

# 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 207 号 (2026 年 7 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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### 1. *Tokyo-Cambridge Gazette*: グローバル戦略編第 207 号

米中両国を中心とする Physical AI/Embodied AI に関して内外の友人達と議論をした。

6 月 5 日、『週刊エコノミスト』誌が、「ロボット技術は弱くない日本が AI は負けていた」と題し、尾形哲也早稲田大学教授に対する interview 記事を掲載した。教授は、「必ずしも『勝つ』必要はない。置いていかれないことが大事」と述べられ、「米中との差は簡単には埋まらないが、遅れず、ついていくことが大切」と語られている。その直前の 5 月 28 日、中国の「新浪财经」紙は、BYD 社が robots 販売を計画している事に関し李柯執行副総裁に対する interview 記事を掲載した。李柯氏は「中国の robot は brain (AI) が弱く、米国の robot は brain が発達しているが、手足が弱い(中国的机器人就是缺一个大脑, 那美国的机器人发发达但四肢不发达)」と述べ、中国が robot の lead market となる事を予言した。またこれに関して、『Forbes』誌は 6 月 12 日付記事で注目する企業を 11 社挙げたが、残念な事に全て米中企業ばかりである(PDF 版 2 参照)。尾形教授が示唆した通り、我々は激しい開発競争を繰り広げている米中両国に遅れる事なく、独自の開発を進めなくてはならない。

また 6 月 5 日、OECD は調査資料“Policy Brief: AI and Skills: What We Know So Far”を公表した。資料は AI の技術的側面に注目するよりも、むしろ AI を使いこなす人の技能(skills)を注目する事の重要性を強調している。そして製造業や中小企業の従業員の AI 関連技能の習得が不可欠である事を記した。また AI 活用には digital 技術や data 分析に関した技能、更には問題解決や創出能力に関連した技能が重要で、このため一段と高度の教育訓練を受けた労働者が求められる事を記している。こうした状況の下、企業は労働者に対して retraining や upskilling を行う事が求められ、政府には AI に必要な技能の変化を観察し、その変化に対応した政策を考案するよう提言している。

資料は generative AI を導入した中小企業に関し国際比較を掲載している。労働不足や技能不足に対して AI が貢献していると回答した比率では、日本が最も高い。即ち AI の普及率を上げる日本の中小企業政策は、効果が期待出来るかも知れないのだ(PDF 版 2 の図 1 参照)。

黎明期にあるロボットには楽観と悲観、双方の見方が存在する。例えばシンガポールのメディア(*Straits Times* 紙)は 6 月 9 日、深圳の service robot を試した事に関した記事を掲載し、実用化は未だ先である事をほのめかした。翻って *Wall Street Journal* 紙の 6 月 11 日付記事は楽観的である(“House Robots Are Coming”)。また労働人口が減少に転じた中国がロボット開発に対する注力する姿を、*Financial Times* 紙が 6 月 24 日付記事(“Robot Nation: China Bets to Beats Its Demographic Decline”)で紹介している(PDF 版 2 参照)。

小誌で何度も強調している通り、AI・Robotics は軍民両用技術(DUTs)だ。これに関し 6 月 5 日、米国大統領府がメモランダム(NSPM-11)を発表した。米国は AI を安全保障上最も重要な技術であるとして、このために留意すべき政策方針を示した。これに関して、think tank の戦略国際問題研究所(CSIS)が 10 日に発表した小論が興味深い(“Defining Autonomy: Why Software, Not Drones, Will Decide the Next War”)。著者は、ウクライナ戦争の状況を観察した上で、多数の drone を統制的に制御する softwareこそ、将来、安全保障上最大の課題だと論じた。確かにその通りだが、欧州や中東での戦闘を見れば drones の活躍は否定出来ない。しかも米国も drones の開発に熱心に取り組んでいる(例えば PDF 版 2 の *Breaking Defense* 誌を参照)。筆者が注目したのは、ホルムズ海峡で撃墜されたヘリコプターの乗員を水上 drone(Unmanned Surface Vehicle (USV))が救出した事だ(PDF 版 2 の *Hill* 紙、“Helicopter Crew Rescued by Unmanned Navy Vessel near Strait of Hormuz”を参照)。

AI・Robotics の平和利用を推進するため、日本の技術者達が、この事例を参考にして海難救助等で救出・救命のための innovation を創出してもらいたいと願っている。

米中間の技術開発競争が激化する中、人材獲得競争も激しくなっている。両国間で歩み寄りの望みは…。

技術開発競争の激化で人材の国際的な交流・移動に変化が生じている。米国の技術的覇権を打ち崩すために、中国は国際的人材移動に神経を尖らせている(例えば中国の人材“困い込み”政策に関する米 think tank(SCSP)の“China's Top AI Talent Can't Leave the Country—Here's What Beijing Is Afraid of”や *Straits Times* 紙の“China's Tech Giants Dangle Annual Pay Packages from \$200K to \$500K to Woo S'pore Trained AI Grads”、PDF 版 2 参照)。

当然の事として、米国側も AI の情報・人材の中国への流出を警戒している。これに関し 6 月 15 日、Stanford 大学 Hoover Institution が、大変興味深い報告書を公表した(“Update: DeepSeek AI an the Great Talent Competition”)。報告書は DeepSeek 社の研究者について調べたものだ。同社は米国の研究者を脅かす程、才能豊かな人材を擁し、また人材の半数以上が海外経験を持たないという。こうした事態は、中国国内で高度な AI 人材育成体制が既に確立された事を示していると報告書は述べている(PDF 版 2 の図 2 参照)。

このように米中両国共に相手に対する警戒心を高める事こそすれ、信頼醸成に努めようという態勢を取っていない事が明らかである。筆者は友人達との議論の中で現況を表現する適切な言葉を、米国防情報局(DIA)の元高官が昨年著した本から引用した(*The Great Heist: China's Epic Campaign to Steel America's Secrets*, December)。その言葉とは、国家安全保障の専門家マット・ボッティンジャー氏の言葉である。即ち「米国の至宝(the crown jewel)である AI 関連技術を中国から守るには、バイデン政権の“小さな庭に高い塀(small yard with high fences)”という策では不十分で、“ブローニング M2 重機関銃で守られた壁(walls guarded by .50-caliber machine guns)”で守る」という対中不信任感が溢れる言葉だ。

地政学的に分断化した現状では、米中だけに注目しては「木を見て森を見ず」という状況になるが…。

国際情勢が深い霧に包まれている状況では、内外の友人達との頻繁な情報交換が不可欠だ。海外の友人達からの情報を基に整理して、自分らの世界観を日々確認している。こうした中、6 月 15 日、ドイツの友人達が独経済復活に関する論文集を公表したと伝えてきた(*Germanomics: Neue Antworten für Wachstum und Wohlstand*; 仮訳: 『ジャーマノミクス: 成長と繁栄への新たな解答』)。論文数は約 90 本。残念だが全て読解する事は不可能で、そうした制約下で友人達と議論したのは、①フラウンホーファー研究機構による innovation strategy (Innovationskraft entfesseln: Wie Deutschland sein Potential nutzen kann)、②Ifo 経済研究所による industrial policy (Moderne Industriepolitik zur Förderung von Innovationskraft und Anpassungsfähigkeit)、③独人工知能研究センター(DFKI)による AI Strategy (KI für Deutschland Agenda)、④ブリュッセルに在る think tank (Bruegel)による macroeconomic policy (Gemeinsame europäische Verschuldung: wie stark sind die Argumente?)だった。

強国(キョウコク)の之を得るや、小を収むるを以てし、之を失うや、  
強(つよ)きを持(た)のむを以てす。小国の之を得るや、節(セツ)を制する  
を以てし、之を失うや、強(つよ)きを離(はな)るるを以てす。  
(管仲)  
A strong state gains power by subduing the small; it loses power through reliance on its strength. A small state gains  
advantage through measured restraint; it loses ground when abandoning strong alliances.  
[強國得之也以收小、其失之也以恃強。小國得之也以制節、其失之也以離強。]  
(Guān Zhōng, a Chinese philosopher and politician during the Spring and Autumn period; 管仲)

## 前述の Germanomics に加え、Sanaenomics に関しても海外の友人達と議論する毎日だ。

日本の政治経済社会に関し、海外の友人達から様々な意見が届く。その中で特に変わっていたので笑った意見は、或るドイツの友人が、*Der Spiegel* 誌の昨年 10 月 4 日に掲載した高市首相に関する記事についての意見だった(„Die Eiseme Lady von Tokio“)。彼は、首相の「働いて働いて働いて働いてまいります(»Arbeiten, arbeiten, arbeiten, arbeiten, arbeiten«)」という発言に感動し、「メルツ独首相も日本の首相のように懸命に働き、leadership (Führung)を発揮してもらいたい」と語りかけた事だった。

筆者は「危機に直面するドイツは、アデナウアーの“宰相民主主義(Kanzlerdemokratie/Chancellor democracy)”の如く、強引な指導が必要」と応え、日本に関しては、吉川洋東京大学名誉教授が 5 月に刊行した本『日本—没落か再生か: 時代精神とアニマルスピリッツ』に触れて応えた。同書は、我々が豊かに暮らすには経済の健全性が不可欠として、MIT のサザンズ・バーガー教授等が著した *Made In America* (1989) の中の言葉—To live well, nation must produce well—に冒頭触れた。次いでシュンペーター先生の 1911 年にドイツ語で著した『経済発展の理論(Theorie der wirtschaftlichen Entwicklung)』中で論じた innovation に触れた(英訳版(*The Theory of Economic Development*))は、1926 年の第 2 版に基づき 1934 年に刊行された)。初版と第 2 版は大幅に異なり、筆者は 28 歳の若き innovative なシュンペーター先生が著した初版が大好きだ。

教授は、日米両国の“時代精神(Zeitgeist/spirit of the age)”の変化、“人の心”の変化を指摘している。米国では「マネーゲーム」化が進み、日本では“戦中派”の退場と同時に「リスクを取る」事が消失していったのだ。そこで教授はケインズ先生の次の有名な文章に触れている: 企業活動とは、「アニマル・スピリッツ、即ち不活動というよりも自然と湧き上がる衝動的行動の結果であり、数値化された利得に数値化された確率を乗じた加重平均の結果ではない(a result of animal spirits — of a spontaneous urge to action rather than inaction, and not as the outcome of a weighted average of quantitative benefits multiplied by quantitative probabilities)」であり、「企業の活動は、南極探検と殆ど大差ない程の正確さを有する将来の利益計算に基づくもの(Only a little more than an expedition to the South Pole, is it based on an exact calculation of benefits to come)」。

また教授は、SONY で Playstation を生んだ久夛良木健(くたらぎ・けん)氏の言葉にも触れているが、それは本当に印象的だ:

今の日本は、かつてのローマ帝国と同様「時計」が止まってしまっているのではないのでしょうか? それは「チャレンジしないサラリーマン経営者」たちの存在です。失敗を恐れて自ら決断しない、まだまだ何とかなると高をくくっているサラリーマン経営者たちに共通するのは「低いアンテナと高いプライド」。かつての幻影に囚われ、内向きの課題対応に追われるうちに、多様な可能性や、破壊的なイノベーションに触れるチャンスをみすみす逃しています。

また同書は、嬉しい事に筆者が大好きなサン＝テグジュペリの有名な言葉—肝心なものは目に見えない(L'essentiel est invisible pour les yeux)—にも触れている。そして後半には現在の日本の“時代精神”のより良き変化を期待し、オランダの歴史家ホイジンガの『中世の秋(Herfstij der Middeleeuwen/The Waning of the Middle Ages)』の最後の言葉に触れた:

“生活の調子”、人々の心が変わる時、初めてルネサンスが到来する(De Renaissance komteerst, wanneer de levensstoan verandert/The Renaissance comes first, when the tone of life changes)。

教授は、『淮南子』や『莊子』、夏目漱石や森鷗外、更にはニーチェにも言及している。読者諸兄姉も是非読んで頂きたい良書である。

## 6 月 17 日、オランダ訪問中の天皇陛下のスピーチが素晴らしい。

オランダ国王・王妃主催の晩餐会で、陛下は世界情勢を踏まえ思慮深い内容の演説をされた。宮内庁の website で観る事が可能である。日蘭両国の交流と世界における両国の役割について、ジョークを交えた品格の高い英語で語られた。

陛下は、4 世紀を超える両国の交流の歴史を顧みると同時に、第二次世界大戦時の悲劇にも丁寧に触れられた。周知の通り、昭和天皇や平成天皇の訪蘭時、騒然とした反日活動が続いた。なぜならオランダの大戦時の記憶は消えてないからだ。日本軍の捕虜虐待に対する辛い記憶が今尚残っているのだ。残念な事に蘭語が理解出来ない筆者だが、オランダの友人達に依れば、日本軍による虐待を記した本が多数存在するらしい。また記録に依れば、戦勝国別に見た B・C 級戦犯の死刑執行事例は、オランダが最多で英国や米国よりも多いのだ。

こうした史実を認識された上で、陛下はスピーチの中で次の様に仰った:

“We must . . . never forget that there was once a time of suffering. It is truly sad that many precious lives were lost and many people were injured, including a large number of civilians, during the last world war. We must always strive to be modest in learning from our past history, listen to the pains and sorrows of the people with compassion, and must pass on our tragic experiences and hardships to future generations so that such sorrow is never repeated. Bearing in mind that there are those who continue to bear the pain of that time to this day, we must continue earnestly our efforts for peace.”

幸いな事に、上皇陛下と天皇陛下の真摯な姿勢により、次第にオランダ国民の態度が変わってきていると聞く。この友好的関係が続く事を切に願っている。だが前大戦が残した心の傷は深く、海外の友人の中には、父や祖父の時代に日本軍と戦ったという人が多い。筆者も Harvard や Oxford、そして National University of Singapore で、気軽に何でも話し合える関係になると、悲しい家族の歴史を語ってくれるようになる。戦争とは、国が敵味方に分かれただけで、見知らぬ人間の間で残酷な行為が生まれる悲惨なものなのだ。

## 6 月 4 日の米国大統領府発表の資料にも注目したい。

日米関係を注視している人は既にご存知と思うが、6 月 4 日、ホワイトハウスは次の様な発表をした—“America 250: Presidential Message on the Anniversary of the Battle of Midway”。即ち 6 月 4 日はミッドウェー海戦の戦勝記念日だ。日本の優れた戦史家の大木毅氏が先月発刊した『ミッドウェー海戦』は、帝国海軍の拙劣なる作戦をコンパクトにまとめた良書だ。特に作家である澤地久枝氏が著書『ミッドウェー海戦』を通じて帝国海軍が隠蔽した史実を明らかにした点を称えている。

両書を読めば、この海戦が「負けるべくして負けた海戦」だった事が理解出来る。両書に加えて、敗戦時、連合艦隊作戦参謀の千早正隆中佐は、戦後の著書『日本海軍の驕り症候群』の中で、敗因を反省する事が「海軍部内でも連合艦隊でもついに行われなかった」と記した。また敗戦時、駆逐艦「初桜」の航海長だった左近允尚敏大尉は、戦後の著書、『ミッドウェー海戦—「運命の五分間」の真実』の中で、「会敵の前に、日本は敵についてほとんど知らなかったのに対し、アメリカは敵についてほとんど知っていた」と記している。そして帝国海軍最後の軍令部総長豊田副武大將は、戦後の 1950 年に『最後の帝国海軍』を著したが、その中で、「私は、海軍の機密電報が敵側に解読されていたというハッキリした情報は、きいたことがない」と記し、また「潜水艦戦に関する限りは日本が世界第一だというぐらいに、自惚れを持っておった」とも語っている。帝国海軍の暗号が解読されていた事実は、ミッドウェー海戦直後に米マスメディアが暴露し、米国海軍自身が日本側に察知されないよう気をもんでいた。また潜水艦戦に関しては、ニミッツ提督が戦後著書の中で、“the poor showing of the Japanese submarines in contrast to the remarkable success of the American boats”と記した。かくして残念ながら、日米両提督の“頭脳”の差は明らかである。

戦訓を学ばず、慢心に入る事の恐ろしさ。これは今の日本においても貴重な教訓である。筆者には太平洋戦争の歴史を詳細に知る米国の友人を数多く持っている。彼等と今後とも、両国が学ぶべき歴史の教訓について語り合ってゆきたい。

## 西太平洋情勢が気になる。台湾に関しては陸奥宗光の『蹇蹇録』の中の谷干城の意見を思い出している。

内外の友人達と、西太平洋情勢について議論している。議論の基になる主な近著は Naval Institute Press の本だ—①London に在る think tank の Rowen Allport 氏の著書(*War Plan Taiwan: OPLAN5077 and the U.S. Struggle for the Pacific*, Feb. 2026)、②中国海軍専門家—Toshi Yoshihara 氏と James R. Holmes 氏による著書(*Red Star over the Pacific, Third Edition: China's Rise and the Challenge to U.S. Maritime Strategy*, Mar. 2026)、そして③元人民解放軍(PLA)将校で Central Oklahoma 大学の李小兵教授による著書(*China's Mahan: Admiral Liu Huaqing and the Rise of the Modern Chinese Navy*, Mar. 2026)。そして今、谷干城が日清戦争後、台湾取得が将来の禍を招く事を警告していた事を思い出している。



私は部下を4つのタイプに分ける。即ち優秀、勤勉、馬鹿、怠惰に。大抵の場合、2つが組み合わさっている。優秀で勤勉であれば参謀本部に必要な将校。次に馬鹿で怠惰な将校がどの軍でも9割を占め、決まりきった仕事に向いているのだ。優秀かつ怠惰なタイプが、トップ・リーダーとして相応しい。難しい決断を下す時、明晰な知性と強靱な神経とが必要だからだ。用心すべきは馬鹿で勤勉な将校だ。重責を伴う仕事を託してはならない。どう転んでも災難しか起こさないからだ。

I divide my officers into four groups. There are clever, diligent, stupid, and lazy officers. Usually two characteristics are combined. Some are clever and diligent—their place is the General Staff. The next lot are stupid and lazy—they make up 90 per cent of every army and are suited to routine duties. Anyone who is both clever and lazy is qualified for the highest leadership duties, because he possesses the intellectual clarity and the composure necessary for difficult decisions. One must beware of anyone who is stupid and diligent—he must not be entrusted with any responsibility because he will always cause only mischief.

[Ich unterscheide vier Arten. Es gibt kluge, fleißige, dumme und faule Offiziere. Meist treffen zwei Eigenschaften zusammen. Die einen sind klug und fleißig, die müssen in den Generalstab. Die nächsten sind dumm und faul; sie machen in jeder Armee 90% aus und für Routineaufgaben geeignet. Wer klug ist und gleichzeitig faul, qualifiziert sich für die höchsten Führungsaufgaben, denn er bringt die geistige Klarheit und die Nervenstärke für schwere Entscheidungen mit. Hüten muß man sich vor dem, der dumm du fleißig ist; dem darf man keine Verantwortung übertragen, denn er wird immer nur Unheil anrichten.] (Kurt Freiherr von Hammerstein-Equord)

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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歴史を学ぶ事は、決して、過去の部分的特殊性を援用して、現在の部分的特殊性を正当化することではありません。過去の一時代の嵌(は)め絵から、一定の形を it as a model to reform a particular aspect of the present. To take out of the jigsaw puzzle of the past a piece with a set form and attempt to fit it into the present is not an enterprise that could have a happy outcome. To do so is to toy with history a pastime fit for children. (Yukio MISHIMA, a Japanese novelist)

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独裁者は、最終的には行動に関する一切を取り仕切る唯一の人間となる。全ての価値観を自分の価値観に吸収し、全ての見解を削除し自分自身の見解にする。他の人々は独裁者自身の考えの道具となる。道具となった彼等に、独裁者は自分が最も正しく、最も洞察力のある人だと信じさせる。何故ならば世の中が混乱と当惑の時代において、独裁者の考えが最も大胆で、幸福をもたらすものに映るからである。独裁者は、無能或いは腐敗した体制に揺さぶりをかけて、彼にとって不適格乃至無能な人々を追い払ってきたからだ。

(ポール・ヴァレリー)

The dictator finally remains the sole possessor of action in its fullness. He absorbs all values into his own and reduces all views to his. He makes other individuals the instruments of his thought, which he expects everyone to believe is the most just and the most penetrating of all, since it proved the boldest and most successful at the time of national disturbance and aberration. He has overturned an impotent or decayed régime, expelled unworthy or incapable men.

[Le dictateur demeure enfin seul possesseur de la plénitude de l'action. Il absorbe toutes les valeurs dans la sienne, réduit aux siennes toutes les vues. Il fait des autres individus des instruments de sa pensée, qu'il entend qu'on croie la plus juste et la plus perspicace puisqu'elle s'est montrée la plus audacieuse et la plus heureuse dans le moment du trouble et de l'égarement public. Il a bousculé le régime impuissant ou décomposé, chassé les hommes indignes ou incapables.]

(Paul Valéry)

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

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自己批判は一種の社会的内部分裂…。共同体に批判的態度で忠誠を尽くす事は不可能 Self-criticism is a kind of inner disunity . . . . While critical loyalty toward a community is not  
ではないが、その実現は容易ではない。従って如何なる社会でも、批判は忠誠心の欠如 impossible, it is not easily achieved. It is therefore probably inevitable that every society should  
の証左と見做される。(ラインホルド・ニーバー) regard criticism as a proof of a want of loyalty. (Reinhold Niebuhr)

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Event: June 10: (Washington, D.C.) Brookings Institution: "AI and Economic Mobility: Opportunities and Challenges."  
Event: June 11: (Washington, D.C.) Congress, Senate Committee on Banking, Housing, and Urban Affairs: Hearing on "AI and the American Dream: Promoting Innovation, Affordability, and American Dominance."  
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## 3. 編集後記

AI の能力や限界に関する友人達との議論が果てしなく続いている。

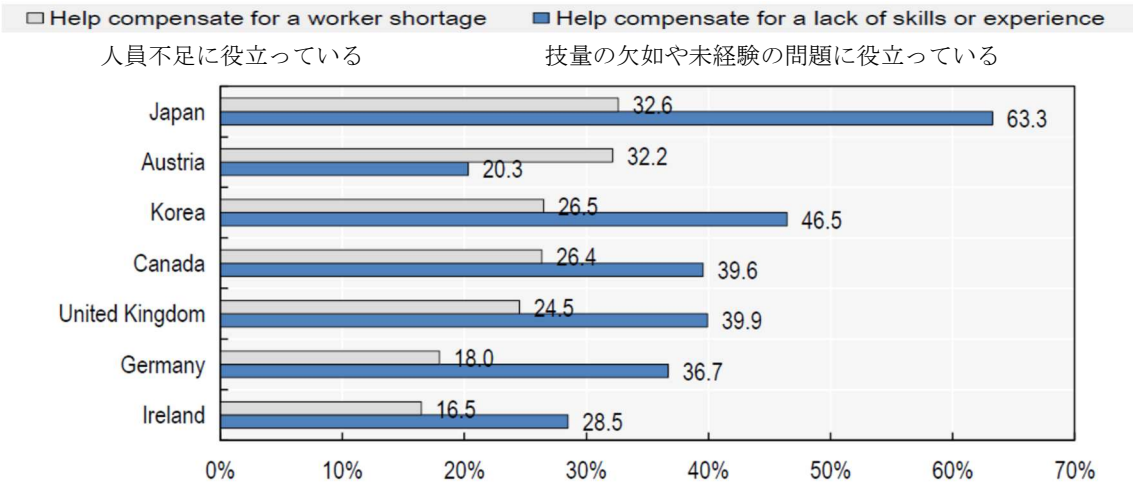
小誌の5月号・6月号で触れた本、即ち米 think tank 外交問題評議会(CFR)のセバスチャン・マラビー氏の著書(*The Infinity Machine: Demis Hassabis, DeepMind, and the Quest for Superintelligence*, Mar. 2026)に夢中になり、友人達と議論している。マラビー氏は *The Man Who Knew: The Life and Times of Alan Greenspan* (邦訳: 『グリーンズパン: 何でも知っている男』) という本でも有名だが、彼の筆致が素晴らしい。*The Infinity Machine* ではノーベル化学賞受賞者で AI 研究者のハサビス氏との対話を基に同書を著した。ハサビス氏とノーベル物理学賞受賞者のペンローズ氏や科学者のベンジオリ氏の論争、またハイゼンベルクが Heligoland に引き籠もり思索した如く、ハサビス氏も静かな思索の地を求めている事を記している興味深い本だ。筆者は AI を開発出来ないが、誤用を極力避け、AI を活用し自分の満足度を高めたいと考えている。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。ネット上でキャンニ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

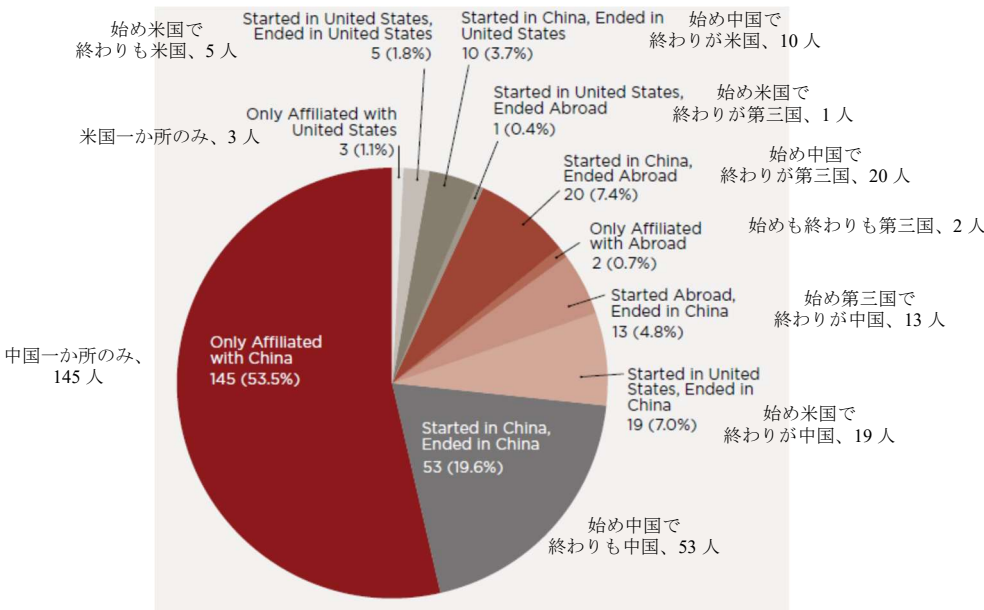
Figure 1 Percentage Reporting That Generative AI Helped Compensate for Worker Shortage/Skill Gap, among SMEs Using Generative AI and Experiencing Shortage/Gap  
図 1 生成 AI を活用し、かつ人員不足・技量問題を抱える中小企業のうち、生成 AI が役に立っていると回答した比率 (%)



Note: SMEs using generative AI were asked: “Did generative AI help your company compensate for this worker shortage (the lack of skills or experience)?”  
Original Source: Organisation for Economic Co-operation and Development (OECD), “Generative AI and the SME Workforce: New Survey Evidence,” Paris, November 5, 2025, <https://doi.org/10.1787/2d08b99d-en>.  
Source: Organisation for Economic Co-operation and Development (OECD), “AI and Skills: What We Know So Far,” Policy Brief, Paris, June 5, 2026, p. 6.

Appendix 2/付属資料 2

Figure 2 Retention Data for 271 DeepSeek Researcher with Affiliation Data  
図 2 DeepSeek の研究者の定着状況(国別・所属組織別)



Source: Zegart, Amy and Emerson Johnston, “Update: DeepSeek AI and the Great Talent Competition,” Stanford, CA: Hoover Institution, Stanford University, June 15, 2026, p. 13.