

# 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201号 (2026年1月)

キヤ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201号

### 謹賀新年、2026年最初の海外情報を読者諸兄姉にご報告する。

世界情勢を俯瞰してみた時、年初から平和と繁栄の貴重さを痛感する。英 *Financial Times* 紙の社説は12月30日、“The Human Cost of a World Without Rules”と題し、現在の乱れた法秩序の下で多くの人々が苦しんでいる事態を報告している。世界に“親切心”や“愛情”が多くの人の心に再び満ちてくるよう、一人ひとりが自らの得意とする分野で努力を続けなければならない。

小誌前号でも触れた12月初旬開催の「2025国際ロボット展(International Robot Exhibition (iREX2025))」は最新のロボット関連技術—humanoid robots や AI-enabled robots—を垣間見る良い機会だった。673の出展者が参加し(そのうち海外からは iREX 史上最多の140社・団体)、累計来場者は約15万6千人だった。12月4日最後のパネル討論会は午後4時半開始だったが、来場者席が殆ど満席で、司会を務めた筆者はホッと胸をなでおろした次第だ。3日夕刻に開催されたレセプションでは、経済産業省(METI)や日本ロボット工業会(JARA)の方々に加えて、中国からの参加者、更にはフランクフルトから訪日した国際ロボット連盟(IFR)のスザンネ・ピーラー事務局長と言葉を交わす事が出来て喜んでいる。

12月20日、Stanford 大学から或る情報が届いた—書籍(*The Digitalist Papers: The Economics of Transformative AI*, Volume 2)の公表である。Transformative AI とは政治経済社会の変革を誘導する AI だ。2023年7月18日、国連安全保障理事会で AI の初会合が開催されて、司会を務めたジェームズ・クリヴァリー英国外相は、AI が「人の生活のあらゆる側面を根本的に変える(fundamentally alter every aspect of human life)」と語り、「AI は国境を認識しないが故に、変革を誘導する技術に関するグローバルな統治を早急に形づくる(shape the global governance of transformative technologies because AI knows no borders)」必要性を強調した。現実的な話として、軍民両用技術(DUT)でもある AI は各国の間で開発競争が進んでいる。その証拠に2023年7月23日、米空軍は3時間に及ぶ AI 無人戦闘機(XQ-58A Valkyrie)の飛行実験に成功している。

米国史に詳しい人なら直ちに理解出来るが、*The Digitalist Papers* の名は、建国時にマディソン等が憲法成立に関し、ペンネーム(Publius)で著した *The Federalist Papers* に因んでいる。2024年9月に公表された *The Digitalist Papers* 第1巻に続いて、第2巻では Stanford 大学のプリンシパル教授をはじめ、Toronto 大学のアジェイ・アグラワル教授や MIT のディヴィッド・オーター教授等が著した21論文が掲載されている(参考までに、論文のタイトルのリストを小誌 PDF 版に示している)。

日進月歩である AI・ロボット技術に関し、先月も引き続き悲観論・楽観論の両論が混在していた。筆者は技術者ではないが、当該技術の社会実装を考案・設計・提案する事に関し、多様な分野の専門家と議論している。従って悲観・楽観に関する判断は差し控える一方で、如何なる組織・制度が AI・ロボット技術を導入していくか、という視点から考察を加えている。こうした視点に立ち、先月議論した情報を分類すると、概ね次の7つの分野に分ける事が出来る(PDF 版 2 を参照)。

経済の領域では①AI・ロボットが労働市場に与える影響、②AI がバブルであるか否か、またバブル崩壊は近いのか否か、③AI・ロボットが企業組織を如何に変えているか、という3分野。次に技術の領域では④米中間の技術開発競争の将来、⑤Humanoid robots の技術は既に社会実装可能な水準に到達したか否か、⑥欧州諸国の技術開発上の問題、⑦DUT である robotics が既に実戦配備の水準に達している状況、という4分野。⑦に関し12月にウクライナ軍が、厳重警戒下のノヴォロシスク露軍港内に停泊中の潜水艦を水中 drone (UUV ‘Sub Sea Bay’) で撃沈したとの報道は衝動的だった(PDF 版 2 を参照)。

## 12月5~17日、仏独英の順に訪問し、政治経済そして技術政策に関して友人達と意見交換を楽しんだ。

最近海外との情報交換が online 中心になったが、やはりワイングラス片手に親密な(tête-à-tête)形で行うと情報交換の質量共に一段と向上する。加えて出張先の書店に立ち寄り、日本では発見しづらい本を見つける事が出来るため、情報収集の成果が格段と上がる。

Paris では生誕百年・没後30年の哲学者ジル・ドゥルーズの本を見つけ、Berlin では没後50年のハンナ・アーレントの本や浮世絵師の北斎を敬愛した生誕150年の詩人リルケの本を発見した。また London で生誕250年のジェーン・オースティンや今月没後50年を迎えるアガサ・クリスティの書籍を発見して喜んでいる。こうした書籍は最新ではないが、友人達との会話の中では重要な役割を果たす。

またドイツでは書店で発見した次の近刊書に関し、面談した際に友人達の解説・評価を聞く事が出来た(紙面の制約上、書名だけを記す)。

①ミュンヘン連邦軍大学(UNIBW)教授が著したロシアによるウクライナ進攻の展望(*Wenn Russland Gewint: Ein Szenario*; 仮訳「ロシア勝利の時: シナリオ」昨年3月発売。米 *Foreign Policy* 誌は同書の英訳版を Christmas Season に読む事を推奨)、②NATO 国防大学(NDC)調査部長・欧州安全保障研究所(EUISS)副所長を務めた専門家による展望(*Szenario: Die Zukunft steht auf dem Spiel*; 仮訳「シナリオ、将来は非常に危険」昨年11月)、③革新的政治家と Humboldt 大学教授が著したドイツの現状分析(*Der große Umbruch: Ein Gespräch über Krisen, Konflikte und Kompromisse*; 仮訳「大変革: 危機、対立、そして妥協」昨年10月)、④歴史学者による国内東西分裂史(*Die Übernahme: Wie Ostdeutschland Teil der Bundesrepublik wurde*; 仮訳「吸収合併: 如何にして東独は西独の一部となったか」昨年7月)、⑤ロシアによる侵攻作戦まで「武力行使は弱さの証拠」と筋金入りの平和主義者であったウクライナ系のドイツ人ジャーナリストによる戦況報告(*Für euch würde ich kämpfen: Mein Bruch mit dem Pazifismus*; 仮訳「君達のために戦う、平和主義との決別」昨年10月)(紙面の制約上、その他の本は省略する)。

米国政府が12月4日に公表した安全保障戦略は欧州諸国で大々的に報道された。独 *Frankfurter Allgemeine Zeitung* 紙は直ちに、欧州に関連する部分を全訳して読者に伝えた。一方、欧州の友人達は米現政権の“America First”戦略として不本意だが甘受する考えを示している。だが、小誌11月号でも記した通り、欧州最強国のドイツは現在の経済状態の下で、軍事的に強くなれるかという疑問がある(これに関し、PDF 版 2 の *Foreign Affairs* 誌の“Can Germany Be Afford to Be Europe’s Protector?”を参照)。また筆者は友人達に対し次の様に質問した—「2007年ミュンヘン安全保障会議(MSC)でメルケル首相(当時)は露大統領の真意を感知したと、自伝に記している(小誌2025年1月号参照)。その時に伝統的“東方政策(Ostpolitik)”である“貿易を通じた変革(Wandel durch Handel (WdH))”の破綻は予見されていたのではないか?」。友人達の返答は次の通り—「聡明な彼女は覚悟していた。だが、ロシアのエネルギーを必要とする産業界と一般大衆が WdH の継続を望んだのだ。仕方がないよ」。

新(あた)らしき 年の初めの初春の 今日降る雪の いや頼(し)け吉事(よごと)。  
(万葉仮名: 新 年乃始乃 波都波流能 家布敷流由伎能 伊夜之家餘其麻。)

On this New Year's Day Which falls on the first day of spring

Like the snow that also falls today And up without pause or end . . .

(大伴家持)

(OTOMO no Yakamochi, a Japanese statesman and waka poet (Eng. trans. Peter J. MacMillan))

## 英国出張時、日本・欧州の経済と終戦 80 周年を迎えた第二次大戦に関し友人達と意見交換を行った。

London 及び Oxford では、日本及び欧州諸国の innovation policies について議論した。17 日に帰国した後も、AI・ロボット技術を念頭にして昨年 11 月 28 日に公表された OECD の報告書(“Artificial Intelligence and the Labour Market in Japan”)を中心に議論した。同報告書は国際的・国内的な比較をする際、英国滞在の様々な国の友人達と議論するのに役立った。ただ、報告書の内容は日本にとって必ずしも芳しくない。AI を使用する従業員比率を国際比較すると日本は著しく低い。先進的役割を果たす金融・保険分野において、また製造業分野においても国際的に著しく低い。日本国内の地域別に見ると、南関東・近畿は比較的高いが、北海道が驚くほど低い(PDF 版の図 1-3 を参照)。今後は、国内の友人達と共に AI の普及のために新しい解決策を議論する事にしている。

12 月 11 日、独連邦統計局(Destatis)が人口動態統計を公表した。日本と同様、高齢化と人口減少が問題視されている(PDF 版 2 を参照)。友人は、英国は幸いにも人口増加傾向を維持している。しかし、それは移民の寄与に依ると同時に、それを起因とする深刻な社会問題が顕在化している事—特に EU 圏以外の人々の流入急増による賃貸住宅問題と英国国民との文化的摩擦—も追加的に語った。

友人達に対し筆者は次の様に述べた—「ボクも少子高齢化は以前から指摘してきた問題だが、それよりも innovation strategies の方がより一層深刻な問題だ」。そして碩学吉川洋東京大学名誉教授の著書『人口と日本経済』を引用しつつ、“一人当たりの所得”を高める innovationこそ重要である、と語った。余談だが、吉川先生は本の中で、1931 年、東京帝国大学で河合栄治郎先生や東畑精一先生と共にシュンペーター先生が映っている写真に触れておられる。筆者は、学生時代にシュンペーター来日に関し高田保馬先生の記述だけしか知らなかったため、興奮した事も語った。吉川先生は同書の中で「人口が減っていく日本国内のマーケットに未来はない、という声をよく耳にするが、超高齢社会に向けたイノベーションによって、日本経済は大きな可能性を秘めているのである。残念ながら、現状では日本企業は退嬰的だ」と記されている。

そして筆者はシュンペーター先生が著書(*Theorie der wirtschaftlichen Entwicklung*)の初版で述べた言葉を引用した—「既存の働き方の枠内だけで自由な意欲的選択が行われ、単に理性的と考えられる行動が存在する。こうした方法では“新しいもの”は決して創造されない(Nur innerhalb dergegebenen Arbeitsmethoden herrscht völlig freie bewußte Wahl und liegt einseitig vernunftgemäß zu begreifender Handlungsspielraum. Auf diese Art wird nie “Neues” geschaffen)」(初版(1912)。巷間知られているのは 1926 年の改定された第 2 版とその英訳)。即ち我々が“新しいもの”を生み出すために、静態的立場からは一見非理性的に映る innovation process を開始する時、ケインズ先生が語る“animal spirits”を必要としているのだ。

英国最後の日、St. James Square に在る海軍・陸軍将校用会員制クラブ(the Naval and Military Club、通称 the In & Out)で友人と会食した。The In & Out に向かう直前、近くに在る Fortnum & Mason 本店に入ったところ、不景気など全く感じられない spending spree を目撃して、まさしく英国版 K-shape Christmas を体感した(米国版の“Happy K-shape Christmas”については、PDF 版 2 の *Financial Times*, Dec. 21 を参照)。

The In & Out はチャーチルが頻繁にお酒を楽しんだ所だ。友人とは、チャーチルの鋭い戦略眼と悲惨な作戦計画立案能力を語り合った。チャーチルはヒトラーとの対決に備えてスターリンと同盟を組み、“悪魔とさえ手を結ぶ”戦略を採った—しかも大戦後のスターリンの勢力拡大を危惧し、欧州大陸での砦となる国としてフランスを—1940 年の敗戦後 Vichy France が枢軸側であったにも拘らず—戦勝国側に入れたのだ。一方、彼の作戦家としての能力は絶望的だ—大英帝国参謀総長(CIGS)のアランブルック元帥はチャーチルを「彼は(専門知識の)詳細を知らず、(作戦の)全体像の半分しか頭に入らない(He knows no details, has only got half the picture in his mind)」と表し(小誌第 92 号(2016 年 12 月)参照)、そして英国の防空担当のダウディング空軍大將は、the Battle of Britain 直前、首相の指示に猛反対して撤回させている。またアイゼンハワー元帥に対するチャーチルの行動に関し、或る歴史家は「軍事問題に関する最悪の素人的介入(amateur meddling in military affairs of the worst sort)」と評している。

次に今年 3 月、Harvard University Press から発売予定の書籍(*Tojo: The Rise and Fall of Japan's Most Controversial World War II General*)に関する話題に移った。筆者は同書を未だ読んでいないため、読了後にメールで感想を述べる事を約束した。その代わりに、東條首相の幼馴染である駐独大使の大島浩陸軍中將について語り合った。英国諜報部の資料に依ると、大島大使は、当時の帝国軍人の中でも資力ある陽気で、独軍将校と仲良くしていたらしい。だが、独軍の優れた将官の記録から大島大使に関して好意的な描写を筆者は未だ発見していない。

事実、ヒトラーは 1942 年 1 月 7 日、「我々ドイツ人は日本人に親近感など抱いていない。彼等は文化も生活様式も余りにも我々と違っている(Zu den Japanern haben wir keine inneren Beziehungen. Sie sind uns in Kultur und Lebensform zu)」と語り、シンガポールの戦いの直前、ゲッペルスは「当然の事として総統は白人が東アジアで被る多大なる損失を深く後悔しておられる(Der Führer bedauert natürlich sehr die schweren Verluste, die der weiße Mann in Ostasien zu erleiden hat)」と 1 月 30 日の日記に記している。そして 2 月 15 日のシンガポール陥落後、或る外交官は「ヒトラー自身は日本軍の大勝利に関し興奮している事はなく、黄色人種を(シンガポールから)押し戻すためにドイツ軍 20 師団を派遣したい気持ちでいる(Hitler selbst nicht restlos begeistert sei von den Riesenerfolgen der Japaner und gemeint habe, am liebsten würde er den Engländern 20 Divisionen schicken, um die Gelben wieder zurückzuwerfen)」と記した。更にはリッペンントロップ外相が絞首刑の前に妻に残した文章の中にも、大島大使に対する親しい言葉が見つからない。日本人としてみれば流暢なドイツ語を話し、1934 年以降、ヒトラーやリッペンントロップとの親密な交流を日本の人々に自慢した大使だが、1939 年の独ソ不可侵条約の時も 1941 年のバルバロッサ作戦の時も彼等から直前まで知らされる事は無かった。大使が Nazi Germany から単に利用されたこの事実を、筆者を含む外国語の不得手な我々は苦い歴史的教訓として銘記する必要があるだろう。

ところでケツサクな事に、お酒が絡んだ話になると大使の事がドイツ側の記録に残っているのだ。例えば小誌前号で触れた独空軍が誇る ace pilot のアドルフ・ガーランドに関する書籍の中に、大島大使の名前と写真が登場する—1941 年夏、彼の独空軍基地訪問の時、「駐独日本大使大島将軍、将軍は蒸留酒(キルシュ)を大量に呑めた(General Oshima, der japanische Botschafter in Deutschland, der General konnte Unmengen schärfsten Kirsch trinken und vertragen)」との記録がある。また建築家で軍需大臣でもあったアルベルト・シュペーアの回想録の中に次の様な記述がある。グデーリアン将軍が 1945 年 1 月、東部戦線での撤退をヒトラーに進言した際、総統は即座に却下したが将軍は引き下がらなかったのだ。その時の様子をシュペーアは「グデーリアンは大島大使と面談したために(司令部に)遅れて来た。…恐らくは大島大使と飲んだアルコールの影響で自制心を失ったのであろう(Als Guderian, der sich durch einen Besuch beim japanischen Botschafter Oshima verspätet hatte, ... Wahrscheinlich befeuert von den Wirkungen des Alkohols, den er bei Oshima zu sich genommen hatte, streifte er alle Hemmungen ab)」と記している。今更言っても仕方がないが、大使には外交官としての戦略眼と、軍人としての戦略眼鋭い作戦家であって欲しかったと思っている(勿論、お酒を或る程度飲むのは結構だが…)

## 21 世紀型モンロー主義に傾く米国を前にして、日本を含む世界は如何なる戦略を選ぶのか。

Oxford で 2026 年の世界経済に関し、Harvard 時代の友人達と議論している時、グレゴリー・マンキュー教授の話になった。彼の祖父母はウクライナからの移民だ。彼の叔父も米国に帰化して、第二次世界大戦時、軍人としてノルマンディー上陸作戦の際に戦死している。叔父さんを含む多くの米国将兵を失った事を、マンキュー教授はルーズヴェルト大統領が承認した上陸作戦が準備不足のためだと考え、憤っているらしい。このため教授は、ニクソン時代以来熱心な共和党员であるらしい。しかし、今も彼は“熱心な”共和党员なのだろうか(小誌昨年 5 月号に、トランプ大統領を批判した教授の言葉を記している)。

さて台湾問題を中心とする西太平洋における緊張関係も全く見通しがつかない状況である。鋭い戦略眼の指導者と作戦・戦術に優れた手腕を發揮する補佐役の活躍を期待している。しかも相手は中国だ。政治戦(political warfare)に関して中国は日本より数段上回る。しかも米大統領の対中戦略が予測不能なだけに最新の情報と知識で対応する必要がある。米戦略省が 12 月 23 日に公表した約百ページの報告書(“Annual Report to Congress: Military and Security Developments involving the People's Republic of China”)を読み、①中国は米国に対して如何なる反応を示してくるのか(PDF 版の図 4 参照)、また②アジア諸国の反応は如何なるものか、③日本に対する海外の期待は、といった問題を議論する必要がある。我々は“反中”や“嫌中”ではなく、硬軟相交えた巧みな政治戦を遂行する必要があるだろう。一般的な話として、多くの人々は気分的にスッキリする“威勢のよい”強硬論を好むであろう。だが、我々は de-escalation を念頭にして戦略を慎重に練る必要があるのだ。



この世には 3 種類の貴族があるのだ。即ち一：出生・ Aristocracies are of three kinds: (1) of birth and rank; (2) of wealth; and (3) of intellect. The last is really the most distinguished of 位階のうえでの貴族、二：金権貴族、三：精神的な貴族。the three.  
最後の精神的貴族は本来最高の貴族である。 [Es gibt drei Aristokratien: 1) die der Geburt und des Ranges, 2) die Geldaristokratie, 3) die geistige Aristokratie. Letztere ist (アルトゥール・シュOPENHAUアー) eigentlich die vornehmste.] (Arthur Schopenhauer)

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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嘘には三種類ある: 嘘、まっかな嘘、そして統計。

There are three kinds of lies: lies, damned lies, and statistics.

(ベンジャミン・ディズレーリ)

(Benjamin Disraeli (Quoted in Mark Twain's *Autobiography*))

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銅を以て鏡と為せば、以て衣冠を正す可べし。 With a bronze mirror, we can be meticulously well-groomed; with the past as a mirror,  
古を以て鏡と為せば、以て興替を知る可し。 we can foretell the rise and fall of events; with a person as a mirror, we can clearly understand successes and failures.  
人を以て鏡と為せば、以て得失を明らかにす可し。 By holding on to these three mirrors, I have kept myself from committing mistakes.  
朕常に此の三鏡を保ち、以て己が過ちを防ぐ。 [以銅為鏡，可以正衣冠；以古為鏡，可以知興替；以人為鏡，可以明得失。朕常保此三鏡，以防己過。]  
(呉鏡) (Wú Jǐng, a Tang dynasty historian; 吳鏡)

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第三帝国は、ドイツ民族がその歴史のなかで 遭った最大の不幸であったばかりでなく、  
The Third Reich was not only the greatest misfortune that the German people have suffered in their existence; it was also their greatest shame.  
[Das Dritte Reich war nicht nur das größte Unglück, das dem deutschen Volke in seiner Geschichte widerfuhr, sondern auch seine größte Schande.] (Friedrich Meinecke)

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三十六度も、また百度も この絵師は彼の山を描いた。 遠ざけられても、また、押し戻されても 三十六度も、また百度も。 (ライナー・マリア・リルケ)	Six and thirty times and hundred times the painter tried to capture the mountain, tore it up, then pushed on again (six and thirty times and hundred times). [Sechsendreißig Mal und hundert Mal, hat der Maler jenen Berg geschrieben, weggerissen, wieder hingetrieben, (sechsendreißig Mal und hundert Mal).] (Rainer Maria Rilke)
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誰にも指があり、そして絵筆と絵具を持つ事も出来るだろう。 Every man has fingers, and may have brush and colours, but he is not by reason of that a painter. So is it with thought. The  
だからと言って画家である訳ではない。思想についても同じ事 thought of right is not a thing which every man has at first hand. True thinking is thorough acquaintance with the object. Hence  
が言える。法の思想を誰もが持っている訳ではないのだ。 our knowledge must be scientific.  
真の思考とは対象とするものを知悉する事である。従って我々 [Jeder Mensch hat Finger, kann Pinsel und Farben haben, darum aber ist er noch kein Maler. Ebenso ist es mit dem Denken.  
の知識は科学的でなくてはならないのである。 Der Gedanke des Rechts ist nicht etwa, was jedermann aus erster Hand hat, sondern das richtige Denken ist das Kennen und  
(ゲオルク・ヴィルヘルム・フリードリヒ・ヘーゲル) Erkennen der Sache, und unsere Erkenntnis soll daher wissenschaftlich sein.] (Georg Wilhelm Friedrich Hegel)

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

No. 201 (January 2026)

人間というものは、過去を意のままに変える自由を持つのであろう。(ハンナ・アーレント) Man may be free to change his own past at will. (Hannah Arendt)

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### 3. 編集後記

昨年を締めくくる言葉は“熊”と「働いて働いて働いて働いて働く」であると聞いた。

Oxford Universal Press は昨年という言葉として、online 上で意図的に人の怒りを誘発する事を意味する“Rage Bait(怒りを呼び覚ます餌)”を選んだ。またドイツ語協会(GfdS)は KI-Ära(AI 時代)、Drohnisierung(ドローン化)、Wohlstandsverlust(生活苦)、Klimamüde(気候問題疲れ)等 10 個の言葉を選んだ。

今年を締めくくる言葉が心温まる明るい気持ちを呼び覚ます言葉である事を願っている。 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

Jun KURIHARA

Research Director, Canon Institute for Global Studies

〒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)

Kurihara.Jun@gmail.com

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事が出来ます。

Appendix 1/付属資料 1

List of Papers in *The Digitalist Papers: The Economics of Transformative AI*  
 スタンフォード大学デジタル経済ラボが 12 月に発表した書籍の中の論文

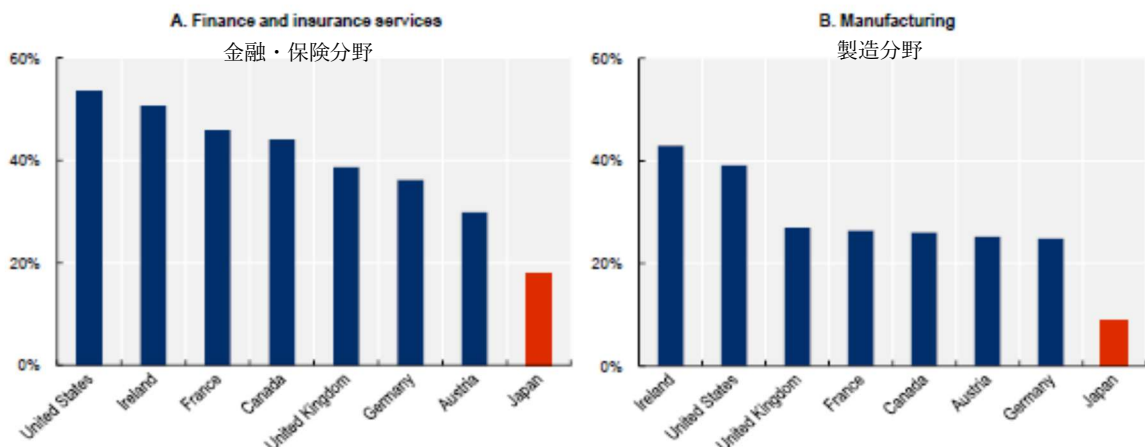
- 01 The Economics of Transformative AI
- 02 The San Francisco Consensus
- 03 The Democratization of Intelligence
- 04 Private Physical AI for the Edge: Small, Energy-Efficient, and Everywhere
- 05 The Universal Innervation of the Economy
- 06 Advanced AI as a Global Public Good and a Global Risk
- 07 “Career” Advice from the AI Frontier: Preparing Young People for Work in the Age of Transformative AI
- 08 Beyond Job Displacement: How AI Could Reshape the Value of Human Expertise
- 09 Universal Basic Capital: An Idea Whose Time Has Come
- 10 Resilient by Design: Dual Safety Nets for Workers in the AI Economy
- 11 Preserving Fiscal Stability in the Age of Transformative AI
- 12 What’s There to Fear in a World with Transformative AI? With the Right Policy, Nothing
- 13 Transformative AI and the Increase in Returns to Experimentation: Policy Implications
- 14 Information in the Age of AI: Challenges and Solutions
- 15 Transformative AI in Financial Systems
- 16 Titans, Swarms, or Human Renaissance? Technological Revolutions and Policy Lessons for the AI Age
- 17 Economic Possibilities for Artificial Intelligence
- 18 Cheap Goods for Everyone? The Impact of Market Power in Artificial Intelligence on Welfare and Inequality
- 19 Open Global Investment as a Governance Model for Transformative AI
- 20 Strategic Dynamics in the Race to AGI: A Time to Race Versus a Time to Restrain
- 21 Beyond Rivalry: A US-China Policy Framework for the Age of Transformative AI

Appendix 2/付属資料 2

Figure 1 The Proportion of Japanese Employees Using AI at Work Is the Lowest among Countries Surveyed

図 1 職場で AI を使用する日本の従業員の比率は各国調査の中で最低

% of all employees, by country 国別の AI を使用する従業員の比率 (%)

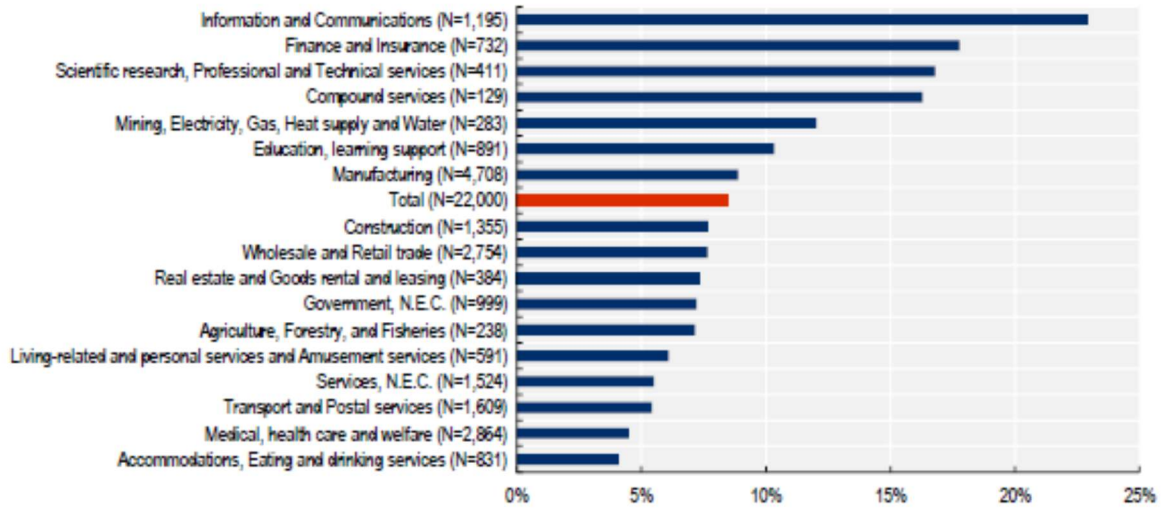


Source: Organisation for Economic Co-operation and Development (OECD), “Artificial Intelligence and the Labour Market in Japan,” Paris, November 18, 2025, p. 21.

Figure 2 While the Japanese Employees Using AI at Work in the Information and Communications Sector Exceeds 20%, There Are Significant Disparities across Other Sectors

図 2 情報通信部門における職場で AI を使用する日本の従業員の比率は 20%を超えている一方、他部門における比率には著しい格差が存在

% of all employees, by sector 分野別にみた AI を使用する従業員の比率 (%)

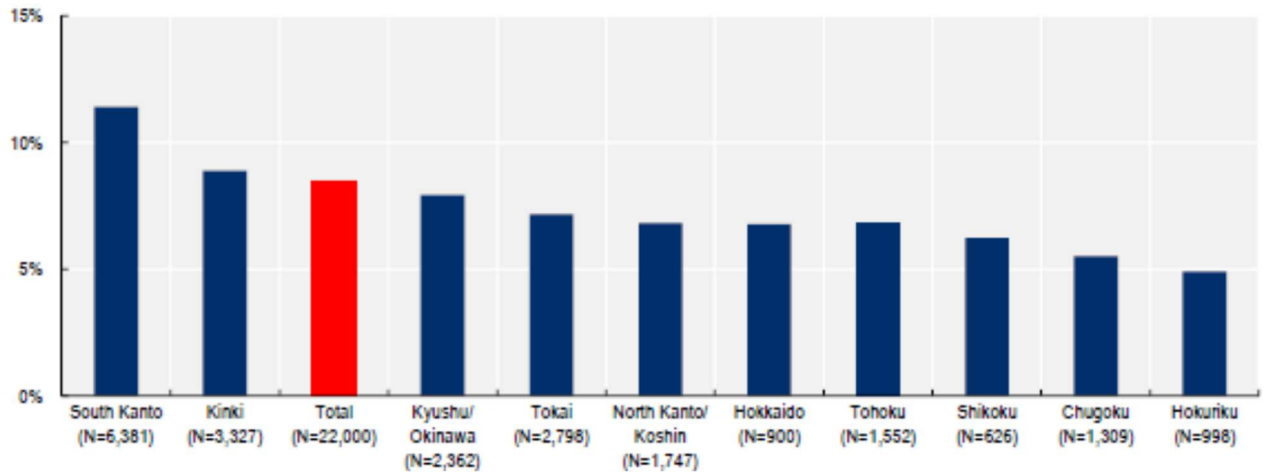


Source: Organisation for Economic Co-operation and Development (OECD), “Artificial Intelligence and the Labour Market in Japan,” Paris, November 18, 2025, p. 23.

Figure 3 There Are Regional Disparities in Japan, with Employees in the South Kanto and Kinki Regions Being More Likely to Say They Are Using AI

図 3 AI 使用比率には地域間格差が存在し、南関東地方や近畿地方では AI 使用を語る比率が高い

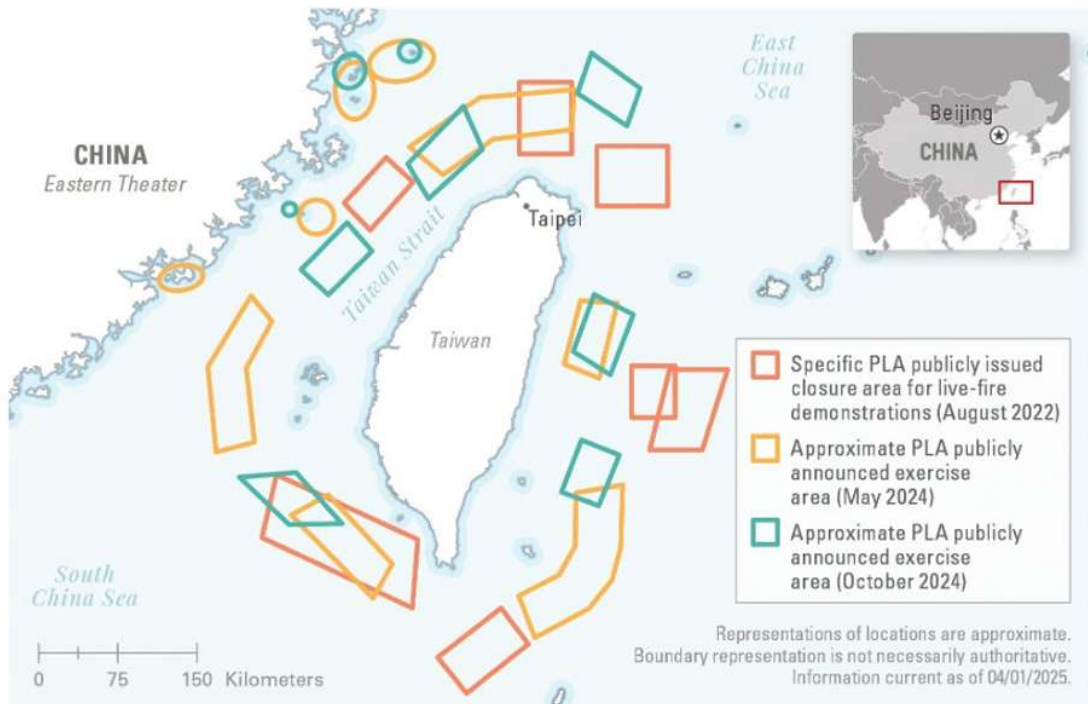
Percentage of all employees, by residential area 地域別の AI 使用従業員比率 (%)



Source: Organisation for Economic Co-operation and Development (OECD), “Artificial Intelligence and the Labour Market in Japan,” Paris, November 18, 2025, p. 28.



Figure 4 PLA Operational Areas around Taiwan in 2024  
図 4 台湾周辺における人民解放軍の活動領域 (2024 年)



Source: U.S. Department of War, "Annual Report to Congress," Washington, D.C., December 23, 2025, p. 49.