

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 200 号 (2025 年 12 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/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 200 号

汎用技術(GPT)である AI・ロボット技術を中心に内外の友人達と議論を続けている。

小誌を通じ最近汎用技術(GPT)である AI・ロボット技術に関する海外の情報、それに加えて筆者の活動を読者諸兄姉に伝えている。本年 9 月号では、6 月 2 日の弊研究所主催のセミナー「AI・ロボットを実装した日本社会: ワークプレイス・ウェルビーイングと生産性向上に向けた標準化戦略」に触れた。またその後の活動を紹介するため、10 月 10 日に再度セミナーを開催した(セミナーの様子は次の website を参照されたい(https://cigs.canon/event/report/20251112_9349.html))。こうした活動を通じて友人達と共に日本経済再活性化の道を考えている。

12 月 3 日からは、4 日間にわたって東京ビックサイトで「2025 国際ロボット展(International Robot Exhibition (iREX2025))」が開かれる。今年で 25 年目を迎える iREX のテーマは「ロボティクスがもたらす持続可能な社会」である。筆者も会場で開催される或るパネル討論会で司会役を務める予定だ。会場での優れた発言者との知的刺激に満ちた意見交換を楽しみにしている。

AI・ロボット技術は米中大国間競争における最重要領域の一つだ。しかも当該技術が汎用であると同時に軍民両用(dual-use)でもあり、安全保障の視点から米中両国は熾烈な開発競争を行っている。これに関して、11 月 17 日、米国戦争省(DoW)のエミール・マイケル次官(研究・工学担当)は、6 つの分野を軍事における重要技術分野(Critical Technology Areas (CTAs))とする事を公表した。その 6 つの分野とは、(1)応用人工知能(AAI)、(2)バイオものづくり(BIO)、(3)紛争・戦闘地域兵站技術(LOD)、(4)優位性を保つべき量子情報科学・戦闘情報技術(Q-BID)、(5)レーザー・マイクロ波技術(SCADE)、(6)極超音速技術(SHY)だ。次官は「敵の動きは速いが、我が方はそれより速く開発する Our adversaries are moving fast, but we will move faster」と語った。そして今、中国側の反応に関し友人達と意見交換を行っている。平和利用が主たる関心領域である我々だが、当然の事としてこうした米中の軍事技術開発動向に無関心である事は許されない。

台湾を巡る国際関係に関して出来るだけ冷静に議論したいと思っているが…。

先月、中国の友人から 12 月初旬に上海で開催予定の国際会議の招待状が届いた。既に上述の iREX での司会役を引き受けていたため、残念ながら、上海からの招待を丁重にお断りした。現在の厳しい日中間係を考えると、東京・上海間の往来に不確実性が漂っているため、上海行きを断念したのは結果的に良かったと自らを納得させている。だが、本来ならばこういう時こそ、“対話”が大切である。

日本の優れた外交官の一人で駐中大使を務めた垂秀夫氏は、著書『日中外交秘録 垂秀夫駐中国大使の闘い』の中で“バックチャンネル”の重要性を記されている。移り気な populism や皮相的な観察しか出来ない hack journalism にわずらわされずに、少数ではあるが産官学の優れた識者が“裏ルート(backchannel)”を通じ、相手側と協力して国際関係上の難問を解く糸口を探る努力をしてくれる事を願っている。

台湾政府は 9 月 19 日、全国民を対象にした危機管理に関する 30 ページの小冊子(「當危機來臨時: 臺灣全民安全指引」)を公表した。日々の生活に忙殺される一般人は小冊子をどう評価しているだろうか? いずれにしろ天災であれ、政治経済的危機であれ、「書経」『説命』が説く如く、「備えあれば憂い無し; 有備無患; With preparation there will be no calamitous issue」だ。日本も危機管理を真剣に考える必要がある。

これに関して、米国議会の米中経済・安全保障調査委員会(USCC)が年次報告書を先月 18 日に公表した。700 ページを超える報告書の中には、最近における注目すべき中国の動きが記されている。その中には当然の事として西太平洋における中国の危険な(?)動きが含まれる。筆者は中でも海底ケーブル切断事件に注目している(PDF 版の図 1 を参照)。Internet 時代における海底ケーブルの重要性は言を俟たない。中国の真綿で台湾の首を絞めるような手法で圧力をかける言動は、台湾の人々の反中姿勢に関し“諷刺”の念を生むかも知れない。だが、周辺諸国及び世界の人々には中国に対する反感を強める事になる事を懸念している。

例えば欧州諸国は、対中経済関係を重視する一方で、政治的・社会的には中国から一定の距離を置く姿勢を示し始めた。台湾の蕭美琴副総統は欧州を訪れ、11 月 7 日にブリュッセルの欧州議会で開催された「対中政策に関する列国議会連盟(IPAC)」の会合で演説した(IPAC は Inter-Parliamentary Alliance on China; 對中政策跨國議會聯盟を指す)。演説のタイトルは「Taiwan: A Trusted Partner in a Volatile World (台湾は世界は動盪變局中信頼的夥伴)」だ。彼女は演説の中で『孟子』「公孫丑下」の中の有名な言葉に触れている—「道を得る者は助け多く、道を失う者は助け寡し; 得道者多助, 失道者寡助; Those who find the proper course have many to assist them; those who lose the proper course have few to assist them」。筆者には大陸・台湾の両方に多くの“道を得る者”を友達がいる。彼等には互いの soft power を損なわず、対話の道を探ってもらいたい。

USCC の年次報告書には台湾問題以外にも多くの課題が記されている—例えば Made in China(「中国制造 2025」)の評価、“専制主義国による枢軸(the axis of autocracy; 专制軸心)”, 中国の宇宙計画, “China Shock 2.0 (中国冲击 2.0)”や rare earths 輸出規制によるサプライ・チェーン上の混乱。こうした課題は、米国のみならず他国でも真剣に議論すべき課題であり、筆者は近年、ドイツの対中姿勢の微妙な変化に注目している。

まず政治面では 9 月 8 日、外務省で開催された駐外大使の会合(Botschafterkonferenz)で、フリードリヒ・メルツ首相が「祖国ドイツのため、世界の同盟国・協力国と共に日々働く事(Arbeiten für Deutschland, jeden Tag, mit Verbündeten und Partnern in aller Welt)」というタイトルで講演した。その中で「露中両国は南欧における勢力範囲を獲得しようとしている(Russland und China sich in Südosteuropa Einflussssphären zu sichern versuchen)」と語り、ロシアを助ける中国に警戒心を示している。また昨年、ドイツ統一を記念する北京での会合で、パトリシア・フローラ駐中大使は、イマヌエル・カント大先生の『啓蒙とは何か(Beantwortung der Frage: Was ist Aufklärung?)』の中の言葉「知る勇気を!(Sapere aude!)」を今の時代に最もふさわしい言葉として引用して演説をしめくくった。その場には、邓励外務次官(当時)も隣席されていたので、友人達と共に大使の発言に驚いていた。かくして政治的視点と思想上の価値観から、独中は次第に袂を分かち形になってゆくのかも知れない。

経済面では、独政府が安全保障上の理由から 5G サービスに関する中国製品を禁止する事になった(PDF 版 2 の Handelsblatt 紙の記事参照)。また小誌 7 月号で記した通り、製造業における独中間係は長年の“補充”から“競合”の関係に移ってきたが、最大の貿易相手国である中国との関係は容易には変更出来ない。しかも先月公表の EU 及び独経済諮問委員会の経済予測は微妙な形で互いに明暗が分かち、見通しのきかない霧の中の独経済は、簡単に対中経済関係を破棄できない。この事に関して筆者は友人達と引き続き情報交換を行っている。

米国の政策に端を発した不確実性が、世界経済システムの将来に暗雲を漂わせ視界不良の状態に…。

米国連邦準備制度理事会(Fed)が11月7日に公表した報告書は、最後に「金融市場の安定性に関する注視すべきリスク」に関し市場参加者に対する調査を掲載した(“Financial Stability Report”、調査は春・秋の2回実施。PDF版の図2参照)。現在、市場参加者は「政策的な不確実性」を危険視している。半年前の春の調査では米国の相互関税政策を起因とする「国際貿易上のリスク」が最も危険視され、「政策的な不確実性」はそれに次ぐリスク要因だった。現在、「政策的な不確実性」に次ぐリスク要因は、図2が示す通り、「地政学的リスク」だ。

従って世界経済システムに関する限り、我々は安全保障と経済活動の双方をバランス良く観察しなくてはならない。こうした「両眼視(binocular vision; 双眼視覚; Binokularsicht)」、単独の個人では殆ど不可能だ。従って優れた専門家達が互いに助け合い、国際政治経済情勢の全体像を概観する鳥瞰図(bird's-eye view; 俯视图; Vogelperspektive)を描き、しかも常に更新するという作業を行わなくてはならない。

トランプ政権の露骨な“America First”政策により、世界観はLockian and Kantian から Hobbesian に大きく変わろうとしている。このため、各国は“Self-Help”志向で独自の産業政策を取り始めている。これに関してIMFから、2009-2010年の世界金融危機以降に各国が採用した産業政策を分析した報告書が発表された(“Industrial Policy since the Great Financial Crisis,” Oct. 31. PDF版の2及び図3を参照)。これに依ると、産業政策として通常採られる手段は財源によるものだが、先進国と新興国で支配的な政策手段が異なる。図3で“AE”と記した先進国では公的融資及び貿易金融が支配的である一方、新興国(EMDE)では助成金が支配的である。

産業政策で最先端技術を社会実装するには財源による支援だけでなく、人的資源・制度インフラが不可欠。

筆者が内外の友人達と意見交換する中で、今世紀前半における日本の技術開発に関し、彼等から最も頻りに質問され事項は次の通りだ—「財源的には日本は豊かだが、なぜ科学や工学に“輝き”を失ったのか?」。この質問に対し筆者の“荒っぽい”答えは次の通り—「学問でも、技術でも、ビジネスでも“カネ”だけでは成功しない。更に必要なモノは①成功へと導く“ヒト”、②人材活用に優れた企業や研究機関といった組織、③効率的な組織が存在する ecosystem を擁する制度インフラ。日本の今の制度インフラは“内向き・20世紀”型で、国内外で海外勢にかなわない」。誤解を招かぬように付言すれば、勿論、今も日本には個性豊かで優秀な“ヒト”が大勢いるのだ。問題は、優秀な“ヒト”が“やる気”を持ち続けて活躍出来る適材適所に優れた組織の存続が難しくなってきた状態なのだ。技術分野では優れた技術者が数多く息絶えている。

同時に、友人達に技術の正否を綿密に分析する事が極めて難しい事を伝えた。なぜなら技術は大抵“極秘裏”に開発される。しかも成功事例は随分後になり初めて成功“物語”として公表され、教訓として学ぶべき重要な“失敗”事例は大抵“人知れず”歴史の闇に葬られるのだ。しかも最近の失敗例の関係者が生存している状況では、いくらか“罪を憎んで人を憎まず”と言っても、“否定的判断”を公表する事は難しい。こうした理由から技術開発の正否に関する教訓を学ぶには、どうしても過去の事例に関する研究が中心になっている。

ここで学ぶべき過去の失敗事例の中で国際比較が可能な初期のレーダー開発を簡単に紹介する。近年議論されている2022年8月成立の「半導体・科学法(CHIPS and Science Act)」は当初議会に提出された時の名は“The Endless Frontier Act”だった。これは、第二次世界大戦時に国防研究委員会(NDRC)議長を務め原爆やレーダーの開発を指導したヴァニーヴァー・ブッシュ MIT 副学長の本(Science, The Endless Frontier)に基づいて名づけられたものだ。副学長は同書の中で、強敵を倒した科学技術力に関して次の様に記している:

科学とこの国の偉大な天才が偉業を成し遂げた。国際連合(筆者注: 連合)がナチ・ドイツに勝利し、要塞化した日本の島から次第に後退させるのに、レーダーが重要な役割を果たした事を我々の中の何人かは知っているのだ(Science and the great practical genius of this nation made this achievement possible. Some of us know the vital role which radar has played in bringing the United Nations to victory over Nazi Germany and in driving the Japanese steadily back from their island bastion)。

現在、1930年代以降のレーダー開発に関しては、主要国(日米英独)の文献で各国の“正否”が比較出来る。興味深い事に、1930年代半ば、技術者のレーダーに関する知識と技量は、日米英独の4カ国の間でほぼ拮抗していたと言えよう。しかし、大戦中に“大差”が生じている。原因は財源や技術者の才能の“差”ではなかった。レーダー開発の背後にある科学思想と産業基盤、そして技術開発を推進する組織・制度に“大差”があった。米国の或る研究者は「日本人は米国人とほぼ同時期にレーダー研究を開始した(The Japanese had initiated research on radar around the same time as the Americans)」と記し、また別の研究者は次の様に述べている—「無関心な政府、科学者の場当たりの活用、そしていつも通りの陸海軍間の協力体制の欠如が、日本のレーダー研究の実践的な軍事適用を致命的な形で遅延させた(Official indifference, haphazard mobilization of scientific talent, and—as always—the absence of interservice cooperation fatally delayed the practical military applications of Japanese radar research)」。

これを読むと、国力にとって科学が重要な要素であり、それを哲学的・思想的・実践的に裏付ける国家体制と産官学の諸機関に関し、日米英独の間に大きな差が存在していた事が理解出来るよう。

太平洋戦争中、レーダー技術は、現在のAIと同様、まさに日進月歩だった。1942年6月のミッドウェー海戦時には米軍は90哩先から帝国海軍の航空隊を確認出来た。だが、「零戦」等に搭乗した日本の熟練パイロットは米国のパイロットより技量が上で、日米の搭乗員の機上における戦死者数は86対198。極めて大雑把な話で恐縮だが、航空機による戦いでは、レーダーを欠いた日本が勝っていたのだ。

2年後の1944年6月のマリアナ沖海戦では米軍のレーダーが150哩の敵掃捕能力を有した。これに対し遅ればせながらレーダーを装備した帝国海軍の能力は僅か50哩。日本のパイロットは「マリアナで七面鳥を撃つ(Great Marianas Turkey Shoot)」が如く撃つために待ち伏せをする米軍機と戦う破目に陥った。結果は再び大雑把な話で恐縮だが、艦載機の損失数を日米で単純比較すれば395対130で完敗だった。

レーダー開発に携わった英国の専門家は、独軍の長所と短所を次の様に語った—「ドイツのレーダーは工学的には英国よりも優れていた。安定性・正確性の上で科学機器のようだった。だが、活用上の哲学的思想は軍部が握り、空軍は特に誤った目的に集中して哲学的失策を犯した(German radar was much better engineered than ours, it was much more like a scientific instrument in stability and precision of performance. The philosophy of using it, however, seemed to have been left to the German Services, and the Luftwaffe in particular made a philosophical mistake by focusing on the wrong objective)」。また彼は、異なる組織の人々が協力して英国のレーダー開発を進めた事を次の様に記した—「全員一致など常に成立するものではない。…だが1935年、科学者が直面するあらゆる形の古臭い障害は無かったのだ。…英国では将校・科学者・技術者が、空爆という脅威に直面して一段と強く結束した。その結果、敵のドイツ人に比べ、我が同僚達の抱える問題を互いに理解する事になったのだ(There was not always to be unanimity... but in 1935 the almost traditional obstructiveness which scientific men are supposed to meet was absent... In Britain, the serving officers and scientists and engineers had been thrown much more together by the bombing threat, and had thus come to appreciate one another's problems much more than did their German counterparts)」。

英米のレーダー開発には英国の政治家と官僚のリーダーシップが大きな役割を果たした。チャーチルは英国製造業の脆弱性を補うため、英国の最先端技術を米国に全て開示し、米国の強力な工業力を梃子にしてヒトラーと戦おうとしたのだ。或る研究者は次の様に語った—「科学者を必ずしも常に理解していなかったが、チャーチルには何かをしなくてはという執念があった。…英国の官僚は殆ど常に問題を大局的に観て大胆な決断を下した(The persistent urging of Mr Winston Churchill that something should be done, though he did not always understand the language of the scientists... In my experience the big men of the British Civil Service are nearly always ready to look at problems in a big way and to make big decisions)」。

帝国海軍で少将待遇を受けてレーダー開発をした「日本のテレビの父」と称される高柳健次郎博士は、戦後次の様に語った—「終戦後、相模湾に入ってきた米艦隊を見たら、みんなメインマストの上でっかい簀(かんざし)みたいなメートル波のレーダーをつけているんです。またセンチ波は大きなお椀のようなパラボラアンテナを艦橋の横につけてぐるぐるまわっていた。これを見て負けるわけだと思いましたね。彼らと同じような電探(筆者注: レーダー)を持ちながら半分の能力しか発揮できなかったんだから、結局、われわれの説得力が足りなかった」。

独空軍のace pilot、アドルフ・ガーランドの言葉もレーダーの威力を物語っている—「戦場で我々は人間の目を頼りにしていた。敵は遙か遠方に見える信頼出来るレーダーに頼っていた。会敵の際には我々の受けた命令は3時間前のものだったが、敵の命令は僅か数秒前のものだった(Wir waren auf unsere eigenes menschliches Auge im Kampf angewiesen. Die britischen Jäger konnten sich auf das sichere und um ein Vielfaches weiter reichende Radar-Auge verlassen. Unsere Einsatzbefehle waren etwa drei Stunden alt, wenn wir in Berührung mit dem Gegner kamen, die britischen nur soviel Sekunden)」。

最先端技術開発の国際競争において、第二次世界大戦における敗戦国の日独両国が残した苦い教訓を我々は忘れてはならない。

国家という概念の虜となり過敏になった感情が民衆の中に広まった。
このため、過去と比較すると戦争が勃発する可能性を遥かに高める事
になっている。
(ジュリアン・パンダ)

The susceptibility developed by national sentiment as it has become popular makes the possibility of war far greater
to-day than in the past.

[Cette susceptibilité dont se revêt le sentiment national en devenant populaire est une chose qui rend la possibilité
des guerres bien plus grande aujourd'hui qu'autrefois.]
(Julien Benda)

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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汝の行為と芸術が万民に好かれなければ、少数を喜ばせよ。
万民を喜ばす事こそ由々しき事態なのだ。
(フリードリヒ・フォン・シラー)

If thou canst not please everyone by thy deed and art, please a few; to please everyone is ill.

[Kannst du nicht allen gefallen durch deine Tat und dein Kunstwerk, Mach es wenigen recht; vielen gefallen ist schlimm.]
(Friedrich von Schiller)

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物質的な力を出来るだけ集めて、その最大限の力をもって、国際政治の枠に A nation that throws into the scale of international politics the maximum of material power it is capable of mustering will find itself confronted with the maximum effort of all its competitors to equal or surpass it. 載せる国は、その国の力に迫り着き、追い抜こうとするあらゆる競争相手国の努力 (ハンス・モーゲンソー) its power. It will find that it has no friends, but only vassals and enemies. (Hans Joachim Morgenthau) と対決する、という事になる。

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プラトンの箴言、「哲人が首長たるか、首長が哲人たる国家は幸いなるかな」。しかし、歴史家に依れば、哲学や文学を少しかじった一知半解の人々ほど、国家にとっては厄介なものはない事を理解出来るでしょう。	That goodly sentence of Plato's, "Happy is that commonwealth where a philosopher is prince, or whose prince is addicted to philosophy." When yet if you consult historians, you'll find no princes more pestilent to the commonwealth than where the empire has fallen to some smatterer in philosophy or one given to letters.	[praecleara illa Platonis sententia, beatas fore respublicas, si aut imperent philosophi, aut philosophentur Imperatores. Imo si consules historicos, reperies, nimium, nullos reipublicae pestilentiores fuisse Principes, quam si quando in philosophastrum aliquem aut litteris addictum incidit imperium.]	(Desiderius Erasmus Roterodamus)
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- November 11: (London) Chatham House: "War in Ukraine: The Battleground for the Future of Europe."
- November 14: (a hybrid event, Brussels) Bruegel: "Europe's Dependence on the US Defence Industrial Base: Source of Transatlantic Strength or Geopolitical Vulnerability?"
- November 19: (an online event, London) Chatham House: "Democratic Resilience in a Disrupted World."
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君(きみ)賢聖なれば、則ち国安(やす)くして When the ruler has strong moral character, then the state will be secure and peaceful and the populace is well-ordered. Fortune and misfortune of 民治(おさ)まる。禍福は君に在り、天の時に the state depend on the ruler, not with the changes of Heaven.
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No. 200 (December 2025)

古(いにしへ)の 七の賢しき/ 人たちが/ 欲(ほり)せしものは/ 酒にしあるらし。
(万葉仮名: 古之七之賢人等毛欲為者酒爾有良之)

In ancient times, / What the Seven Wise Men/ Wanted, / It seems, was sake wine.

(大伴旅人)

(Ohtomo no Tabito, a Japanese statesman and waka poet)

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3. 編集後記

小誌今月号は今年最後の月例報告だが、残念な事に届ける情報の中に明るい平和と繁栄の話が少ない。

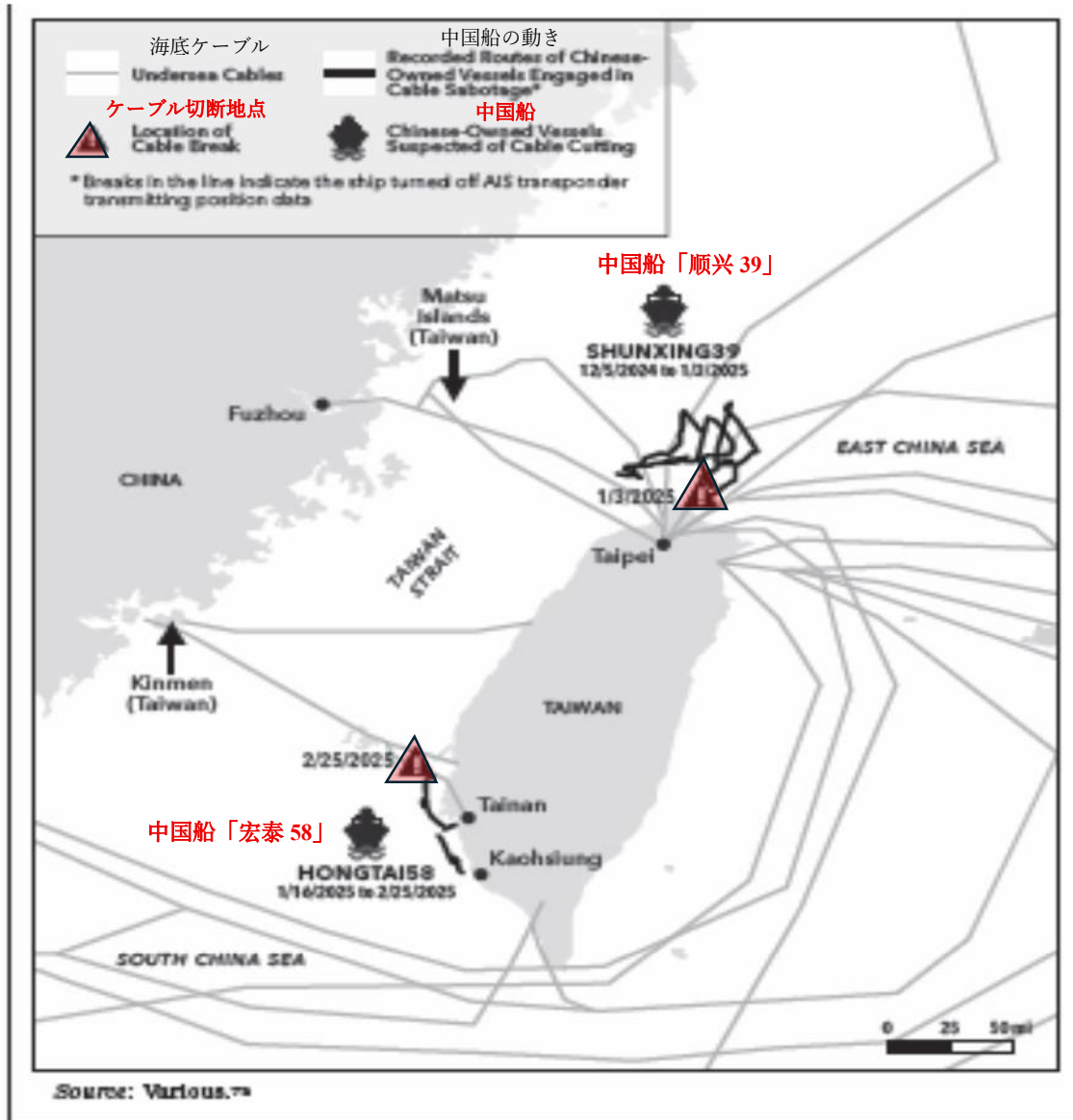
12 月初旬ベルリンを訪れ、日本と同じく経済構造改革や安全保障問題に取り組む現地の実情を、友人達と直接議論出来る事を楽しみにしている。2025 年は敬愛するトーマス・マン先生の生誕 150 周年及び没後 70 周年を祝う年である。友人達と先生の作品である *Der Zauberberg* (『魔の山』) や *Mario und der Zauberer* (『マリオと魔術師』)、そしてナチスに結果的には協力したマエストロ・フルトヴェングラーを決して許さなかったマン先生の態度について、グラス片手に語り合う事を楽しみにしている。

そして来年こそ、欧州や中東の戦争が終結し、極東にも危機が沈静化する事を願っている。

以上

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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 Incidents of Chinese Vessels Sabotaging Undersea Cables near Taiwan in 2025
図 1 台湾周辺海域での海底ケーブルに対する中国船による破壊工作 (2025 年)

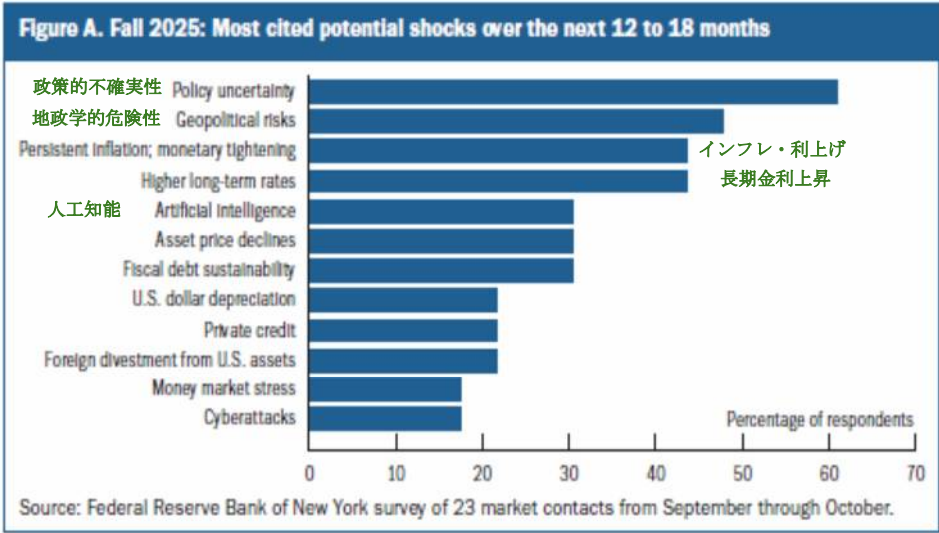


Beijing Seeks to Weaken the Taiwan People's Will to Resist through a Multifaceted Campaign to Infiltrate, Destabilize, and Isolate Taiwan

Source: U.S.-China Economic and Security Review Commission (USCC), 2025, "2025 Annual Report to Congress," Washington, D.C., November 18, 2025, p. 610.

Figure 2 Salient Risks to Financial Stability (Fall vs Spring 2025)
図 2 金融市場の安定性に関する注視すべきリスク (2025 年の春と秋との比較)

2025 年秋調査



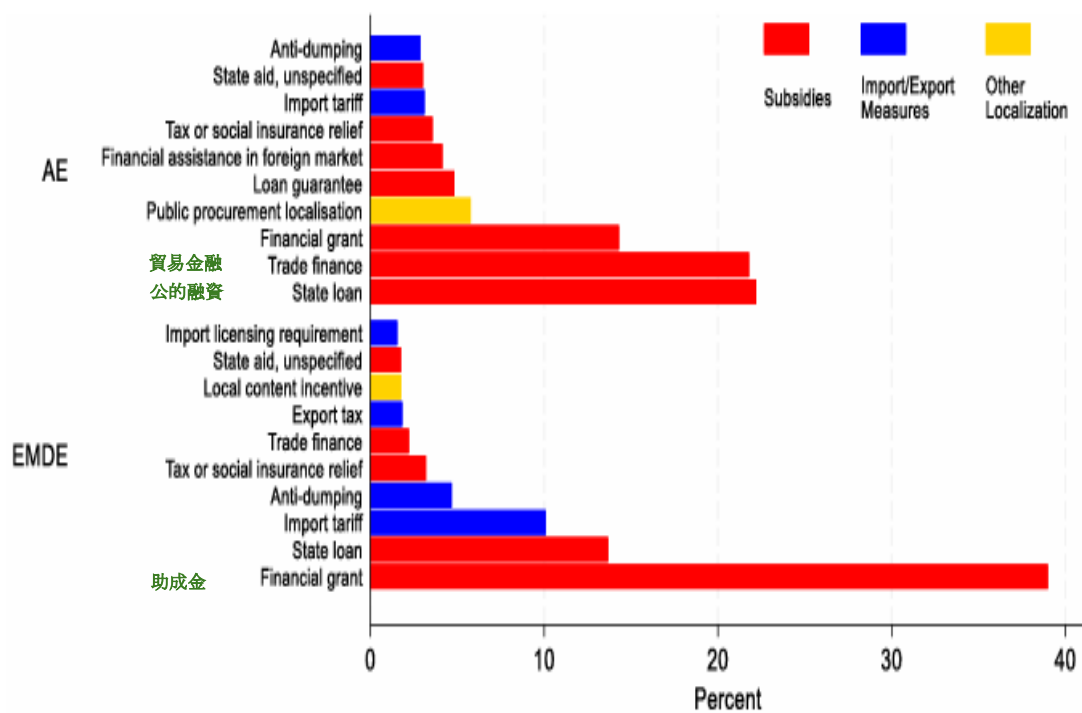
2025 年春調査



Source: Federal Reserve System (Fed), “Financial Stability Report,” Washington, D.C., November 7, 2025, p. 52.

Figure 3 Trade Distortive Industrial Policy Instruments by Income Group

図 3 所得階層別(先進国(AE)と新興国(EMDE))に見た
貿易に影響を与える産業政策手段



Source: Evenett, Simon *et al.*, "Industrial Policy since the Great Financial Crisis," Working Paper 25/222, Washington, D.C.: International Monetary Fund (IMF), October, 31, 2025, p. 18.