

# 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206号 (2026年6月)

キャン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206号

### 英国労働安全衛生庁(HSE)の幹部が来日した際、協調安全(collaborative safety)について意見交換をした。

先月、労働者の安全・健康・福祉、更には公衆の安全に関する英国の規制機関である労働安全衛生庁(Health and Safety Executive (HSE))の幹部が来日した。筆者は彼等と共に5月13日、日本の労働安全に関する現場を訪問し、翌日弊所(CIGS)で国際シンポジウムを開催した。

現場訪問では、山梨県忍野村に在るファナック本社及び工場、そして東京都江東区に在る清水建設歴史資料館(NOVARE Archives)を訪れ、AI・Robotics 関連の協調安全に向けた両社の方針を聞き、実際の作業現場の様子を見学した。それぞれ2時間半を超える訪問であったが、まさしく“アツ”という間の密度の濃い訪問だった。日頃、専門家との意見交換だけで deskwork に浸りっぱなしの筆者としては、実り多い現場見学となった。また翌14日、弊所の会議室において、筆者が理事を務める一般社団法人セーフティグローバル推進機構(IGSAP)主催の国際シンポジウムを開催した(“Safety Evolves – UK Trends and Collaborative Safety/安全は進化する — 英国の潮流と協調安全”。

シンポジウムの様子と内容は、近日中に IGSAP 及び CIGS の website で見る事が可能になる。関心の有る読者は是非ともご覧頂きたい。主な内容としては次の通り。現在、「AI・Robotics の社会実装に向けて、いかなる制度的・組織的変革及び法的規制をする必要があるのか」に関して、主要先進国で様々な議論がなされている。特に協働ロボットが急速に発展する中で、人とロボットが近接して作業する場合の安全性、すなわち協調安全(Collaborative Safety)の重要性が高まっている。こうした中で、イノベーション活動を推進するという新しい形の安全規制や、新興技術への対応のあり方を検討している HSE の説明を受けるとともに、“日本発”の安全概念である協調安全(IEC Guide 127)を踏まえた議論及びパネルディスカッションを行った。日英の優れた登壇者の発言を聞き、多くを学ぶ事が出来た。ただ、筆者としては、時間的な制約から、次の問題を議論出来なかった事が残念だった。即ち AI に強い英国と Robotics に強い日本はいかなる形の協力・補完関係を築く事が出来るのか。激しい米中間の技術競争の狭間に置かれた日英両国が採るべき strategic options に関し意見交換をしたかった(当然の事として、日本企業は米国企業との協力関係を築いている。例えば、PDF 版2の FANUC や Kawasaki Robotics の戦略的技術提携を参照)。ただ HSE 幹部とは、シンポジウム後の宴席で、今後継続して意見交換をする事で意見が一致したので大変喜んでいる。

## 4月27日に開催された Harvard での hybrid event に参加した。

4月27日午後(日本時間早朝)、筆者は Harvard Kennedy School (HKS) で開催された会合に日本から参加した(小誌前号2の“Professor Tony Saich Retirement Panel Discussion: State, Society, and Governance in Modern China: Institutions, Legitimacy, and Legacy”を参照)。

筆者は online で懐かしい知人・友人達が参加・発言する様子を眺めていた。その中には以前弊所で講演をお願いした人々がいる(経済学講師の Jay Rosengard 氏、中国専門家の Edward Cunningham 氏、倫理学の専門家 Kenneth Winston 氏)。また懐かしい人々も登壇している(Law School の William Alford 教授、中国専門家 Elizabeth Perry 教授や William Kirby 教授、そして Alastair Iain Johnston 教授、更には Business School の Meg Rithmire 教授)。最後の発言者は HKS の重鎮 Graham Allison 教授だ。筆者は online 参加のために、残念ながら cocktail time に参加出来なかったが、その時の様子を7月に来日予定の Saich 教授から、また来年1月来日予定の Rosengard 氏から聞く事を楽しみにしている。

## 米国製造業が変貌しつつある。だが、その実態は綿密に観察しないと、本質を見失うかも知れない。

5月21日、McKinsey Global Institute (MGI)が米国製造業に関する報告書を公表した(“Ramping Up Manufacturing in America?” PDF 版2参照)。報告書は、米国の製造業を強化する場合に①いかなる基準で、②いかなる分野を強化すべきか、に関して議論している。同書は製造品の輸入金額(2025年、3兆ドル)に関し、①の基準に次の3つを選択した—(a)重要性(critical)、(b)輸入先の集中度(concentrated)、(c)地政学的距離(geopolitically distant)。(a)(b)(c)のどれか一つに該当する製品は輸入全体の71%を占め、2つ或いは3つの基準に該当する製品は25%を占め、3つの基準全てに該当する製品は、Smartphones, Laptops, Rare earths で7%を占めた。分野別では electronics 製品の輸入依存率が最も高い。そして②の強化すべき分野に関して、供給増の可能性という視点で観ると輸送機械が最も有力との事であった。但し、米国製造業は分野、業種、企業において多様性が著しく、画一的な方策(a one-size-fit-all approach)で対策を講じられない事を述べている(MGI の資料に関連して小誌前号の *Wall Street Journal* 紙の4月18日付記事“America Is in the Middle of a Stealth Manufacturing Boom”も参照された)。また米国の学術機関である全米アカデミー(NASEM)も、14日に報告書を公表した(“A Vision for the Manufacturing USA Program in 2030 and 2035”、PDF 版2参照)。

現在、世界中が製造業に高い関心を抱いている背景には、地政学的分断と日進月歩の技術進歩がある。しかも、震源地は中国である事は言を待たない。それも先進諸国だけでなく新興工業国にまで“Made in China”が押し寄せている(PDF 版2の米 think tank (PIIE)の5月11日付資料や英 *The Economist* 誌の5月21日付記事を参照)。翻って、中国の経済専門家(于飛(Yu Fei)氏と郭凱(Guo Kai)氏)は、自信に満ちた資料を公表している(“Why Chinese Manufacturing Appears to Compete with All Countries; 為何中国制造业看上去在与所有国家竞争”、PDF 版2を参照)。

かくして世界中が“新たな産業政策”に取りつかれているのだ。そして友人達と PDF 版2に示した次の様な文献資料について議論した。

①IMF 公表の“A New Wave of Industrial Policy in Asia-Pacific: Could Resurgence Lead to Structural Transformation?”、そして②米国商工会議所にロジウムグループが提出した“China's Next Generation Industrial Policy”、更には③*Wall Street Journal* 紙5月15日付記事“Beijing's 'Industrial Policy of Everything' Leaves Rest of the World in the Dust” 日本語版: 全産業を支配する中国戦略、世界を凌駕”。

また innovation policy として、5月22日に OECD が発表した“Business Innovation Statistics”を見ながら、innovation に積極的な企業の割合と経済パフォーマンスの OECD 加盟国間の差に関して友人達と議論した(PDF 版の図1-3参照)。更には national security policy として、IMF が5月28日に発表した“Industrial Policy Is Adapting to Crises, but Remains Hard to Implement Effectively”についても意見交換した(PDF 版の図4参照)。

筆者の恩師で MIT Institute Professor の Suzanne Berger 教授は、MIT Initiative for New Manufacturing (INM)の co-director を務めておられる(小誌前号2の *MIT Technology Reviews* 誌、“A Boost for Manufacturing”を参照)。教授に対して、筆者が6月から大阪大学産業科学研究所戦略室の客員教授を兼務する事を伝えた。今後、教授との意見交換を通じ、阪大と MIT との関係を強化する事に貢献したいと考えている。

哲学が灰色に灰色を重ねて描く時、或る一つの生の形態 When philosophy paints its grey in grey, a shape of life has grown old, and it cannot be rejuvenated, but only recognized, by the grey in grey of philosophy; the owl of Minerva begins its flight only with the onset of dusk. (即ち或る時代の制度や組織等)は既に老いており、しかも grey in grey of philosophy; the owl of Minerva begins its flight only with the onset of dusk. その形態は、その描かれた灰色によって若返る事はなく、 [Wenn die Philosophie ihr Grau in Grau malt, dann ist eine Gestalt des Lebens alt geworden, und mit Grau in Grau läßt sie sich nicht nur verjüngen, sondern nur erkennen; die Eule der Minerva beginnt erst mit der einbrechenden Dämmerung ihren Flug.] ただ理解されるだけである。ミネルヴァの梟は、黄昏時に verjüngen, sondern nur erkennen; die Eule der Minerva beginnt erst mit der einbrechenden Dämmerung ihren Flug.] になって初めて飛び始めるのだ。(ヘーゲル) (Georg Wilhelm Friedrich Hegel)

### ウクライナ戦争は、露大統領が語るように本当に終結に向かっていているのだろうか。

ロシアは5月9日、モスクワ赤の広場で戦勝記念パレード(Парад Победы на Красной площади)を行った。プーチン大統領は演説の中で、「大祖国戦争の世代が達成した偉業は、現在の特別軍事作戦における将兵を鼓舞している。彼等はNATOが支援する敵と戦い、我等の勇士は前進している(Великий подвиг поколения победителей вдохновляет воинов, выполняющих сегодня задачи специальной военной операции. Они противостоят агрессивной силе, которая вооружается и поддерживается всем блоком НАТО. И несмотря на это, наши герои идут вперед)」と語った。また、前日の演説で戦争は「終結に向かう(идет к завершению)」と述べた。しかしながら、巷間、ウクライナ側の優勢が報じられるために、戦争終結に向かっていているとは思えない。こうした中、露メディア(TACC)は5月25日、「露外務省は、外国人に対しキーウを離れる行動を、また市民にはキーウの軍事施設を避ける行動を勧告(МИД РФ рекомендует иностранцам как можно скорее покинуть Киев; Жителей города призвали не приближаться к военным объектам)」と伝えた。そして独メディア(Frankfurter Allgemeine Zeitung 紙)も、5月22日に「行き着く先は対露戦争(„Wir werden in einem Krieg mit Russland landen“) という表題で、我々の不安をかきたてるような記事を掲載している(PDF版2を参照)。

### 戦争で飛躍的發展を遂げる軍民両用技術の AI・Robotics。だが、平和利用の側面も重視すべきでは？

悲惨な殺戮が続く中、軍民両用技術(DUT)であるドローンの進歩が著しい。筆者は今、専門家達と多くのドローン技術関連資料に関し、意見交換を続けている(例えばPDF版2の本(Lessons from Drone Wars)を参照)。話は逸れるが、英語に詳しい人ならご存知の通り、drone(には、“雄の蜜蜂”や“ダラダラした怠け者”という意味もある。例えば、哲学者のカント大先生は、著書『純粋理性批判(Kritik der reinen Vernunft)』を批判した人達を念頭にした本『プロレゴメナ(Prolegomena)』の冒頭、彼等を“怠け者のdrone”と皮肉り、古代ローマの詩人ウェルギリウスの詩の一節を引用した—「蜜蜂達は怠惰な雄蜂の群れを巣から追い払う(ignavum, fucus, pecus a praesepibus arcent; Bees are defending their hives against drones, those indolent creatures)」。昔と異なり、現代のdronesは極めて敏捷で、残酷な雄蜂と善良な雄蜂が混在しているのである。

ウクライナ戦争でAI・Roboticsが大活躍である。小誌前号でCNNが4月20日に報じた記事“Robots Don't Bleed: Ukraine Sends Machines into the Battlefield in Place of Human Soldiers”を読むと複雑な心境に陥る。またこれに関して、Military Times 紙の4月25日付記事“Ukraine to Field 25,000 Ground Robots in Push to Replace Soldiers for Frontline Logistics”も参考になる。ただ、我々としてはAI・Roboticsの平和利用に関心がある。即ち小誌の冒頭で記したように安全・健康・ウェルビーイング(Safety, Health & Well-being (SHW))を目指した形でのAI・Roboticsの発展だ。従って、軍事面での技術進歩を常時観察しながら、平和利用の分野で実装化・実用化の方策を友人達と考えてゆくつもりである。

Robotics 専門家、ジョナサン・ハースト Oregon 州立大学教授は、Agility Robotics 社の共同創業者で Chief Robot Officer を務め、Oregon State University Robot Institute の共同設立者でもある。現在、Agility Robotics の humanoid robot (Digit)は、Amazon の Seattle に在る施設や Toyota のカナダ Ontario 州に在る工場で試用されている。教授は5月20日にIEEE Spectrum 誌に小論を載せた(“Will Robotics Have a ChatGPT Moment? A Single Breakthrough AI Moment in Robotics May Not Be the Answer”, PDF版2参照)。

教授は ChatGPT を契機として爆発的に発達した AI とは異なった形の Robotics の発達を予想している。彼は自律型の AI-powered robots の爆発的發展を確信して、今後の Robotics の発達を a “Cambrian explosion” of useful, intelligent machines と呼んだ。“カンブリア爆発”とは、約5億4千万年前、動物の基本構造を持つ生物が爆発的に海中に出現した現象だ。筆者と同じ cautious optimism のハースト教授は、humanoid robots に関して、今尚存在する「見込みと現実の間の大きな隔り(a big gap between promise and reality)」を指摘する。そして5つの問題を指摘した—①「YouTube 上の動画と現実の隔り(The YouTube-to-Reality Gap Is Real)」。彼は小誌3月号の冒頭で触れた中国の Uniree 製 G1 robots による kung fu (功夫) dance に触れた。この dance は全ての動きが事前振り付けられ入念に計画されたものだ。教訓は「絶対に YouTube の robot video を信じるな(never trust a YouTube robot video)」と彼は語った。②「必要とするデータに関する問題(Data Is An Unsolved Challenge)」。人の複雑な動きを模する humanoid robots に必要なデータ収集は不可能に近い。③「万能 robot など出来ない(There Will Be No Single Robot AI)」。即ち general purpose robot は不可能。The physical world is infinitely varied and complex. ④「ハードウェアは今尚難しい(Hardware Is Still Very Hard)」、⑤「ロボットの真価は簡単な作業(Real Value Comes From “Easy” Tasks)」。即ちモラベック(Moravec)の paradox が教える通り、人にとって困難な仕事を AI や robots が行い、人にとって容易な行動は AI や robots が出来ない。以上が5つの問題である。

### ドイツにおける政治の極右化が気になる。しかもドイツだけでなく、英仏伊等の欧州諸国にも…。

独公共放送(Die Tagesschau)が5月7日に報じた世論調査結果は衝撃的である(AfD ist Hauptprofiteur der Unzufriedenheit: 仮訳: 極右政党の AfD が(棚ぼた的に)人々の不満の主要な受け皿に)。AfD 支持派が初めて CDU/CSU を凌いだ理由とは、政府の行動が「遥かに弱く、遥かに遅く、力強さに欠く(viel zu langsam, viel zu langsam und nicht kraftvoll genug)」からだ。しからば、CDU/CSU の劣勢を反転するため、政府が「強く、速く、力を込めて」行動し、経済・移民問題を解決出来るのか、とドイツの友人達に問うと、彼等は「無理(unmöglich)」だと言う。代替案として、人々を説得する策を探ってみても妙案は出てこない。筆者は Berlin のシュテファン・マウ Humboldt 大学教授の本を引用し、政治的啓蒙の難しさや苦境に陥った人々の頑固さを友人達に伝えた (Ungleich vereint: Warum der Osten anders bleibt, 2024年6月)。

(ハーバマス先生が注意した通り)怒れる市民を“真綿で”包み、臨陣医或いは social worker の如き理解力で市民に接してはダメだ。また有権者は、自ら批判される時、耳を貸そうとしない。AfD 支持者にはこれが一段とよく当てはまる。何故なら、“エリート・カルテル”や“国家メディア”に対抗し、自己主張する自分達こそが“民主主義の擁護者”で、“silent majority”と考えているからだ。

(Man sollte Wutbürger nicht “in Watte” packen (Jürgen Habermas) und ihnen mit therapeutischem oder sozialarbeiterischen Verständnis begegnen. Gleichzeitig hören Wählerinnen und Wähler es nicht gern, wenn man sie kritisiert. Für die AfD-Anhängerschaft gilt das umso mehr, sieht sie sich doch als “Verteidigerin der Demokratie” und als “schweigende Mehrheit”, die sich gegen das “Elitenkartell” und die “Staatsmedien” zu behaupten versucht. Setzt man hier auf Abgrenzung und harte Kritik, können Menschen in diesem Lager gleichsam festgezurrt werden.)

我々は欧州政治にも注意を払う必要に迫られている。フランスの詩人・評論家であるポール・ヴァレリーは1931年、「注目すべき事に、今日、独裁制は自由が嘗てそうであったように、伝染性を持っている(Il est remarquable que la dictature soit à présent contagieuse, comme le fut jadis la liberté)」と語った。今の英仏伊—Reform UK, Rassemblement national (RN), Fratelli d'Italia (FdI)—を見ると1931年の欧州を思い出ししてしまう。

### 先月も数冊の良書を巡り、友人達と意見交換した。

先月は新刊書に関して友人達と意見を交換した。例えば①経済構造に関する Steering Structural Change (May)、②米国政治史の Theodore Roosevelt and the Tennis Cabinet (May)、③台湾問題の Defending Taiwan (April)、④軍民両用技術の Lessons from Drone Wars (March)、⑤戦史の Tojo: The Rise and Fall of Japan's Most Controversial World War II General (March)、⑥貿易政策の How to Win a Trade War (May)、⑦AI 関連の The Infinity Machine (March)、⑧Robotics 関連の Robot-Proof (March)、⑨Apple 社の動向を記した Apple in China (May)だ(小誌の先月号・今月号の2参照)。

筆者の悪癖である“積読(ツンドク)”の中の一冊が、小誌4月号で触れた哲学者の故ハーバマス先生の著書だ。その邦訳が奇しくも3月に岩波書店から、また英訳が2月に出版された(Jürgen Habermas: „Es musste etwas besser werden...“; 『ハーバマス回想録: この世界が少しでも良くなるには…』; Jürgen Habermas: Things Needed to Get Better)。同書の中で最も印象に残った文章は次の通り—「ドイツの哲学は、1933年以降の亡命による瀉血(シャケツ)(大量の頭脳流出)から、また、ナチ時代の道徳的・精神的な墮落から決して立ち直ってないです(In Deutschland hat sich unsere Philosophie vom Adersalz der Emigration seit 1933 und überhaupt von der moralisch-geistigen Korruption der Nazizeit nicht mehr erholt)」。この文章を読んで、今筆者は日本の「戦後」を再吟味したいと考えている。

夫れ呉人と越人と相悪(にく)むも、其の舟を同じくして The men of Wu and the men of Yue are enemies; yet if they are crossing a river in the same boat and are caught by a storm, they  
濟(わた)りて風に遇うに当たりては、其の相救うや、左右 will come to each other's assistance just as the left hand helps the right.  
の手の如し。 (『孫子』) [夫吳人與越人相惡也、當其同舟濟而遇風、其相救也如左右手。] (Sūnzi/Sun Tzu; 孫子)

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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鳥の行動形態は、飛翔、求愛、雛鳥の哺育、巣作りの様に複雑であるが、Complicated as the behavior patterns of birds are—in flying, in courtship, in the care of the young, and in nest building—they are carried out correctly the very first time without the need of any large amount of instruction from the mother. . . . Can man-made machines learn and can they reproduce themselves? We shall try to show . . . 鳥は最初から母鳥に詳しく教えてもらう事なく、こうした行動を確実に行う。 . . . 機械も学習し、繁殖する事が出来る事を出来るだろうか。機械も学習し、繁殖する事が出来る事を示そう。(ノーバート・ウィーナー) that in fact they can learn and can reproduce themselves. (Norbert Wiener)

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ヒトがいなければ何事も達成出来ない。だが、制度・組織なしでは何事も続かない。 Nothing is possible without men, but nothing lasts without institutions.  
(ジャン・モネ) [Rien n'est possible sans les hommes, rien n'est durable sans les institutions.] (Jean Monnet)

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- May 18: (Brussels) Bruegel: "How Resilient Is China? Managing Political and Economic Vulnerability: Managing Political and Economic Vulnerabilities in a Fractured Geopolitical Environment."

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徳は心の持(もち)前也。人々天より自然と生まれつきたる Virtue (徳) is the basic nature of the human spirit. Human beings are endowed by Heaven at birth with a virtuous essence, 仁義禮智の徳性と云(いふ)ものありて、 大學に是(これ)を consisting of benevolence (仁), righteousness (義), propriety (禮) and wisdom (智). In the classic of the *Great Learning* (『大學』), 明德と云(いひ)、中庸に是を天命の性と云(いふ)。…此(この) this is referred to as clear virtue (明德); in the *Doctrine of the Mean* (『中庸』) as Heaven's imperative (天命の性)。… With the 仁の徳を以て物を親愛し、義の徳を以て事の宜(よろ)しきを virtue (徳) of benevolence (仁), things are empathized with genuine feeling; with righteousness (義) the validity of a fact is 處置し、禮の徳を以て恭敬を尊(もつばら)とし、 智の徳を determined; with propriety (禮) there is deep reverence; with wisdom (智) moral imperatives are seen clearly. 以て是非を明(あきら)かにす。(中井竹山) (NAKAI Chikuzan, a Japanese Confucian scholar of the *Kaitokudo* (懷徳堂) Merchant Academy in Osaka)

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### 3. 編集後記

AI・Robotics の社会実装・事業化に向けた制度・組織のあり方に関し、意見交換を進めてゆきたい。

小誌の冒頭で記した山梨訪問のための車中で、国際標準化戦略の専門家である藤田俊弘氏と議論を楽しんだ。彼に依れば「日本企業は、製品の技術戦略に専念して、製品規格の国際化戦略に関心を持たない」と語った。この事を日本人に分かり易く説明するために、同氏はゴルフの話になぞらえて語るらしい。即ち日本人は自らのテクニックを磨く事に専念する。他方、外国人はテクニックを磨くと同時にゴルフ・コースの設計にも留意する。そして有利な形でバンカーや池を配置し、自らの優位性を高めようとする。このように説明すれば、聴き手の理解力が更に高まるらしい。確かに、運動選手は自らの実力のみならず競技のルール変更にも注意しなくてはならない。ビジネスも結局同じである。

我々は“Made in Japan”・“Made by Japan”と同時に“Standards Set by Japan”にも知恵を働かせなくてはならない。以上

(編集責任者) 栗原 潤 キヤノ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 <i>Cambridge Gazette</i> はネット上で見ることが出来、ダウンロードも出来ます。ネット上でキヤ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。	

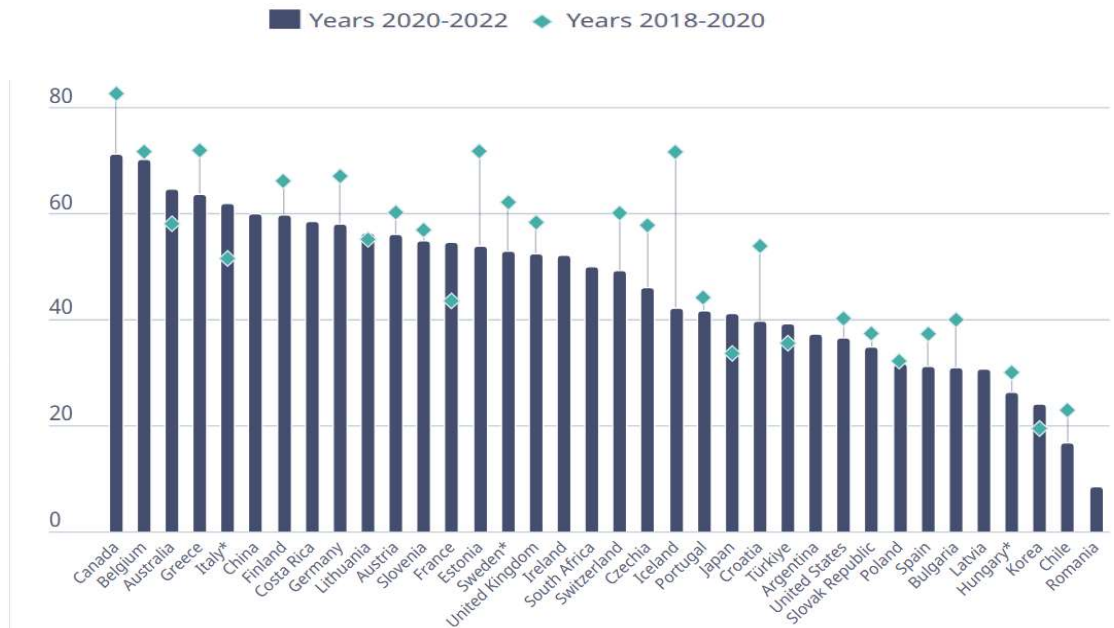
Appendix 1/付属資料 1

Figure 1 Innovative and Innovation-Active Enterprises (Percentage of All Enterprises)  
 図 1 イノベーションに積極的な企業の比率 (全産業)



Note: Countries with asterisk have a break between years 2018-2020 and years 2020-2022.  
 Source: Organisation for Economic Co-operation and Development (OECD), "OECD Business Innovation Statistics Database," April 2026, <http://oe.cd/inno-stats>, Retrieved May 2026.

Figure 2 Innovative and Innovation-Active Enterprises (Manufacturing Sector (ISIC Rev. 4 C))  
 図 2 イノベーションに積極的な企業の比率 (製造業)

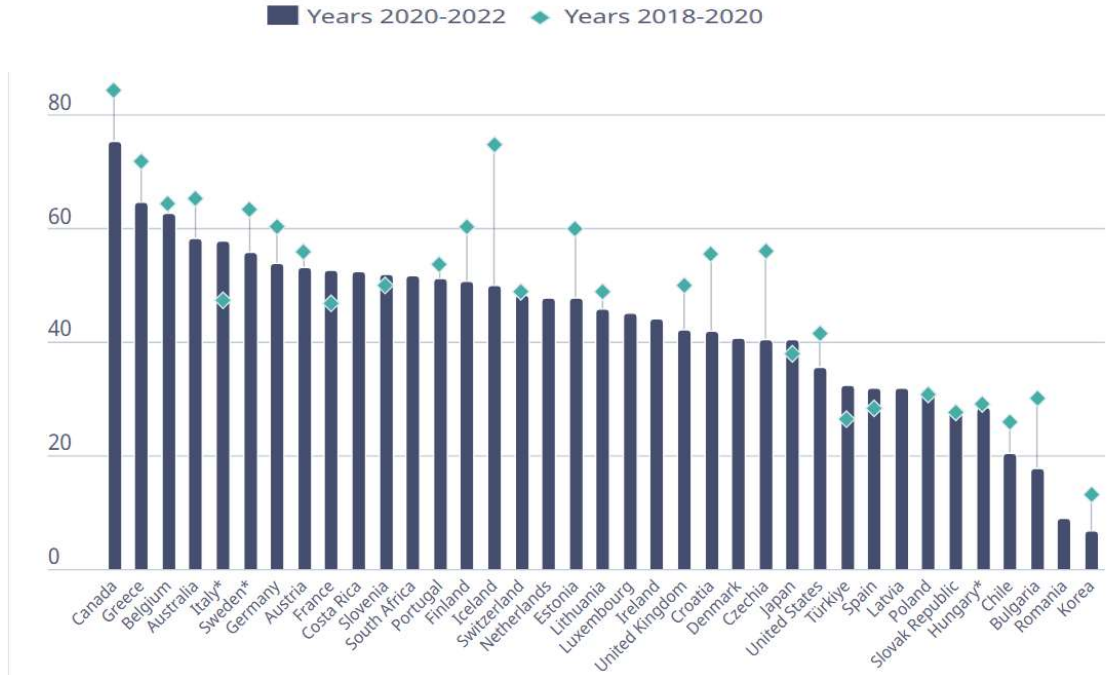


Note: Countries with asterisk have a break between years 2018-2020 and years 2020-2022.  
 Source: Organisation for Economic Co-operation and Development (OECD), "OECD Business Innovation Statistics Database," April 2026, <http://oe.cd/inno-stats>, Retrieved May 2026.

Appendix 1 (Coninued)/付属資料 1 (続き)

Figure 3 Innovative and Innovation-Active Enterprises (Services Sector (ISIC Rev. 4 G46-H-J-K and M71 to M73))

図 3 イノベーションに積極的な企業の比率 (サービス業)

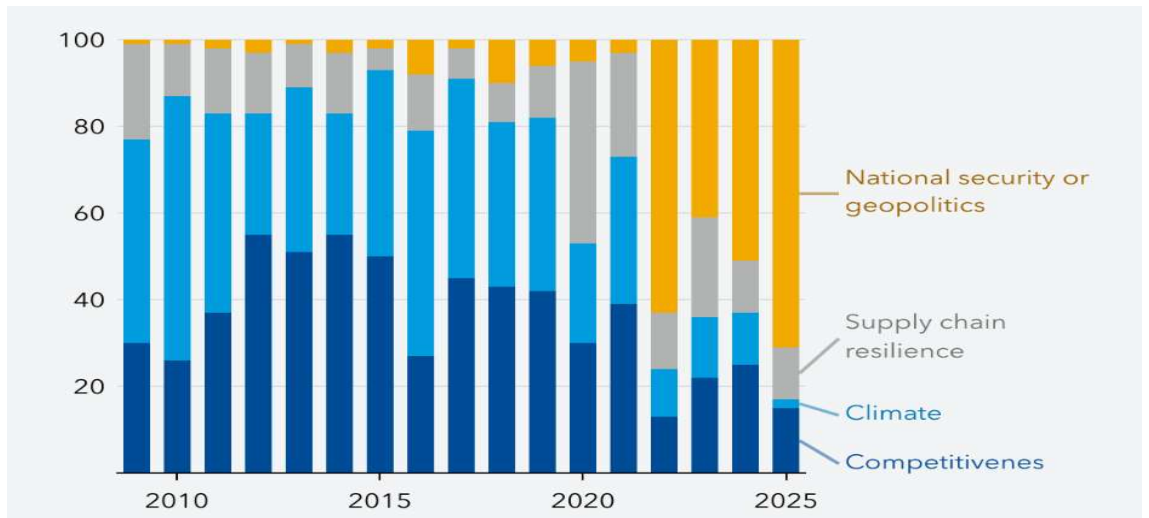


Note: Countries with asterisk have a break between years 2018-2020 and years 2020-2022.  
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Appendix 2/付属資料 2

Figure 4 Percent of Trade-Distortive Measures with Identified Motive

図 4 貿易構造を歪めさせる目的別の産業政策



Source: Jakubik, Adam *et al.*, "Industrial Policy Is Adapting to Crises, but Remains Hard to Implement Effectively," *Blog*, Washington, D.C.: International Monetary Fund (IMF), May 28, 2026.