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 211 号 (2026 年 11 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.
彼れを知らずしよて己れを知れば、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 211 号

経済社会強靭化のため、「技術の事業化と技術者の育成を如何にすべきか」を議論している。

世界知的所有権機関(WIPO)が 9 月 29 日、Global Innovation Index (GII)を公表した。これに依れば、日本は昨年に引き続き世界第 12 位だ。また世界の 10 大 innovation clusters では、「東京=横浜」が昨年首位の「深圳=香港=広東」を抜いて首位となり、「大阪=神戸=京都」も第 7 位に入った。だが、関東と関西の innovation clusters には問題が山積している。PDF 版の図 2 が示す通り、世界シェアに関し関東は特許出願件数で 10.1%、発表資料で 1.3%、venture capital 取引額で 2.2%である。即ち特許件数は多いものの、先端技術の発表資料で北京の 4.2%に遥かに及ばず、VC(venture capital)活動では米国西岸地区の 6.9%にまったく及ばない。関西も特許では立派な 2.8%だが、資料では 0.6%、VC では 0.2%と悲しいぐらいシェアが低い。即ち優れた特許を抱えていても、それにふさわしい論文も経済活動も世界から見れば寂しい状況だ—換言すれば日本の ecosystem がうまく"機能していない"のだ(昨年の小誌第 10 月(第 198)号及び今月号 PDF 版の図 1、2 参照)。

こうした中、経済社会の強靭化のため、技術活用の「仕組み(制度・組織)」をいかに再編すべきか、また若人を優れた科学技術者としていかに育成すべきかという点に関して、日本の優れた人々と議論している。そうした活動の一環として、11 月 13 日、幣研究所(CIGS)は、大阪大学産業科学研究所(産研)と共催で「新産業立国へ — 世界とつながる産学融合拠点」と題したイベントを開催する。大阪大学の優れた専門家と共に「日本の優れた科学技術を、いかなる方法で新産業創出や国際競争力強化につなげていくか」に関して議論する予定だ。

AI の開発・利用・事業化のための ecosystem に関する議論が続いている。

米国 think tank (CEIP)の Singapore 支部の研究者が 9 月 23 日に公表した資料を巡って友人達と議論した。資料は first-tier AI talent の国際移動に関する分析である("Who's Ahead in the Global AI Talent Race?" PDF 版 2 の表 1~3 参照)。これに依れば、人材育成・活用に関し、米中両国が圧倒的地位を築いている事が理解出来る。国際移動に関し、米国やシンガポールに優秀な人材が流入し、中国やインドから人材が流出しているのだ。また資料は 2022 年と 2025 年における優秀な AI 人材が所属する組織別のランキングを示している。これに依ると 2022 年から 2025 年の間におけるアジアの研究組織の躍進が著しく、中国(北京大学、清華大学等)、韓国(KAIST 等)、シンガポール(NUS 等)の組織がリストに名を連ねている。残念だが、日本の組織名が見当たらない。人材育成と組織体制改変に関し、関係者の努力に期待したい。

これに関し Google の元 CEO であるエリック・シュミット氏は、10 月 21 日の podcast("In Good Company")の interview で、AI 開発を巡り、中国が間もなく米国を追い越す事を警告している("In the Battle for AI Supremacy, China Is Only Six Months behind the U.S. — Which Means It's Winning"; "中国在 AI 竞赛中落后美国半年，为何这已是胜势"、22 日の *Wall Street Journal* 紙を参照)。

こうした中、AI 開発・活用に関して、前述した ecosystem の重要性について友人達と議論している。例えば米 think tank (RAND)は、10 月 5 日に発表した論文の中で、hardware、software、AI models そして standards といった広義の ecosystem が重要だと述べた("The Emerging Digital Battleground: The Critical Factors That Produce Advantage in the U.S.-China Competition for Digital Networks"、PDF 版 2 参照)。また RAND Europe は、英国とオランダの ecosystem に関した報告書を発表し、また Oxford 大学の China Policy Lab (OCPL)は、中国の ecosystem に関した報告書を発表している(PDF 版の 2 参照)。

Robotics についても、開発・利用・事業化のための ecosystem に関する議論が続く。

国際ロボット連盟(IFR)が 9 月末、2026 年版の"World Robotics"を公表した。24 日発表の産業ロボット分野では、中国のロボット設置台数が昨年比で 20%増加し、世界全体の設置台数の 59%を占めた事、そして日本の設置台数が昨年比 19%減少し、台数では米国に世界 2 位の地位を譲り、3 位となった事が注目される。30 日発表のサービス・ロボット分野では、設置台数が昨年比で 24%増加した事が報告された。機種別では、無人搬送用(AGR)や自律走行搬送用(AMR)の運搬ロボットが昨年の設置台数の 47%を占め、第 2 位は飲食物の配膳ロボットや受付・案内ロボット等のホスピタリティ・ロボットで、設置台数 22%のシェア、第 3 位は工場・事務所用清掃ロボットで 18%だった。IFR は、service robots の将来に関し、省力化という社会からの要請を受けて、広範な分野で普及が進展するという見解を示した。同時に、(a)人とロボットとの近接協働作業増加を起因とする安全基準の必要性と設定の難しさ、(b)学習・動作に必要不可欠なデータの集積に加え、性能維持に必要な費用、(c)活用分野が広範なために、大量生産よりも少量多品種となる事、以上 3 点が今後の課題として述べている。

10 月 12~16 日に上海で開催された中国国際工業博覧会(CIIF)に関して、筆者自身は残念ながら参加出来なかったが、多くの友人達から届いた情報に基づき簡潔に報告する。今年の特徴として、humanoid robots が昨年と異なり、「"歌い踊る(会唱会跳)"—から"活用する(会干活)"」に転じた事が指摘されている。そして"大手 4 社(四大家族—发那科(FANUC)、ABB、安川、库卡(KUKA))"や"新興 4 社(四小龙—新时达、柴孚、新松、节卡)"が興味深い展示をした。開幕時、中国工程院(CAE)の王坚氏は、上述した robots の学習・動作に必要な data の問題を指摘し、「data が依然として個別に秘匿されている(数据还锁在每个人的抽屉里)」、即ち"分断的 data 保存(siloed data)"問題を語った。他方、Unitree(宇树)の王兴兴氏は、各企業が data を秘匿する必然性に触れた。また清華大・Stanford 大出身で Hesai Technology(禾赛科技)の向少卿氏は、3 種類の data(数据)—"人の作業(人类操作)"、"simulation(仿真)"、"フィジカルな動作(真机运行)"—が不可欠である事を述べた。また、課題山積の humanoid robots は、「業界の内外で少し食傷気味(行业内外的人早已疲惫)」の状況にある事も会場で感じられたという。これに関し IFR は、humanoid robots の発展には、動作の機敏性や頑強性、経済的効率性、そして国際標準化された安全基準が不可欠であると記している。

広範な分野で"human-robot interaction (HRI)"が拡大し、"協調安全(collective safety)"の標準化に関する意見交換が盛んに行われている。米国 think tank (SCSP)は、国際基準を巡る中国の動きに関する報告書を 9 月に公表した("The Standards Road to Shanghai"、小誌前号 PDF 版の 2 参照)。他方、中国国家標準化管理委員会は、①9 月 14 日、"AI Safety Governance Framework 3.0(«人工智能安全治理框架 3.0»)"を公表し、②10 月 16 日、国際標準化機構(ISO)・国際電気標準会議(IEC)の専門委員会(SC27: Information security, cybersecurity and privacy protection)に関する中国の活動を公表した。こうした海外情勢に関し、我々は決して座視してはならない。綿密なる情報収集と行動を積極的に起こす時を迎えているのだ。

あらし山 / ふもとの寺の / かねの音に / 暮るる紅葉の / かげぞさびしき。 (樋口一葉)
Mt. Arashi / at the foot of the Mountain / The bell's sound of a Temple / In the gathering twilight / Lonely shadows of the crimson maple leaves. (Ichiyo HIGUCHI, a Japanese writer)

中間選挙を直前に控えた米国政治から目を離す事が出来ない。

11 月の米国中間選挙に関する情報を毎日調べている。だが、選挙結果を正確に的中させる事は至難の業だから、選挙後の小誌来月号で論じる事にする。周知の通り、トランプ大統領の行動は誰にも予想出来ない。こうした中、筆者は米国政治経済の専門家達の見解に加え、連邦議会と財界の反応に注目している。これに関して、優れた journalist のトーマス・エドサル氏が 10 月 20 日、*New York Times* 紙に掲載した寄稿論文が簡潔で素晴らしい("Trump Can No Longer Mask His Real Agenda")。同氏は、元大統領経済諮問委員会(CEA)委員長で Harvard のジェイソン・ファーマン教授、UC Berkeley のエマニュエル・サエズ教授、Yale のジェイコブ・ハッカー教授等専門家の見解を引用して、大統領の政策(特に One Big Beautiful Bill Act (OBBA))が逆進課税的に作用し、貧富の格差が拡大したために社会的混乱を一段と悪化させたと述べている(これに関し *Wall Street Journal* 紙の 9 月 19 日付記事"The Gap between the Rich and the Very, Very Rich Getting Wider"も参照されたい)。

以前、筆者が在籍していた Harvard Kennedy School (HKS)の Center for Business and Government (CBG)に、元カナダ副首相のクリスティア・フリーランド氏が今年 1 月から加入した。彼女は 10 月 16 日、*Financial Times* 紙上に小論を載せた—米財界は、大統領との対立を恐れて、今は発言を控えている。だが、"現在の plutopopulism(金権的大衆迎合主義)"に不安を抱いているとの事("US Business Leaders Are Waking Up to the Perils of Plutopopulism"、PDF 版 2 を参照)。そして筆者は今、彼女の新刊書到着を待っている(*Unreliable Boyfriend: An Insider's View of Dealing with a Chaotic Superpower, Plutocrats, and Other Complicated People*, October 2026)。米国制度に詳しくない筆者だが、大統領の plutocratic 或いは kleptocratic な資産運用行為に対し、政府倫理法(EIGA)や政府倫理局(OGE)、更には司法省や FBI を含んだ制度改革の必要性を感じている。

もう一つ米財界の意見で気になるのは、*Wall Street Journal* 紙の 10 月 13 日と 18 日の社説だ("NATO's Message to Putin? 'We Will Fight': Gen. Alexus Grynkewich Sends a Strong Deterrent Message, but Does Mr. Trump Agree?"及び"To Russia with Love, Signed Donald: Trump Waives Sanctions and Tariffs under the Lindsey Graham Law")。特に後者は映画"007 Series"の *From Russia with Love* を思い出させてくれたので笑ってしまった。

欧州からの政治経済情報も不安材料に満ちている。

英 *The Economist* 誌の 10 月 8 日付記事に面白い表現を発見した—「明日出来る事は今日しない主義」に陥っている欧州の指導者による一種のリレー走(a sort of relay race of political *mañana*-ism)、("Europe's Lame-Duck Year Could Hardly Come at a Worse Time: Elections Will Sap What Little Resolve Europe Has to Make Tough Decisions"、PDF 版 2 参照)。欧州全体の結束のためには、各国の政治家達は譲歩をする必要がある。だが、選挙前のためにそれが出来ず、能力と意志のギャップが生まれている事を同誌が指摘した。かくしてロシアの脅威と対ウクライナ支援、全地球的な地政学的対応、更には低成長という困難な状態を、結束力を欠いたまま、欧州諸国は経験する事になると同誌は予想している。

筆者は友人達に、「政治経済的に優れた提言書を提出しても、今は指導者の実行意志が弱いから、「馬の耳に念仏(fall on deaf years; auf taube Ohren; tomber dans l'oreille d'un sourd)となる」と告げ、また「ナチの政権掌握を阻止するため、トーマス・マン先生は 1930 年 10 月に講演("理性に訴える(Ein Appell an die Vernunft)")を行い、アルベルト・アインシュタイン先生も 1932 年 6 月に"緊急請願書(Der Dringende Appell)"を公表したが、効果が無かった。生活に苦しむ庶民にとり、支離滅裂でも"よどみ無く流れ、力強い"Hitler の演説の方が魅力的なのだ」と語った。ドイツの友人からは、「Humor 好きの君に *Der Spiegel* 誌が褒めた本を薦める」との連絡が届いた。その本とは今年 8 月の新刊書(*Make Nazis Afraid Again: Wie man Rechte im Internet mit Humor und Fakten fertigmacht und nebenbei die Demokratie verteidig*; 仮訳『再びナチスを怯えさせよ: ユーモアとファクトを武器に右翼をネット上で破り、民主主義を守る』)。彼の助言に対し筆者は、ニーチェ先生の言葉—「信念は真理に対して嘘よりも危険な敵だ(Überzeugungen sind gefährlichere Feinde der Wahrheit als Lügen)」—に触れ、「我々の"humor と fact"に比べ、彼等の"理性・根拠なき信念"は無敵だ」と語った次第だ。いずれにしろ、政治的困難に直面している独仏の友人達とは、12 月に直接面談し、意見交換する事を楽しみにしている。

独仏両国経済も心配だ。10 月 15 日、仏 *Le Monde* 紙は、仏独両国が自動車産業の«Made in Europe»に関し合意した事を伝えた(«La France et l'Allemagne s'accordent sur l'avenir d'une industrie automobile ‹made in Europe›», PDF 版 2 参照)。中国の安価な EV 流入に対する対策であるが、これに関し多くの人々が疑念を表明している。例えば翌 16 日の独 *Frankfurter Allgemeine Zeitung*(FAZ)紙は、自由貿易を放棄し保護主義に走る事を非難し、単に"Made in Germany"に執着する事は効果が乏しく、非効率的だと論じた(„Handel mit China: Deutschland ist ganz schön scheinheilig"及び„Spielebranche unter Druck: ‚Made in Germany geht einfach nicht mehr'"、PDF 版 2 参照)。同日、独 think tank(IfW Keil)のモリッツ・シュラリック所長も global supply chains を活用した"新たな製造業"を目指すべきという小論を発表した(„Nicht ‚Made in Europe', sondern ‚Made with Europe'" (英文も公表: "Forget 'Made in Europe.' Think 'Made with Europe'")、PDF 版 2 参照)。

FAZ 紙にもう一つ面白い小論を見つけた。10 月 5 日掲載のハロルド・ジェイムズ Princeton 大学教授によるドイツ産業を巡る小論だ(„Zukunft der Industrie: So ein Problem hatte Deutschland schon lange nicht mehr"; 仮訳: 「ドイツ産業の未来: 久方ぶりの深刻な問題」、PDF 版 2 参照)。教授は、独機械工業連盟(VDMA)会長が 2024 年、"中国はもはや(我々にとり)市場ではない(China existiert als Absatzmarkt nicht mehr)"と語った事に触れ、またハンガリーの国家経済大臣が 2025 年、中国企業 BYD のハンガリー工場建設時、「これでドイツは驚愕する」と発言した事に触れた。こうした発言は、独経済が 1970 年代の米国経済危機以来、最も深刻な問題に直面している事を示す証拠だと教授は語った。教授は更に時代を遡り、第二次世界大戦時の米独間の生産体制比較を行い、優れた技術者による多品種少量の優れた独型生産体制と、未熟練労働者でも従事可能な標準化された米型大量生産体制との対照性を示した。その一例としてドイツ空軍のジェット戦闘機(Me262)を挙げ、同機の生産機数は僅か 1,430 機で、しかも実戦配備されたのは 200 機程。他方、米陸軍の双発攻撃機(Douglas A-20 Havo)は 7,487 機と大量生産された。即ち緻密で洗練化され逐次的改良を得意とする独型生産方式に対して、臨機応変であるため飛躍的な変革が可能な米型生産方式を比較したのだ。そしてドイツ製造業が中国製造業に対抗するためには、従来の考え方を棄てて、AI を援用した生産体制の飛躍的な変革を図るよう提言している。残念な事に、ドイツ語ではあったが、筆者はこの教授の正確で詳細な説明に魅了されて一気に読了した。

こうしてドイツ産業は、中国産業の台頭により構造転換に迫られている。これに関し中国問題専門の think tank (MERICS)は 10 月 22 日、報告書を公表した(MERICS China Essentials、PDF 版 2 参照)。冒頭、同書は「厳しさを増す EU の対中貿易姿勢(Härtere Linie der EU im Handelskonflikt mit China)」と記している。そして中国の"武器化した"輸出管理政策に関して、"中国側の輸出額(Export wert für China)"と"輸入国側への影響(Auswirkungen auf Importland)"を X 軸と Y 軸で示して、中国からの輸入品目別に見た影響度と輸入規模を一目で理解可能な図を掲載した。この図を見ると、輸入金額として少額だが、レアアース(Sttene Erden)が輸入国の製造業に与える影響が大きい事が容易に理解出来る。

こうした中、Morgan Stanley が中国の新生産方式に関する報告書を 9 月 25 日に公表した("China's Industrial Era"、PDF 版 2 参照)。中国調査部門長の衷晟氏は、中国製造業が「"Made in China"から"Made by China"(从"中国制造"到"中国创造")」を念頭に、"世界の工場(the world's factory)"から"世界の産業 OS(the world's industrial operating system)"へと姿を変えようとしていると語った。この中国産業の変革及びドイツ産業の苦悶を、我々日本は傍観する立場にない事を銘記すべきであろう。

上述の海外情勢を勘案すれば、情報収集の制限下であっても、"親中"でなくとも"知中"であるべきだ。

10 月 12 日、Washington, D.C.の think tank (CEIP)の中国専門家が、中国のロボット産業に関する小論を公表した("Chinese Robots Could Decide the AI Race: How Beijing's Bet on Hardware Could Leave Washington Behind," *Foreign Affairs*、PDF 版 2 参照)。"Embodied AI(具身智能)"の開発を通じて、"AI-powered robot industry(人工智能驱动机器产业)"育成を企図する中国の姿を記している。これを読んだ筆者は、日米中欧亜の友人達と情報交換し正確な中国の実態を探究しなければ、日本の戦略は"的外れ"になると感じた次第だ。こうした考えに基づき、先月議論した本を、紙面の制約から、著者・書名のみを記す—①ダニエル・ベル香港大學教授: *Why Ancient Chinese Political Thought Matters* (Apr. 2026)、②徐國琦香港大學教授: *The Idea of China: A Contested History* (Mar. 2026)、③Stanford 大の許成鋼氏: *Institutional Genes: Origins of China's Institutions and Totalitarianism* (Jun. 2025)(原本: «制度基因: 中國制度與極權主義制度的起源» (Nov. 2024))、④Steve Tsang(曾鋭生)London 大学教授: *China's Global Strategy under Xi Jinping* (Sept. 2026)、⑤ロジウム・グループのローガン・ライト氏: *Broken China: How the Economic Miracle Shattered* (Sept. 2026)、以上。

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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だれもが、人の軽信性や強欲を非難しなかったのだ。非難すべきものとは、気高い国民性のすべてを覆い隠すような品位のない金銭欲、或いは陰謀を企てている謀略者が仕掛けた罠に、熱血ほとばしる情熱という疾風で人々を煽る、理性を欠いた脱出不可能な陥溺。
(チャールズ・マッケイ)

Nobody blamed the credulity and avarice of the people--the degrading lust of gain, which had swallowed up every nobler quality in the national character, or the infatuation which had made the multitude run their heads with such frantic eagerness into the net held out for them by scheming projectors.
(Charles Mackay)

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哲学は大いに進歩したにも拘わらず、民衆を魅了する理想を提供する事が出来なかった。だが、民衆にとって幻想は欠くべからざるものだ。民衆とは、灯火に向かう昆虫の如く、民衆が求める幻想に合わせて、よどみなく話す雄弁家へと本能的に向かうのだ。
(ギュスターヴ・ル・ボン)

Notwithstanding all its progress, philosophy has been unable as yet to offer the masses any ideal that can charm them; but, as they must have their illusions at all cost, they turn instinctively, as the insect seeks the light, to the rhetoricians who accord them what they want.

[Avec tous ses progrès la philosophie n'a pu encore offrir aux foules aucun idéal qui les puisse charmer ; mais, comme il leur faut des illusions à tout prix, elles se dirigent d'instinct, comme l'insecte allant à la lumière, ver les rhéteurs qui leur en présentent.]
(Gustave Le Bon)

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速かなるを欲するなかれ。小利を見ることなかれ。 Do not be desirous to have things done quickly; do not look at small advantages. Desire to have things done quickly prevents their being done thoroughly. Looking at small advantages prevents great affairs from being accomplished.
速かならんと欲すれば達せず。小利を見れば、大事成らず。 [無欲速。無見小利。欲速則不達。見小利則大事不成。]
(孔子) (Kǒngzǐ/Confucius; 孔子)

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同一民族の個々人のうち、恐らく半数は平均程度の歌唱能力を持ち、四分の一は平均以下の能力を持ち、残りの四分の一は平均以上の能力を備えている。この四分の一のうち、歌唱能力が高くなるに従い、人数は次第に減ってゆき、ついにはカルーソーほどに達するのだ。
(ヨーゼフ・シュンペーター)

Perhaps half the individuals in an ethnically homogeneous group have the capacity for it to an average degree, a quarter in progressively diminishing measure, and, let us say, a quarter in a measure above the average, and within this quarter, through a series of continually increasing singing ability and continually diminishing number of people who possess it, we come finally to the Carusos.
[Vielleicht der Hälfte der Individuen einer ethnisch homogenen Gruppe ist die Fähigkeit dazu in einem durchschnittlichen Maße eigen, einem Viertel in fortschreitend immer geringerem Maß und, sagen wir, einem Viertel in einem überdurchschnittlichen Maß, und innerhalb dieses Viertels kommen wir durch eine Reihe von immer zunehmender Gesangfähigkeit und immer abnehmender Zahl der Leute, die sie haben, schließlich bis zu den Carusos.]
(Joseph Alois Schumpeter)

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ヒトラー、フランス議会、爆撃機の指揮官、真珠湾のレーダー管理責任者、フルシチョフ、米国の有権者といった人々は、何等かの"非合理性"から免れ得ない点では共通している。だが、彼等の非合理性は決して同じではない。そして、その非合理性の中の幾つかは合理的行動理論に基づき説明出来るのだ。 (トーマス・シェリング)

Hitler, the French Parliament, the commander of a bomber, the radar operators at Pearl Harbor, Khrushchev, and the American electorate may all suffer from some kinds of "irrationality," but by no means the same kinds. Some of them can be accounted for within a theory of rational behavior. (Thomas C. Schelling)

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

September 24: (London) Chatham House: "The European Agenda and UK–EU Relations: A French Perspective on a Changing World."
October 5: (Washington, D.C.) American Enterprise Institute (AEI): "Gerrymandering and Representation: What Have We Done, and Where Are We Going?"
October 6: (an online event, Washington, D.C.) Brookings Institution: "How China and the US Will Regulate AI Models for Safety."
October 11: (Taipei) Indo-Pacific Strategy Thinktank (印太戰略智庫) and Japan Institute for National Fundamentals (JINF) (國家基本問題研究所): "Taiwan-Japan Technology Future Forum (2026 台日科技未來論壇)."
October 12~13: (Warsaw) Casimir Pulaski Foundation (Fundacja im. Kazimierza Pułaskiego): "Warsaw Security Forum (WSF)."
October 13: (Washington, D.C.) Brookings Institution: "Can 'Working-Class Liberalism' Heal Liberal Democracy?"
October 14: (an online event, Paris) Institut français des relations internationales (Ifri): "Navigating Uncertainty: Asian Powers amid US-China Competition."
October 14: (an online event, Washington, D.C.) Brookings Institution: "Reforming Regulation: Debating Cost-Benefit Analysis and the Role of OIRA."
October 19: (an online event, Washington, D.C.) Brookings Institution: "Midterm Elections and the Future of Congress and the Presidency."
October 19: (Washington, D.C.) American Enterprise Institute (AEI): "Prioritizing Free Expression in the United States."
October 20: (Washington, D.C.) Brookings Institution: "New Survey Tracks Darkening Mood and Shifting Political Loyalties ahead of Midterm elections: Findings from the 17th annual American Values Survey."

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全ての熟慮、全ての弁論には、確乎とした理性の力が必要だ。それが無ければ、人々の決意は性急極まりなくなり、彼等の判断は正しくなくなる。とは言え、もしそこに力強い雄弁、即ち人々の注意と同意を確保するための雄弁が無ければ、理性の影響力ははかないものに過ぎないであろう。 (トマス・ホッブス)

In all Deliberations, and in all Pleadings, the faculty of solid Reasoning, is necessary: for without it, the Resolutions of men are rash, and their Sentences unjust: and yet if there be not powerful Eloquence, which procureth attention and Consent, the effect of Reason will belittle. (Thomas Hobbes)

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米国は圧倒的軍事力を行使する。数えきれない外国の指導者達が、アメリカの軍事的示威行動は賢明でないと、たとえ考えたとしても、米国の強引な意志の強要に際して、何もできず、また何もしないであろう。米国のタカ派は、次の 2 つの理由で帝国としてそう行動すべきと考えている。第一に、米国は何の咎めも受けずにいられるからであり、また第二に、軍事力を誇示しなければ、世界政治の中で米国が更なる周辺化するからだ。…だが、タカ派の解釈は誤りであり、それは米国の没落に繋がる。しかもそれは漸次的低落から、遥かに急速かつ混乱に満ちた転落への没落なのだ。

(イマニュエル・ウォーラーステイン)

The United States wields overwhelming military power, and even though countless foreign leaders consider it unwise for Washington to flex its military muscles, these same leaders cannot and will not do anything if the United States simply imposes its will on the rest. The hawks believe the United States should act as an imperial power for two reasons: First, the United States can get away with it. And second, if Washington doesn't exert its force, the United States will become increasingly marginalized. . . . But hawk interpretations are wrong and will only contribute to the United States' decline, transforming a gradual descent into a much more rapid and turbulent fall.

(Immanuel Wallerstein)

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多くの場合、艦隊の示威行動は、軍事的対立を起こさずに政治的目的を実現する事を可能にさせる。この軍事的対立の回避は、艦隊の潜在力による圧力、そして軍事作戦の開始に対する危機感によるものである。従って、海軍は常に国家の政策の一手段であり、平和時における重要な外交的な柱であった。
(ソ連海軍元帥セルゲイ・ゴルシコフ)

In many instances, demonstrative actions by the fleet made it possible to achieve political objectives without resorting to armed conflict — relying instead on the pressure exerted by the fleet's latent power and the threat of initiating military operations. Thus, the navy has always been an instrument of state policy and an important pillar of diplomacy during peacetime.
[Демонстративные действия флота во многих случаях давали возможность достичь политических целей, не прибегая к вооруженной борьбе, а только оказывая давление своим потенциальным могуществом и угрозой начать военные действия. Таким образом, флот всегда был орудием политики государств, важной опорой дипломатии в мирное время.]
(Sergei Gorshkov, an admiral of the fleet of the Soviet Union; Сергей Горшков)

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Event: October 12~16: (Shanghai) Donghao Lansheng Group (DLG) (东浩兰生): "The 26th China International Industry Fair (CIIF 2026) (中国国际工业博览会 (中国工会)): 'New Industrialization & Smart Manufacturing Resilience (工业新质，智造无界)."
Event: October 12: (an online event, Paris) Organisation for Economic Co-operation and Development (OECD): "From Automation to Autonomy: The Next Frontier in Robotics."
Event: October 14: (an online event, Washington, D.C.) Peterson Institute for International Economics (PIIE): "How Do We Deal with Chinese Overcapacity?"
Event: October 14: (Washington, D.C.) American Enterprise Institute (AEI): "A Conversation with Jeremy Chang and Benjamin Haas: Securing the Autonomous Systems Supply Chain."
Event: October 19: (a hybrid event, Stanford, CA) Stanford University, Digital Economy Lab: "Carina Hong: AI That Can Prove It: From Mathematical Discovery to Verified Software."
Event: October 20: (Washington, D.C.) American Enterprise Institute (AEI): "Toward a New Golden Age of Science: A Conversation with Michael Kratsios, Director of the White House Office of Science and Technology Policy."
Event: October 19~20: (Berlin) German Federal Government: "Invest in Germany Summit: 'Investing in Tomorrow Starts Here.'"
Event: October 21: (Brussels) Bruegel: "AI at Work: Where Should Think Tank Comms Draw the Line?"
Event: October 27: (a hybrid event, London) Chatham House: "Chasing China: How Should the UK and EU Respond to China's Competitive Threat?"

3. 編集後記

米中間選挙後の国際政治環境に不安を感じているのは筆者だけではあるまい。

中間選挙後のトランプ大統領は、如何なる形で世界中の人々を驚かせるであろうか。誰にも予想出来ないが故に不安が高まっている。前述したように連邦議会や財界、また連邦裁判所、更には"主権者として情報収集に努め、或る程度の知識を有する市民(informed citizens)"の行動を期待する。そして世界全体が連帯感を取り戻し、再び平和と繁栄を次世代に遺してゆくような政治の復活を願っている。

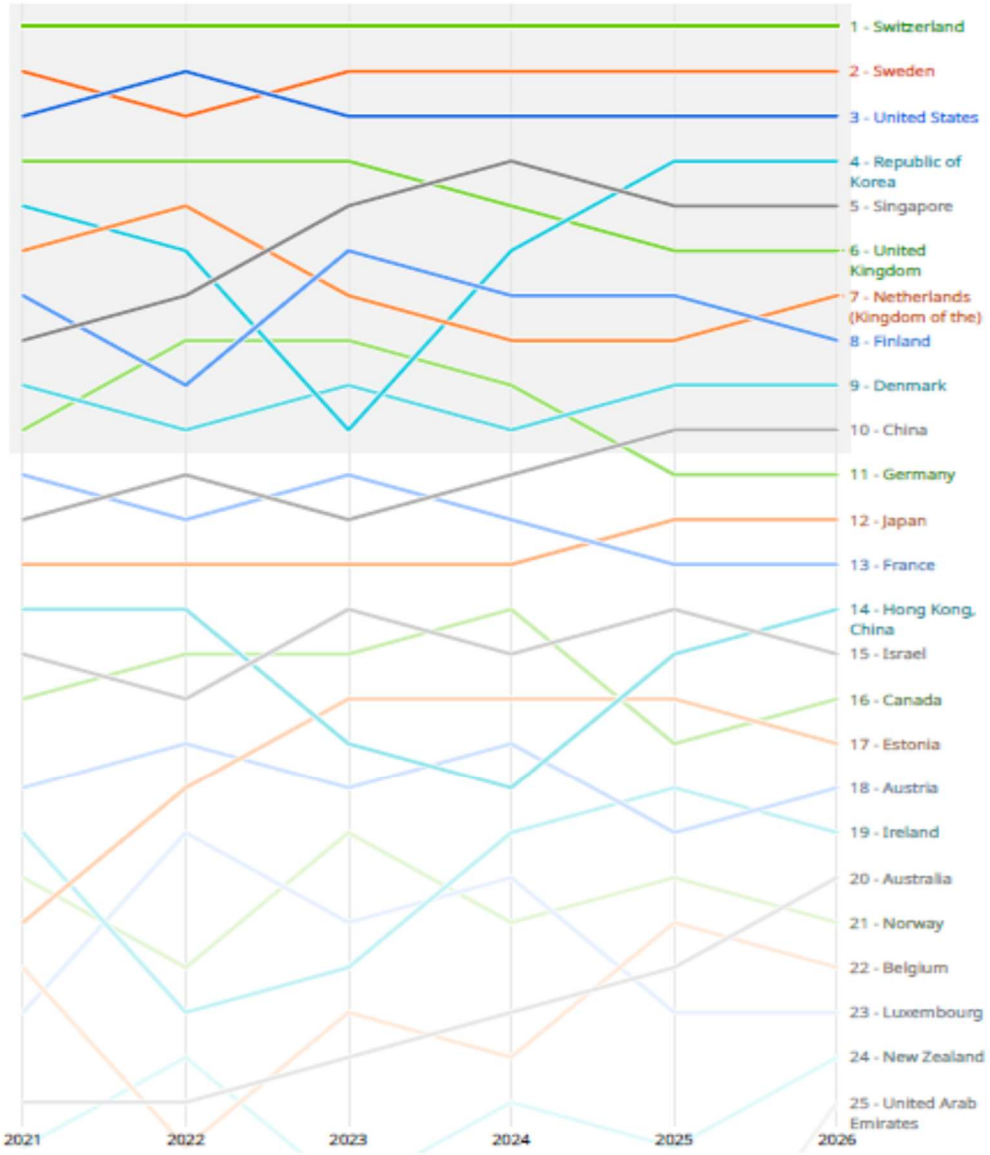
今、世界の政治経済社会は"見識のある啓蒙された市民(an enlightened citizenry)"の形成を望んでいる。　以上

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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　The Global Innovation Index (GII) Innovation Leaders, 2021-2026
図 1　世界所有権機関(WIPO)作成の
グローバル・イノベーション・インデックスでみた主導的国家 (2021-2026 年)



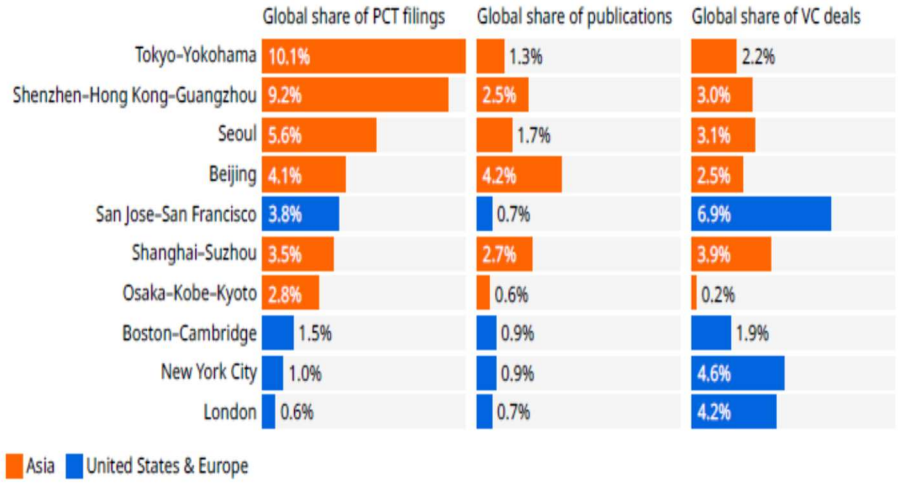
Note: Changes to methodology and variables in data availability may affect year-to-year comparisons of GII rankings. The GII model undergoes periodic refinements, which need to be taken into consideration when interpreting longitudinal performance trends.
Source: World Intellectual Property Organization (WIPO), "Global Innovation Index 2026: Powering Entrepreneurs at the Front of Science," Geneva, September 29, 2026, p. 57.

Figure 2　GII: Global Share of PCT Filings, Publications and Venture Capital Deals for the Top 10 Innovation Clusters, 2026

図 2　GII における上位 10 ヵ所のクラスターの世界的シェアを国際特許出願、発表資料、ベンチャー・キャピタル(VC)の投資案件に関して比較

Among the top 10, Asian clusters lead in patents and publications, while the US and European clusters in venture capital

―アジアのクラスターは発表資料・特許出願で、米欧は投資案件でリード―



Source: World Intellectual Property Organization (WIPO), "Global Innovation Index 2026: Powering Entrepreneurs at the Front of Science," Geneva, September 29, 2026, p. 85.

Appendix 2/付属資料 2

Table 1　The Carrier Paths of Top AI Talent Globally, 2025 (Share by Country, %)
表 1　トップ AI 人材のキャリア・パス (2025 年、国別シェア: %)

Country	Undergraduate	Graduate School	Post Graduate Work
China	57.4	37.7	40.6
USA	13.3	31.2	34.2
Europe	6.4	7.8	6.9
South Korea	5.7	4.6	4.7
UK	2.1	3.6	3.0
Singapore	0.5	2.5	2.5
Canada	2.0	2.7	2.5
Australia	0.6	1.3	0.9
India	4.0	0.4	0.4
Russia	0.7	0.3	0.2
Others	7.2	7.9	3.9

Note: Sample of 10,280 authors accepted at Neural Information Processing Systems (NeurIPS) 2025, about 40 percent of total authors. The samples include authors whose entire career path data were available.
Source: Ma, Damien and Binyi Yang, "Who's Ahead in the Global AI Talent Race?" Singapore: Carnegie China, September 23, 2026, p. 3.

Table 2　Top AI Talent Global Movements, 2025, Persons
表 2　トップ AI 人材の国際移動 (2025 年、人数)

Country	Left	Arrived	Net
USA	155	2,300	**2,145**
Singapore	31	249	**218**
UK	114	210	**96**
Canada	122	178	**56**
Europe	264	308	**44**
Australia	31	65	**34**
Russia	54	2	▲52
South Korea	135	31	▲104
India	370	3	▲367
China	1847	118	▲1,729
Others	503	162	▲341

Note: This looks at net talent and loss by counting the difference between researchers who've left their undergraduate country and now stay or work in a different country. These numbers are not static and likely change year to year.
Source: Ma, Damien and Binyi Yang, "Who's Ahead in the Global AI Talent Race?" Singapore: Carnegie China, September 23, 2026, p. 3.

Table 3　Institutions Where the Researchers Work, 2022 vs. 2025
表 3　トップ AI 人材所属研究機関のランキング (2022 年及び 2025 年)

Ranking	Institution	
	2025	2022
1	Peking University (PKU)/ 北京大学	Google
2	Tsinghua University (THU)/ 清华大学	Tsinghua University (THU)/ 清华大学
3	Korea Advanced Institute of Science and Technolgy (KAIST)/한국과학기술원	Massachusetts Institute of Technolgy (MIT)
4	Shanghai Jiao Tong University (SJTU)/ 上海交通大学	Stanford University
5	Massachusetts Institute of Technolgy (MIT)	Carnegie Mellon University (CMU)
6	Stanford University	Microsoft
7	Google	Meta
8	University of Science and Technology of China (USTC)/ 中国科学技术大学	Peking University (PKU)/ 北京大学
9	Zhejiang University (ZJU)/ 浙江大学	University of California, Berkeley
10	University of Illinois Urbana-Champaign (UIUC)	University of Illinois Urbana-Champaign (UIUC)
11	University of California, Berkeley	Princeton University
12	Carnegie Mellon University (CMU)	Shanghai Jiao Tong University (SJTU)/ 上海交通大学
13	National University of Singapore (NUS)/ 新加坡国立大学	University of California, Los Angeles (UCLA)
14	Chinese University of Hong Kong (CUHK)/ 香港中文大學	University of Wisconsin-Madison (UW)
15	Fudan University/ 复旦大学	Korea Advanced Institute of Science and Technolgy (KAIST)/한국과학기술원
16	Nanyang Technology University (NTU)/ 南洋理工大学	Eidgenössische Technische Hochschule Zürich (ETH Zürich)
17	Meta	Huawei Technologies/ 华为
18	Nanjing University (NJU)/ 南京大学	Nanjing University (NJU)/ 南京大学
19	University of Hong Kong (HKU)/ 香港大學	Harvard University
20	Seoul National University/ 서울대학교	Amazon

Note: Rankings are based on fractional paper credit rather than a simple author count. Each accepted paper is assigned a total weight of one, divided equally among its authors, and each author's share is credited to the institution where that researcher worked in the relevant observation year.
Source: Ma, Damien and Binyi Yang, "Who's Ahead in the Global AI Talent Race?" Singapore: Carnegie China, September 23, 2026, p. 5.