

2024 年度日米フォーラム

Japan-US Forum 2024

Redefining Japan-US Economic Relationship
in the Era of Fragmentation and Disorder
at the time of US Presidential Election and Beyond

報 告 書

2024 年 10 月 21 日(月)

一般財団法人 国際経済交流財団



2024 年度日米フォーラム 2024 年 10 月 21 日（月）（於：米国ワシントン D.C.）



開会の辞 Kent E. Calder 氏



開会の辞 豊田 正和



Session 1 スピーカー 山下 ゆかり 氏



Session 1 スピーカー 石井 大貴 氏



Session 1 スピーカー Christopher Elsner 氏



Session 1 スピーカー Jennifer Sklarew 氏



質疑応答



会場の様子

2024 度日米フォーラム 2024 年 10 月 21 日（月）（於：米国ワシントン D.C.）



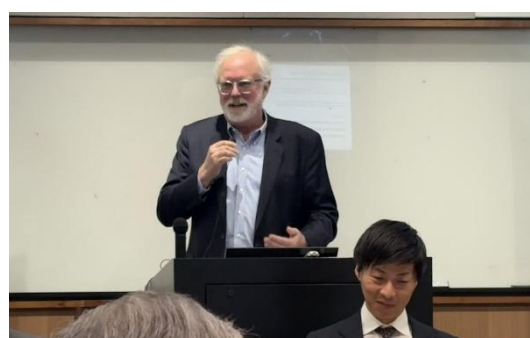
Session 2 モデレーター 原岡 直幸



Session 2 スピーカー Kenneth I. Juster 氏



Session 2 スピーカー 平見 健太 氏



Session 2 スピーカー David B. Shear 氏



Session 2 スピーカー 谷川 喜祥 氏



質疑応答



質疑応答



会場の様子

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1. 開催趣旨

国際経済交流財団（JEF）では、諸外国との経済交流を促進するために、毎年その時々
の課題となる経済問題を取り上げ、世界各地域の有識者と解決に向けた議論を重ねてい
る。2024 年度も、我が国の政策や予測可能なビジネス環境づくりへの寄与を目的に、日
米フォーラムを開催した。今回は、権威主義・自国主義的リーダーの台頭や、国内外での
分断が進む中、今後の世界経済を左右する次期米国大統領選挙直前という絶妙な時期を
とらえて行われた。集まった登壇者は政・官・学・産業界で政策提言に影響力を有する日
米の有識者であり、両国が共有する課題について忌憚のない意見交換が行われた。

本会議は、2024 年度は 10 月 21 日（月）に米国ワシントン D.C.にある、ジョンズ・
ホプキンス大学高等国際関係大学院（Johns Hopkins School of Advanced International
Studies, SAIS）との共催で実施された。

（1）開催の背景と経緯

これまで何度にもわたり日米経済関係について情報・意見交換を行って来た SAIS
Reischauer Center for East Asian Studies Director の Kent Calder 教授に、本フォーラム
共催の具体的な打診をしたのは昨年度末 2024 年 3 月のことだった。2024 年は世界の主
要国で選挙が行われる年であったが、1 月の台湾を皮切りにインドネシア、イラン、ロシ
ア、インド等と続き、年後半は日本、米国で結果が出た。

この中で、特に先が読めない不透明度を増幅させたのは、新米国大統領の選出結果だ
と言われていた。米国以外の多くの国々においても、自国中心主義の傾向が懸念される
が、一旦進んでしまったグローバリゼーションから完全に手を引くことはできないだろ
う。国際的に合意されたルールを守らず、自己中心的な保護主義を貫こうとすれば秩序
は保てず、貿易システムは後退する。自国だけで成り立つ経済はもはや存在せず、それが
各国に影響を及ぼすことは間違いない。サプライチェーンが分断され、いくつかの同志
国が集まって作る同盟の中での分業を目指す動きも出ている。

ロシアでは予想どおり現政権が続投し、ウクライナへの軍事侵攻はまだ出口が見えな
い。政治と切り離せなくなった経済や軍事力がルールを無視し、実力を行使しても、今
世の中はそれを阻止することができないでいる。日米の協力により、この分断と歪んだ
世界を軌道修正することはできるのか、議論が行われた。

（2）フォーラムの概況

上記のとおり、参加有識者は同盟国同士である日米が如何に世界の共通課題の現状を

把握し、対応策を導き出すことができるかをテーマに話し合った。米国新政権により、危機が高まる可能性がある喫緊の課題の1つがグローバルな温暖化による気候変動とエネルギー安全保障である。その発端とも言える権力に基づく国家支配の増加と、国際的規範やルールが脅かされ、国際秩序が保たれなくなった時代において、どのようなリーダーシップが発揮されるべきなのか。

日本からは気候変動・エネルギー及び国際法・国際紛争処理の専門家2名と JEF 会長及び専務理事がワシントン D.C.に渡航し、現地では日本の産業界を代表して経団連米国事務所長及び日本への安定的な鉱物資源調達をサポートする金属鉱物資源機（JOGMEC）ワシントン事務所長がスピーカーとして加わった。

米国側は共催機関であるジョンズ・ホプキンス大学の SAIS ライシャワー東アジア研究所長をはじめ、エネルギー商品市場の指標価格・分析情報を提供する企業の代表、エネルギー・環境政策分析・立案の研究者、元国防省副長官であり元駐越大使、元米国大統領国際経済問題担当副補佐官かつ元駐印大使がそれぞれの立場でエネルギー安全保障と国際秩序についてプレゼンと議論を行った。

登壇者の議論は、会場に集まった聴衆と、大学側が行った当日配信による視聴者にも公開された。事前広報の少なさからか、残念ながら過去に行ったストリーミング配信に比べると、大幅に参加者が少なかったことは反省材料である。

今後は、双方の YouTube チャンネルに掲載することで、不足分をカバーすべく議論と成果の普及を図っていく所存である。また、フォーラムでの議論内容や結論は、日米の参加者からそれぞれの関係産業や学会にフィードバックされることを求めている。JEF が編さんする報告書やウェブページへのレポート掲載も参考情報として活用していただくことを期待している。

Session 1 では、気候変動に対応したエネルギー安全保障に関し、エネルギーを如何に確保していくべきか、そのために日米で共に何ができるか意見を出し合った。不足するエネルギーを考える時、進めるべきは利用効率を高めることなのか、貯蓄を増やすべきなのか。第三国との協力関係は如何に構築することができるのか、水素の可能性と市場育成のためのコストと補助金（日本政府の包括的見地の素晴らしさと、サプライサイド支援に偏りがちな米国の政策の対比）、世界第6位の広さを持つ日本の EEZ で開発する洋上風力発電の潜在的可能性と市場の需要度・熟度との隔たり、エネルギー消費者への適正な教育の必要性（特に原子力発電に関して）がトピックとして取り上げられた。日米が協力して、第三国にどう関わってもらえるのかについては、もう少し突っ込んだ議論をする時間が必要であり、今後課題を残した。

Session 2 では、地政学的なリスクが高まり、複雑さを増す通商政策に焦点を当て、世界で台頭する権威主義と、それに対するルールに基づく国際経済秩序について意見交換

を行った。世界の貿易政策は、地政学上の課題と経済成長・エネルギー安全保障・環境とのバランスを取る必要があることから、多国間協定から複数国間協定、問題解決に寄与しない既存の国際基準や交渉に代わり、時に米国が傾く一方的主義や単独主義(unilateralism)や世界的な権威主義的傾向への台頭に懸念が示された。また、WTOの紛争処理能力低下についても問題視されて久しい。

一方、世界貿易額は過去 23 年間で 4 倍となり、グローバルサプライチェーンによる人々の生活向上が図られており、これまで以上に産業界の実用的な見解を包含した政策立案が必要との意見で一致した。また、アジアの多極性を保つためにも経済面を越えて気候変動・サイバーセキュリティ・保健・海洋状況把握等の面で QUAD など日米が協力できる同盟関係の重要性が説かれた。

また、米国は包括性と反保護主義の必要性においてリーダーシップを発揮することが求められている。産業政策は同盟国間での調整の上、公共政策目標と一致させ、公共財である企業活動を後押しすることが重要とした。

経済安全保障と自由貿易に関しては、デリスクングや先端技術の厳格管理アプローチ(Small yard high fence)を慎重に扱うべきであり、基本は自由貿易を推進すべきとの考えであった。

なお、グローバルサウスと呼ばれる国々は多国間フォーラムにおいて公共財に寄与する重要な役割を持つが、立ち位置が様々であり、プロセスは一筋縄ではいかないとの認識であった。

※議論の詳細は、後掲の各項目をご参照ください。

- ・出席者：「2. 開催概要」「4. 出席者略歴」
- ・会議次第：「3. 詳細日程」
- ・議事要旨：「5. 議事要旨：(1) 日本語 (2) 英語」

2. 開催概要

1. 開催日：

2024 年 10 月 20 日（日）SAIS 主催打合せ夕食会

2024 年 10 月 21 日（月）日米フォーラム開催

クローズド・ディスカッション

3. 会 場：Washington D.C.

10 月 20 日（日）Restaurant Rasika, Penn Quarter

10 月 21 日（月）SAIS 会議室

・フォーラム：B-222

・クローズド・ディスカッション：Room 678

4. 主催者：

<日本側> 一般財団法人国際経済交流財団（JEF）

<米国側> ジョンズ・ホプキンス大学高等国際関係大学院

Johns Hopkins School of Advanced International Studies (SAIS)

5. テーマ：Redefining Japan-US economic relationship in the era of fragmentation and disorder at the time of US Presidential Election and beyond

・セッション 1： Securing Energy by Responding to Climate Change

「気候変動に対応したエネルギー安全保障」

・セッション 2： International Order - Power versus Rules

「国際秩序－権威主義対ルールベース」

6. 出席者：

日米よりスピーカー11 名、オブザーバー37 名、配信視聴者 23 名

<日本側>

(敬称略、登壇順)

豊田 正和 一般財団法人国際経済交流財団 会長

山下 ゆかり 一般財団法人日本エネルギー経済研究所 常務理事

石井 大貴 独立行政法人エネルギー・金属鉱物資源機構（JOGMEC）
ワシントン事務所 所長

原岡 直幸 一般財団法人国際経済交流財団 専務理事

平見 健太 長崎県立大学国際社会学部 准教授

谷川 喜祥 一般財団法人日本経済団体連合会 米国事務所 所長

【ゲストスピーカー】 クローズド・ディスカッション

藤澤 秀昭 在米日本国大使館 公使

<米国側>

(敬称略、登壇順)

Kent E. Calder	Director, Edwin O. Reischauer Center for East Asian Studies, Johns Hopkins University (SAIS)
Christopher Elsner	Director, S&P Global Commodity Insights
Jennifer Sklarew	Assistant Professor, Development of Environmental Science and Policy, George Mason University
David B. Shear	Former Ambassador to Vietnam, Senior Advisor, Edwin O. Reischauer, Center for East Asian Studies, Johns Hopkins University (SAIS)
Kenneth I. Juster	Former Ambassador to India

【ゲストスピーカー】 クローズド・ランチディスカッション

David E. Sanger	White House and National Security Correspondent for The New York Times
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7. 開催形式： 対面シンポジウム形式

SAIS 公式 YouTube チャンネルにてライブ配信

8. 使用言語： 英語

3. 詳細日程



US-Japan Forum 2024

Redefining Japan-US economic relationship
in the era of fragmentation and disorder at
the time of US Presidential Election and beyond

Monday, October 21, 2024

Johns Hopkins University School of Advanced International Studies (SAIS)
555 Pennsylvania Avenue NW, Washington, DC 20001, United States





Agenda

Welcome and Conceptual Introduction

09:00

Kent E. CALDER

Director, Reischauer Center for East Asian Studies,
Johns Hopkins University (SAIS)

Masakazu TOYODA

Chairman and CEO, Japan Economic Foundation

Session 1: Securing Energy by Responding to Climate Change

09:10 - 09:15...Introduction by Moderator: **Kent E. CALDER**

09:15.....Presentation by Speakers

Yukari YAMASHITA

Managing Director, Institute of Energy Economics, Japan (IEEJ)

Hiroataka ISHII

Japan Organization for Metals and Energy Security (JOGMEC)

Christopher ELSNER

Associate Director in Energy-Wide Perspectives for S&P Global Commodity

Dr. Jennifer F. SKLAREW

George Mason University, the Department of Environmental Science and
Policy

09:55 - 10:40...Discussion

10:40 - 10:55...Q&A/Comment



Session 2: International Order - Power versus Rules

11:00 - 11:05...Introduction by Moderator: **Naoyuki HARAOKA**

11:15.....Presentation by Speakers

Kenta HIRAMI

Associate Professor, University of Nagasaki

Kiyoshi TANIGAWA

Executive Director, Keidanren USA

Ambassador David SHEAR

Former Ambassador to Vietnam

Senior Advisor, Edwin O. Reischauer Center for East Asian Studies

Johns Hopkins University (SAIS)

Ambassador Kenneth JUSTER

Former Ambassador to India

Distinguished Fellow at the Council on Foreign Relations

11:55 - 12:40...Discussion

12:40 - 12:55...Q&A / Comments

12:55.....Closing Remarks: KENT CALDER

13:30 - 14:30...Closed Roundtable Discussion Speakers

Hideaki FUJISAWA

Minister, Embassy of Japan in the US

David E. SANGER

White House and National Security Correspondent for The New York Times

4. 出席者略歴

About the speakers (In order of appearance on stage)



Masakazu TOYODA

Chairman and CEO
Japan Economic Foundation (JEF)

Masakazu Toyoda currently serves as the Chairman and CEO of the Japan Economic Foundation (JEF), as well as Special Advisor to the Institute of Energy Economics of Japan and Director of the Pacific International Center for High Technology Research.

He is the former Chairman and CEO of the Institute of Energy Economics (2010-2021); served also for nearly a decade on both the Board of Governors of the Oxford Institute of Energy Studies (2012-2021); and the International Advisory Board Council of the King Abdullah Petroleum Studies and Research Center (KAPSARC) in Saudi Arabia (2011-2019).

During his distinguished government career, he served in numerous key positions within the Ministry of Economy, Trade, and Industry of Japan culminating in his service as Vice Minister for International Affairs (2007-2008). He also subsequently served as Secretary General of the Secretariat for Space Policy in Japan's Cabinet Secretariat.

Chairman Toyoda holds a Master of Public Affairs degree from the Woodrow Wilson School of Public and International Affairs at Princeton University (1979), and an undergraduate Bachelor of Law degree from the University of Tokyo (1973).

About the speakers (In order of appearance on stage)



Kent E. CALDER

Director, Edwin O. Reischauer Center
for East Asian Studies
Johns Hopkins University (SAIS)

Kent E. Calder currently directs the Edwin O. Reischauer Center for East Asian Studies at Johns Hopkins University SAIS, as he has done since 2003.

Calder recently also served for varying intervals as Dean, Vice Dean for Faculty Affairs, and Vice Dean for Academic Affairs at SAIS.

Prior to SAIS, Calder served as special advisor to the U.S. Ambassador to Japan; Japan Chair at the Center for Strategic and International Studies (CSIS); tenured professor at Princeton University; lecturer on government at Harvard; and as the first executive director of Harvard University's Program on U.S.-Japan Relations. He received his Ph.D. from Harvard University, where he worked under the direction of Edwin O. Reischauer, former US Ambassador to Japan.

A specialist in East Asian political economy, Calder lived and researched in Japan for eleven years and elsewhere in East Asia for four years.

In 2014, He was awarded the Order of the Rising Sun, Gold Rays with Neck Ribbon. Calder's recent publications include: *Global Political Cities: Actors and Arenas of Influence in International Affairs* (2021); *Super Continent: The Logic of Eurasian Integration* (2019); *Circles of Compensation: Economic Growth and the Globalization of Japan* (2018); and *Singapore: Smart City, Smart State* (2017); *Asia in Washington* (2014); and *The New Continentalism: Energy and Twenty-First Century Eurasian Geopolitics* (2012).

About the speakers (In order of appearance on stage)



Yukari Niwa YAMASHITA

Managing Director
Institute of Energy Economics, Japan
(IEEJ)

Yukari Niwa Yamashita is a Managing Director for the Institute of Energy Economics, Japan (IEEJ), in Charge of the Energy Data and Modelling Center which is responsible for quantitative and qualitative analyses on energy policy issues. Her team's analyses and recommendations contribute greatly to debates and policy making for Japan and international communities such as ERIA, APEC and IEA. The annual IEEJ's Outlook is globally recognized for its timely analyses and pragmatic approach towards climate change.

Yamashita has been serving as a member of various government councils and committees in the fields of energy and science & technologies.

Recent examples include a committee on nuclear policies and WG on global warming countermeasures. She also led miscellaneous international and regional programs in the area of energy cooperation through IEA, APEC, ERIA and IPEEC. She is a visiting professor at Kyushu University. She served as the 2020 President of the International Association for Energy Economics (IAEE) and continues to support IAEE activities.

She is married with two daughters and four adorable grand children.

Her favorite way to spend weekend is gardening, especially with her moss garden ("koke-niwa") and roses.

About the speakers (In order of appearance on stage)



Hirotaka ISHII

Japan Organization for Metals and
Energy Security (JOGMEC),
Washington D.C. Office

Hirotaka Ishii is a general manager of Washington, D.C. office of Japan Organization for Metals and Energy Security (JOGMEC).

Prior to joining JOGMEC, he served at the Government of Japan's Ministry of Economy, Trade & Industry (METI), where he was recently in charge of drafting GX (Green Transformation) Decarbonization Power Supply Act, Hydrogen Society Promotion Act and Carbon dioxide Capture and Storage Business Act.

Ishii received his bachelor's degree of economics from Tokyo University in 2005. Also, he was a visiting fellow at the Walter H. Shorenstein Asia-Pacific Research Center (Shorenstein APARC) for 2016-17.

About the speakers (In order of appearance on stage)



Christopher Elsner

Director

S&P Global Commodity Insights

Christopher Elsner is a Director for S&P Global Commodity Insights and leads the Executive Briefings service, which caters to executive teams, senior management, and Boards at the largest energy corporations as well as officials and analysts in governmental organizations globally. He possesses specialized knowledge of financial performance and corporate strategy of international oil and gas companies, global power firms, and the cleantech sector. Additionally, he routinely consults on the impact of financial flows on energy firm behavior, dynamics driving oil and gas markets at every level of the global supply chain, the developments within energy markets in a decarbonizing global economy as well as drivers of capital flows between various types of energy assets, firms and technologies, including the evolution of geopolitics within the broader energy transition.

Before arriving at S&P, he worked for the U.S. Department of Energy and the Energy Information Administration (EIA) as an International Energy Analyst. In this function, he concentrated on bilateral engagements with foreign governments, mainly from the Middle East and Central Asia. He also provided analysis of energy trends to the regional Combatant Commands (COCOMs), contributing to active strategic planning by the U.S. Department of Defense. As an analyst at the EIA, he covered both North America and the MENA region, providing analysis to other U.S. federal agencies, Congress and the White House. Elsner earned a BA from Kenyon College, an MA from Johns Hopkins School of Advanced International Studies, and an MBA from HEC Paris."

About the speakers (In order of appearance on stage)



Jennifer SKLAREW

Assistant Professor
Department of Environmental Science
and Policy
George Mason University

Jennifer Sklarew brings 30 years of energy and environmental policymaking and analysis to her research and teaching. Specific focal areas for her qualitative research include sustainability and resilience challenges in the energy-water nexus, solutions that leverage food-energy-water-climate interdependencies, and energy system transitions in Japan, India, and China. NPR has quoted Dr. Sklarew as an expert on Japanese energy policymaking change. Her most recent work, a book published by Routledge, is *Building Resilient Energy Systems: Lessons from Japan*.

Dr. Sklarew's prior professional experience spans the public and private sectors. Prior to entering academia, she served in the U.S. Department of Commerce's Office of Japan, where she led her office's work on Japanese electricity and gas deregulation, as well as the Asia-Pacific Partnership on Clean Development and Climate. Dr. Sklarew also served as a Mike Mansfield Fellow in various Japanese government agencies. Prior to entering the government, Dr. Sklarew worked as a DC-based energy policy consultant to Japanese utility companies, and as a policy analyst for the Japan Nuclear Cycle Development Institute.

A member of the Council on Foreign Relations and former rapporteur for the Council's Energy Security Group, Dr. Sklarew received her Ph.D. in public policy from George Mason University, her MA from Johns Hopkins University's School of Advanced International Studies (SAIS), and her BA from the University of Pennsylvania.

About the speakers (In order of appearance on stage)



Naoyuki HARAOKA

Executive Managing Director

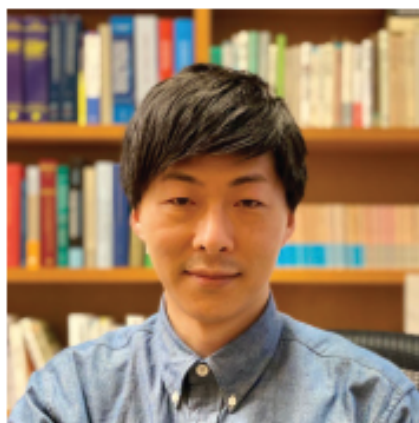
Japan Economic Foundation (JEF)

Naoyuki Haraoka has been Executive Managing Director of the Japan Economic Foundation (JEF) since 2007. After graduating the University of Tokyo in 1978 (Bachelor of Economics), He joined MITI (Ministry of International Trade and Industry) of Japanese government. Having been posted in the industrial policy section and the international trade policy section for a few years, he was enrolled in a two-year MPA (Master of Public Administration) programme at Woodrow Wilson School of Princeton University in the US on a Japanese government sponsorship.

After having acquired MPA at Princeton, he rejoined MITI in 1984 as an economist. Since then, he had been posted as Deputy Director and Director of a number of MITI divisions including Research Division of International Trade Policy Bureau. He was also posted in Paris twice, firstly, Principal Economist of Trade Bureau of OECD (Organization of Economic Cooperation and Development) from 1988 to 92 and secondly Counselor to Japanese Delegation of OECD from 1996 to 99.

After coming back to MITI from his second stay in Paris, at the occasion of the government structural reform in 2001 when MITI was remodeled as METI (Ministry of Economy Trade and Industry), Haraoka joined the efforts to found METI research institute, Research Institute of Economy Trade and Industry as its Director of Administration. He became Chief Executive Director of JETRO San Francisco in 2003 and stayed in San Francisco until 2006. He was Director-General of METI Training Institute from 2006 until July 2007 when he left METI permanently.

About the speakers (In order of appearance on stage)



Kenta HIRAMI

Associate Professor
International Law
Faculty of Global Studies
University of Nagasaki, Japan

Kenta Hirami is an associate professor at the Faculty of Global Studies, University of Nagasaki. His research is focused on Public International Law, International Economic Law and International Dispute Settlement. He holds a PhD in Law from Waseda University, Japan and an LLM from Waseda University.

Before joining University of Nagasaki in 2022, He was a post-doctoral Research Fellow of Japan Society for the Promotion of Science (JSPS) (2017-2020), an assistant professor at the Faculty of Social Sciences, Waseda University (2020-2022). He was also an official of the International Economic Dispute Settlement Division, Ministry of Foreign Affairs of Japan, representing the government of Japan in several World Trade Organization (WTO) disputes (2014-2016).

He currently serves as a member of working groups in several government ministries and agencies including Ministry of Foreign Affairs of Japan, Ministry of Economy Trade and Industry of Japan and Research Institute of Economy Trade and Industry, Japan.

About the speakers (In order of appearance on stage)



Kiyoshi TANIGAWA

Executive Director
Keidanren USA

Kiyoshi Tanigawa is the Executive Director of Keidanren USA, as head of Keidanren's Washington DC office.

He leads its public affairs activities in strengthening the U.S.-Japan economic relationship.

Tanigawa joined Keidanren more than two decades ago and has engaged in public policy advocacy throughout his career. Prior to his current position, he was responsible for energy and climate change policy, deeply engaged in policymaking at both the national and international levels, as well as initiating various projects by the Japanese business community.

He is also noted for his expertise in such areas as industrial policy, regulatory reform, innovation, trade, and Asian affairs.

Tanigawa earned his B.A. in economics from the University of Tokyo, and holds master's degrees from the University of Tokyo, Columbia University, and the London School of Economics and Political Science, with scholarships from the Fulbright and Rotary Foundation.

About the speakers (In order of appearance on stage)



Ambassador Kenneth I. JUSTER

Ken Juster recently completed his service as the 25th U.S. Ambassador to the Republic of India (2017-2021). He is currently a Distinguished Fellow at the Council on Foreign Relations. Juster has over 40 years of experience as a senior government official, business executive, and lawyer.

Ambassador Juster previously served in the U.S. government as Deputy Assistant to the President for International Economic Affairs, on both the National Security Council and the National Economic Council (2017); Under Secretary of Commerce (2001-2005); Counselor (Acting) of the State Department (1992-1993); and Deputy and Senior Advisor to Deputy Secretary of State Lawrence Eagleburger (1989-1992). In the private sector, he has been a partner at the global investment firm Warburg Pincus (2010-2017), a senior executive at Salesforce.com (2005-2010), and a senior partner at the law firm Arnold & Porter.

For his service as Ambassador, Juster received the State Department's Distinguished Service Award, the Defense Department's Distinguished Public Service Award, the Director of National Intelligence's Exceptional Service Award, and the Energy Department's Excellence Award.

Ambassador Juster holds a law degree from the Harvard Law School, a Master's degree in Public Policy from Harvard's Kennedy School of Government, and a Bachelor of Arts degree in Government (PhiBeta Kappa) from Harvard College.

About the speakers (In order of appearance on stage)



Ambassador David B. SHEAR

Senior Advisor
Edwin O. Reischauer Center for East
Asian Studies
Johns Hopkins University (SAIS)

David Shear was the Assistant Secretary of Defense for Asian and Pacific Security Affairs from September 2014 to June 2016. He served as Ambassador to Vietnam 2011 to 2013. Ambassador Shear served for 32 years in the American Foreign Service.

He has also served in Sapporo, Beijing, Tokyo, and Kuala Lumpur. In Washington, he has served in the Offices of Japanese, Chinese, and Korean Affairs and as the Special Assistant to the Under Secretary for Political Affairs. He was Director of the Office of Chinese and Mongolian Affairs in 2008-2009 and served as Deputy Assistant Secretary in the Bureau of East Asian and Pacific Affairs in 2009-2011. He was a Rusk Fellow at Georgetown University's institute for the Study of Diplomacy 1998-99. He is the recipient of the State Department's Superior Honor Award and the Defense Department's Civilian Meritorious Service Award for his work in U.S.-Japan defense relations.

Ambassador Shear graduated from Earlham College and has a Master's degree in International Affairs from the Johns Hopkins University (SAIS). He has attended Waseda University, Taiwan National University, and Nanjing University. He and his wife Barbara have a first-degree rank in the practice of Kendo, or Japanese fencing. He speaks Chinese and Japanese.

About the speakers (In order of appearance on stage)



Hideaki FUJISAWA

Minister
Economic Section, Embassy of Japan

Minister Hideaki Fujisawa has mainly taken charge of various international policy areas, including economic relations with Southeast Asian and Pacific countries (director, Asia and Pacific Division), as well as Middle East (first secretary, Embassy of Japan in Iran and senior deputy director, Middle East & Africa Division and international negotiations on energy and environmental policies).

In this capacity, he had been in charge of planning a wide range of trade policies in METI since July 2021. He is currently serving as minister of Economy, Trade, Industry/Business and Energy at the Embassy of Japan in Washington, D.C.

About the speakers (In order of appearance on stage)



David E. SANGER

White House and National Security
Correspondent for The New York
Times

David E. Sanger has reported for The New York Times for more than four decades, serving on three teams that have won the Pulitzer Prize.

He has served as Tokyo Bureau Chief, Chief Economic Correspondent, Chief Washington Correspondent and White House Correspondent, and written four books on American national security. The most recent, written with Mary Brooks, was a New York Times bestseller in April 2024: *New Cold Wars: China's Rise, Russia's Invasion and America's Struggle to Save the West*.

He has also served as executive producer for two HBO documentaries: "The Perfect Weapon," based on his book by the same name on cyber conflict, and "Year One," an examination of President Biden's first two years in office. With Graham T. Allison Jr., he co-teaches "Central Challenges in American National Security, Strategy and the Press" at the Kennedy School of Government.

A 1982 graduate of Harvard College, Sanger was the first senior fellow in The Press and National Security at the Belfer Center for Science and International Affairs at Harvard. He is also a national security contributor to CNN.

5. 議事要旨

(1) 日本語

以下のサマリーは、共催団体であるジョンズ・ホプキンス大学高等国際関係大学院（SAIS）が作成した英文サマリーを当財団が和訳したものである。



日米フォーラム

分断と秩序なき時代における

米国大統領選挙後の日米関係を再定義する

2024 年 10 月 21 日

開会の挨拶

Kent E. Calder ライシャワー東アジア研究センター所長、ジョンズホプキンス大学高等国際関係大学院 (SAIS)

Calder 氏は、複数の複雑な力によって形作られた世界情勢と日米関係の極めて重要な瞬間におけるこの会議の重要性を説明した。また、2008 年の金融危機が世界システムを作り変えた重要な転換点であったと指摘し、この危機がどのようにして先進国全体にポピュリズムの波を引き起こし、ドナルド・トランプ大統領の当選やボリス・ジョンソン、マリーヌ・ル・ペンなどのポピュリスト指導者などの政治的变化に影響を与えたかについて述べた。これらの変化は国際関係、経済成長の軌道、エネルギー戦略を一変させた。Calder 氏は、ロシアの不満の高まりが最終的に 2022 年のウクライナ戦争につながったことを、これらの世界的変化のもう一つの結果であると指摘した。Calder 氏はまた、再生可能エネルギーへの移行を加速させ、世界のダイナミクスをさらに作り変えた、特にエネルギー分野における技術の進歩を強調した。Calder 氏は、世界的な傾向にもかかわらずポピュリズムを回避している日本の例外性を指摘した。混乱した世界における日本のレジリエンス、それは日米協力の重要性、およびすべての人々に利益をもたらす安定した世界秩序を構築する可能性を浮き彫りにするものである、と述べた。

豊田正和 一般財団法人国際経済交流財団 (JEF) 会長

豊田氏は、権威主義的指導者の台頭や領土拡大のための経済・政治・軍事力の主張など、最近の世界的な課題を強調した。こうした課題は、COVID-19 パンデミックやロシアのウクライナ侵攻をきっかけに激化している。こうした危機は中国の経済的不確実性とともな大きな懸念事項であると指摘した。本フォーラムの議題は、エネルギー、環境、国際秩序という、相互の関連性が増す高まりつつあるトピックに焦点を当てている。10 年前はこれらの分野間の複雑なつながりはそれほど明らかではなかったが、現在ではエネルギー政策、環境配慮、地政学的安定性の関係を理解することが不可欠であると指摘した。日本と米国は、今後の米国大統領選挙や日本のリーダーシップの交代など、政治的移行に直面しており、今回のこの対話は時宜にかなっている。両国が選択する方向は、国際社会によって注意深く監視されることになる。フォーラムでの議論がこれらの複雑な問題を分析するだけにとどまらず、将来の政策に反映されるような実行可能な解決策につながることを期待する。

セッション 1：気候変動に対応したエネルギー安全保障

Kent E. Calder（モデレーター）

Calder 氏は講演の冒頭で、4 つのプレゼンテーションのうち 3 つが日米協力であり、特にエネルギー効率と第三国との共同の取り組みにおける日米協力の可能性が焦点となっていることを強調した。

山下ゆかり 日本エネルギー経済研究所（IEEJ）常務理事

山下氏は、エネルギー効率の向上、再生可能エネルギーの貯蔵と送電網統合の改善、二酸化炭素回収・貯留（CCS）の拡大、化石燃料の安定供給という、4 つの優先事項を強調した。次に、エネルギー効率における日本の強みと米国および他の国々とのパートナーシップを強調し、2030 年までに世界の効率を倍増するという COP28 の目標に言及して、先進国が日本のトップランナー（Top Runner）や米国のエネルギースター（U.S. Energy Star）プログラムに類似した知識共有と効率基準でこれらの地域を支援することを提唱した。山下氏はまた、日米の協力により AI やデータセンターなどの技術を最適化することで省エネが可能であると提言した。さらに、重要鉱物をめぐる経済安全保障上の懸念にも触れ、特定のサプライチェーンへの依存を減らすためのイノベーションを提唱した。同氏は、持続可能なネットゼロの未来への移行においてリソースを最大化するために、日本、米国、その他の国々の協力を求めた。

石井大貴 独立行政法人エネルギー・金属鉱物資源機構（JOGMEC）ワシントン事務所所長

石井氏は日本の気候変動対策の概要を説明し、世界排出量に占める日本の割合と中国や米国などの主要経済国からの大きな貢献を考慮すると、日本の取り組みは世界排出量削減に貢献していると強調した。彼は、日本の産業構造と社会構造をクリーンエネルギーへと転換し、経済成長と競争力の両方を高めることを目指す日本のグリーントランスフォーメーション（GX）イニシアチブを紹介した。彼はまた、鉄鋼、化学、発電などの分野で低炭素水素を支援する水素社会推進法などの最近の法律にも注目した。石井氏は、福島原発事故後の原子力発電の衰退を指摘したが、安全対策と規制遵守を条件に、2030 年までにエネルギーミックスの 20～22% に回復させる計画を共有した。最後に石井氏は、日本の「S+3E」（安全、エネルギー安全保障、経済効率、環境）エネルギー戦略について説明し、ウクライナ危機を含む最近の世界情勢はエ

エネルギー安全保障の重要性を浮き彫りにし、1973 年を彷彿とさせる潜在的なエネルギー危機をもたらしていると強調した。

Christopher Elsner Director, S&P Global Comodity Insights

Elsner 氏は、エネルギー安全保障と脱炭素化に影響を与える地政学的変化について論じた。彼は、2008 年の金融危機を転換点と位置付け、ウクライナ侵攻やテキサスの大寒波など最近の出来事はエネルギー安全保障の重要性を強調したと述べた。特に 2013 年から 2014 年以降の米国のシェールブームは、安定したエネルギー供給を確保することで日本に利益をもたらし、日米協力の機会を強化した。脱炭素化が中心的な焦点であり、彼は再生可能エネルギーとエネルギー貯蔵のサプライチェーンの混乱がもたらす課題を指摘した。日本にとって、脱炭素化目標を達成するには電化が不可欠だが、AI とデータセンターからの需要の高まりはエネルギー資源を圧迫する可能性がある。原子力エネルギーは、グリッド規模の貯蔵とともに、日本の 24 時間エネルギー信頼性にとって不可欠である。天然ガスは、再生可能エネルギーの変動性のバランスをとるために、日本のエネルギーミックスで引き続き重要な役割を果たすだろう。Elsner 氏は、EV や水素自動車の台頭でこれらの燃料の需要は減少しているものの、石油や石油精製製品市場における日米協力の可能性を強調した。一方で、日本の火力発電の信頼性は経済の安定に不可欠であり、脱炭素化の取り組みが進む 2030 年代、2040 年代も引き続き優先されるだろうと強調した。

Jennifer Sklarew Assistant Professor, Department of Environmental Science and Policy, George Mason University

Sklarew 氏は、さまざまなステークホルダーの観点からレジリエンスに焦点を当て、日米協力への影響について述べた。Sklarew 氏は、エンジニアリング、エコロジカル、ソーシャル、および経済のレジリエンスという異なるレジリエンスの種類を概説し、これらの優先事項を別々に推進すると、認識される対立につながる可能性があるとは指摘した。次に、エネルギー貯蔵、グリッドアクセス、サプライチェーンなど、エネルギー安全保障、環境目標、および経済的レジリエンスのバランスをとるグリーントランスフォーメーション (GX) イニシアチブにおける日本の優先事項を論じた。日本の再生可能エネルギーへのシフトには、洋上風力、水素、アンモニアが含まれるが、土地利用に関する懸念や再生可能エネルギー生産者へのグリッド料金などの課題は残っている。米国でも優先事項は同様であるものの、たとえば、トランプ政権は連邦政府の土地での石油とガスを重視する可能性があるなど、政策の

実施は将来の政権交代に応じて変わる可能性がある。米国における再生可能エネルギーの経済的レジリエンスは、バッテリー価格の低下とユーティリティー規模のストレージの拡大によって進化している。しかし、送電網の相互接続の遅れは続いており、州主導の再生可能エネルギーの取り組みは連邦政府の政策変更の影響を受ける可能性がある。カリフォルニア州、マサチューセッツ州、ニューヨーク州が再生可能エネルギーの基準でリードしているものの、トランプ政権は州の行動に制限を課す可能性があると指摘した。最後に、日米協力について、Sklarew 氏は新政権下での潜在的な道筋を概説し、水素、原子力技術、重要鉱物、CCS は新政権下でも協力の対象となる可能性が高い分野であり、加えてトランプ政権はブルー水素と大規模水力発電に重点を置く可能性があるとした。

パネルディスカッション 1

Calder 氏は、議論をバッテリー貯蔵から始め、その後、日米協力に関連する他のトピックについて検討することを提案した。

Elsner 氏は、再生可能エネルギーの供給が断続的な場合に信頼できる電力を維持するには、EV ではなくグリッド規模のエネルギー貯蔵が当面の優先事項であると強調した。彼は、インフレ抑制法などの米国の政策は日本にとって有益な情報を提供する一方で、米国では EV のバッテリー需要のせいでグリッドレベルの貯蔵ソリューションの拡大が遅れていると指摘した。

山下氏は、バッテリー貯蔵における中国の重要な役割を認め、計算と最適化のためのソフトウェア制御も同様に重要であると指摘した。日本の第 6 次エネルギー基本戦略では、水素が別の形でより長期間貯蔵できる可能性があることから、代替手段として検討されている。

石井氏は、風力発電や太陽光発電とともに、カーボンニュートラルを達成する上で水素が重要であることを強調した。彼は、日本の全体的なエネルギー枠組みに水素を戦略的に統合する必要があると指摘した。

山下氏は、日本が水素を積極的に推進していることを強調したが、その最終用途と市場の準備状況に疑問を呈した。彼女は、実行可能な水素サプライチェーンを構築するには、現在のエネルギー材料と比較して水素の初期コストが高いので、それを補うための補助金が必要であると強調した。

Sklarew 氏は、2024 年に日本の海洋エネルギー法が改正され、排他的経済水域（EEZ）での洋上風力発電開発が許可されたにもかかわらず、市場の準備が依然として課題であると指摘した。

Calder 氏は、日本の排他的経済水域（EEZ）が世界で 6 番目に大きいことから、日本には海洋開発の大きな可能性があるとは指摘した。

石井氏は、水素の需要と供給の両方を対象とし、市場の成長を促すため双方に補助金を支給するという日本の新政策に賛意を表した。

Calder 氏は、総合的なアプローチを採用している例として日本のこの産業政策を高く評価し、供給重視の米国の政策とは対照的であると述べた。

Elsner 氏は、世界の政策は供給のみに焦点を当てる傾向があるため、日本とヨーロッパは供給と需要の両方を優先する点で異色であると指摘した。彼は、CCS と水素の法外なコストには、米国のインフレ抑制法の 45V 条項のような強力な財政的インセンティブと政策が必要であると強調した。彼は、強力な政策支援がなければ、CCS と水素プロジェクトは建設段階に至るまでに苦勞する可能性があるとは説明した。

石井氏は東南アジアの人口増加と天然ガスの使用について述べ、米国は LNG を輸出することでこれらの国のカーボンニュートラル化を支援でき、日本は技術貢献できると提言した。

山下氏は、効率的な製品の促進のために小売業者と協力することを強調し、規制だけではなく消費者教育が非効率的な製品の段階的廃止に役立つことを強調した。山下氏は、日本と米国はどちらもエネルギー効率の効果的なモデルを持っているが、この分野での協力はこれまで最小限にとどまっていると指摘した。

豊田氏は、電力会社が家庭にエネルギー使用の削減を義務付ける、ヨーロッパ式の間接的な省エネ規制が日本に役立つ可能性があるかどうかを尋ねた。また、福島原発事故の後、日本が原子力規制の最適化に苦戦していることを指摘し、日本がバランスの取れた原子力規制を採用する際に、米国が支援できるかどうかを尋ねた。

Sklarew 氏は原子力規制の問題について、米国のリスク管理枠組みとは対照的に、文化的なリスク許容度ゼロという日本の慎重な規制アプローチを論じた。Sklarew 氏は、スリーマイル島の経験から学んだトレードオフと事故対応の重要性を指摘し、日本はリスクに応じた規制という考え方や地域社会の関与を強化すればより効果的な対応が可能になると述べた。

Elsner 氏は、米国は従来の原子力プロジェクトと先進的な原子力プロジェクトの両方に対して地元の反対に直面しており、それが進歩を遅らせていると付け加えた。彼は、原子力プロジェクトやその他のインフラプロジェクトに対する地元および国の支援を得るために、リスクコミュニケーションを改善する方法について協力することを提案した。

山下氏は、原子力エンジニアの高齢化に伴う日本の課題について述べ、トレーニングのための国際協力の重要性を強調した。彼女は、若いエンジニアを世界的なエネルギーの議論に参加させる必要性を強調し、マイクロソフトの革新的な原子力プロジェクトが若いエンジニアに刺激を与える可能性があると述べた。

セッション 2：国際秩序－権威主義対ルールベース

原岡直幸（モデレーター） 一般財団法人国際経済交流財団（JEF）専務理事
原岡氏は、関税、デジタル貿易、およびそれらが世界経済秩序に与える影響など、貿易政策の話題に焦点を当てて、セッション 2 を開始した。原岡氏は、地政学的リスクと、経済成長、エネルギー安全保障、環境問題の間でバランスを取ることが求められることから、世界貿易政策がより複雑さを増していると指摘した。

Kenneth I. Juster Former Ambassador to India

Juster 氏は、世界貿易の変化する状況と、米国大統領選挙が貿易政策に及ぼす潜在的な影響について説明した。Juster 氏は、世界貿易が多国間協定から、CPTPP や日米デジタル貿易協定などの複数国間またはセクター別協定に移行していることを指摘した。Juster 氏は、米国が上級委員会の委員選任を拒否し、紛争解決プロセスを弱体化させていることなど、WTO が直面している課題について説明した。米国の WTO に対する不満は、合意要件と、米国の貿易利益に不利となる関税不均衡の認識からも生じている。Juster 氏は、Jake

Sullivan 国家安全保障担当大統領補佐官による 2023 年の新自由主義経済体制の批判について触れ、これが選択的関税、輸出規制、国内産業政策に米国が移行するきっかけとなったと述べた。このアプローチは、日本製鉄による US スチール買収への反対に見られるように、外国企業による重要産業の買収を制限するバイデン政権の措置に表れている。Juster 氏は、今後について、ハリス副大統領とトランプ前大統領のいずれが当選しても、米国は慎重な貿易姿勢を続ける可能性が高いと述べた。ハリス氏は関税、同盟国とのパートナーシップ、気候変動政策に重点を置く一方、トランプ氏は海外市場、特に中国の市場開放に向けた影響力を得るために高関税を追求する可能性がある。

平見健太 長崎県立大学国際社会学部 准教授

平見氏は、貿易における単独行動主義の台頭とそれが世界経済関係に与える影響について論じた。同氏は単独行動主義を 2 つの意味で定義し、大国が単独行動主義の手段を使って気候変動対策や労働基準などの価値観を他国に押し付けるといった問題の側面に焦点を当てた。その後、米国通商法第 301 条や EU の企業持続可能性デューデリジェンス指令 (CSDDD) など、米国と EU における単独行動主義の事例を取り上げ、主要市場がこうした手段を使ってアクセスを制御し、対外行動に影響を与える様子を示した。同氏は、単独行動主義の台頭は、既存の国際ルールの新規性、条約交渉の停滞、WTO の紛争解決制度の弱体化に起因すると指摘した。平見氏は、単独行動主義の 3 つの問題点、すなわち、ある地域社会の価値観を他国に押し付ける、外国企業に課す経済的および行政的負担、他国の規制自主権の制限について概説した。解決策として、彼は可能な限り貿易協定紛争システムを使用することを提案し、紛争を減らすための経済外交の重要性を強調し、政策設計において民間部門の懸念が考慮されるように民間部門が関与するよう奨励した。

David B. Shear Senior Advisor, Edwin O. Reischauer Center for East Asian Studies, Johns Hopkins University (SAIS)

Shear 氏は、インド太平洋地域における米国の経済戦略と地政学戦略を一致させることの重要性について語った。2011 年、彼はベトナムに環太平洋パートナーシップ (TPP) への参加を促し、中国からの貿易独立性の向上など、その経済的および地政学的利益を強調した。しかし、Shear 氏は、ワシントンは貿易と地政学のこのつながりを常に評価してきたわけではないと指摘した。彼は、オバマ大統領が TPP の議会への提出を遅らせ、トランプ大統領がその後 2017 年に米国を協定から撤退させた一方で、環太平洋パートナーシップに関する包括的および先進的な協定 (CPTPP) を通じて協定を救済しよう

とする日本の努力が、ある程度、影響を緩和したと指摘した。Shear 氏は、中国と連携すれば経済的利益が得られるが、米国と提携しても目に見える利益は少ないという中国からのインド太平洋諸国への暗黙のメッセージに言及し、これを「Netflix」（中国）と「Blockbuster Video（米国を本拠地とする DVD レンタルチェーン）」（米国）の違いに例えた。同氏は最後に、安定した地域秩序を確立するために経済政策と地政学的目標を結び付けるという米国のコミットメントを再興するよう促したが、今のところは日本などの同盟国が米国の関与停止によって生じた溝を埋めていることを認めた。Shear 氏は、日米同盟が課題に直面した 1990 年代と同様に、同盟の将来は積極的に追求しなければ最終的に「我々が失うもの」になると警告して締めくくった。

谷川喜祥 一般財団法人日本経済団体連合会米国事務所 所長

谷川氏は、世界貿易が 2000 年の 6.1 兆ドルから 2023 年には 24 兆ドルに拡大し、極度の貧困が大幅に減少し、企業が重要な役割を果たしていると指摘した。谷川氏は、日本の優先課題として、国力強化、国際ルールの推進、南半球との協力関係の構築、の 3 つを挙げた。また、日本の国家安全保障戦略では「戦略的自立」（特定の国への依存を減らす）と「戦略的不可欠性」（日本が重要なパートナーであり続けることの確保）を重視していると説明した。これらの目標を達成するには、日本はオープンでルールに基づく経済秩序を維持し、特に志を同じくする国々との「友好関係」を通じてサプライチェーンのレジリエンスを高める必要がある。谷川氏は、自由で公正な貿易と投資環境、経済安全保障、持続可能性を統合することの重要性を強調した。また、経済連携協定（EPA）と自由貿易協定（FTA）を通じて貿易ネットワークを拡大するとともに、紛争解決機能の回復や安全保障ルールの更新を含む WTO 改革を推進するよう求めた。持続可能性については、環境貿易の促進、炭素価格設定や排出量計算に関する合意に向けた努力を通じて、地球環境目標の推進を訴えた。彼は最後に、こうした多面的な地球規模の課題に対処するには創造的な解決策が必要であると強調した。

パネルディスカッション 2

原岡氏は、議論の中で共有された具体的な提案に感謝の意を表し、日米豪印戦略対話（QUAD）のような同盟やインフラを支える金融イニシアチブの重要性を強調した。彼は、ルールに基づく国際経済に積極的に貢献する上で米国が直面している課題を指摘し、QUAD のような米国を含む同盟は、不平等などの問題に対処し、地政学的緊張を緩和するのに役立つ可能性があるとした。

さらに、ビジネスの観点から、企業にとって安定した環境を作り出すために、明確で予測可能なルールが必要であることを強調した。彼は、経済安全保障と自由貿易のバランスをとることについてのインサイトを求め、貿易を促進しながら重要なセクターを保護するために「狭い庭、高い柵」アプローチを提唱する人もいると指摘した。しかし、このアプローチの範囲を定義することは依然として難しい。彼は、企業にとってこのバランスを最もうまく達成するにはどうすればよいかをパネリストに尋ねた。

Juster 氏は、米国の TPP 離脱に対する Shear 氏の懸念に同調し、これを戦略的誤りとみなした。彼は、中国の優位性がない多極的なアジアという構想に対して日米が共に関心を寄せる必要性を強調した。Juster 氏は、一帯一路などの構想や RCEP への関与を通じた中国の拡大する貿易関係について触れ、中国が最終的に CPTPP に参加する可能性があるかと警告した。彼は、米国と日本が特に QUAD を通じ協力してこれらの問題に取り組むことを提言した。

平見氏は、米国との同盟は共通の価値観に根ざしたパートナーシップであり、権威主義的脅威から国際秩序を守るために不可欠であると述べた。しかし、米国が頻繁に一方的な行動に頼り、それがビジネス環境を不安定にする可能性について、自身のプレゼンテーションで述べた懸念を繰り返した。平見氏は、日本は現実的な対応をとり、米国の各政策に対して公正かつ公平な立場を維持し、問題のある一方的措置を回避するために米国の意思決定に影響を与えるよう努めるべきだと提案した。

Shear 氏は、Juster 氏の見解に沿って、インド太平洋における影響力を強化するために日本と米国が協力する方法を述べた。彼は、東南アジアにおける経済的および政治的影響力の両方にとって不可欠な要素である TPP の機会を米国が逃したことを認めたが、東南アジアの開発資金を強化することで市場開放措置の欠如を補うことを提案した。

谷川氏は、WTO や UNFCCC のような多国間フォーラムで合意に達することの難しさを指摘し、日米協力の範囲の広さと深さを強調した。谷川氏は、自由で開かれたルールに基づく国際秩序を再構築する「未来のためのグローバルパートナー (Global Partners for the Future)」における米国のリーダーシップを促し、さらに、包摂性 (inclusivity) の推進と保護主義に対する警戒の必要性を強調した。また、産業政策は公共政策の目標と軌を一にし、企業がますます果たすべき公共財としての役割に対応する必要があると主張した。

平見氏は、産業政策の復活について論じ、その主な要因として、中国の国家資本主義が世界競争力に与える影響と、自由主義諸国で産業政策の必要性に関する議論が続いていることに鑑み、特にサプライチェーンの確保における経済安全保障の必要性を挙げた。産業政策は本質的に市場への政府の介入を伴う。平見氏は、産業政策が不可欠であると考えられる場合、志を同じくする国々の間でこれらの政策を調整することが重要であり、これにより同盟国間の資源配分が明確になり、経済安全保障がさらに強化される可能性がある」と結論付けた。

原岡氏は、提示された詳細な提案に感謝の意を表し、QUAD とインフラのための金融イニシアチブの重要性を強調した。彼は、米国がルールに基づく国際経済を全面的に支援することは難しいかもしれないが、QUAD のような同盟の取り組みは、不平等やより広範な地政学的課題などの問題に対処するのに役立つ可能性がある」と述べた。彼はパネリストに対し、ビジネスの観点から、経済安全保障と自由貿易のバランスをどのように達成するかについて意見を求め、重要な地域を保護しながら開放性を促進する「狭い庭、高い柵」アプローチが実用的かもしれないと指摘した。

Juster 氏は、ビジネスと地政学的状況に影響を与える世界的な不確実性について語った。彼は、企業は、進化する国際秩序、中国の影響力の拡大、多極的ダイナミクスが顕在化し、グローバルサウスと BRICS 諸国が世界機関でより重要な役割を求めている中で、コンプライアンスとリスク管理チームを拡大していると指摘した。

谷川氏は、技術と経済の安全保障を管理する戦略として、「リスク回避」や「狭い庭、高い柵」アプローチなどの概念を慎重に支持すると述べた。しかし、特定のルールをすぐに時代遅れにしてしまうほど技術の変化のペースが速いと述べ、実施の難しさを指摘した。

原岡氏は、議論に感謝の意を表し、CPTPP に対する日本の立場を明確にした。彼は、中国が必要な要件を満たす限り、日本は同協定への中国の参加を歓迎するとし、目標は中国を封じ込めることではないことを強調した。中国は日米両国にとって重要な貿易相手国であると認識し、アジア太平洋地域での自由貿易の促進は日本の目的と一致しており、米国も暗黙のうちにこれを期待していると述べた。彼は、米国の貿易目標のこの特徴づけに対してパネリストが同意するかどうかを尋ねた。

Juster 氏は、トランプ前大統領が、地域のサプライチェーン協力とコミュニケーションを支援する数少ないイニシアチブの一つであるインド太平洋経済枠組み（IPEF）を破棄する意向であると指摘した。Juster 氏は、CPTPP を維持するための日本のリーダーシップを高く評価し、その高い基準を維持することの重要性を強調した。彼は、協定の質の低下を防ぐため、中国はこれらの基準を満たす場合にのみ、特に国有企業がそうする場合にのみ、参加を許可されるべきであると警告した。

Calder 氏は、世界秩序というより広いテーマの中での議論を振り返り、リスク削減メカニズムとグローバルな公共財の提供における協力の必要性を強調した。彼は、Juster 氏のインフラ向けブレンドファイナンスの例を強調し、そのようなイニシアチブは米国や日本のような支配的な国の影響力を維持するために不可欠であると述べた。彼は、トランプ大統領の下で締結された日米デジタル貿易協定のような既存の二国間協定を考慮すると、デジタル貿易に対する完全な多国間アプローチではなく、複数国間アプローチが実行可能であろうと述べた。Calder 氏はまた、特に戦略的目標を共有する分野で、日本の産業政策を米国にとっての学習モデルとして検討することを提案した。

Juster 氏は、QUAD の取り組みは経済だけにとどまらず、気候関連支援、サイバーセキュリティ、健康安全保障、ワクチン、人道支援、海洋領域支援などの分野で地域に公共財を提供していることを強調した。さらに、米国は麻薬やフェンタニル対策、気候変動への取り組み、サイバーセキュリティの強化など、国境を越えた問題に関して中国と協力的なアジェンダを追求してきたことを強調した。

谷川氏は、エネルギー転換に対してカスタマイズされたアプローチの重要性を強調し、アジア諸国は多様なエネルギーポートフォリオと産業構造を持っているため、経済的中立への単一の道は実現不可能であると指摘した。彼は、日本は南半球諸国と他の国々を国際秩序に統合するモデルを開発することでリーダーシップを発揮できると示唆し、そのようなアプローチは将来的に有益となる可能性があることを強調した。

平見氏は、WTO のグローバル多国間主義の枠組みの中で公共財を提供することの複雑さについて言及し、多国間主義に対する現在の脅威がこの課題を特に困難にしていると指摘した。彼は、南半球諸国が多国間フォーラムで公共財に貢献する上で重要な役割を担っていることを強調したが、それぞれの立

場が分かれているためプロセスは複雑になっている。一部の南半球諸国は特定の問題で西側諸国と足並みを揃えているが、他の国々は中国のシステムを支持しており、公共財の提供にさらなる複雑さが生じている。

豊田氏は、トランプ前大統領とその支持者が TPP に反対した理由について質問した。貿易は勝者と敗者の両方を生み出すと指摘し、悪影響を受ける可能性のある人々を支援することの重要性を強調した。彼は、日本では、再教育、再訓練、その他の支援などの措置がこれらの課題に対処するのに役立つ可能性があるとして指摘し、特に自由貿易には常に勝者と敗者が存在するという事実を踏まえ、米国が自国の貿易調整措置を改善して自由貿易の影響をより適切に管理できる可能性について見解を求めた。

原岡氏は、米国と中国の両方で、グローバル化を支持する若い世代の利益が考慮されることを個人的な希望として共有した。彼は、これら将来の世代の好みを反映するために、自由主義的な国際貿易体制を速やかに回復すべきであると提案した。

(1) 英語

This English summary was drafted by Edwin O. Reischauer Center for East Asian Studies, Johns Hopkins University (SAIS).



Summary US- Japan Forum

**Redefining Japan-US economic relationship
in the era of fragmentation and disorder at
the time of US Presidential Election and beyond**

October 21, 2024

Opening Remarks

Kent E. Calder, *Director, Reischauer Center for East Asian Studies, SAIS*

Dr. Calder framed the conference's relevance amid a pivotal moment in global affairs and U.S.-Japan relations, shaped by multiple complex forces. He also identified the 2008 financial crisis as a critical inflection point that reshaped the global system, and discussed how this crisis triggered a populist wave across industrialized nations, influencing political shifts, such as Donald Trump's election and populist leaders like Boris Johnson and Marine Le Pen. These shifts have transformed international relations, economic growth trajectories, and energy strategies. He cited Russia's rising discontent, which ultimately led to the Ukraine War in 2022, as another outcome of these global changes. He also highlighted technological advancements, particularly in energy, which have accelerated the transition to renewables, further reshaping global dynamics. Dr. Calder noted Japan's exceptionality in avoiding populism despite global trends. In a turbulent world, Japan's resilience underscores the importance of U.S.-Japan cooperation and the potential to build a stable global order that benefits all.

Masakazu Toyoda, *Chairman and CEO, Japan Economic Foundation (JEF)*

He highlighted recent global challenges, such as the rise of authoritarian leaders and the assertion of economic, political, and military power to expand territories, which have intensified in the wake of the COVID-19 pandemic and Russia's invasion of Ukraine. He noted that these crises, alongside China's economic uncertainties, are major concerns.

The forum's agenda focuses on energy, the environment, and the international order, topics that are increasingly interlinked. He pointed out that a decade ago, the intricate connections between these areas were not as evident, but now understanding the relationship between energy policies, environmental considerations, and geopolitical stability is essential.

This dialogue is timely, as both Japan and the U.S. face political transitions, including the upcoming U.S. presidential election and leadership shifts in Japan. The directions these nations choose will be closely monitored by the global community. In closing, Mr. Toyoda expressed his hope that the forum's discussions would go beyond just analyzing these complex issues and lead to actionable solutions that could inform future policies.

Session 1: Securing Energy by Responding to Climate Change

Kent E. Calder (moderator)

Dr. Calder opened by reflecting on the presentations, emphasizing that three of the four centered on U.S.-Japan cooperation, particularly around energy efficiency and the potential for joint efforts with third countries.

Yukari Yamashita, *Managing Director, Institute of Energy Economics, Japan (IEEJ)*

Prof. Yamashita highlighted four priorities: enhancing energy efficiency, improving renewable energy storage and grid integration, scaling up carbon capture and storage (CCS), and maintaining stable fossil fuel supplies. She then underscored Japan's strengths in energy efficiency and partnerships with the U.S. and other nations, referencing the COP 28 goal to double global efficiency by 2030, also advocated for developed nations to support these regions with knowledge-sharing and efficiency standards akin to Japan's Top Runner and the U.S. Energy Star programs. Prof. Yamashita also suggested that U.S.-Japan collaboration could optimize the technologies such as AI and data centers for energy savings. Additionally, she addressed economic security concerns over critical minerals, advocating for innovation to reduce reliance on specific supply chains. Prof. Yamashita called for collaborative efforts from Japan, the U.S., and other nations to maximize resources in transitioning to a sustainable, net-zero future.

Hiroataka Ishii, *General Manager, JOGMEC, Washington, D.C. Office*

Mr. Ishii outlined Japan's climate initiatives and emphasized that Japan's efforts contribute to global emissions reduction, given Japan's share of global emissions and the large contributions from other major economies like China and the U.S. He introduced Japan's Green Transformation (GX) initiative, which aims to shift Japan's industrial and social structures toward clean energy, enhancing both economic growth and competitiveness. He also highlighted recent legislation, such as the Hydrogen Society Promotion Act, to support low-carbon hydrogen in sectors like iron and steel, chemicals, and power generation. Mr. Ishii noted nuclear power's decline post-Fukushima but shared plans to restore it to 20-22% of the energy mix by 2030, pending safety measures and regulatory compliance.

Mr. Ishii concluded by describing Japan's "S+3E" energy strategy (safety, energy security, economic efficiency and environment), and stressed that recent global events, including the Ukraine crisis, underscore the importance of energy security, posing a potential energy crisis reminiscent of 1973.

Christopher Elsner, *Director, S&P Global Commodity Insights*

Mr. Elsner discussed geopolitical shifts impacting energy security and decarbonization.

He identified the 2008 financial crisis as an inflection point, with recent events like the Ukraine invasion and Texas deep freeze underscoring energy security's importance.

The U.S. shale boom, particularly since 2013-2014, has benefitted Japan by ensuring a stable energy supply, reinforcing opportunities for U.S.-Japan cooperation. Decarbonization was a central focus, with him noting the challenges posed by supply chain disruptions for renewables and energy storage. For Japan, electrification is crucial to meet decarbonization targets, though the rising demand from AI and data centers may strain energy resources. Nuclear energy, along with grid-scale storage, is vital for Japan's 24-hour energy reliability. Natural gas will remain significant in Japan's energy mix to balance renewables' variability. Mr. Elsner highlighted potential for U.S.-Japan cooperation in oil and refined products markets, though demand for these fuels is decreasing with the rise of EVs and hydrogen vehicles, while Japan's thermal power reliability, essential for economic stability. Finally, He stressed that will continue to be prioritized into the 2030s and 2040s as decarbonization efforts advance.

Jennifer Sklarew, *Assistant Professor, Environmental Science and Policy, George Mason University*

Dr. Sklarew focused on resilience from various stakeholder perspectives, discussing implications for U.S.-Japan cooperation. She outlined different resilience types: engineering, ecological, social, and economic resilience, noting that the separation of these priorities can lead to perceived conflicts. She then reviewed Japan's priorities within its Green Transformation (GX) initiative, including energy storage, grid access, and supply chains, which balance energy security, environmental goals, and economic resilience. Japan's renewable energy shift includes offshore wind, hydrogen, and

ammonia, though challenges like land use concerns and grid fees for renewable producers remain. In the U.S., priorities are similar, though policy implementation may vary based on future administration changes. For example, a Trump administration might emphasize oil and gas on federal land. Economic resilience for renewables in the U.S. is evolving, driven by declining battery prices and expanding utility-scale storage. However, delays in grid interconnection persist, and state-led renewable initiatives may be affected by federal policy changes. She noted that California, Massachusetts, and New York are leading in renewable standards, though a Trump administration might impose limitations on state actions. Finally for U.S.-Japan cooperation, Dr. Sklarew outlined potential paths under new administrations, Hydrogen, nuclear technology, critical minerals, and CCS are likely areas for collaboration regardless, and Trump administration may focus on blue hydrogen and large-scale hydropower.

Panel Discussion 1

Dr. Calder proposed starting the discussion with battery storage and then exploring other topics related to U.S.-Japan cooperation.

Mr. Christopher Elsner emphasized that grid-scale energy storage, rather than EVs, is the immediate priority for maintaining reliable power when renewables are intermittent. He noted that While U.S. policies like the Inflation Reduction Act offer insights for Japan, EVs' demand for batteries is slowing the scaling of grid-level storage solutions.

Prof. Yamashita acknowledged China's critical role in battery storage, noting that software control for computing and optimization is equally vital. Japan's Sixth Basic Energy Strategy is exploring hydrogen as an alternative, given its potential for longer-duration storage in a different form.

Mr. Ishii emphasized hydrogen's importance in achieving carbon neutrality, alongside wind and solar power. He noted the need to strategically integrate hydrogen within Japan's overall energy framework.

Prof. Yamashita highlighted Japan's active promotion of hydrogen but questioned its end-use and market readiness. She emphasized the need for subsidies to offset hydrogen's high initial costs compared to current energy materials, to build a viable hydrogen supply chain.

Dr. Sklarew noted that, despite the 2024 amendment to Japan's Marine Energy Resources Act permitting offshore wind development in Exclusive Economic Zones (EEZ), market readiness remains a challenge.

Dr. Calder pointed out Japan's significant potential for offshore development, given that its Exclusive Economic Zone (EEZ) is the sixth-largest globally.

Mr. Ishii affirmed that Japan's new policy targets both supply and demand for hydrogen, with subsidies on each side to help grow the market.

Dr. Calder praised this as an example of Japanese industrial policy taking a holistic approach, contrasting with the more supply-focused U.S. policies.

Mr. Elsner noted that Japan and Europe are exceptions in prioritizing both supply and demand, as global policies tend to focus on supply alone. He stressed that prohibitive costs for CCS and hydrogen require strong financial incentives and policies, such as those in the U.S. Inflation Reduction Act's 45V provisions. He explained that without robust policy support, CCS and hydrogen projects may struggle to reach the construction phase.

Mr. Ishii noted Southeast Asia's population growth and natural gas usage, suggesting that the U.S. could support these countries' carbon neutrality by exporting LNG, while Japan could contribute technology.

Prof. Yamashita emphasized collaboration with retailers to promote efficient products, highlighting that consumer education, along with regulations, helps phase out inefficient items. Prof. Yamashita noted that Japan and the U.S. both have effective models for energy efficiency but have so far collaborated only minimally in this area.

Mr. Toyoda asked whether Japan might benefit from European-style indirect regulations on energy savings, where utilities are mandated to engage households in reducing energy use. He also asked if the U.S. could help Japan adopt balanced nuclear regulations, noting Japan's struggle to optimize its nuclear regulatory approach post-Fukushima.

Dr. Sklarew addressed the nuclear regulation question, discussing Japan's cautious regulatory approach due to a cultural zero-risk tolerance, which contrasts with the U.S.'s risk management framework. She suggested Japan could benefit from more risk-based regulation and community engagement, noting the importance of trade-offs and incident response, as learned from the Three Mile Island experience.

Mr. Elsner added that the U.S. faces local opposition to both traditional and advanced nuclear projects, which has slowed progress. He suggested collaborating on ways to improve risk communication to gain local and national support for nuclear and other infrastructure projects.

Prof. Yamashita commented on Japan's challenges with an aging nuclear engineering workforce, underscoring the importance of international collaboration for training. She highlighted the need to expose young engineers to global energy discussions and noted Microsoft's innovative nuclear project as potentially inspiring for young engineers.

Session 2: International Order - Power versus Rules

Naoyuki Haraoka (moderator), *Executive Managing Director, Japan Economic Foundation (JEF)*

Mr. Haraoka opened Session 2, with a focus on trade policy topics such as tariffs, digital trade, and their impact on the global economic order. He noted the increasing complexity of global trade policy due to geopolitical risks and the balancing act required between economic growth, energy security, and environmental concerns.

Ambassador Kenneth I. Juster

Ambassador Juster discussed the shifting landscape of global trade and the potential impact of the U.S. presidential election on trade policy. He noted that global trade has moved from multilateral agreements to plurilateral or sector-specific deals, such as the CPTPP and the U.S.-Japan digital trade agreements. He explained the challenges the WTO faces, including the U.S. blocking appointments to the appellate body, which has weakened the dispute resolution process. U.S. frustrations with the WTO also stem from the consensus requirement and perceived tariff imbalances that disadvantage American trade interests. Ambassador Juster pointed to National Security Advisor Jake Sullivan's 2023 critique of the neoliberal economic order, which marked a shift toward selective tariffs, export controls, and domestic industrial policies. This approach is evident in the Biden administration's measures to limit foreign acquisitions in critical industries, as seen with its opposition to Nippon Steel's attempt to acquire U.S. Steel. Looking forward, Ambassador Juster suggested that both Vice President Harris and former President Trump would likely continue a cautious trade stance if elected. Harris would focus on tariffs, allied partnerships, and climate policies, while Trump might pursue high tariffs to gain leverage for opening foreign markets, especially with China.

Dr. Kenta Hiramī, *Associate Professor, International Law Faculty of Global Studies, University of Nagasaki*

Dr. Hiramī discussed the rise of unilateralism in trade and its implications for global economic relations. He defined unilateralism in two senses, focusing on the problematic aspect where powerful states use unilateral measures to impose values, such as climate action or labor standards, on others. He then highlighted examples of unilateralism from the U.S. and the EU, including the U.S. Trade Act's Section 301 and the EU's Corporate Sustainability Due Diligence Directive (CSDDD), illustrating how major markets use such measures to control access and influence external behavior. He attributed the rise of unilateralism to the ineffectiveness of existing international rules, stalled treaty negotiations, and the WTO's weakened dispute settlement system. Dr. Hiramī outlined three issues with unilateralism: the imposition of one community's values on others, the economic and administrative burdens it places on foreign businesses, and the restriction of regulatory

autonomy for other states. As solutions, he suggested using trade agreement dispute systems where possible, emphasizing the importance of economic diplomacy to reduce conflicts, and encouraging private sector involvement to ensure their concerns are considered in policy design.

Ambassador David B. Shear, *Senior Advisor, Reischauer Center for East Asian Studies, Johns Hopkins University (SAIS)*

Ambassador David Shear addressed the importance of aligning U.S. economic and geopolitical strategies in the Indo-Pacific region. In 2011, He encouraged Vietnam to join the Trans-Pacific Partnership (TPP), highlighting its economic and geopolitical benefits, including increased trade independence from China.

Ambassador Shear noted, however, that Washington has not consistently appreciated this link between trade and geopolitics. He pointed out that President Obama delayed submitting the TPP to Congress, and President Trump subsequently withdrew the U.S. from the agreement in 2017, while Japan's efforts to salvage the agreement through the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) mitigated some impacts. Ambassador Shear cited China's implicit messaging to Indo-Pacific countries that aligning with China brings economic gain, while partnering with the U.S. yields less tangible benefits—a portrayal he likened to the difference between “Netflix” (China) and “Blockbuster Video” (the U.S.). He closed by urging the U.S. to renew its commitment to linking economic policy with geopolitical goals to establish a stable regional order, though he acknowledged that for now, allies like Japan are filling the gap left by U.S. disengagement. Ambassador Shear concluded with a warning that, as in the 1990s when U.S.-Japan alliance faced challenges, the future of the alliance is ultimately "ours to lose" if not actively pursued.

Kiyoshi Tanigawa, *Executive Director, Keidanren USA*

Mr. Tanigawa noted that global trade has expanded from \$6.1 trillion in 2000 to \$24 trillion in 2023, significantly reducing extreme poverty, with businesses playing a crucial role. Mr. Tanigawa outlined three priorities for Japan: strengthening national power, advancing international rules, and building cooperation with the Global South. He explained that Japan's National Security Strategy emphasizes “strategic autonomy” (reducing

dependence on certain nations) and “strategic indispensability” (ensuring Japan remains a critical partner). Achieving these goals requires Japan to uphold an open, rules-based economic order and enhance supply chain resilience, especially through “friend-shoring” with like minded countries. He stressed the importance of integrating free and fair trade and investment climate, economic security, and sustainability. He called for expanding trade networks through economic partnership agreements (EPAs) and free trade agreements (FTAs), while also pushing for WTO reforms, including restoring its dispute settlement function and updating security rules. On sustainability, He urged promotion of environmental trade, efforts to reach agreements on carbon pricing and emissions accounting to advance global environmental goals. He closed by underscoring the need for creative solutions to address these multifaceted global challenges.

Panel Discussion 2:

Mr. Haraoka expressed gratitude for the concrete proposals shared during the discussion, emphasizing the importance of alliances like the QUAD and financial initiatives to support infrastructure. He noted the challenges facing the U.S. in actively contributing to a rules-based international economy, suggesting that alliances involving the U.S., such as the QUAD, could help address issues like inequality and mitigate geopolitical tensions. From a business standpoint, He then highlighted the need for clear, predictable rules to create a stable environment for companies. He asked for insights on balancing economic security with free trade, noting that some advocate a "small yard, high fence" approach to protect essential sectors while promoting trade. However, defining the scope of this approach remains challenging. He asked the panelists how best to achieve this balance for businesses.

Ambassador Juster echoed Ambassador Shear’s concerns about the U.S. withdrawal from the TPP, which he viewed as a strategic error. He emphasized the shared U.S.-Japan interest in a multipolar Asia where China does not dominate. Noting China’s expansive trade relationships through initiatives like the Belt and Road and its involvement in RCEP, Ambassador Juster warned that China could eventually join the CPTPP. He advocated for

the U.S. and Japan to address these issues collaboratively, particularly through the QUAD.

Dr. Hiramami described the U.S. alliance as a partnership rooted in shared values and essential for defending the international order against authoritarian threats. However, he reiterated concerns from his presentation regarding the U.S.'s frequent reliance on unilateral actions, which can destabilize business environments. Dr. Hiramami suggested that Japan should adopt a pragmatic response, maintaining a fair and impartial stance on each U.S. policy and working to influence U.S. decision-making to avoid problematic unilateral measures.

Ambassador Shear addressed how Japan and the U.S. could collaborate to strengthen their influence in the Indo-Pacific, aligning with Ambassador Juster's views. He acknowledged the missed opportunity of the TPP, which he saw as a vital component for both economic and political influence in Southeast Asia but suggested offsetting the absence of market-opening measures by enhancing development finance in Southeast Asia.

Mr. Tanigawa emphasized the broad scope and depth of U.S.-Japan cooperation, noting the difficulty of achieving consensus in multilateral forums like the WTO and the UNFCCC. He encouraged U.S. leadership in "Global Partners for the Future" to rebuild a free and open rule-based international order, emphasizing the need for inclusivity and caution against protectionism. He argued that industrial policy should align with public policy goals and be responsive to the public goods role companies increasingly play.

Dr. Hiramami discussed the revival of industrial policy, attributing it to two main factors: the impact of China's state capitalism on global competitiveness and the need for economic security, especially in securing supply chains. He noted ongoing debates in liberal countries regarding the necessity of industrial policy, which inherently involves government intervention in the market. Dr. Hiramami argued that if industrial policy is deemed essential, then coordinating these policies among like-minded countries is crucial. He concluded that

coordinating policies could clarify resource allocation among allies, further enhancing economic security.

Mr. Haraoka expressed gratitude for the detailed proposals presented, emphasizing the importance of the QUAD and financial initiatives for infrastructure. He observed that while it may be challenging for the U.S. to fully support a rules-based international economy, alliance efforts like the QUAD could help address issues such as inequality and broader geopolitical challenges. From a business perspective, he asked the panelists to comment on how to achieve a balance between economic security and free trade, noting that a “small yard, high fence” approach—protecting essential areas while promoting openness—might be practical.

Ambassador Juster addressed global uncertainties impacting the business and geopolitical landscape. He noted that companies are expanding compliance and risk management teams as they navigate an evolving international order, China’s growing influence and the emergence of multipolar dynamics, with countries in the Global South and BRICS seeking a more prominent role in global institutions.

Mr. Tanigawa expressed cautious support for concepts like “de-risking” and the “small yard, high fence” approach as strategies to manage technological and economic security. However, he noted the challenge of implementation, given the rapid pace of technological change that can quickly render specific rules outdated.

Mr. Naoyuki Haraoka expressed appreciation for the discussion and clarified Japan’s stance on the CPTPP. He emphasized that Japan would welcome China’s participation in the agreement, provided China meets the necessary requirements, underscoring that the goal is not to contain China. Recognizing China as a vital trading partner for both Japan and the U.S., Mr. Haraoka suggested that promoting free trade in the Asia-Pacific region aligns with Japan’s objectives and should be implicitly expected from the United States. He asked the panelists whether they agreed with this characterization of U.S. trade goals.

Ambassador noted that former President Trump intends to cancel the Indo-Pacific Economic Framework (IPEF), one of the few initiatives supporting regional supply chain cooperation and communication. Ambassador Juster then praised Japan's leadership in preserving the CPTPP and emphasized the importance of maintaining its high standards. He cautioned that China should only be allowed to join if it meets these standards, especially regarding state-owned enterprises, to prevent any lowering of the agreement's quality.

Dr. Kent Calder reflected on the discussion within the broader theme of world order, emphasizing the need for risk reduction mechanisms and cooperation in providing global public goods. He highlighted Ambassador Juster's example of blended finance for infrastructure, noting that such initiatives are essential for maintaining the influence of dominant powers like the U.S. and Japan. He suggested that a plurilateral approach to digital trade, rather than a fully multilateral one, could be viable, given existing bilateral agreements like the U.S.-Japan digital trade deal under President Trump. Dr. Calder also proposed exploring Japan's industrial policy as a learning model for the U.S., especially in areas where they share strategic goals.

Ambassador Juster emphasized that the QUAD's efforts extend beyond economics, providing public goods for the region in areas such as climate-related support, cybersecurity, health security, vaccines, humanitarian aid, and maritime domain assistance. He then highlighted that the U.S. has pursued a cooperative agenda with China on transnational issues, including combating drugs and fentanyl, addressing climate change, and enhancing cybersecurity.

Mr. Tanigawa highlighted the importance of a tailored approach to energy transition, noting that Asian countries have diverse energy portfolios and industrial structures, making a single pathway to economic neutrality unfeasible. He suggested that Japan could play a leadership role by developing a model that integrates the Global South and other countries into the international order, emphasizing that such an approach could be beneficial in the future.

Dr. Hiram addressed the complexity of providing public goods within the framework of global WTO multilateralism, noting that current threats to multilateralism make this task particularly challenging. He emphasized the crucial role of Global South countries in contributing to public goods in multilateral forums, though their divided stances complicate the process. Some Global South countries align with Western countries on certain issues, while others support the Chinese system, creating additional layers of complexity in providing public goods.

He posed a question about why former President Trump and his supporters opposed the TPP. Noting that trade creates both winners and losers, Mr. Toyoda emphasized the importance of supporting those who may be adversely affected. He pointed out that in Japan, measures such as reskilling, retraining, and other forms of support could help address these challenges and asked for perspectives on how the U.S. could potentially improve its own trade adjustment measures to better manage the impacts of free trade, particularly the fact that there are always winner and losers in free trade.

He shared a personal hope: that the interests of younger, pro-globalization generations, both in the U.S. and China, be taken into account. He suggested that a liberal international trade regime should be restored promptly to reflect these future generations' preferences.

6. 発表資料

パワーポイントスライドを活用し、掲載許可を得たスピーカー分のみを掲載。
(敬称略、登壇順)

Session 1: Securing Energy by Responding to Climate Change

- ① Hirotaka Ishii, General Manager of Washington, D.C. Office, Japan Organization for Metals and Energy Security
- ② Christopher Elsner, Director, S&P Global Commodity Insights
- ③ Jennifer Sklarew, Assistant Professor, Development of Environmental Science and Policy, George Mason University

Session2: International Order - Power Venue Rules

- ① Kenta Hiram, Associate Professor, International Law, Faculty of Global Studies, University of Nagasaki

Session 1: ① Hirotaka Ishii, General Manager of Washington, D.C. Office, Japan
Organization for Metals and Energy Security



Securing Energy by Responding to Climate Change

October, 2024

Hirotaka Ishii
General Manager of Washington, D.C. office
Japan Organization for Metals and Energy Security

Japan's goals and strategies (Carbon Neutrality)

■ Speech by Prime Minister KISHIDA Fumio at the Guildhall in London (2022.5.5)

【Goals】

- ✓ Japan will achieve its international commitments to **carbon neutrality by 2050** and to **reduce greenhouse gas emissions by 46% by 2030**, while ensuring a stable energy supply.
- ✓ To achieve these goals, **150 trillion yen in new investments** will be raised over the next decade through public-private collaboration, including 17 trillion yen in fiscal 2030.



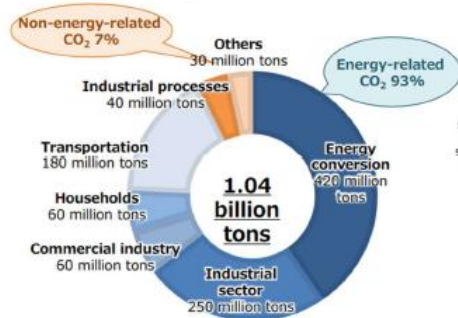
Source: METI

1

Japan's CO2 emissions

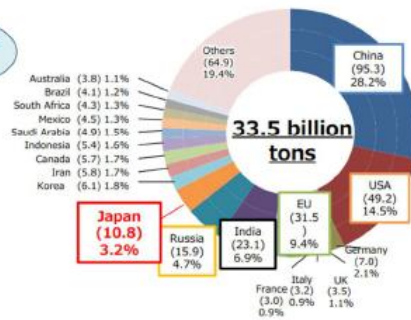
- In Japan, CO2 emissions from **power sector accounts for 40%**. Emission reduction from Industrial and other sectors are crucial towards carbon neutral.
- Japan will contribute to global emission reduction by providing solution for ourselves and beyond.

Japan's CO₂ emissions (2020)



(Source)
Created from Greenhouse Gas Inventory Office

Global energy-related CO₂ emissions (2020)



(Source) IEA, CO₂ Emissions from Fuel Combustion Highlights 2020

2

Japan's Major Energy-Climate Policy packages

- Government of Japan announced the Basic Policy for the Realization of GX in February 2023. Relevant bills passed the Diet session in May.
- Green Transformation (GX) delivers both **emission reduction** and **economic growth**. Successful GX initiatives enhance competitiveness of companies and nations.

Basic Policy for the Realization of GX, 2023

- Create new demand and markets in the fields of stable energy supply and decarbonization, leading to the improved competitiveness of its industries and economic growth.
- ¥150 trillion+ of public / private investments over next decade
- **Pro Growth Carbon Pricing Concept.**



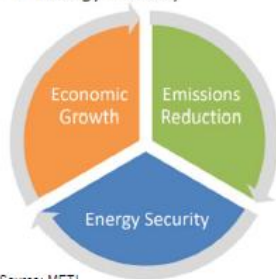
3

Three Principles of the Green Transformation

Triple breakthrough

Japan aims to simultaneously achieve

- Emissions Reduction
- Economic Growth
- Energy Security



Source: METI

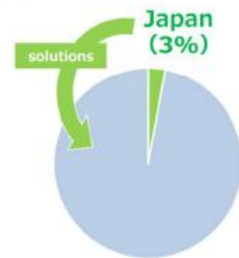
One goal, various pathways

Toward our common goal of achieving net zero, we will make practical energy transitions through various pathways depending on the circumstances of each country.



Solution to the world

Japan will decarbonize itself, but also contribute to global decarbonization by providing solutions outside Japan.



4

Japan Climate Transition Bond: where the funding is going

Examples of Use of Proceeds

Transformation of the manufacturing industry	<ul style="list-style-type: none"> ✓ Development and introduction of innovative technologies such as hydrogen reduction ironmaking, transition to a carbon circular production system
GX of the transportation sector	<ul style="list-style-type: none"> ✓ Support to the introduction of next-generation vehicles. ✓ Development of next-generation aircraft and zero-emission vessels
Promotion of carbon recycling / CCS	<ul style="list-style-type: none"> ✓ Support to R&D on carbon-recycled fuel
Promotion of energy saving	<ul style="list-style-type: none"> ✓ Introduction of insulated windows
Mainstreaming of renewable energy	<ul style="list-style-type: none"> ✓ Support for next-generation solar cells (perovskite) and floating offshore wind
Next-generation innovative reactor	<ul style="list-style-type: none"> ✓ Next-generation innovative reactors incorporating new safety mechanisms
Promotion of introducing hydrogen and ammonia	<ul style="list-style-type: none"> ✓ Establishment of domestic and international supply chain ✓ R&D and support for hydrogen production from surplus renewable energy
Development of the electricity and gas markets	<ul style="list-style-type: none"> ✓ Promotion of zero-emission thermal power generation ✓ Establishment of submarine DC power transmission

Source: METI

5

Three bills on Hydrogen, CCS and Offshore wind

- Toward a decarbonized society, efforts to promote the utilization of clean energy technologies such as **hydrogen, CCS, offshore wind power** are in progress.
- Japanese Cabinet has submitted three bills to the Diet:
 - ① **the Bill for the Act on Promotion of Hydrogen-Based Society*** → Passed in May
 - ② **the Bill for the Act on CCS Business*** → Passed in May
 - ③ **the Bill for promoting Offshore Wind in EEZ.** → in session

*Provisional Translation

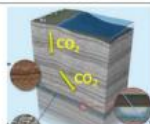
Hydrogen



To promote large-scale introduction of hydrogen and its derivatives such as ammonia, the Bill sets out the framework for:

- **support schemes**
 - (i) **supplier support focusing on the price gap and**
 - (ii) **hub development;**
- **regulatory refinement (safety, port and road uses);**
- **voluntary target setting and reporting on low-carbon hydrogen and its derivatives.**

CCS



To enable private companies to start CCS projects in Japan by 2030, the Bill for the Act on CCS covers:

- **the permit system for drilling and CO2 storage;**
- **safety rules for CO2 transportation and storage, etc.**

Offshore Wind



Japan has **the 6th largest Exclusive Economic Zone (EEZ) in the world**. For Japanese target of offshore wind power generation of **10 GW in 2030 and 30-45 GW in 2040**, Japan has started to consider the arrangement of business environment for the development of offshore wind in the EEZ.

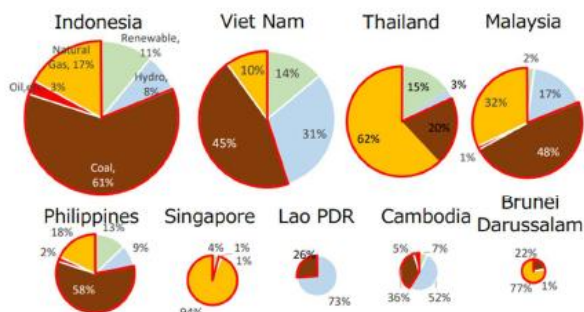
Source: METI

6

Asian transition, how?

- Although **many ASEAN countries** have announced their intention for carbon neutrality, many of them heavily **depend on coal- and natural gas-fired power generation**.
- As the demand for electricity further increases in line with economic growth, **it is essential to steadily promote decarbonization in a practical manner**. To this end, **cooperation through Japanese technology, finance and experiences under AZEC platform are also important**.

*The amount of electricity in ASEAN has doubled in the past decade and is expected to triple in the next 3 decades.



(Reference) China: Coal 64%, Natural Gas 3%, India: Coal 72%, Natural Gas 4%

※ The area of the pie chart is proportional to the amount of electricity generated in each country. However, Cambodia and Brunei are approximately four times of the actual area.

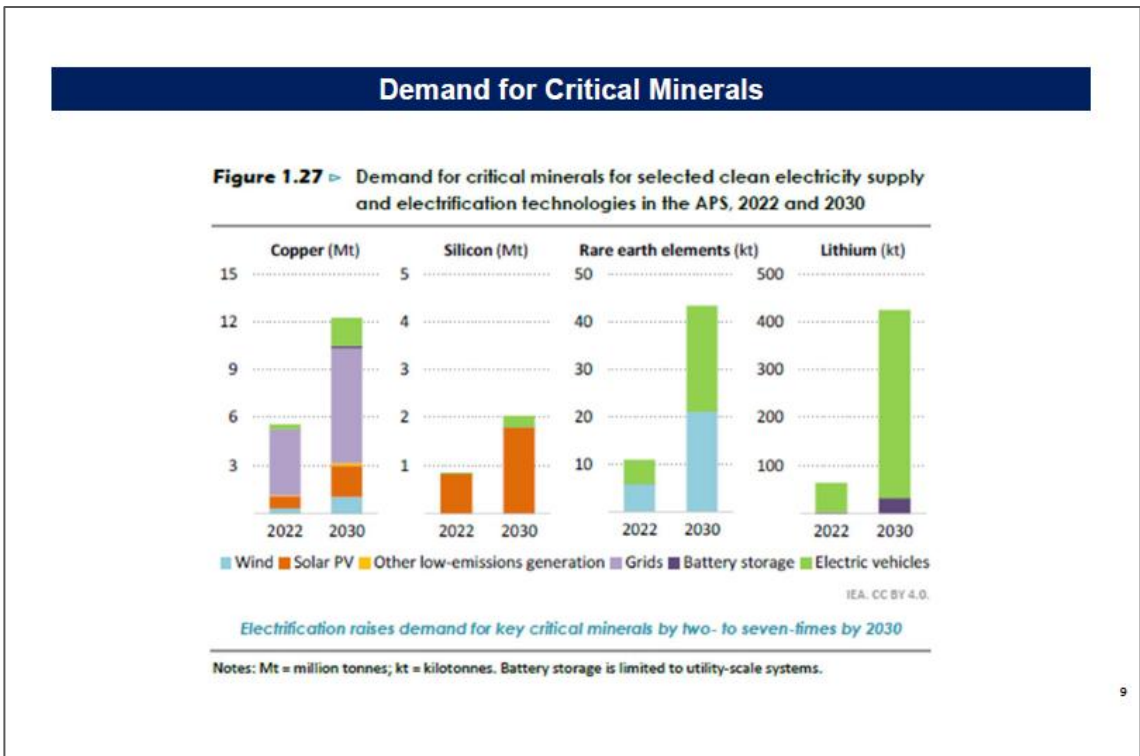
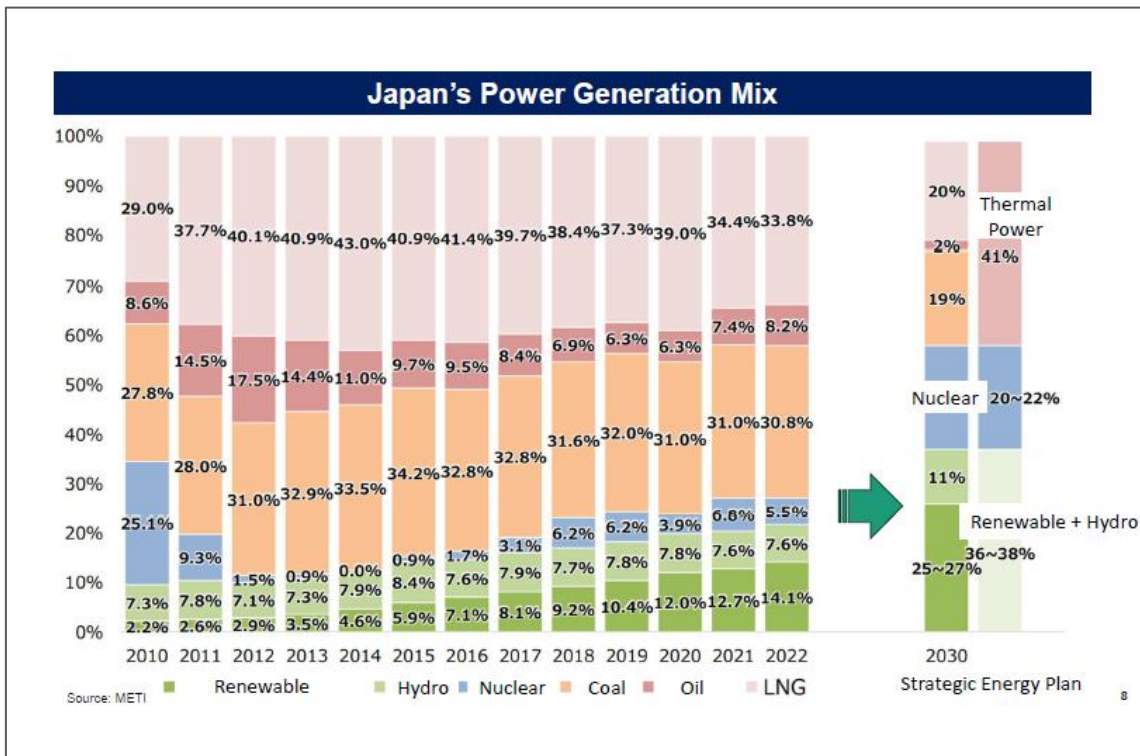
Source: IEA

CN goals set by Southeast Asian countries

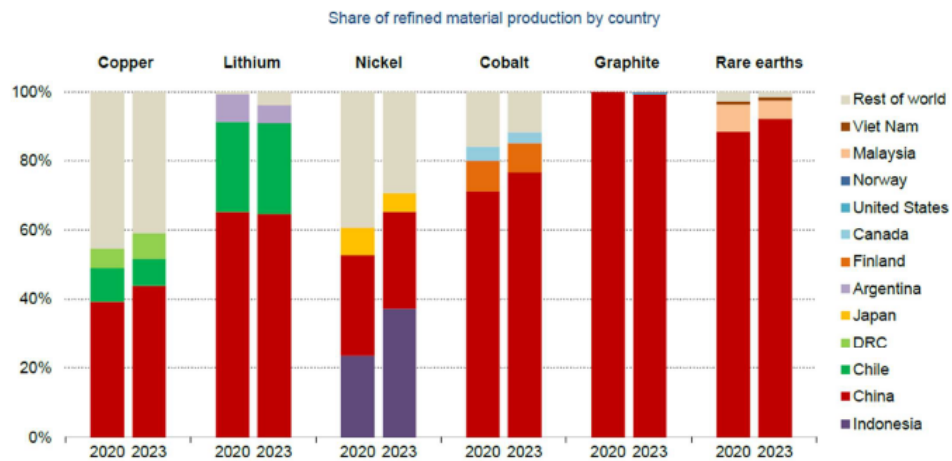
Country	CN Target
Indonesia	CN by 2060
Viet Nam	CN by 2050
Thailand	CN by 2065 ※ If it's only CO2, then by 2050.
Malaysia	CN by 2050
Philippines	—
Singapore	CN by 2050
Lao PDR	CN by 2050
Cambodia	CN by 2050
Brunei Darussalam	—
Myanmar	CN by 2050

Source: NDCs submitted by each country, etc.

7



Dependence on China for Critical Minerals



10

The Basic Viewpoint of the Energy Policy

S + 3E

Safety +

- ✓ Energy Security
- ✓ Economic Efficiency
- ✓ Environment

11

Platts | CERAWeek | Chemical Week


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Commodity Insights

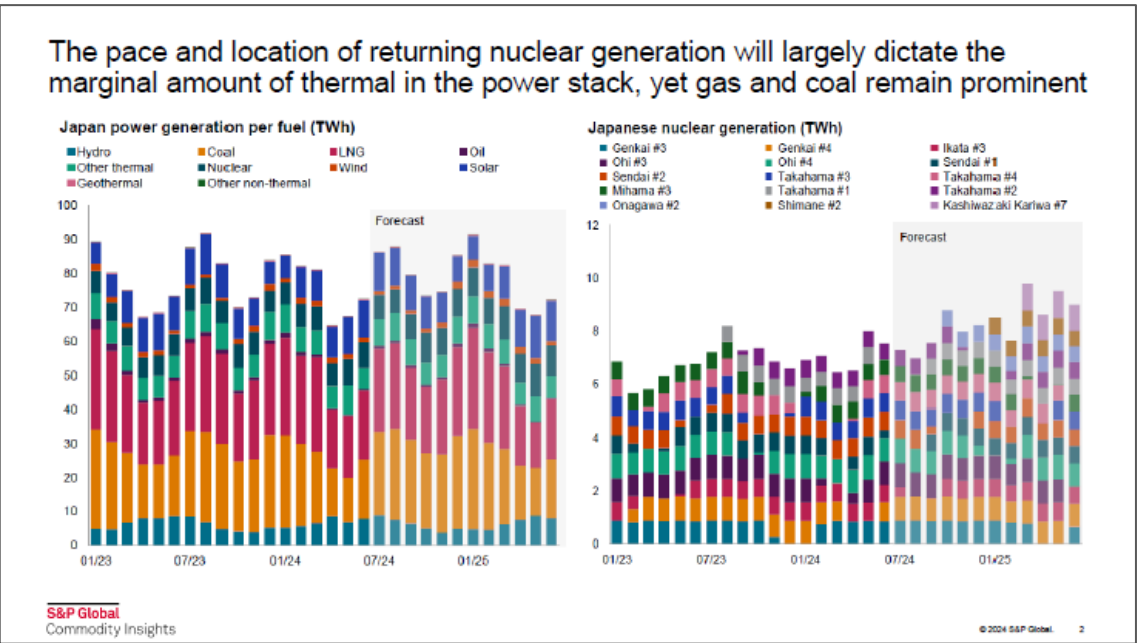
Securing Energy by Responding to Climate Change

Christopher Elsner, Director, Executive Briefings

October 21, 2024

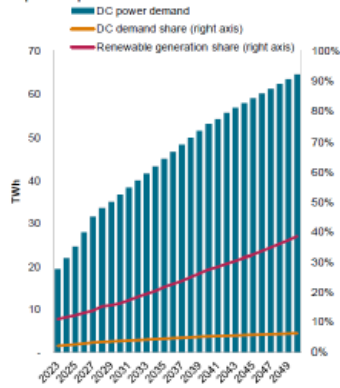


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Power demand from data centers will buoy overall decline from other sectors, while geographical concentration will make sourcing renewables a challenge

Japan DC power demand



Data compiled: September 2024.
Source: S&P Global Commodity Insights.

S&P Global
Commodity Insights

What is the government's latest forecast and local policy trend on DC development?

- Japan does not have a specific DC capacity target, but government projections indicate that peak power demand from DCs will increase by 4 GW from 2023 to 2030, with consumption reaching 50 TWh by 2030. Long-term estimates place DC power demand at under 100 TWh by 2050, or 10% of national demand.
- Japan has strict data protection and privacy regulations, including the requirement for certain sensitive data to be stored within the country. This creates demand for domestic data centers to meet regulatory compliance and ensure data localization, especially for sectors such as finance, healthcare and government services.

How will DC impact power demand?

- DC will become a key growth point of power demand, helping to counter declines from other sectors.
- However, even with DC factored in, Japan's overall power demand will likely remain flat or only slightly higher than its current level by 2050, as incremental DC demand will be largely offset by reductions in other sectors.

How will DC impact power supply?

- While diversification of DC locations is encouraged, most new DCs remain clustered around Tokyo and Kansai. This will put additional pressure on local grids, particularly in the Greater Tokyo region, which is already running on single-digit reserve margins during peak times. Although nuclear restarts in various regions will help to fill part of the gap and boost supply availability in Tokyo, new LNG-fueled CCGTs will still be needed to meet most of this upcoming demand. In addition, the local distribution infrastructure will need to be upgraded and expanded to accommodate new DC connections, particularly in concentrated clusters such as the Inzai city.

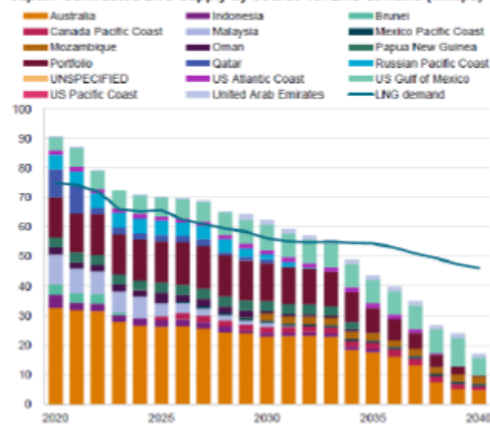
Will there be enough green power to meet DC demand?

- Japan is expected to add an average of 5 GW of solar and wind capacity every year from now to 2050, which should be able to inject enough green power into the generation mix from a volume perspective. However, not all of this green power can be easily accessible by DCs owing to locational and timing mismatch, as well as the additional complexities and costs involved with direct procurement of green power.

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The US will play a leading role in supplying Japan with natural gas as progress towards decarbonizing the electric grid – while maintaining reliability – advances

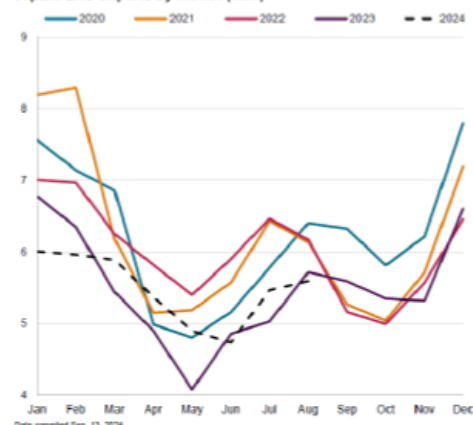
Japan: Contracted LNG supply by source vs. LNG demand (MMtpa)



Data compiled Sep 10, 2024.
Source: S&P Global Commodity Insights.
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S&P Global
Commodity Insights

Japan: LNG imports by month (MMt)

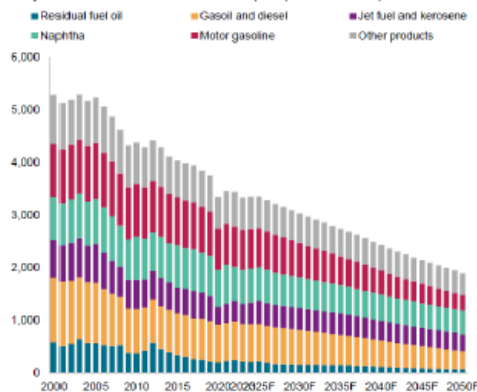


Data compiled Sep 13, 2024.
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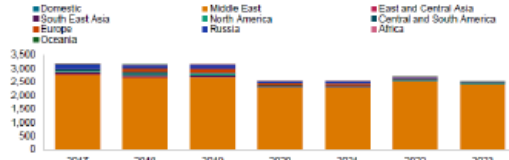
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One area that could see growing trade between Japan and the US is in crude and refined product imports, potentially giving way to hydrogen on the margin

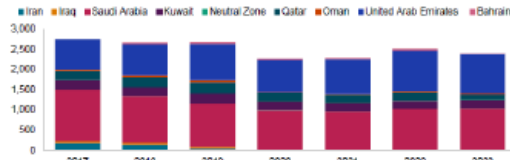
Oil product demand forecasts — Japan (thousand b/d)



Japan crude oil supply by source (thousand b/d)



Japan Middle Eastern crude oil imports by source (thousand b/d)



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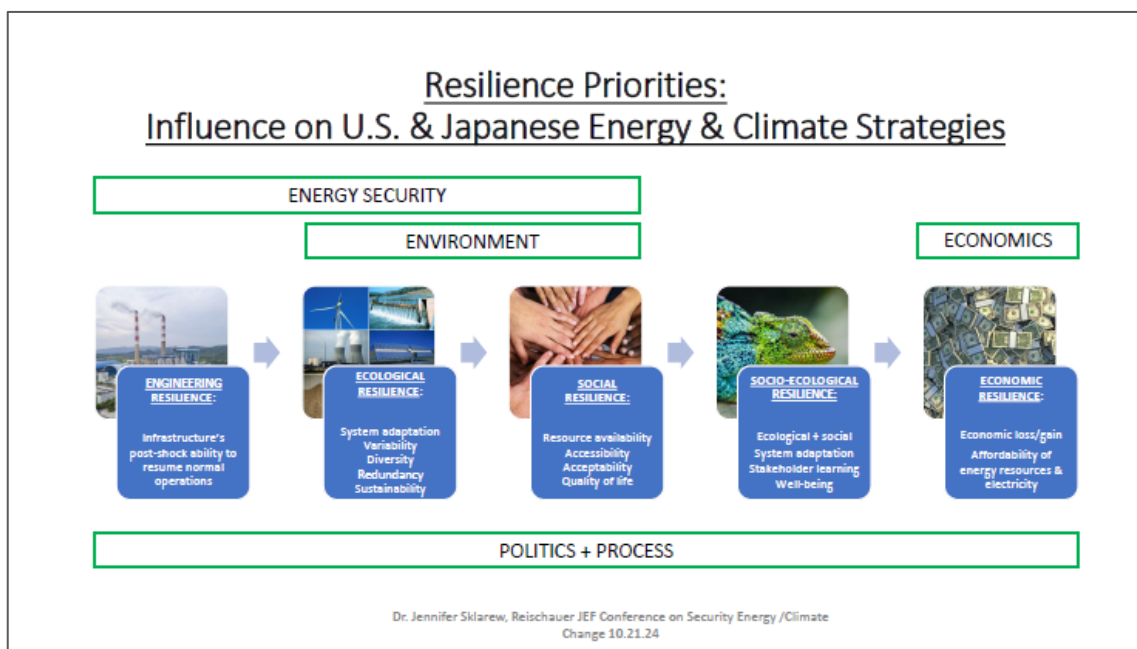
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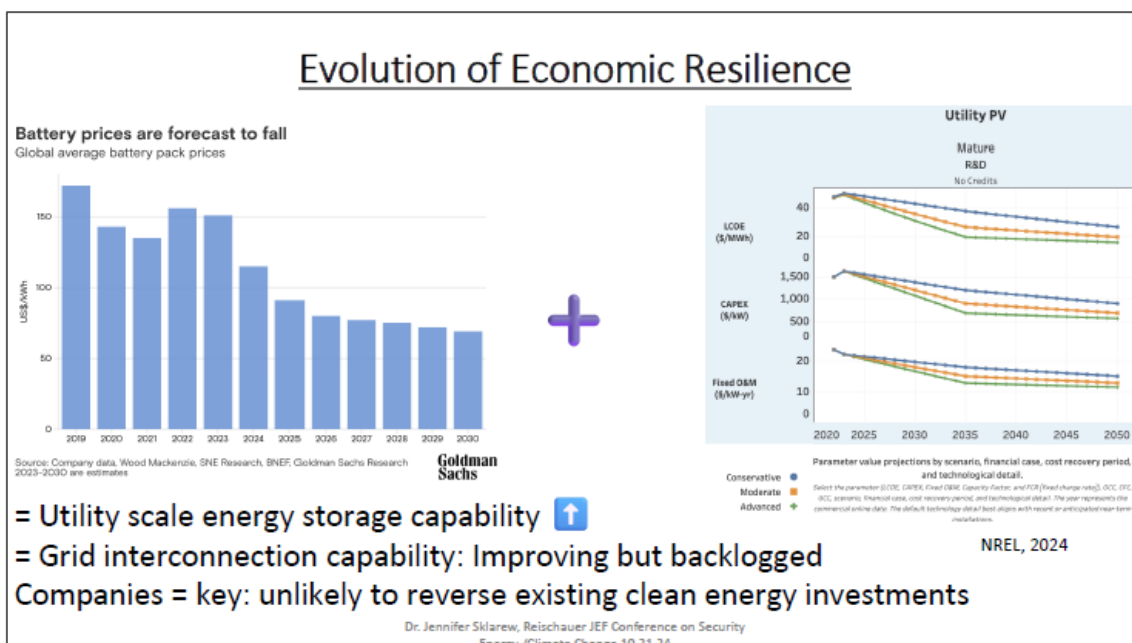
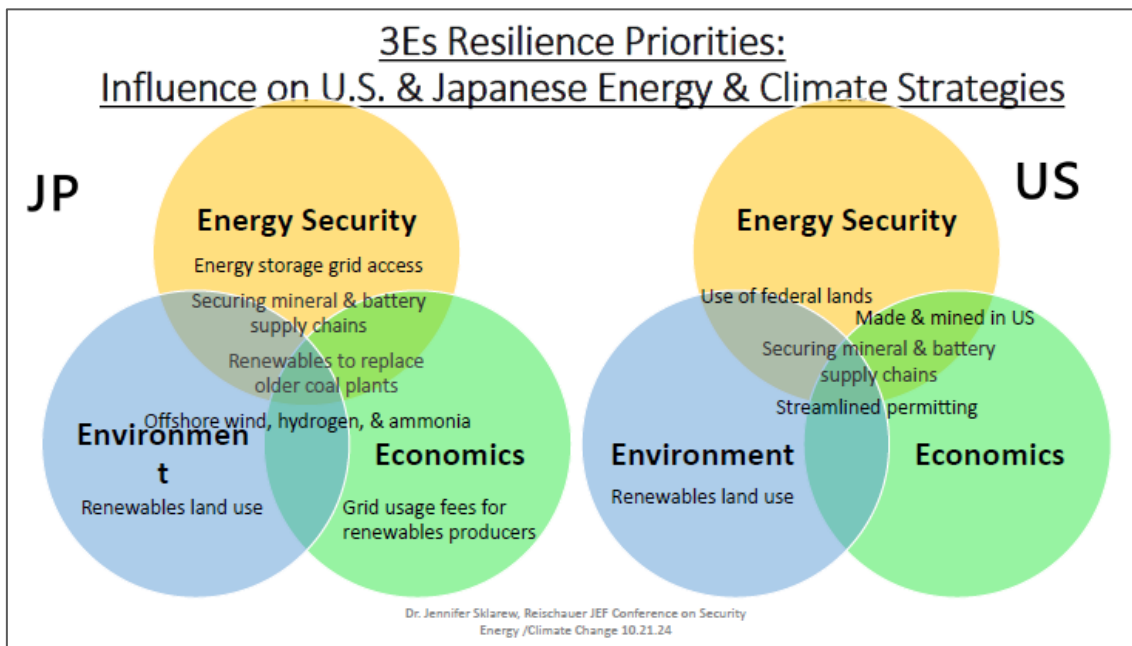
Session 1 : ③ Jennifer Sklarew, Assistant Professor, Development of Environmental Science and Policy, George Mason University



U.S.-Japan Energy & Climate Resilience: Priorities & Prospects

Jennifer Sklarew, Ph.D.
Assistant Professor of Energy & Sustainability
George Mason University
Reischauer Center— JEF Conference:
Securing Energy by Responding to Climate Change
October 21, 2024





Politics & Process: Influence on U.S. & Japanese Energy & Climate Strategies

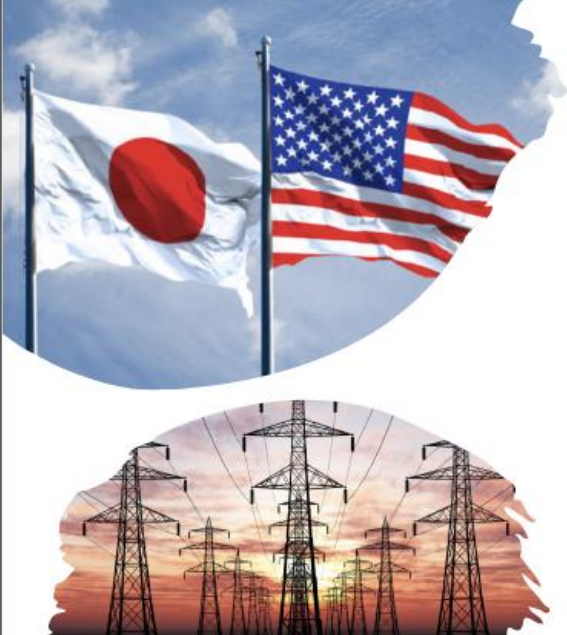
	U.S.	Japan
POLITICS		
National	Upcoming election	New PM: focus on hydro & geothermal
State/Prefecture	Upcoming elections	Upcoming elections
Local	Siting & employment	Siting & employment
PROCESS	<ul style="list-style-type: none"> • State leadership: CA, MA, NY, TX • <u>Trump</u>: Limits on states through Supreme Court & EPA + Executive Orders • <u>Harris</u>: Federal + state climate & energy incentives 	<ul style="list-style-type: none"> • Land use restrictions for solar • New nuclear construction

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U.S.-Japan Energy Cooperation Prospects

Energy Technology	Trump Administration	Kamala Harris Administration
Hydrogen	blue + purple	blue + purple + green
Nuclear Fission & Fusion	Yes	Yes
Natural Gas	Yes	Yes
Critical Minerals	Yes	Yes
CCS/CCUS	Yes	Yes
Hydropower	Yes: Large	Yes: All
Offshore Wind	No	Yes
Geothermal	Uncertain	Yes
Solar	Uncertain	Yes
Battery storage	Possible	Yes

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THANK YOU!

QUESTIONS?

jsklarew@gmu.edu

Sklarew, Jennifer F. 2023. *Building Resilient Energy Systems: Lessons from Japan*. Routledge.

Available at Routledge, Amazon, & Barnes & Noble.

Dr. Jennifer Sklarew, Reischauer JEF Conference on Security Energy /Climate Change 10.21.24

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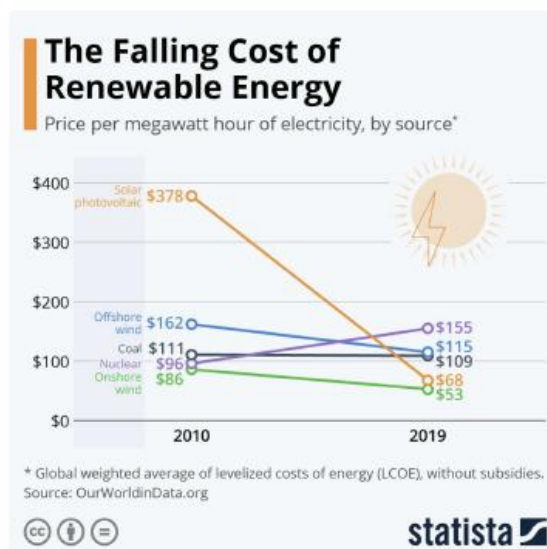
<https://instituteeforenergyresearch.org/wp-content/uploads/2014/09/electric-transmission-lines.jpg>

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Additional Material

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<https://www.weforum.org/agenda/2021/11/renewable-energy-cost-fallen/>

Local Initiatives

U.S. leaders:

California: auto emissions standards, EV + charging incentives, energy efficiency rebates

Massachusetts: Energy efficiency

New York: Accelerated Renewable Energy Growth & Community Benefit Act: streamlines siting and environmental reviews, includes community engagement & benefits

22 states + DC have RPS or Clean Energy Standard of 100% by 2033-2050

22 states + DC have energy storage incentives

12 states have energy storage targets

Most battery storage added in the US in 2023 was in CA and TX (<https://www.eia.gov/todayinenergy/detail.php?id=61202>)

Japanese leaders:

Land use: In April 2024, Miyagi Prefecture became 1st local government implementing an ordinance to impose taxes specifically targeting renewable facilities. Ordinance imposes a tax on owners of renewable energy facilities (solar, wind or biomass) newly installed through the development of forest areas larger than 0.5 ha in proportion to the power capacity. new measure to drive the location of new renewable energy power projects outside of forest areas, with approximately 60% of all prefectures nationwide being "interested" in such ordinance.

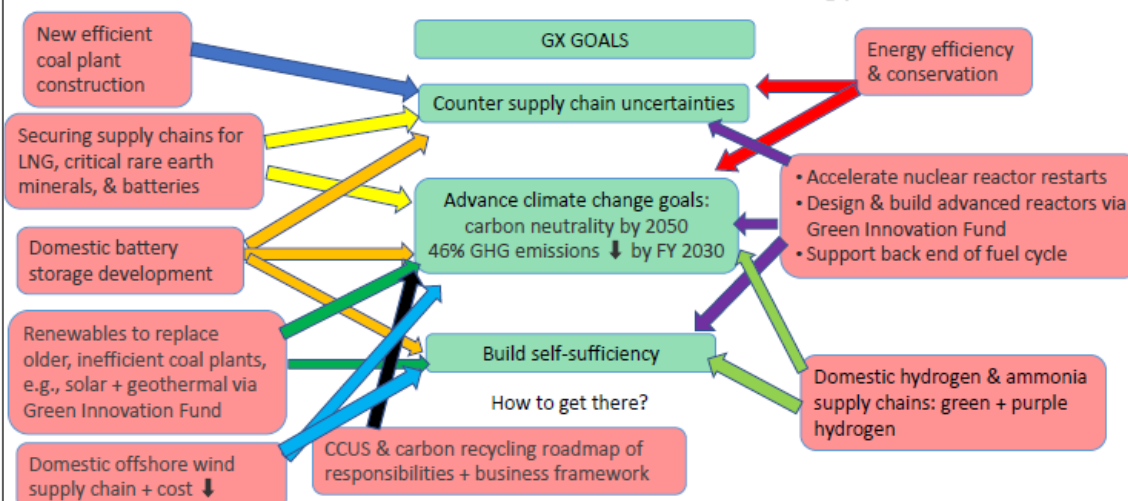
In Tohoku, in addition to Miyagi Prefecture, Aomori Prefecture also announced in September 2023 its intention to introduce a new tax targeting renewable energy facilities, especially onshore wind projects (in April 2024, the governor suggested at a press conference that the scope should include solar projects too).

Governor of Yamagata Prefecture also stated interest in a tax at a press conference in April 2024.

(<https://www.orrick.com/en/insights/2024/07/Japan-Renewables-Alert-68>)

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Energy /Climate Change 10.21.24

Combining New Capitalism and Energy Resilience Thinking: Green Transformation GX Strategy



Session 2 : ① Kenta Hiram, Associate Professor, International Law, Faculty of Global Studies, University of Nagasaki

Resurgence of Unilateralism in International Economic Order

Kenta Hiram
Associate Professor, University of Nagasaki
October 21, 2024, US-Japan Forum 2024

Outline

1. What Is Unilateralism?
2. Rationales for the Rise of Unilateralism in Trade Policy
3. Problematic Nature of Unilateralism
4. How Should Unilateralism Be Controlled?

1-1 What Is Unilateralism?

1. Juridical unilateral acts

- they generally fall within the framework of the application of international law.

E.g., the delimitation by a state of its territorial waters

2. the general tendency prevailing among some powerful states to act unilaterally to impose their values on other states

- To achieve some policy objectives, states with large markets have increasingly taken unilateral measures to condition market access by imposing direct liability on economic actors in other states that wish to trade.

2

1-2 Examples

United States

- Helms-Burton Act
- Section 301 of the Trade Act of 1974
- Section 232 of the Trade Expansion Act of 1962

European Union

- Carbon Border Adjustment Mechanism (CBAM)
- EU Battery Regulation
- Corporate Sustainability Due-Diligence Directive (CSDDD)
- EU Deforestation Regulation (EUDR)
- "Brussels effect"

3

2-1 Rationales for the Rise of Unilateralism in Trade Policy

- Ineffectiveness of existing international rules for today's challenges
 - Stagnation of rule-making by treaties
 - WTO Appellate Body crisis
- Under these circumstances, unilateral measures imposing conditions on market access are more likely to be effective tools to change the behavior of other state or its economic actors.

4

2-2 Inclination for unilateralism at US-EU TTC

US-EU Trade and Technology Council (TTC), "Pittsburgh Statement", Annex V (Statement on Global Trade Challenges), September 29, 2021

1. ...
2. The European Union and the United States recognise that **domestic measures that each takes on its own** can play a critical role in ensuring that trade policy supports market-based economies and the rule of law. This recognition is without prejudice to the views that either of them may have with respect to the appropriateness of any particular measure.

5

3 Problematic Nature of Unilateralism

- Imposition by one state of its values on other states

E.g., Helms-Burton Act, US – Shrimp case

- Imposition of costs and burdens on economic actors in other states

E.g., CBAM, CSDDD, EU Battery Regulation

- Constraints on the regulatory space of other states

4 How Should Unilateralism Be Controlled?

1. Practical approach

- Use of dispute settlement system in trade agreements?
- Economic diplomacy

2. Legal theoretical approach (under consideration)

- “Opposability” of unilateral measures
- Principle of “good faith”

7. 成果

フォーラム参加者全体としての満足度は 100%だった。

また、フォーラムの質も参加者全員から期待どおりもしくは、期待以上だったとの回答を得た。米国大統領選直前に行われたものであったため、取り上げたトピックが適当であり課題として取り上げるべきものであったか、との問いに対しても全員がそう思う、もしくはほぼそう思うと回答した。

参加者自身の仕事もしくは研究に役立ったか聞いたところ、88%が役立ったと答え、残りの 12%もそれなりに役立ったとの評価だった。

セッションごとの評価では、気候変動に対応したエネルギー安全保障により関心が高かったことが窺えるが、権威主義対ルール思考の国際秩序についても全員が満足またはある程度満足したと評価した。

概ね良い結果を得ることができたが、特にスピーカーの選定が素晴らしく、ダイバーシティがあって良かったとするコメントは、主催者として目指すべき一面でもあり、大変ありがたく受け止めている。今後の励みにしていきたい。

一方、アンケートでは、午前・午後のセッションに分けて実施したらどうか、との意見もあり、もう少しフロアを巻き込んだ議論・質疑にも時間を割くべきであったと考える。今後はこの点に注意し、時間配分にも気を配っていきたい。

本事業では、対面参加型の聴衆に加え、時間を気にせず聴講できる動画のウェブページ掲載している。加えて、フォーラムの同時配信も行ったが、事前に目指した案内先拡大については対策が不十分であり、今後の課題として残った。後日、報告書や動画をホームページに掲載する旨、日米の著名大学・研究所、日本及び日米経済関係機関、産業界等へも情報拡散すべく、ご案内していきたい。

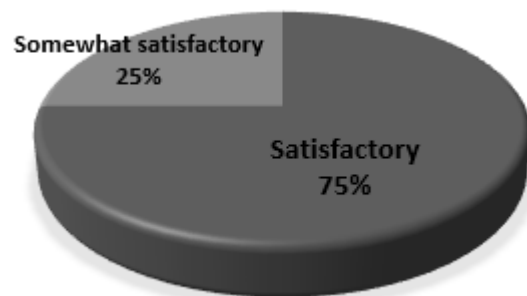
今回のフォーラム参加者を所属分野別に見ると、ほぼ均等に分かれており、学生、研究者やビジネスパーソン、大学教授の順に多かった。来年度以降は、政策決定に携わる政府関係者にも声がけし、参加者の所属先を多角化して様々なご意見をいただけるように工夫したい。

8. アンケート集計結果

フォーラム参加者 37 名にアンケートを実施（回答者数 24 名）

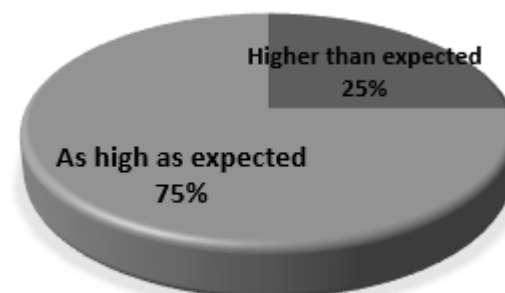
1. Overall Evaluation of the Forum

Evaluation	%
Satisfactory	75%
Somewhat satisfactory	25%
Somewhat unsatisfactory	0%
Unsatisfactory	0%



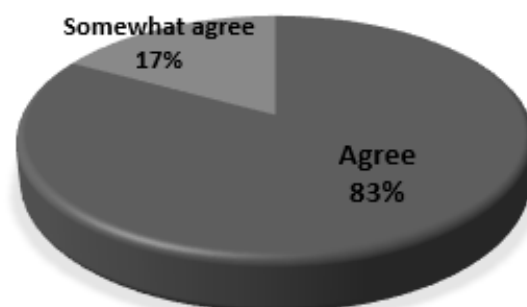
2. Evaluation of the Quality of the Forum as compared with your expectation

Evaluation	%
Higher than expected	25%
As high as expected	75%
As low as expected	0%
lower than expected	0%



3. Were the topics timely and relevant to the issues of the day?

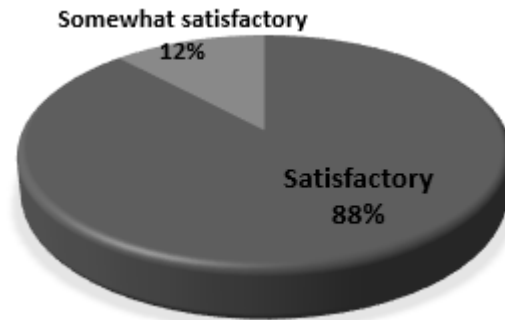
Evaluation	%
Agree	83%
Somewhat agree	17%
Somewhat disagree	0%
Disagree	0%



4. Session by Session Evaluation

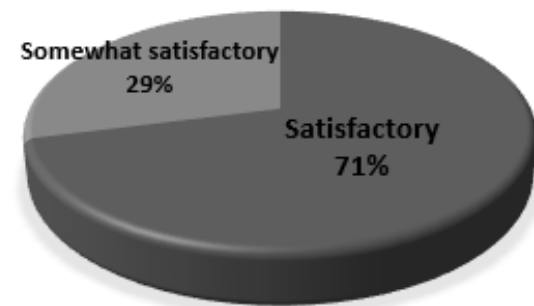
Session 1

Evaluation	%
Satisfactory	88%
Somewhat satisfactory	12%
Somewhat unsatisfactory	0%
Unsatisfactory	0%



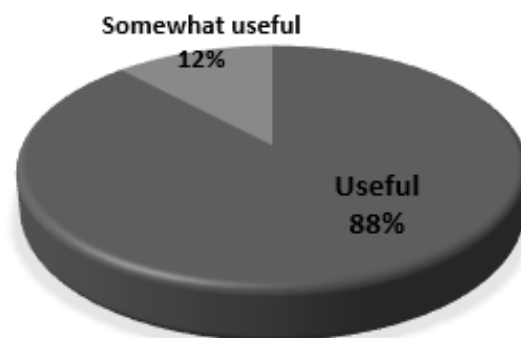
Session 2

Evaluation	%
Satisfactory	71%
Somewhat satisfactory	29%
Somewhat unsatisfactory	0%
Unsatisfactory	0%



5. Were today's discussions useful for your work/research?

Evaluation	%
Useful	88%
Somewhat useful	12%
Somewhat useless	0%
Useless	0%

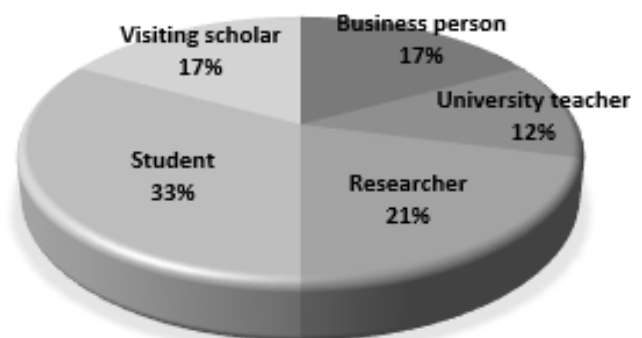


6. Any other comments/suggestions are appreciated.

- Great event
- Please provide microphone to all speakers
- Gorgeous conference speakers
- How about splitting into morning and afternoon session for effective outcomes?
- Conference that you handled so successfully
- Just the right mix of subjects, people and time
- By all accounts it was very well done with excellent and diverse set of speakers
- It was a wonderful meeting with so many experts
- Wanted an opportunity for questions from the audiences

7. You are:

Affiliation	%
Business person	17%
University teacher	12%
Researcher	21%
Student	33%
Media	0%
Government official	0%
Visiting scholar	17%



9. 共催団体紹介



The Japan Economic Foundation (JEF) was established in July 1981 to deepen mutual understanding between Japan and other countries through activities aimed at promoting economic exchanges. With this goal in mind, JEF engages in a broad range of activities; it provides information about Japan and arranges opportunities to exchange ideas among opinion leaders from many countries in such fields as industry, government administration, academia and politics in order to break down the barriers to mutual understanding. <https://www.jef.or.jp/>



Edwin O. Reischauer Center for East Asian Studies,
Johns Hopkins School of Advanced International Studies
(SAIS)

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They both exemplified the deep commitment to public service and transpacific communication that the Reischauer Center aspires to perpetuate in its scholarly and cultural activities today. <https://www.reischauercenter.org/>

10. 事務局

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Devin Woods, シニアプログラムコーディネーター

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2025 年 2 月

一般財団法人 国際経済交流財団

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