策“手段”が合致していない事に起因している。

大統領は“My Peter”と呼ぶナヴァロ氏と共に、19 世紀末の米国産業の抬頭がマッキンリー大統領時代の関税政策によって実現されたと理解しているらしい。それ故に現在の米国製造業の復活に関税が極めて有効な政策であると信じている。だが、この認識に大きな誤りがあるのだ。確かに 1890 年代の米国製造業の輸出急増は 1890 年関税法の成立と同時期に生じている。だが、当時の経済政策における関税の役割や当時の関税が産業競争力に与えた影響に関する彼等の認識には誤りがある。1890 年関税法は所得税が導入された 1913 年歳入法以前のものだ。即ち関税は、社会保障制度が確立する以前の“規模の小さい”連邦政府の主要財源であった。翻って現在の関税は、複雑な supply chains が縦横に張り巡らされたグローバル経済における単なる一段段であり、しかも社会保障や医療保険、更には国防を担当する“大きな”連邦政府に委ねられた一つの手段だ。従って単純な形で関税を急に変更するだけでは問題は解決しないのである(PDF 版図 1 参照)。

また米国の産業構造変化も考慮すべきだ。1890 年代は製造業が勃興期を迎えて、米国の輸出は従来の棉花や穀物という農産物に加え、鉄鋼・石油が増加し始めた時代だった。新たに発見されたメサビ鉄山から供給される安価な鉄鉱石により、1890 年代中葉から米国鉄鋼業が英国に対して猛追を開始した時期であり、鉄鋼製品の米国輸出に占める割合は 1890 年の 3.0%から 1900 年の 9.0%へと上昇したのだ。(これに関し、例えばアーウィン Dartmouth 大学教授の“How Did the United States Become a Net Exporter of Manufactured Goods?” Apr. 2000 を参照)。

更には相互関税率の算出式に関しても疑問が残る。紙面の都合上、詳述を避けるが、算出時の誤りに関し、米 think tank (AEI)の研究者が小論(“President Trump's Tariff Formula Makes No Economic Sense. It's Also Based on an Error”)を公表している。また独 think tank (IW)の研究者も、論文(„Trumps Liberation Day: Eine kurze ökonomische und handelspolitische Bewertung“)の中で、為替レートや米国の輸出に関して、極めて単純な“他の事情が同じならば(ceteris paribus)”の前提に基づき税率が算出されている点を指摘している(PDF 版の 2 参照)。

かくしてトランプ関税は決して“考え抜かれた(well-thought-out)”ものではなく、経済活動が忌避する“不確実性”を世界中に拡散する政策なのだ。このため筆者は友人達に対し「人工知能(AI)に頼んだ方が、優れた産業再活化政策を案出してくれるかも?」と冗談気味に語った。

トランプ関税を経済政策ではなく外交手段として見た時、関税率の国別一覧表は一層不可思議に映る。

米国の最優先事項が米中大国間競争における勝利ならば、米国側につなぎ留めるべき先進国やアジア諸国に高い相互関税を課するのは何故か。中国による迂回輸出阻止のために、関税に関してアジア諸国と交渉する事が果たして合目的なのだろうか(PDF 版表 1 参照)。

そもそも地政学的に米国はアジアだけでなく、欧州や中東にも目を光らさなくてはならないはずだ。それなのにアジアの友邦を関税で苦しめて良いのか、と疑問に思った次第だ。4 月 6 日に台湾メディア(CNA/中央通訊社)が報じた映像(“相互関税: 頼清徳総統、政策を 5 つ提示: 報復措置は採らず(美対等関税 頼總統提 5 策略: 沒有計劃採取關稅報復)”)を観た時、苦渋に満ちた表情の総統の姿が印象的であった。

こうした中、ナヴァロ氏の著書(*Crouching Tiger: What China's Militarism Means for the World*, Nov. 2015)『米中もし戦わば』/«美、中間戦の起點»/«卧虎: 中国军国主义对世界意味着什么»)を遅ればせながら読んだ。彼は多くの識者の意見を巧みに取り込み、地政学的分析を行っている。本の冒頭から或る程度は納得して読んでいたが、最後の 45 章で“違和感”を感じた。ナヴァロ氏はこの章の冒頭で『聖書』を引用した—「マタイ傳」の「分れ争ふ町また家はたたず(Every city or house divided against itself shall not stand)」だ。もしもこの言葉を彼が信じているならば、“対中”を念頭に米国内及び海外諸国を巧みに啓蒙・統一する手段を編み出す必要があるのではないか。しかし、大統領上級顧問としての彼の助言は米国の内外に拒絶・分裂を生み出した。しかも *Wall Street Journal* 紙に依れば、4 月 9 日に関税率適用に関して 90 日間の延期が決定されたのは、積極的な関税推進派のナヴァロ氏が別の会議に出席して居ない時に、財務・商務両長官が大統領に直訴した結果らしい。即ち閣内においても“分れ争ふ”形となっているのだ。こう考えると、今後とも米国の政権内や国内での“分れ争ふ”状態は不可避だろう。

翻って中国は対抗手段の一つとしてレアアースの輸出を制限し始めた。レアアースはハイテク製品—スマートフォンから最先端戦闘機に至るまで—の製造に不可欠な資源だ。大統領の側近は貿易戦争開始前、資源の対中国(及びカナダ)依存度を調べていなかったのではないかと。常識的に考えれば、戦争開始直前には敵国に対する自国の戦略物資の輸入依存度を確認する必要がある。今次貿易戦争の際、関連資料を読めば、中加両国に対し高関税を課す事が賢明だとはいえ、到底思えない(例えば、PDF 版の図 2、3 で示した米国地質調査所(USGS)本年 1 月発表の“Mineral Commodity Summaries 2025”を参照)。ナヴァロ氏に加え国防産業基盤(defense industrial base (DIB))の復権を望むペッセン財務長官も、“森を見つ、木にも細心の注意を払って”)正確な知識に基づき、経済に混乱を招来しないような関税政策を考えるべきだったのだ。

米国自身が“分れ争ふ(divided against itself)”状態ならば、喜ぶのは中国やロシア、そしてイランや北朝鮮だ。

4月末にリオデジャネイロで開催された BRICS 外相会合の直後に公表された議長声明には「無差別的な高率相互関税や非関税障壁を含む WTO ルールと不整合で、正当化される事の無い程の不正で一方的な保護主義的手段(unjustified unilateral protectionist measures inconsistent with WTO rules, including indiscriminate raising of reciprocal tariffs and non-tariff measures)」という形で、暗に米国を批判する文章が挿入されている。

会合には 11 の BRICS 加盟国と 9 のパートナー国、合計 20 カ国が参加して、その中にはマレーシアやタイ等のアジア諸国が含まれる。これに関し、シンガポールの或る友人は「東南アジア諸国を迂回した中国の対米輸出を警戒する事は理解出来る。だが、アジアの平和と繁栄に対して積極的に関与するという米国の意思をアジアが信じれないと感じた時、アジアの中小国家は中国側に益々傾いてゆく」と語った。

ロシアは、「特別軍事作戦(специальная военная операция (СВО))」が 3 年を過ぎた現在でも目的を達成する事が出来ず、苦戦が続いている(とは言え、歴史が示す通り、戦況を正しく判断する事は決して出来ない。ただ確実に言える事は、「不幸な戦争は未だ続く」と言う事だけなのだ)。

こうした中、プーチン大統領は 3 月末にムルマンスクで開催された国際会議(«Арктика – территория диалога»/The Arctic: Territory of Dialogue)で「ロシアは最大の北極圏国家(Россия – крупнейшая арктическая держава)」と語り、露北西部と極東をシベリア鉄道やバイカル・アムール鉄道を通じて繋いだ「北極圏回廊(Трансарктический коридор/Transarctic corridor)」構想について語った。これに関して、筆者は「北極圏回廊」は中国の「氷上のシルクロード(氷上丝绸之路/Ice Silk Road)」と如何なる関係になるのだろうか、と友人達に質問した次第だ(PDF 版図 4 参照)。

また 4 月中旬にモスクワで開催された国際展示会では中国のエレクトロニクス関連企業が多数参加した事を知り、「こうした形で西側の最先端の電子機器が、我々の知らない間にロシアに流れていくかも?」と友人達に語った。

米中大国間競争は、政治経済社会の全ての次元において展開されている。

西太平洋を巡る動きが激しい—台湾海峡、東シナ海、南シナ海、そして黄海における中国の動きに関係諸国が神経を尖らせているのだ。台湾では現状維持派と親大陸派との間で政治的対立が激化している。立法院での与野党の対立、そして軍幹部や先端技術分野の専門家と大陸との親密な関係に警戒感が高まっている(PDF 版の 2 参照)。しかし、そうした中でも市井の人々は未だ緊張感を感じていないらしい。台湾の think tank (国防安全研究院 (INDSRI))が 3 月末に公表した世論調査(«國防安全民意調查»)に依ると、「回答者の僅か 23%が人民解放軍(PLA)による 5 年以内の軍事侵攻を憂慮している」として、台湾政府による情報提供と一般市民に対する啓蒙策の必要性を提言している。

4 月初旬には PLA 東部戦区が軍事演習(海峡雷霆-2025A)を実施した。平和を願う我々が油断禁物だ。日中交流は当然継続すべきだが、同時に米韓台比豪等関係諸国との連携を強化すべきである。こうした中、第一期トランプ政権時に国家安全保障問題担当大統領副補佐官だったボッティンジャー氏による編著書(The Boiling Moat: Urgent Steps to Defend Taiwan, Jul. 2024)の邦訳版・漢訳版が今年の 2 月に出版された(『煮えたぎる海峡: 台湾防衛のための緊急提言』; «沸騰の護城河: 保衛台灣的緊迫行動»)。今、同書を基に内外の友人達と議論を続けている。

同書の冒頭に記された 2 つの引用句は本当に素晴らしい。

「邊地之城…必將嬰城固守、皆為金城湯池、不可攻也(Cities along the frontier... must resolutely their defenses; protected by metal ramparts and boiling moats, they become impregnable)」(「漢書」卷四十五「蒯伍江息夫傳」)

“To be prepared for war is one of the most effectual means of preserving peace.” (George Washington, ‘First Annual Address to Congress,’ January 8, 1790)

経済摩擦は高関税の応酬(tit-for-tat)が加わったために一段と激化している。この tit-for-tat strategy は明らかに双方にとり自傷行為である。中国側の巧みな対外経済戦略手法に関しては、Georgetown 大学のメディアロス氏等による論文(“China’s New Economic Weapon,” Spring, 2025)や小誌(169, 174 号(2023 年 5, 10 月)で触れた Tufts 大学のドレズナー教授や Johns Hopkins 大学のファレル教授による本(The Uses and Abuses of Weaponized Interdependence, Mar. 2021)等を基に友人達と意見交換を行っている。メディアロス氏も前述の論文の冒頭で記したが、経済的威圧(economic coercion)は中国の常套手段(stock-in-trade)だ。筆者は、1931 年 9 月、満洲事変勃発の経済的背景として中国側の経済的威圧があり、1932 年 10 月の「リットン報告書(Lytton Report)」の中にも記されていると語った(現在は米国による経済的威圧の方が凄まじいが…)。

社会面での大国間競争で特筆すべきは科学分野だ。中華系の研究者は政府から現在厳しい眼で監視されている。非常に悲しい事態だ。勿論、軍民両用技術分野における研究者の活動・資金源は監視すべきだ。だが行き過ぎは禁物だ。こうした中、2022 年 9 月の習近平主席の言葉を思い出している—科学には国境は無い。(しかし)科学者には祖国がある(科学无国界, 科学家有祖国)、と(小誌 167 号(2023 年 3 月)参照)。そして今、4 月 7 日に Stanford 大学が公表した“AI Index Report 2025”を基に、米中間 AI 開発競争を議論している(PDF 版の表 2-4 参照)。

周知の通り現在、米国では別の次元で学术界が大騒動になっている。全米アカデミーズの有志が 3 月 31 日に、そして米国大学協会(AAC&U)が 4 月 22 日に、学術団体及び研究者に対する最近の政府の高圧的対応を問題視する意見を公表した(PDF 版 2 参照)。

特に反ユダヤ的対応をしたという理由で Harvard 大学や Columbia 大学等が助成金の削減の危機に直面したのだ。米国の歴史に詳しい人ならご存知の通り、長年米国は反ユダヤ的社会であった。従って Harvard や Columbia も第二次大戦までは「明らか」に反ユダヤ的だった。

1933 年から 1953 年まで 19 年余り Harvard 大学を管理運営したジェイムズ・コナント学長も反ユダヤ主義者であった事は有名だ。筆者は米国の或る教授から、ノーベル経済学賞受賞者のサミュエルソン教授がユダヤ人である理由から就職時に苦労した事を聞いた事がある。また Nazi Germany から逃れてきた優れた法学者であるハンス・ケルゼン教授は、1940 年に Harvard 大学の名誉ある講座(Oliver Wendell Holmes Lectures)を担当し、著書(Law and Peace in International Relations)を残した。この講座の担当者は Harvard 大学教授の職が与えられる事が当然視されていた。にも拘わらず、コナント学長は認めなかった。またそれ以前の 1934 年 5 月、独海軍軽巡洋艦「カールスルーエ」のボストン寄港時、ナチ党員である独海軍将兵を歓迎する式典に、コナント学長を含む大学教授や学生、更にはマサチューセッツ州知事やボストン市長が参加したのだ。勿論、コナント学長“だけ”を非難するつもりはない。当時の社会の反ユダヤ思想が問題だったのだ。

当然の事だが、現在の Harvard や Columbia は上述したような戦前の状態ではない。将来に向けて、米国の優れた大学が哲学思想、芸術、そして科学分野で引き続き世界をリードする研究をしてくれる事を願っている。

今年は第二次大戦終結 80 周年を迎える。これを記念して各地で様々な行事が開催されている。

80 年前の出来事だが、戦争に絡んだ憤怒と苦悶は人の頭と心からは簡単には消え去らない。4 月 16 日、ベルリンから約 70km 離れた街ゼーロウで記念式典が開催された。80 年前の 4 月 16 日から 4 日間、首都ベルリンへと進撃する赤軍とそれを阻止する独軍との間で激戦が繰り返されたのがゼーロウ高地だ。現在、ドイツ政府は記念式典にロシア及びベラルーシの外交官を招待する事を控えている。だが、ネチャーエフ露大使が式典に参列したのだ。独 Die Zeit 誌に依れば、露大使は招待を受けずに参列したが、参列自体は拒否されなかった。その事をウクライナ政府が問題視したらしい。人間の心は複雑だ—80 年前の事を思い出して憤る人もいれば、覚えていても沈黙する人がいる。忘れてしまった人もいれば、知らない人がいる。そして今、80 周年式典がどこかで開催されている間、どこかで戦争が行われている。

4 月 7 日は、戦艦「大和」はじめ 10 隻の水上艦隊が出撃し、徹底的な敗北に終わった日から 80 年を迎えた日だ。少年の時から何度も戦艦「大和」のプラモデルを作成しただけに忘れられない日でもある。約 20 年前、アナポリスの米国海軍兵学校の博物館を訪問した時、素晴らしい「大和」の模型があった事を記憶している。美しい「大和」の姿とは異なり、80 年前の 4 月 7 日の海戦は悲惨なものであった。海戦で撃墜された米軍機は僅か 5 機(その他損失が 8 機)。帝国海軍の損害は「大和」はじめ 6 隻が沈没。悲惨極まりない完敗だ。

米軍は暗号解読と潜水艦による偵察で「大和」出撃の直後から動きを観察していた。また帝国海軍の対空火器は電子式でなく光学式で、しかも高射砲の砲弾は近接信管ではなく旧式の時限信管だ。これでは米軍機を撃墜する事は難しい。日米両軍ともプロの軍隊であるが、二軍対一軍の対決みたいなものである。精神主義が科学的な合理主義を圧倒していた当時の帝国海軍の最期は実に悲しい。

戦前 Princeton 大学に留学し、敗戦時には情報将校だった實松讓大佐は、この 4 月 7 日の海戦に関して、戦後、次のように記している—「目的地到達前に壊滅することは、ほとんど決定的」で、「傘もあたえずに豪雨の中をぬれずに通れと要求する」作戦であり、それは「狼の大群とライオンを押しつけて、猟犬に虎穴にはいれ」 という「シロウト目にも不可能と思われる自殺行為」であったのだ。

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如何なる国においても、国の中で最も有能な人物を見出して、その人を最高位に登らせ、誠心誠意その人を尊敬すれば、国としては完全な政治が得られる。… このような国は完全な状態にあり、理想的な国家である。最優秀の人とは最も真心の有る人で、また最も公正でしかも最も気高き人物である。… そうなれば我等の行為と生活は、政治が律し得る範囲に於いて、十分律せられる事であろう。これこそが憲法が理想とするところなのだ。だが、悲しいかな、我等の熟知するところ、現実的な話として理想が完全な形で達成される世界とは、常に遑遑の彼方に存在するのだ。従って我等は幾分我慢出来る程度にこれに接近する状態を以て、大いに感謝して満足する事にしよう。

(トーマス・カーライル)

Find in any country the Ablest Man that exists there; raise him to the supreme place, and loyally reverence him: you have a perfect government for that country. . . . It is in the perfect state; an ideal country. The Ablest Man; he means also the truest-hearted, justest, the Noblest Man. . . . Our doing and life were then, so far as government could regulate it, well regulated; that were the ideal of constitutions. Alas, we know very well that Ideals can never be completely embodied in practice. Ideals must ever lie a very great way off; and we will right thankfully content ourselves with any not intolerable approximation thereto!

(Thomas Carlyle)

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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時分にも恐るべし。去年(こぞ)盛(さか)りあらば、今年は花なかるべきことを知るべし。時の間(ま)にも、男時(おととき)・女時(めとき)とてあるべし。いかにすれども、能(よ)にも、よき時あれば、かならず悪きことまたあるべし。
(世阿彌)

You should be exceedingly mindful of heaven-sent opportunities. You should know that if you were in your prime last year, you will likely not have the Flower this year. At intervals there will be moments of good luck and moments of bad luck. No matter what you do, if there are good moments in Noh.

(Zeami, a Japanese Noh actor and playwright (c. 1363–c. 1443))

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現実の国際政治の勢力均衡は、如何なる時代でも当然の事ながら、経済的にも戦略的にも、The actual balance of political power at any given time is, of course, the product, on the one hand, of geographical conditions, both economic and strategic, and, on the other hand, of the relative number, virility, equipment, and organization of the competing peoples. In orerの意味で地理的条件に規定された産物である。また別の意味では競合する国民の間での人口、of the relative number, virility, equipment, and organization of the competing peoples. In 生氣、設備、組織の相対的差異に規定された産物である。そうした量的指標が正確に推計される proportion as these quantities are accurately estimated are we likely to adjust differences 事が出来れば、武力という残忍な方法に頼る事なく、勢力均衡上の比率調整が出来るであろう。 (Halford John Mackinder)

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

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屈原曰く「世を挙げて皆濁れるに、我独り清(す)めり。衆人皆酔へるに、我独り醒めたり。是(ここ)を以て放たる」、と。
漁父(ギョホ)曰く「聖人は物に凝滞(ギョウタイ)せずして、能く世と推移す。世人皆濁らば、何ぞ其の泥を濯(に)して、其の波を揚げざる。衆人皆酔はば、何ぞ其の糟(かす)を漉(く)らひて、其の醴(しる)を飲(すす)らざる。何の故に深く思ひ高く挙がり、自ら放たれしむるを為すや」、と。

(『楚辞』)

Qū Yuán said “This world is polluted; I am only pure. The masses are drunk; I am only sober. You see I’m expelled.”

The elder fisherman said “Saints, instead of being obsessed with trivial things, would rather choose to get along with the world. When people in the world are polluted, why don’t you stir the mud and raise the muddy waves? When the masses are drunk, why don’t you eat wine lees and sip light wine? Why in the world are you thoughtfully particular about high-mindedness and trying intentionally to make yourself expelled?”

[屈原曰「衆世皆濁我獨清。眾人皆醉我獨醒。是以見放」。

魚父曰「聖人皆凝滞於物而能舉世推移。世人皆濁何不漉其糟而飲其醴。何顧深想思高舉自令放為?」]

(Chúci「楚辭」, an ancient anthology of Chinese poetry)

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我々は経験を通じて人間関係に関する十分な知識を得る事が出来、しかも、その人間関係がどの程度熱情・激情に対し耐えるかを知る事が出来るのだ。その時に、我々は人間の寛大さが非常に限られたものと感じ、友人や家族、或いはせいぜい生まれた国の範囲を超えて、寛大さが減多に広がらない事を感じるのである。(デイヴィッド・ヒューム) When experience has once given us a competent knowledge of human affairs, and has taught us the proportion they bear to human passion, we perceive, that the generosity of men is very limited, and that it seldom extends beyond their friends and family, or, at most, beyond their native country. (David Hume)

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March 25: (Washington, D.C.) Congress, Senate Select Committee on Intelligence: Hearing on "Worldwide Threats."
March 25: (Washington, D.C.) Congress, Senate Armed Services Committee, Subcommittee on Seapower: Hearing on "The State of Conventional Surface Shipbuilding."
March 25: (Washington, D.C.) Congress, Senate Armed Services Committee, Subcommittee on Cybersecurity: Hearing on "Artificial Intelligence Cyber Capabilities."
March 25~28: (Boao (博鳌), China) Boao Forum: "Boao Forum for Asia Annual Conference 2025 (博鳌亚洲论坛 2025 年年会)."
March 26~27: (Murmansk (Мурманск), Russia): Roscongress Foundation (Фонд Росконгресс): "International Arctic Forum (международный арктический форум)."
March 27: (an online event, Washington, D.C.) Center for a New American Security (CNAS): "The Future of Military Artificial Intelligence."
April 1: (Washington, D.C.) Congress, Senate Armed Services Committee: Hearing "to consider the nomination of: Lieutenant General John D. Caine, USAF (Retired) to Be General and Chairman of the Joint Chiefs of Staff."
April 2: (Washington, D.C.) Peterson Institute for International Economics (PIIE): "The Real Turning Point for Germany: Economic and Security Implications of the Merz Chancellorship."
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April 11: (Sūzhōu (苏州)), Chinese Government, Guówùyuan (State Council/国务院), Gōngyè hé Xīnxīhuàbù (Ministry of Industry and Information Technology (MIIT)/工业和信息化部): "Dì-qī-cì ZhōngRìHán Xīnxī Tōngxin Bùzhǎng Huìyì [The Seventh China-Japan-ROK trilateral ministerial conference on information and communication/第七次中日韩信息通信部长会议]."
April 14: (Brussels) Bruegel: "Rearming Europe: How to Fund and Govern Europe's Future Defence."
April 22: (Washington, D.C.) Georgetown University: "A New Geopolitical Era and US-China Competition."
April 24: (Singapore) Singapore Institute for International Affairs (SIIA): "Roundtable: Liberation or Disruption? Assessing the Impact of Trump's Tariff Policy on the Region."

その他—Information in Other Fields

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リーダーにとって重要な事とは、細部にわたって意思決定にかかわる知識を持つ忠実な“補佐集団”を持つ事である。森の全体像が木々の情景によって邪魔されぬように、リーダー自身は細部に囚われて全体を見失ってはならない。実行段階では、リーダー自らが選んだ信頼出来る専門家をこれに当らせて、リーダー自身は専門家の報告を確かめ、審査を頻繁に行う事に止めるのだ。

(アンドレ・モーロー)

The leader must have round him a dedicated team that can deal with minor decisions for him. He must not let the trees hide the wood. For the execution of orders, he has his technicians whom he has chosen and in whom he has confidence; he allows them to act freely and is content to verify, by frequent checking, the exactitude of the information they bring him.

[Il importe que le chef, autour de lui, réunisse une équipe qui lui soit toute dévouée et qui sache prendre les décisions de détail. Il ne doit pas permettre aux arbres de lui cacher la forêt. Pour l'exécution, il a ses techniciens qu'il a choisis et qui possèdent sa confiance; il les laisse agir et se contente de vérifier, par de fréquents sondages, l'exactitude de leurs informations.]

(André Maurois)

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すべてを疑うか、すべてを信ずるかは、両方とも
都合の良い解決法だ。どちらも我々は反省しない
で済むからだ。(アンリ=ジュール・ポアンカレ)

To doubt everything or to believe everything are two equally convenient solutions; both dispense with the necessity of reflection.
[Douter de tout ou tout croire, ce sont deux solutions également commodes, qui l'une et l'autre nous dispensent de réfléchir.]

(Jules-Henri Poincaré)

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3. 編集後記

トランプ政権が開始した貿易戦争の最終的帰結を友人達と語り合っているが…。

「トランプ氏は短期的に米国自体が経済的に傷ついても、米中大国間競争で勝利すれば良いと考えているのか?」と尋ねる友人達に対し、筆者の歯切れの悪い反応は次の通りだ: 「側近のナヴァロ、ベッセントの両氏が深慮遠謀から「肉を切らせて骨を断つ」、即ち「To lose a battle to win a war」、中国語では「苦肉計/kǔròujì (Inflict injury on oneself to deceive the enemy)」であるならスゴイ戦略。だが、今の混乱を見れば、そうとは思えず…」。

いずれにせよ当面は「予期せぬ事を予期(expect the unexpected)」しつつ静観すべき、と諦めている。

以上

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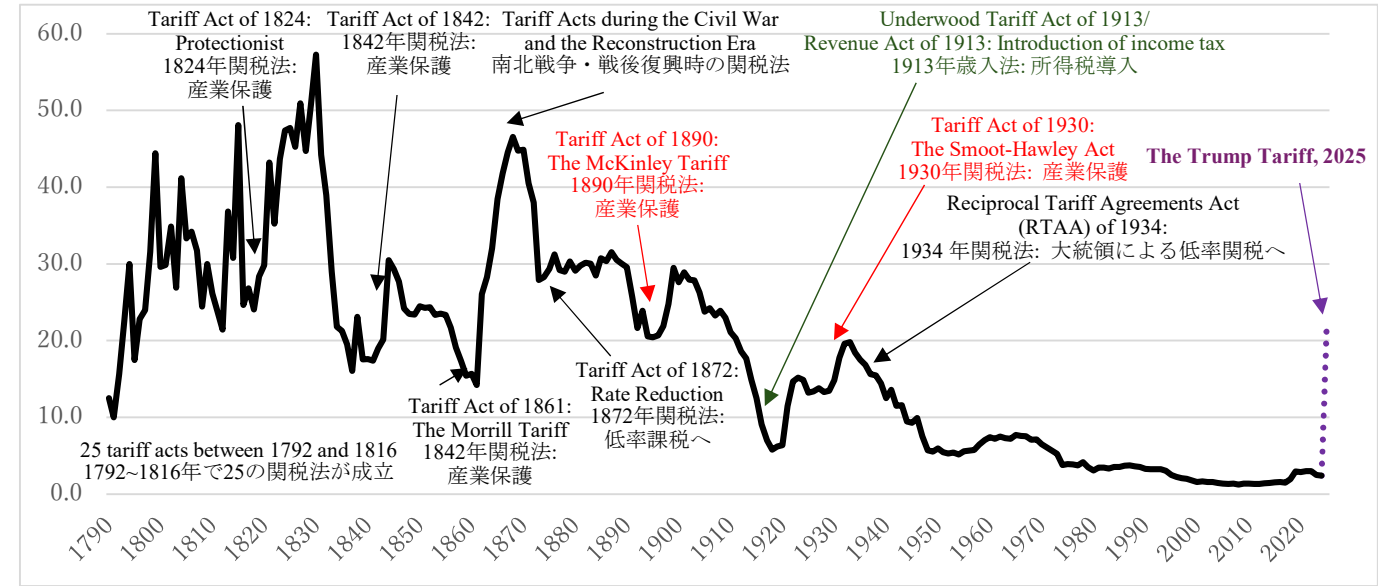
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Jun Kurihara; 栗原 潤

Figure 1 US Average Effective Tariff Rate since 1790 (%)
図 1 1790 年以降の米国実効関税率 (%)



Note: Other notable tariff acts: Wilson-Gorman (1894), Dingley (1897), Payne-Aldrich (1909), Emergent Tariff (1921), Fordney-McCumber (1922).
Source: The Budget Lab at Yale, "Where We Stand: The Fiscal, Economic, and Distributional Effects of All U.S. Tariffs Enacted in 2025 Through April 2," New Haven, CT, April, 2025, <https://budgetlab.yale.edu/research/where-we-stand-fiscal-economic-and-distributional-effects-all-us-tariffs-enacted-2025-through-april>.

Table 1 Trumpian Triff Rates by Country
表 1 国別のトランプ相互関税率

A: Tariff charged to the USA/各国の対米税率; B: Reciprocal Tariff/相互関税

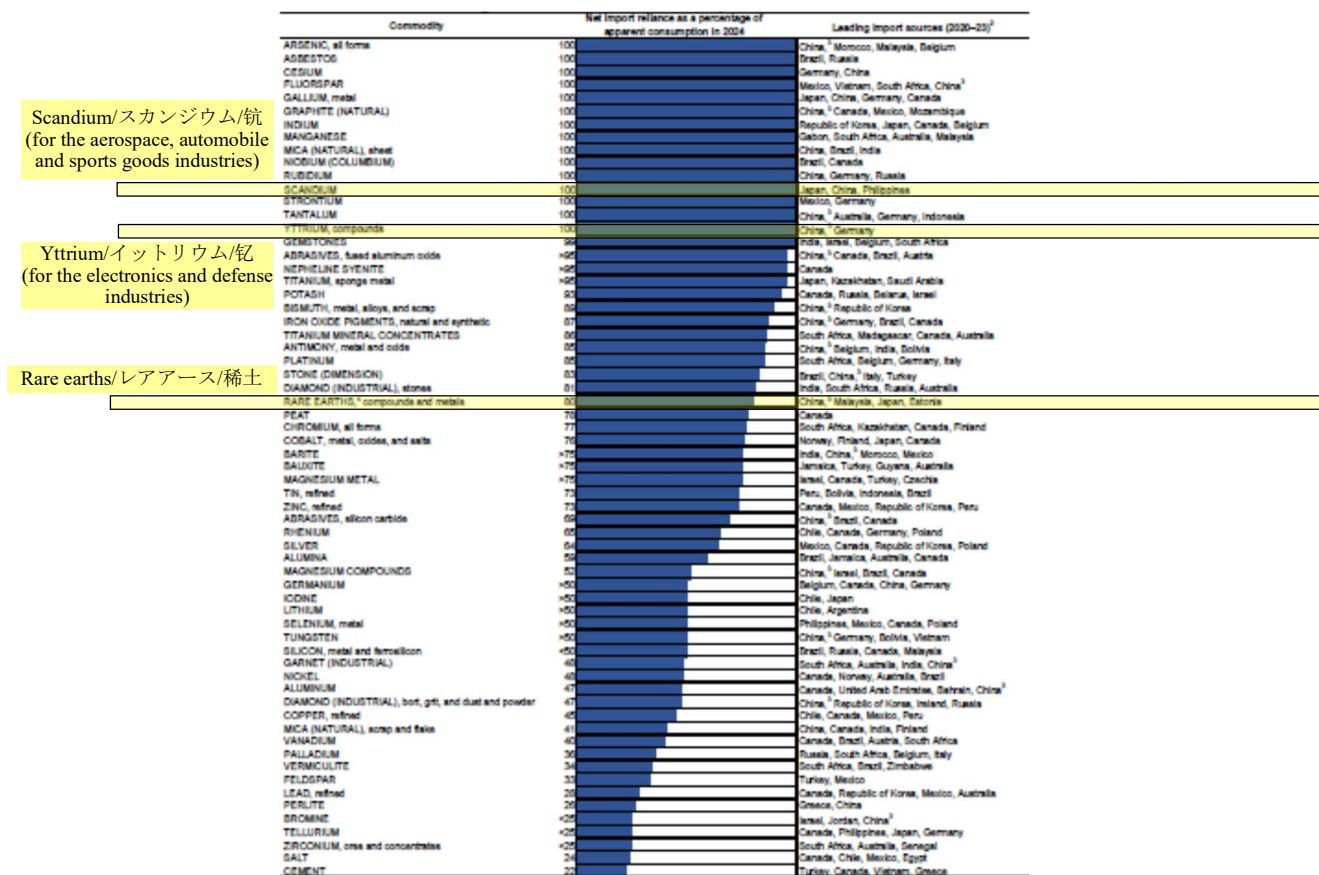
Country	A	B
Saint Pierre and Miquelon	99	50
Lesotho	99	50
Cambodia	97	49
Laos	95	48
Madagascar	93	47
Vietnam	90	46
Sri Lanka	88	44
Myanmar (Burma)	88	44
Mauritius	80	40
Iraq	78	39
Guyana	76	38
Serbia	74	37
Reunion	73	37
Liechtenstein	73	37
Botswana	74	37
Bangladesh	74	37
Thailand	72	36
Bosnia and Herzegovina	70	35
China (Note: 145%, as of Apr. 10)	67	34
North Macedonia	65	33

Country	A	B
Taiwan	64	32
Indonesia	64	32
Fiji	63	32
Switzerland	61	31
Moldova	61	31
Libya	61	31
South Africa	60	30
Nauru	59	30
Pakistan	58	29
Norfolk Island	58	29
Tunisia	55	28
Kazakhstan	54	27
India	52	26
South Korea	50	25
Malaysia	47	24
Japan	46	24
Brunei	47	24
Namibia	42	21
Côte d'Ivoire	41	21
Jordan	40	20

Country	A	B
European Union	39	20
Nicaragua	36	18
Zambia	33	17
Philippines	34	17
Israel	33	17
Mozambique	31	16
Venezuela	29	15
Norway	30	15
Nigeria	27	14
Chad	26	13
Other countries	10	10

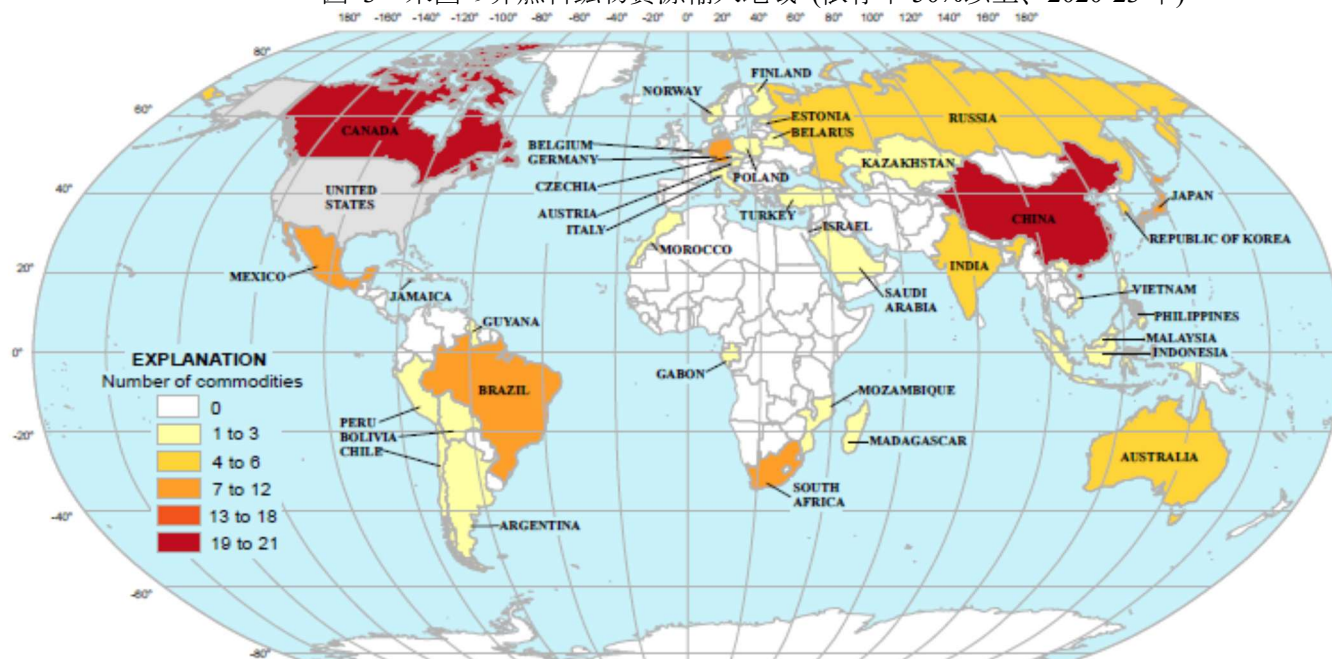
Note: Canada and Mexico: 25%.
Source: The Budget Lab at Yale, "Where We Stand: The Fiscal, Economic, and Distributional Effects of All U.S. Tariffs Enacted in 2025 Through April 2," New Haven, CT, April, 2025, <https://budgetlab.yale.edu/research/where-we-stand-fiscal-economic-and-distributional-effects-all-us-tariffs-enacted-2025-through-april>.

Figure 2 U.S. Net Import Reliance (2024)
図 2 米国の鉱物純輸入依存率 (2024 年)



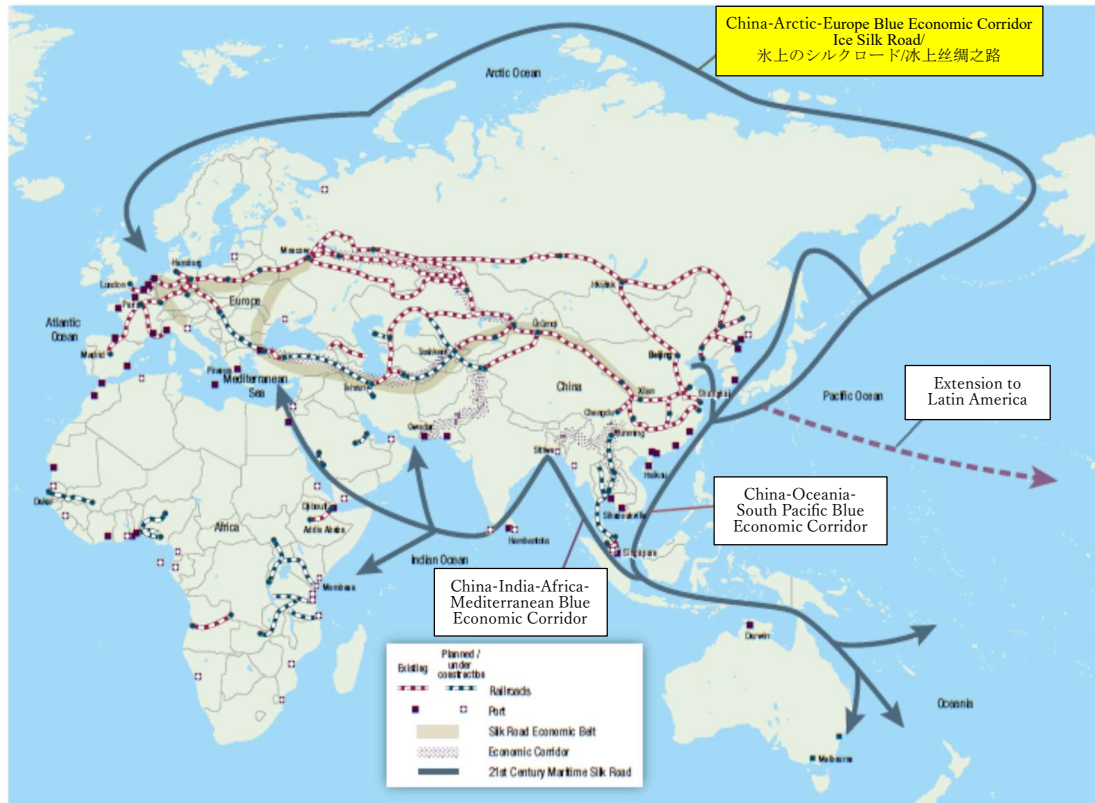
Source: U.S. Department of Interior, U.S. Geological Survey (USGS), "Mineral Commodity Summaries 2025," Reston, VA, January 31, 2025, p. 7.

Figure 3 Leading Import Sources (2020-2023) of Nonfuel Mineral Commodities (Greater than 50% Net Import Reliant)
図 3 米国の非燃料鉱物資源輸入地域 (依存率 50%以上、2020-23 年)



Source: U.S. Department of Interior, U.S. Geological Survey (USGS), "Mineral Commodity Summaries 2025," Reston, VA, January 31, 2025, p. 8.

Figure 4 Xi Jinping's Vision of Pax Sinica China-centered Global Networks
 図4 習近平政権時代の Pax Sinica 中国を中心とするグローバル・ネットワーク



Source: National Institute for Defense Studies (NIDS), "NIDS China Security Report 2019," Tokyo: NIDS, February 2019, p. 18.

Table 2 Granted AI Patents per 100,000 Inhabitants by Country, 2023
表 2 主要国の人口 10 万人当たり AI 関連特許件数 (2023 年)

Ranking	Country	国	Granted AI Patents per 100k Inhabitants
1	South Korea	韓国	17.27
2	Luxembourg	ルクセンブルク	16.31
3	China	中国	6.08
4	United States	米国	5.20
5	Japan	日本	4.68
6	Germany	ドイツ	1.22
7	Singapore	シンガポール	0.98
8	Finland	フィンランド	0.97
9	Sweden	スウェーデン	0.74
10	United Kingdom	英国	0.52
11	Denmark	デンマーク	0.47
12	France	フランス	0.43
13	Netherlands	オランダ	0.40
14	Australia	オーストラリア	0.38
15	Greece	ギリシャ	0.27

Source: Stanford Human-Centered Artificial Intelligence (HAI), “Artificial Intelligence Index 2025,” Stanford, CA, April 7, 2025, p. 45.

Table 3 Number of Notable AI Models by Select Geographic Areas, 2024
表 3 主要国における注目すべき AI モデル開発件数 (2024 年)

Ranking	Country	国	Number of Notable AI Models
1	United States	米国	40
2	China	中国	15
3	France	フランス	3
4	Canada, Israel, Saudi Arabia, and South Korea	カナダ、イスラエル、サウジアラビア、韓国	1

Source: Stanford Human-Centered Artificial Intelligence (HAI), “Artificial Intelligence Index 2025,” Stanford, CA, April 7, 2025, p. 46.

Table 4 Number of Notable AI Models by Organization, 2024 and 2014~2024
表 4 開発組織別の注目すべき AI モデル開発件数 (2024 年(単年)及び 2014~2014 年(累計))

2024			2014~2024		
Ranking	Organization	Number	Ranking	Organization	Number
1	Google	7	1	Google	187
1	OpenAI	7	2	Meta	82
3	Alibaba (阿里巴巴)	6	3	Microsoft	39
4	Apple	4	4	OpenAI	36
4	Meta	4	5	Carnegie Mellon University	25
4	Nvidia	4	5	Stanford University	25
7	Anthropic	3	7	Tsinghua University (清华)	22
7	Minstral AI	3	7	UC Berkeley	22
9	ByteDance (字节跳动)	2	9	Nvidia	17
9	DeepSeek (深度求索)	2	10	University of Oxford	16
9	MIT	2	11	MIT	15
9	Tencent (腾讯)	2	11	Salesforce	15
9	UC Berkeley	2	11	University of Washington	15
9	Writer	2	14	Alibaba (阿里巴巴)	14
9	Zhipu AI (智谱)	2	15	Allen Institute for AI	12

Source: Stanford Human-Centered Artificial Intelligence (HAI), “Artificial Intelligence Index 2025,” Stanford, CA, April 7, 2025, p. 49.