

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203号 (2026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。

今月号 «目次»

1. *Tokyo-Cambridge Gazette*: グローバル戦略編第203号
2. 情報概観—①マクロ経済、②資源・エネルギー環境、③外交・安全保障
3. 編集後記

1. *Tokyo-Cambridge Gazette*: グローバル戦略編第203号

AI・Robotics に関し、中国の身体性知能(embodied intelligence; 具身智能)を巡り情報交換を友人達と行っている。

友人達と先月最も頻りに情報交換したのは、中国の春節の際に国営放送(CCTV)が放映した Unitree 製 G1 robots による kung fu (功夫) dance だった(PDF版の2、CCTV Video News Agency, “Kung Fu Robots Deliver ‘Knockout’ Performance at Spring Festival Gala (春节联欢晚会),” Feb. 16 を参照)。

第一報はフランスからだ。17日、友人が「驚きの人型ロボット」を観て」と連絡してきた(PDF版2のBFM, «Chine: des robots humanoïdes renversants»)。多くの読者諸兄弟もご覧になったと思うが、海外メディアがこの kung fu dance を取り上げていたため、内外の専門家と技術水準に関して議論した。例えば①*The Economist* 誌や②*Newsweek* 誌の解説が興味深い (“Year of Droid: China’s Humanoids Are Dazzling the World. Who Will Buy Them? The Market for Robot Dancers, Alas, Is Limited,” Feb. 18 及び “China’s Humanoid Robot Boom: What to Know *Newsweek* 日本語版: 見事なカンフーを見せた中国ヒト型ロボットのからくりとリスク,” Feb. 24、PDF版2参照)。①は北京智源人工智能研究院(BAAI)の王仲遠院長の見解に触れ、②は小誌1月号で触れた国際ロボット連盟(IFR)のスザンネ・ビーラー事務局長の見解に触れた。王院長は昨年11月20日に中国の humanoid robots は未だ黎明期である事を強調している。そしてビーラー氏は黎明期の humanoid robots と人間と協働する際の課題を指摘している。

王院長は現在の China’s robot boom が「見せかけの需要」による bubble(偽需求泡沫)となる事態を危惧している。Humanoid robots に対し、中国人は大きな期待を今抱いている。だが社会実装過程に未だ到達していないため、膨らんだ期待は早晩雲散霧消するかも知れないのだ。その理由は BAAI が10種類の中国製 humanoid robots について試験したが半数以上が1ないし2ヵ月以内に故障したからだ。機械工学的な脆弱性を克服しない限り、巷間“量産元年”と呼ばれている humanoid robots も、再び研究段階に逆戻りする危険性を王院長は指摘した。

ビーラー氏は Unitree 製 G1 による kung fu dance を観察し、(a)人間が motion capture suit を着て data 作成をすれば簡単に出来る動きだと指摘し、(b)G1 は人間を傷付ける危険性があり、微妙な動きについては人間が傍らで遠隔操作している事、また(c)kung fu dance で、もしも1台が故障でもしていたら大変だと述べた。そして中国以外では humanoid robots と人間が協働している事が危険だと判断されている事を指摘し、「フェンスやガラス壁の後ろ側に置かれていない限り、人間サイズの humanoids は危険であり、(中国以外では)見る事は殆どない (You hardly see human-sized humanoids unless they are behind fences or glass walls because they are unsafe)」と *Newsweek* 誌の記者に語った。

Humanoid robots が様々な領域で活躍するには、「人間に対して安全な形で協調的に動ける事」、即ち“協調安全(collaborative safety)”の概念が重要だ。尚、小誌では“協調安全”に関し昨年7・9・10月号で取り上げている。人とロボットが協働する以前は、日本ロボット学会(RSJ)の小平紀生名誉会長の著書『産業用ロボット全史』に依ると、人とロボットは当初“離して”作業する事が法律で定められていた(1983年制定の「労働安全衛生規則第9節」)。だが、近年の AI・Robotics の発達で“協調ロボット(collaborative robots or cobots)”が誕生して“協調安全”概念が極めて重要になってきたのだ。これに関連して、英国政府の健康安全庁(Health and Safety Executive (HSE))の幹部が5月中旬に訪日を予定している。筆者は日本の専門家と共に彼等をファナック社等の現場へ案内し、“協調安全”に関し意見交換する事を計画している。

複雑な形で AI・Robotics 等の技術が大国間競争や軍民両用技術開発、更には倫理問題に絡んできた。

米中大国間競争は、政治経済技術、更には文化の領域にも及んでいる。これに関し Harvard Kennedy School (HKS)の Senior Fellow であるパウル・カルヴァオ氏が *Forbes* 誌に小論を寄稿している(“Should AI Go to War? Anthropic and the Pentagon Fight It Out [Forbes 日本語版: AI は戦場で活用されるべきか アンソロピックと米国防総省の対立、倫理的境界線はどこへ?],” PDF版2参照)。カルヴァオ氏は Harvard の Business School と Kennedy School が共同で設立した研究所(Center for Business and Government (CBG))に所属している。筆者が Senior Fellow として Harvard に移った時、最初に所属したのがこの研究所(CBG)だ。このために彼の見解に関し、懐かしい気持ちを抱きつつ友人達と意見交換した。

同氏は Anthropic が昨夏に Pentagon と締結した契約の延長に際し、米国政府が抱く「米国民に対する包括的監視と完全自律型兵器」に関する方針と同社の倫理規定との対立を述べている。中心的課題である「AI 倫理論争が戦場に到達(When AI Ethics Debates Reach the Battlefield)」を彼が語り出した時、筆者は「生死を分ける」非情な戦争では倫理感が薄れる事は歴史が証明している。このために意見交換の際に感情が高ぶってしまい、議論は興奮の中で無限ループに陥ってしまうと、諦観を抱きながら考えている。

米国東部時間で2月27日午後、トランプ大統領は Anthropic との取引を停止し、同社とはライバル関係にある OpenAI との合意するに至った。Anthropic 社には敵対する海外主体に通常適用する“supply chain risk”に指定するとの事。これに関して同社は27日朝、声明を発表している(PDF版の2参照)。軍民両用技術(DUT)が人間の活動全般に浸透するに従い、DUT・倫理関係は将来大きな課題となっていく。

米中大国間競争の狭間で苦悩する欧州 (1): 2月初旬のフランスの報告書に驚いている。

2月9日、仏政府の諮問機関である戦略・計画高等弁務官局(Haut-Commissariat à la Stratégie et au Plan (HCSP))が、80ページ余りの報告書を公表した(«L’industrie européenne face au rouleau compresseur chinois»; 仮訳: 「破竹の勢いで進撃する中国に直面する欧州産業」、PDF版2の参照)。報告書の執筆者は think tank (Centre d’Etudes Prospectives et d’Informations Internationales (CEPII))のトマ・ジェビン氏等だ。最初のページから筆者は驚いている—序文は「トランプ大統領の戦略に欧州は目を奪われていた。…(そうした中)我々は中国の経済的脅威を殆ど見落としていた (Le feu d’artifice trumpiste capte tous les regards des Européens. … nous ne voyons presque plus la menace économique chinoise)」と始まっている。

そして仏国の輸出の4分の1、独国の輸出の3分の1、国内生産の3分の2が中国の脅威に晒されていると記している(PDF版の図参照)。今後の対抗策として、「嘗て無い程の保護政策、即ち30%の対中関税、ユーロの20から30%の人民元に対する減価(une protection commerciale inédite, équivalente à un droit de douane général de 30% vis-à-vis de la Chine; ou une dépréciation de l’euro de 20% à 30% par rapport au renminbi)」を提案している。「何と大胆かつ手厳しい対抗策だ。問題認識は正しいが、問題解決策としては実施不可能と思うよ」と欧州の友人達に連絡した次第だ。

米中大国間競争の狭間で苦悩する欧州 (2): メルツ独首相の訪中について。

2月25-26日、フリードリヒ・メルツ首相は北京と杭州を訪れた。出発直前に、首相は中国に対し次の5原則を伝える事を公表した。即ち①強力な経済競争力のあるドイツを目指す(ein starkes und wettbewerbsfähiges Deutschland)、②政治的デリスキング志向(eine „Politik des De-Risiking“)、③公正で透明性の高い経済的競争(fairer und transparenter Wettbewerb)、④大国としての中国の立場を認識(China als neue Großmacht)、⑤中国に対する欧州の統一的政策の堅持(eine europäisch eingebettete Politik gegenüber China)だ。この中で友人達と議論したのは④と⑤である。④では世界の平和と繁栄のため、ドイツは中国が責任ある大国として、対ロシア協力と対台湾軍事行動に対し自重する事を望んでいる。だが、シタタカな中国は明確には賛意を示さないはずだ。これに関連して、ロシアの脅威に関し、ドイツの think tank(国際安全保障研究所(SWP))の所長を15年間務めたフォルカー・ベルテス氏が2月22日の Handelsblatt 紙にロシアの NATO 攻撃能力に関する小論を掲載している。⑤に関しては、ハンガリー等が EU 域内統一を阻止している事に加え、メルツ首相自身が仏西との戦闘機開発に関し否定的である。これに対しマクロン大統領は India AI Impact Summit に参加した 19 日、独側の態度に対し「欧州基準が必要(On a besoin d'avoir un standard européen)」と反論している。いずれにせよ、安全保障面での欧州の統一には時間がかかりそうだ。また米国の think tank(外交問題評議会(CFR))で欧州問題を専門とするリアナ・フィックス氏は Foreign Affairs 誌の最新号(3・4月号)に論文を発表している(“Europe's Next Hegemon: The Perils of German Power,” PDF 版 2 参照)。彼女も、燻り続ける残り火のような欧州域内での a Hitlerite Germany に対する恐怖感を抑えるため、ドイツが経済及び安全保障の域内統一に一段と積極的に努力する事を主張している。

これに関して筆者は「戦争で被害を受けた集団の記憶は容易には消えない」として、第二次世界大戦時、1942年1月から対独戦のために米陸軍省が英国に派遣する将兵に配布した小冊子の introduction を友人達に紹介した(Instructions for American Servicemen in Britain, 1942):

“You are going to Great Britain as part of an Allied offensive—to meet Hitler and beat him. . . . No Time to Fight Old Wars. If you come from an Irish-American family, you may think of the English as persecutors of the Irish, or you may think of them as enemy Redcoats who fought against us in the American Revolution and the War of 1812. But there is no time today to fight old wars over again or bring up old grievances fought on in the Civil War.”

即ち歴史を遡れば、米国には①英国で迫害を受けたアイルランド系の人達、②独立戦争や米英戦争で英国と戦った人達、③南北戦争時、英国は中立だったが多くの英国人が南部側を助けたために苦しんだ北軍側の人達がいた。その人達の子孫である将兵に対して、米国政府が、「今は過去の戦争を思い出す時ではなく、ヒトラーと戦う時だ」と指示したのだ。確かに戦争で心を傷つけた人の苦悶は非常に永く続く。

ドイツでは反 EU ・親露に傾く極右政党(AfD)の勢力拡大が気になる。今後とも欧州の友人達との情報交換を続けてゆきたい。

米中大国間競争に関し、様々な視点からの議論が必要だ。海外での議論も忘れてはならない。

フィックス氏の論文を掲載した Foreign Affairs 誌の最新号には筆者が興味を抱く論文が多く収められている。ここでは①スティーヴン・ウォルト Harvard Kennedy School(HKS)教授による論文(“The Predatory Hegemon: How Trump Wilds American Power”)、そして②ディヴィッド・ランプトン Johns Hopkins 大学高等国際関係大学院(SAIS)名誉教授と王緝思北京大学名誉教授が著した論文(“America and China at the Edge of Ruin”)について簡単に触れてみる事にする。

最初の論文の中で、教授は現政権の政策を観察し適切な表現を求めた結果、「強奪的・略奪的(predatory)な覇権国(hegemon)」という言葉が浮かんだらしい。即ち国際関係は zero-sum の関係であるという前提に立ち、米国の優位な立場を悪用し、敵味方関係なく外国からの譲歩・賛辞・尊敬を求めて、短期的な利得に執着しているのがトランプ政権下の米国だ。冷戦時代、米国は“慈悲深い(benevolent)覇権国”として振る舞おうとした。ソ連崩壊後の一極体制時には“注意力散漫で頑固な(careless and willful)覇権国”に変わった。そして今の米国は“強奪的・略奪的(predatory)”に振る舞っている。しかし第1期トランプ政権時は、マシス国防長官、ケリー首席補佐官、マックマスター補佐官等といった経験豊富で優れた側近が強奪的・略奪的な大統領を諭す役割を果たした。翻って第2期政権時には、相手国の弱みに付け込み、米国側に著しく偏った形で短期的利得を獲得する事を追求しているのだ。教授は小誌前号で触れたカナダのカーニー首相が語ったツキジデスの言葉、即ち「強者は出来る事を為し、弱者は当然の苦難を受ける(The strong do what they can, and the weak suffer what they must: δυνατὰ δὲ οἱ πρῶτοντες πράσσοσι καὶ οἱ ἀσθενεῖς ὑποποροῦσιν)」に触れている。教授はトランプ氏が味方のみならず自国をも長期的に弱らせる事態を予想し、後年の米国大統領が、米国が現在保持している優位性が損なわれた状況下で指導する状態に陥ると述べている。

第二の論文の中で著者は米中大国間競争の激化と、その結果生じる世界全体の平和と繁栄の喪失を危惧している。現在の米国は中国を経済・技術・思想的な米国の優位性に挑戦する敵として考えている。他方、中国は米国を中国の抬頭を阻止し、共産党を傷つけ、中国の犠牲の下で米国の優位性を保持しようとする敵として考えている。米中問題の専門家である著者は第二次世界大戦後の歴史を回顧する。1950年代の朝鮮戦争は米国にトラウマを、中国に勇猛心を刻み込んだ。1970年代になると中ソ対立を背景に毛沢東・周恩来とニクソン・キッシンジャーによる米中接近が実現した。そして今、トランプ=習関係は激しく揺れ動いている。そういう時だからこそ、両国の関係改善の機会を逃してはならないと著者は語る。そしてそのきっかけとして台湾問題こそが最も適切であると主張する。即ち関係改善のため、両国は譲歩するべきなのだ。中国は武力行使を控える事を、米国は台湾が独立の意志を示した際には援助を差し控える事を明確に示す必要がある。そのためには外交・経済・軍事の面で関係改善が不可欠となる。だが、双方に深い相互不信が存在しているため、厳しい道のりである。そして論文の最後に、ニクソンが会談の際に毛沢東の1963年の言葉を引用している—“Ten thousand years are too long. Seize the day, seize the hour! (一万年太久，只争朝夕)”。因みにランプトン教授の近著の表紙は彼と朱鎔基首相が笑顔で語り合っている写真だ(Living U.S.-China Relations: From Cold War to Cold War, 2024)。それを見つ、楽観的立場の筆者は「論文の副題の書き出しが A Last Chance だ。だから another last chance が有るかも知れない事を忘れてはいけないね」と友人達に伝えた次第だ。

勿論、関係悪化を予想する情報を収集・分析する事は、cautious optimist の筆者であっても必要だ。この種の情報の一つは中国が国力を誇張している主張する本である(Command of Commerce: America's Enduring Economic Power Advantage over China, Oxford University Press, 2025)。同書を読めば中国の反米派が敵意を強めると心配している。因みに同書の裏表紙には、優れた専門家の推薦文が載っている—例えば、Chip War の著者で Tufts 大学のクリス・ミラー教授や UC San Diego(UCSD)のスーザン・シャーク教授、更にはテイラー・フラヴェル MIT 教授だ。

翻って中国側にも米国側の反中派が敵意を強めるのではと心配する程、挑発的発言をする研究者がいる。その代表格が London School of Economics(LSE)金刻羽(Keyu Jin)教授。彼女の父は今年の1月まで AIIB 行長を務めた金立群氏だ。彼女は14歳から New York に住み、名門校(Horas Mann School(HM))に通い、大学は新入生から博士課程まで一貫して Harvard で学んだ才女。また彼女の発言は素晴らしい。内容だけでなく声・テンポが申し分なく、完璧な英語で語りかける。先月、特に印象に残ったのは YouTube の映像に行った演説である(Global China Tracker, “Why Cina Build 3 Economic Weapons America Simply Can't Copy: Keyu Jin”)。中国は米国と異なる体制を有し、大国間競争では中国が米国に対して必ず勝利すると語った。特に彼女の次の発言は印象的だ:

中国は 5G の軍事転用を華為に指示出来る。翌日議論なし。… 中国は AI 監視を騰訊にソーシャル・メディアと統合する事を指示出来る。即刻の命令だが反発なし。… 中国は民間経済を軍事経済に転換した。テック企業は全て兵士であり、イノベーションも全て潜在的な兵器だ。(China can command Huawei to hand over all 5G research to the military, tomorrow, no debate. . . . China can tell Tencent to integrate AI surveillance into social media, immediately, no pushback. . . . China has turned its private sector into a militarized economy; every tech company is a soldier; every innovation is a potential weapon.)

米中大国間競争の狭間で日本が採り得る戦略は？ 嘗ての貿易立国・技術立国としての日本は何処に？

1月22日、Times Higher Education(THE)が世界の大学を評価した資料を公表した(“World University Rankings by Subject 2026: Results Announced”)。また2月27日、Financial Times 紙が中国の大学の抬頭に関する記事を掲載した(“How China's Universities Joined the Global Elite”)。こうした大学のランクに関し、小誌昨年7月号で筆者は、個々の研究室や講座で本来評価すべきと論じた。だが世界の若き俊英から見れば大学の順位はやはり気になるらしい。従って日本の未来の innovation 創出のため、ranking でも魅力ある日本大学に変身する事を願っている。

米国は利己的かつ無謀な関税政策を追求し、しかも国際社会における他の馬鹿げた事情とあいまって全世界の繁栄を破滅に至らしめた。…いつの時にもどの国にも並みはずれた一定数の市民が存在し、彼等は国内と海外に絡んだ問題に関し、無知な愛国主義者よりも、遥かに明瞭に理解している。…(1930年関税法を巡って)米国の経済学者は、自殺的な関税に対し痛烈に批判してきたが、それは徒勞に終わったのである。(ラインホルド・ニーバー)

America pursued a selfish and foolhardy tariff policy, together with other imbecilities in international life, contributed to the ruin of prosperity in the whole world. . . . There is always, in every nation, a body of citizens more intelligent than the average, who see the issues between their own and other nations more clearly than the ignorant patriot, . . . American economists have recently inveighed against a suicidal tariff policy in vain. (Reinhold Niebuhr)

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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群集心理の専門家であるウィルフレッド・トロッターやギュスターヴ・ル・ボンが下した結論とは、「集団の知的精神は、言葉本来の意味で厳密に言えば『考えない』である。思考に代わり、衝動・習慣・情緒が登場するのだ。集団が決断する時、大抵の場合、最初に湧き起こる衝動とは、信頼している指導者の衝動に従う。こうした現象こそ、最も強固に確立された群集心理の原則の一つである。」 Trotter and Le Bon concluded that the group mind does not *think* in the strict sense of the word. In place of thoughts it has impulses, habits, and emotions. In making up its mind, its first impulse is usually to follow the example of a trusted leader. This is one of the most firmly established principles of mass psychology. (Edward Bernays)

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

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長年の経験が示すところでは、権力者は誰でも権力を濫用する傾向がある。彼は限界を自ら認識するまで権力を濫用する。… utmost limit. . . . To prevent the abuse of power, it is necessary that . . . power should be a check to power.
権力濫用を防止するには、… 権力を権力で阻止する必要がある。 [C'est une expérience éternelle, que tout homme qui a du pouvoir est porté à en abuser ; il va jusqu'à ce qu'il trouve des limites. . . . Pour qu'on ne puisse abuser du pouvoir, il faut que . . . le pouvoir arrête le pouvoir.] (Montesquieu)

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君の明らかなる所以(ユエン)の者は、兼聴(ケンチョウ)すればなり。 The enlightened ruler listens to both sides of conflicting suggestions; heed only one side, the ruler will be benighted.
その暗き所以の者は、偏信(ヘンシン)すればなり。 (呉兢) [君之所以明者、兼聴也。共所以暗者、偏信也。] (Wú Jīng, a Tang dynasty historian/吳兢)

外交・安全保障: Diplomacy and National Security—Conferences, Workshops and Seminars

- January 27: (Cambridge, UK) Centre for Geopolitics (CFG), University of Cambridge: “War and Diplomacy in an Age of Disorder: Options for Japan and the United Kingdom.”
- January 28: (an online event, Washington, D.C.) Center for Strategic and International Studies (CSIS): “Understanding Global South Perspectives on Taiwan.”
- January 28: (Washington, D.C.) Center for a New American Security (CNAS): “U.S. Defense at an Inflection Point: The 2026 National Defense Strategy.”
- February 11: (Washington, D.C.) US Congress, House Select Committee on Strategic Competition between the United States and Chinese Communist Party: Hearing on “Lies, Lawfare, and Leverage: The CCP’s gaslighting and Manipulation to Marginalize Taiwan.”
- February 13–15: (Munich) Stiftung Münchner Sicherheitskonferenz: “Munich Security Conference 2026 (MSC 2026).”
- February 24: (Washington, D.C.) United States Congress: “President Donald Trump’s State of the Union.”
- February 26: (an online event, Washington, D.C.) Peterson Institute for International Economics (PIIE): “Will Europe Ever Get Its Defense Act Together?”

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

No. 203 (March 2026)

「支配者と支配階級の変質」こそが、歴史的に The degeneration of the ruler and of the ruling classes has been the cause of all the great disorders in history!
みて壊滅的秩序崩壊の原因である。(ニーチェ) [Die Entartung der Herrscher und der herrschenden Stände hat den größten Unfug in der Geschichte gestiftet!] (Friedrich Nietzsche)

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Event: February 24: (Brussels) Bruegel: "Financing Innovative Ventures in Europe: Closing the Scale-Up Gap: What Are the Policy Solutions to Help New European Companies Thrive?"
Event: February 25: (an online event, Washington, D.C.) Brookings Institution: "AI + Work: Building Pro-Worker AI."

3. 編集後記

NHK の 2 月の TV 番組「100 分 de 名著」がヤスパース先生の『哲学入門』だと知って喜んだ。

ヤスパース先生は最も尊敬する哲学者の一人だ。ナチ政権下のハイデルベルグでユダヤ人の妻と死を覚悟した先生は逮捕される直前、幸運にも米軍が街を占領したために戦後まで生き延びる事が出来た。先生の言葉は難解だが、語り口はとてもやさしい。『哲学入門』の中で先生は語る:

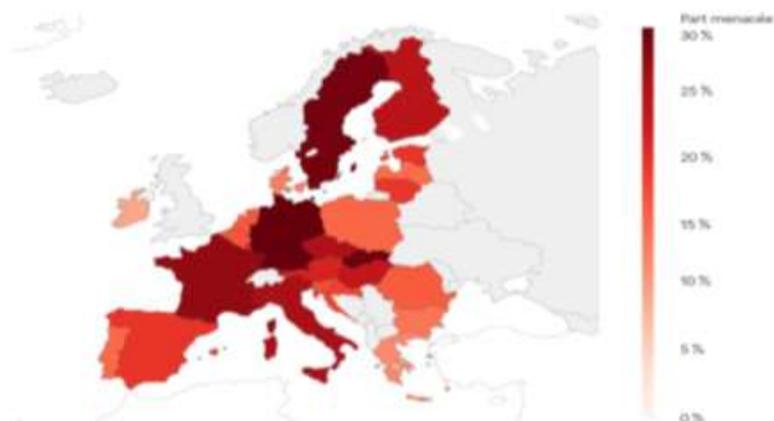
人間として誰もが哲学をします。… 自分はいかにして生きるべきか? その答えは自分自身だけでしか発見出来ません(Jeder Mensch als Mensch philosophiert. ... Wie will ich leben? Die Antwort kann nur ein jeder für sich selbst finden.)

魅力的なヤスパース先生の品性と知性! 友人で偉大な哲学者のハイデッガー先生がナチ政権に傾いた時、静かに彼は警告を伝えた(ハイデッガー先生は残念だがナチ政権に魅力に囚われてしまった)。またハンナ・アーレントが元親衛隊幹部のアドルフ・アイヒマンの裁判に関して論じた著書(『エルサレムのアイヒマン(Eichmann in Jerusalem: A Report on the Banality of Evil)』)を著した時、ユダヤ人社会や知識人から手厳しく批判された。“知の巨人”アイザイア・バーリンさえも冷静さを失い、心無い発言を彼女に投げかけた。こうした中、ヤスパース先生は彼女を優しく慰めている。

深い霧の中に迷い込んだ世界において、今一人ひとりが静かに“哲学する”時を迎えているのだ。 以上

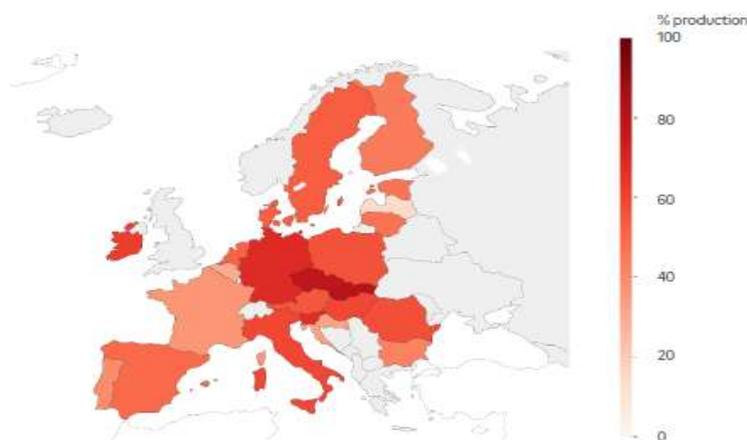
(編集責任者) 栗原 潤	Jun KURIHARA
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過去の Cambridge Gazette はネット上で見ることが出来、ダウンロードも出来ます。ネット上でキャンングローバル戦略研究所のウェブサイトに行き、そこで栗原のコラム・論文の欄をクリックして頂ければ、バックナンバー全てを見ることが出来ます。	

Figure 1 Share of European Exports Threatened by Chinese Competition (%)
(Carte 1 Part des exportations européennes menacée par la concurrence chinoise (en %))
図 1 欧州各国の輸出の中で中国との競争に脅かされる割合 (%)



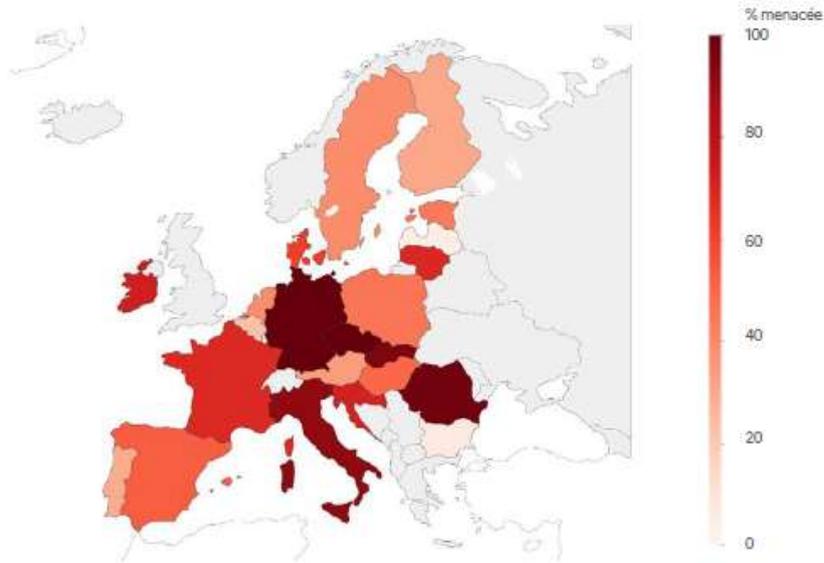
Note: Sectoral threats, identified when at least two indicators exceed the alert threshold (see Appendix 2), are aggregated at the country level. Source: BACI, authors' calculations.
(Note : Les menaces sectorielles, identifiées lorsqu'au moins deux indicateurs dépassent le seuil d'alerte (voir Annexe 2), sont agrégées au niveau de chaque pays. Source : BACI, calculs des auteurs).
Source: French Government, Haut-Commissariat à la Stratégie et au Plan (HCSP), «L'industrie européenne face au rouleau compresseur chinois», Paris, February 9, 2026, p. 28.

Figure 2 Share of Manufacturing Output Potentially Threatened by Chinese Imports, by European Country (%)
(Carte 2 Part de la production manufacturière potentiellement menacée par les importations chinoises, par pays européen (en %))
図 2 欧州各国の製造業が中国からの輸入により潜在的に減少する割合 (%)



Note: Sectoral threats, identified when at least two indicators exceed the alert threshold, are aggregated at the country level. See Annex 3 for a detailed presentation of the indicators used. Source: Eurostat and BACI, authors' calculations.
(Note : Note : Les menaces sectorielles, identifiées lorsqu'au moins deux indicateurs dépassent le seuil d'alerte, sont agrégées au niveau de chaque pays. Voir Annexe 3 pour une présentation détaillée des indicateurs retenus. Source : Eurostat et BACI, calculs des auteurs).
Source: French Government, Haut-Commissariat à la Stratégie et au Plan (HCSP), «L'industrie européenne face au rouleau compresseur chinois», Paris, February 9, 2026, p. 30.

Figure 3 Share of Comparative Advantages Threatened by European Country
 (Carte 3 Part des avantages comparatifs menacée par pays européen (en %))
 図 3 欧州各国経済の中国に対する比較優位が脅かされる割合 (%)



Note: The map represents, for each European country, the share of revealed comparative advantages exposed to strong Chinese competition, as identified using the internal market approach. This share is measured by the percentage of manufacturing output corresponding to the country's ten main revealed comparative advantages, for which at least two indicators of Chinese competition exceed the alert threshold (see Annex 3). Source: BACI, authors' calculations.
 (Note: La carte représente, pour chaque pays européen, la part des avantages comparatifs révélés exposée à une concurrence chinoise forte, telle qu'identifiée à partir de l'approche fondée sur le marché intérieur. Cette part est mesurée par le pourcentage de la production manufacturière correspondant aux dix principaux avantages comparatifs révélés du pays, pour lesquels au moins deux indicateurs de concurrence chinoise dépassent le seuil d'alerte (voir Annexe 3). Source : Eurostat et BACI, calculs des auteurs).
 Source: French Government, Haut-Commissariat à la Stratégie et au Plan (HCSP), «L'industrie européenne face au rouleau compresseur chinois», Paris, February 9, 2026, p. 32.