

2022 年度日アジア太平洋フォーラム

Asia Pacific Forum 2022

“Global fractures and Asia Pacific economy”

報告書

2022 年 12 月 1 日（木）～2 日（金）

（オンライン開催）

一般財団法人 国際経済交流財団



2022年度日アジア太平洋フォーラム 2022年12月1日(木)～2日(金)
オンライン会議の様子



開会の辞：Shiro ARMSTRONG 氏



開会の辞：豊田正和



基調講演 Craig EMERSON



セッション1：
Murray McLEAN AO 氏



セッション1：
Choong-Yong AHN 氏



セッション1：
Seri Jayasiri JAYASENA 氏



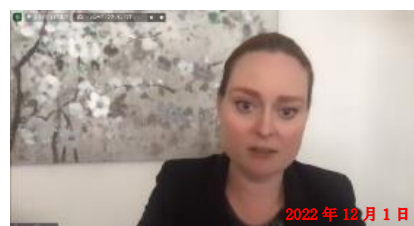
セッション1：
Somkiat TANGKITVANICH 氏



セッション1：
Anita PRAKASH 氏



セッション1：
Shujiro URATA 氏



セッション1 モデレーター：
Lauren RICHARDSON 氏



セッション1の様子



セッション2：
Yunling ZHANG 氏



セッション2：
Yose Rizal DAMURI 氏



セッション2：
Gary HAWKE 氏



セッション2：
Man-Jung Mignonne CHAN 氏



セッション2：
Sachin CHATURVEDI 氏



セッション2：事務局の様子



セッション2：質疑応答の様子



セッション2モデレーター：原岡直幸



セッション3：
Khine Khine NWE 氏



セッション3：
Josef T. YAP 氏



セッション3：
Tri Thanh VO 氏



セッション3モデレーター：
Frank JOTZO 氏



セッション3の様子

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1. 開催趣旨

国際経済交流財団は、我が国企業の国際競争力に資するため、更なる成長が期待され重要な市場であるアジア太平洋地域について、持続的経済成長への貢献、またビジネス制度の共通化・標準化の点で重要な地域経済統合を推進するという観点から、アジア太平洋地域のシンクタンクや大学等と共に議論を重ねている。

当事業は、アジア太平洋地域で指導的役割を果たす政財界、官界、学界における有識者が一堂に会し、豊富な経験に基づき同地域の課題解決に向けて、率直な意見交換を行い、相互交流と理解を深めて参加各国の政策立案に資することを目的としている。

2003年に第1回を開催、今年度はオーストラリア国立大学(ANU)との共催で第21回のラウンドテーブル・ディスカッションをオンライン形式で行った。

2. 開催概要

1. 開催日時：

2022年12月1日（木）11:30～13:30 (JST)

2022年12月2日（金）11:30～14:10 (JST)

2. 主催者： 一般財団法人国際経済交流財団

Japan Economic Foundation (JEF)

共催者： オーストラリア国立大学 オーストラリアーアジアリサーチセンター

Australia-Japan Research Centre, The Australian National University (ANU)

3. 開催形式： オンライン

日本側 JEF 財団施設及び各自デバイスより接続

オーストラリア側及び他地域参加者 各自デバイスより接続

4. テーマ：メインテーマ

世界の分断とアジア太平洋経済

“Global Fractures and the Asia Pacific Economy”

セッション1：

ウクライナ戦争後の地政学と世界経済システム

Geopolitics and the Global Economic system Post-Ukraine Conflict

セッション2：

ルール・ベースの経済の回復

Rule-Based Economic Recovery

セッション3：

気候変動とエネルギーが意味するもの

Implication of Climate Change and Energy

5. 出席者：

日本及びアジア太平洋地域13国・地域及び関係機関 [インド、インドネシア、オーストラリア、韓国、タイ、台湾、中国、ニュージーランド、フィリピン、ベトナム、マレーシア、ミャンマー、ERIA] の代表者、主催・共催機関代表者およびオブザーバー約50名

6. 使用言語： 英語

3. 詳細日程

ASIA PACIFIC FORUM 2022

Global fractures and the Asia Pacific economy

Agenda

Day One, 1 December

11.30-12.10pm
JST

Welcome remarks

Masakazu Toyoda, Chairman & CEO, Japan Economic Foundation

1.30-2.10pm
AEDT

Shiro Armstrong, Director, Australia-Japan Research Centre,
The Australian National University

Keynote address

Dr. Craig Emerson, Managing Director, Emerson Economics
Former Australian Minister for Trade and Competitiveness
Director, Australian APEC Study Centre, RMIT
Visiting Fellow, The Australian National University
Adjunct Professor, College of Business, Victoria University

10 minutes

Intermission

12.20-1.30pm
JST

Session 1: Geopolitics and the Global Economic system Post-Ukraine Conflict

Murray McLean AO, Chair, Foundation of Australian and Japanese Studies (NPO)
Fellow, Australian Institute for International Affairs (since 2018)

2.20-3.30pm
AEDT

Chairman, Dunmore McLean Pty Ltd. [Australia]

Choong-Yong Ahn, Distinguished Professor, Graduate School of International
Studies, Chung-Ang University [Korea]

Seri Jayasiri Jayasena, Former Secretary General, Ministry of International Trade and
Industry [Malaysia]

Somkiat Tangkitvanich, President, Thailand Development Research Institute
[Thailand]

Anita Prakash, Senior Policy Advisor for IEC, Economic Research Institute for ASEAN
and East Asia [ERIA]

Shujiro Urata, Professor Emeritus, Waseda University [Japan]

Moderator: Lauren Richardson, Director, ANU Japan Institute

Day Two, 2 December

11.30-12.40pm

JST

1.30-12.40pm

AEDT

Session 2: Rule-Based Economic Recovery

Yunling Zhang, Director, Institute of International Studies,

Shandong University [China]

Yose Rizal Damuri, Executive Director, Centre for Strategic and International Studies [Indonesia]

Gary Hawke, Emeritus Professor, Victoria University of Wellington [New Zealand]

Man-Jung Mignonne Chan, Research Fellow & Professor, Taiwan Center for Security Studies, National Chengchi University [Taiwan]

Sachin Chaturvedi, Director General, Research and Information System for Developing Countries [India]

Moderator: Naoyuki Haraoka, Executive Managing Director, Japan Economic Foundation

10 minutes

Intermission

12.50-2pm

JST

2.50-4pm

AEDT

Session 3: Implication of Climate Change and Energy

Daw Khine Khine Nwe (Rosaline), Secretary General,

Republic of the Union of Myanmar Federation of Chambers of Commerce and Industry [Myanmar]

Josef T. Yap, Senior Research Fellow, Ateneo School of Government [Philippines]

Tri Thanh Vo, Chairman, Vietnam National Committee for Pacific Economic Cooperation [Vietnam]

2-2.10pm

JST

4-4.10pm

AEDT

Moderator: Frank Jotzo, Director, Centre for Climate Change & Energy Policy,

The Australian National University

Closing remarks

Masakazu Toyoda, Chairman & CEO, Japan Economic Foundation

Shiro Armstrong, Director, Australia-Japan Research Centre,

The Australian National University

4. 出席者

計20名（登壇順）

- Mr. Masakazu TOYODA, Chairman and CEO, Japan Economic Foundation
- Mr. Shiro ARMSTRONG, Director, Australia-Japan Research Centre,
The Australian National University
- Dr. Craig EMERSON, Managing Director, Craig Emerson Economics
Former Australian Minister for Trade and Competitiveness
Director, Australian APEC Study Centre, RMIT
Visiting Fellow, The Australian National University
Adjunct Professor, College of Business, Victoria University
- Dr. Lauren RICHARDSON, Director, ANU Japan Institute
- Amb. Murray McLEAN AO, Chair, Foundation of Australian and Japanese Studies
(NPO) Fellow, Australian Institute for International Affairs
Chairman, Dunmore McLean Pty Ltd
- Dr. Prof. Choong Yong AHN, Distinguished Professor, Graduate School of
International Studies, Chung-Ang University
- Datuk Seri Jayasiri JAYASENA, former Secretary General, Ministry of
International Trade and Industry
- Dr. Somkiat TANGKITVANICH, President, Thailand Development Research
Institute
- Ms. Anita PRAKASH, Senior Policy Advisor for IEC, Economic Research Institute
for ASEAN and East Asia (ERIA)
- Prof. Shujiro URATA, Professor Emeritus, Waseda University
- Mr. Naoyuki HARAOKA, Executive Managing Director, Japan Economic Foundation
- Prof. Yunling ZHANG, Director, Institute of International Studies, Shandong
University
- Dr. Yose Rizal DAMURI, Executive Director, Centre for Strategic and International
Studies
- Prof. Gary HAWKE, Emeritus Professor, Victoria University of Wellington
- Dr. Man-Jung Mignonne CHAN, Research Fellow & Professor, Taiwan Center for
Security Studies, National Chengchi University
- Prof. Sachin CHATURVEDI, Director General, Research and Information System
for Developing Countries
- Prof. Frank JOTZO, Director, Centre for Climate Change & Energy Policy,

The Australian National University

- Daw Khine Khine NWE, Secretary General, Republic of the Union of Myanmar Federation of Chambers of Commerce and Industry
- Dr. Josef T. YAP, Senior Research Fellow, Ateneo School of Government
- Dr. Tri Thanh VO, Chairman, Vietnam National Committee for Pacific Economic Cooperation

5. 略歴



**Mr. Masakazu
TOYODA**

Chairman & CEO,
Japan Economic
Foundation (JEF)

Masakazu Toyoda, he currently serves as Chairman and CEO of the Japan Economic Foundation (JEF), as well as Special Advisor to the Institute of Energy Economics of Japan; an Adjunct Professor at Japan's National Graduate Institute for Policy Studies (GRIPS); 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. Mr. 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).



Mr. Shiro ARMSTRONG

Director, Australia-Japan
Research Centre,
The Australian National University.

Shiro Armstrong is economist and Associate Professor at the Crawford School of Public Policy at the Australian National University. He is Director of the Australia-Japan Research Centre, Editor of the East Asia Forum, Director of the East Asian Bureau of Economic Research and Research Associate at the Center on Japanese Economy and Business at the Columbia Business School. Shiro is also Visiting Scholar at the Research Institute of Economy, Trade and Industry and Visiting Associate Professor at Keio University.



Dr. Craig EMERSON

Managing Director,
Craig Emerson Economics

Dr Craig Emerson is an eminent economist, holding a PhD in economics from the Australian National University, with 35 years of experience in public policy, politics and public service. He was Senior Adviser to Prime Minister Bob Hawke from 1986 to 1990 and, after entering parliament in 1998, went on to serve as Minister for Trade and Competitiveness, Minister for Tertiary Education, Skills, Science and Research, and Minister Assisting the Prime Minister on Asian Century Policy between 2010 and 2013. Dr Emerson is now Managing Director of Craig Emerson Economics, Chair of the Mckell Institute, an Adjunct Professor at Victoria University's College of Business, and writes a fortnightly column for The Australian Financial Review. He is also a member of CEDA's Council on Economic Policy.



Amb. Murray McLEAN

Chairman of
Dunmore McLean Pty Ltd

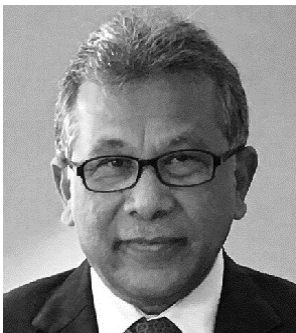
Murray McLean is Chair, Foundation of Australian and Japanese Studies (NPO); a Fellow of the Australian Institute for International Affairs (since 2018); and Chairman of his family company, Dunmore McLean Pty Ltd. He was Chair, Australia Japan Foundation (2012-2020); a Vice Chancellor's Professorial Fellow at Monash University (2012-2015) and a non-resident Fellow at the Lowy Institute for International Policy (2014-2016). Formerly a senior officer of the Australian Department of Foreign Affairs and Trade (DFAT), he retired in 2012 after a 42 year career culminating in his role as Ambassador to Japan (2004-2011) initiating negotiations on the Japan/Australia EPA and on growing security cooperation as well as leading Australia's response to the earthquake, tsunami and nuclear disasters of 2011. Prior to that role, he served as Deputy Secretary of DFAT (2004); First Assistant Secretary, North Asia Division (2001- 2003), High Commissioner to Singapore (1997-2001); Assistant Secretary, East Asia Branch, (1992-1996), and Consul General, Shanghai (1987-1992). His other DFAT postings were at the Australian Embassy in Washington D.C. (1983-1986); the Australian Embassy in Beijing (twice) (1973-1976 and 1979- 1983) and in Hong Kong (1971-1973). In DFAT, he was consistently involved in the formulation of Australian policy towards Asia and also served as a special ministerial envoy on North Korean nuclear matters visiting North Korea on several occasions. He was appointed as an officer of the Order of Australia (AO) in the Australia Day Honours list 2013 and in November 2014, the Japanese Emperor presented him with the Grand Cordon of the Order of the Rising Sun.



**Dr. Prof. Choong
Yong AHN**

Distinguished Professor,
Graduate School of
International Studies,
Chung-Ang University

Dr. Choong Yong Ahn is currently a distinguished Professor at the Graduate School of International Studies, Chung-Ang University. Previously, he was Co-Chair of the Korea-India Strategic dialogue organized by the Seoul Forum and Korea Foundation, Chairman of the Korea Commission for Corporate Partnership, Chairman of the Presidential Regulatory Reform committee, presidentially appointed Foreign Investment Ombudsman, President of Korea Institute for International Economic Policy, and Chair of APEC Economic Committee. Dr. Ahn's honors include the Economist of the Year from the Maeil Business Daily Newspaper, and Okita Policy Research Award by the National Institute for Research Advancement in Japan and free economy publication award by the Federation of Korea Industries.



**Datuk Seri Jayasiri
JAYASENA**

Former Secretary General,
Ministry of International
Trade and Industry

Seri Jayasiri Jayasena is the former Secretary General of the Ministry of International Trade and Industry, Malaysia. He joined the civil service in December 1981 as Assistant Secretary of International Affairs, Ministry of Primary Industries dealing with international commodity issues. He later assumed the post of First Secretary/ Counsellor in the Permanent Mission of Malaysia in Geneva from 1988 to 1997 representing Malaysia in the Uruguay Round of negotiations to establish the WTO.

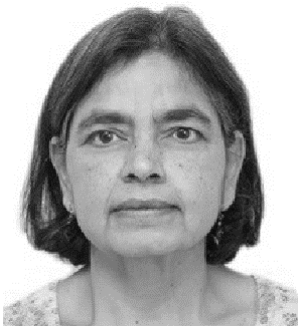
He returned to MITI in 1997 and served in various positions. He was Malaysia's Senior Official to APEC from 2002 -2006. He assumed the post of Deputy Secretary- General, MITI, in charge of strategy and monitoring in January 2015 before serving as the Secretary-General from July 2016 until his mandatory retirement from civil service in May 2018. Throughout his career, he represented Malaysia in numerous international meetings and trade negotiations. He led Malaysia's team in the ASEAN- China FTA, Malaysia-Japan FTA, the TPPA and CPTPP negotiations. He was also deeply involved in many industry related issues and led the High-Level Task Force on the way forward for Malaysia to embrace Industry 4.0.



Dr. Somkiat Tangkitvanich obtained his PhD in Computer Science from Tokyo Institute of Technology. He has been recognized as a leading Thai expert in the areas of trade and investment policies, innovation policy, education policy and ICT policy. He was a main architect of Thai PBS, the first public television in Southeast Asia, and many media laws in Thailand. Under his leadership, TDRI is nominated “Person of the Year” in 2012 by the Bangkok Post.

**Dr. Somkiat
TANGKITVANICH**

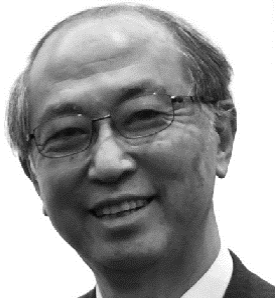
President, Thailand
Development Research
Institute



Anita Prakash is Senior Policy Advisor in the Office of President of Economic Research Institute for ASEAN and East Asia (ERIA), Jakarta, Indonesia. She provides policy and research support for bilateral and multilateral processes between ASEAN and its Dialogue Partners, the Trade Ministers meetings in ASEAN, the East Asia Summit, the Asia-Europe Meeting, and the G20. Her policy research covers international trade and investment with a focus on GVCs and supply chains, and connectivity plans in Southeast Asia, East Asia, and between Asia-Europe and Asia-Africa. Her current research focus is on emerging economic architecture and supply chains in the Indo-Pacific.

Ms. Anita PRAKASH

Senior Policy Advisor,
Economic Research Institute
for ASEAN and East Asia (ERIA)



Prof. Shujiro URATA

Professor Emeritus,
Waseda University

Shujiro Urata is Professor Emeritus, Waseda University. He was Professor of International Economics, Graduate School Asia-Pacific Studies, Waseda University. He is currently Faculty Fellow at the Research Institute of Economy, Trade and Industry (RIETI), Specially Appointed Fellow at the Japanese Centre for Economic Research (JCER), Senior Research Advisor, Economic Research Institute for ASEAN and East Asia (ERIA), Visiting Fellow, Asian Development Bank Institute (ADBI) and Distinguished Senior Fellow at the Institute of Developing Economies (IDE-JETRO). Professor Urata received his BA in Economics from Keio University, MA and Ph.D. in Economics from Stanford University. He is a former Research Associate at the Brookings Institution, an Economist at the World Bank. He specializes in International Economics and Economics of Development. He has held a number of research and advisory positions including senior advisor to the Government of Indonesia, consultant to the World Bank, OECD, the Asian Development Bank and the Government of Japan. He has published a number of books and articles on international economic issues. His recent books include *Achieving Inclusive Growth in the Asia Pacific*, co-editor, Australian National University Press, 2020, *Enhancing SME Participation in Global Value Chains*, editor, Asian Development Bank Institute, 2021, *The Effect of Globalisation on Firm and Labour Performance*, co-editor, Routledge, 2021, and *Globalization and Its Economic Consequences: Looking at APEC Economies*, co-editor.



**Dr. Lauren
RICHARDSON**

Director,
ANU Japan Institute

Lauren Richardson is Lecturer in the Department of International Relations and Director of the ANU Japan Institute. From 2018-2020 she was Director of Studies and Lecturer in the Asia Pacific College of Diplomacy at the Australian National University. Prior to that, Dr Richardson taught Northeast Asian Relations at the University of Edinburgh. Her research focusses on the role of non-state actors in shaping diplomatic interactions in Northeast Asia, particularly Japan-Korea relations. She is currently completing a book manuscript provisionally entitled *Reshaping Japan-Korea Relations: Transnational Advocacy Networks and the Politics of Redress*.



**Mr. Naoyuki
HARAOKA**

Executive Managing
Director,
Japan Economic
Foundation (JEF)

Naoyuki Haraoka, born in Tokyo in 1955. 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 remodelled as METI (Ministry of Economy Trade and Industry) he 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 and joined JEF as Executive Managing Director.



Prof. Yunling ZHANG

Director, Institute of International
Studies Shandong University

Yunling Zhang, Professor and Academician of Chinese Academy of Social Sciences (CASS). He is a member of National Committee of CPPCC. He is now President of Chinese Association for Asia-Pacific Studies, Vice President of China Committee of PECC, Director of Research Center for Regional Security.

He was Director General of Institute of Asia-Pacific Studies, CASS (1993.11- 2007.8), Director General of Institute of Japanese Studies, CASS (co-current, 1995-2001). He served as a member of EAVG, China-ASEAN Cooperation Official Expert Group, Task Force of ASEM and Chairman of Joint Expert Group for Feasibility Study on EAFTA, and a Member of Joint Expert Group for Feasibility on CEPEA.



**Dr. Yose Rizal
DAMURI**

Executive Director,
Centre for Strategic and
International Studies (CSIS)

Yose Rizal Damuri is the Executive Director, Centre for Strategic and International Studies. His research activities focus on international trade, regional integration and globalization of value chain. He received his PhD in International Economics from the Graduate Institute of International Studies, Geneva, Switzerland. He is active in many networks of research institutes in East Asia, such as in Asia Pacific Research Network on Trade (ARTNet) and ERIA Research Institute Network (ERIA-RIN) and Think 20, the think tank network of G20 countries. Currently he serves as the Co-Chair of Indonesia National Committee of Pacific Economic Cooperation (INCPEC). Yose is also active in various policy forum in Indonesia, including as the Research Coordinator of Indonesia Service Dialogue, a forum dedicated for the development of services sector in Indonesia.



Prof. Gary HAWKE

Emeritus Professor,
Victoria University of
Wellington (VUW)

Gary Hawke was Head of the School of Government and Professor of Economic History at Victoria University of Wellington. He held visiting appointments at Stanford University, All Souls' College, Oxford, the Australian National University and a number of institutions in Japan. He is a Fellow of the Royal Society of New Zealand, Distinguished Fellow of the NZ Association of Economists and Fellow of the Institute of Public Administration of New Zealand. He is a Companion of the New Zealand Order of Merit. He consults for government on education policy. As Director of the Institute of Policy Studies from 1987 to 1998, the projects for which he was responsible included relations among Australia, New Zealand and the United States and New Zealand's position in the Asia-Pacific region. He is a member of the board of the New Zealand Committee of the Pacific Economic Cooperation Council, NZPECC, a member of the Academic Advisory Council of the Economic Research Institute for ASEAN and East Asia and represents NZ Institute for Economic Research on its Research Institutes Network. He is now Emeritus Professor, Victoria University of Wellington, and Senior Fellow, NZ Institute of Economic Research.



**Dr. Man-Jung
Mignonne CHAN**

Research Fellow & Professor
Taiwan Center for Security
Studies, National Chengchi
University

Dr. Mignonne Man-jung Chan has extensive experience in the academia, government, business, and media. She is Research Fellow & Professor at the Taiwan Center for Strategic Studies, National Chengchi University. She is also Chief Strategy Officer (CSO) of the Forum on Humanities, a top-notch cross-strait bilateral business forum, as well as CSO of Healthy Asia, a region-wide company that flagships AI technology, medi-care management expertise, and comprehensive medical humanity. Furthermore, she sits in many Boards, including Chinese Taipei PECC (Pacific Economic Cooperation Council) Committee; and Executive Board Member of the Sino-U.S. Economic & Cultural Association. In addition, she is also commissioned as Senior Advisor to the Legislative Yuan. Dr. Chan currently also serves as Advisor to the KMT Party think tank, National Policy Research Foundation; Chinese Taipei APEC Study Center at Taiwan Institute of Economic Research; and Advisor to the Chinese Cyan Geese Peace Education Foundation. She is also Coach for a special inter-college negotiation program commissioned by the Ministry of Education. Dr. Chan used to serve as Non-Executive Independent Board Member of Standard Chartered Bank (Taiwan) during 2013-2022; KMT Member of the Parliament at-Large and sat as Chair of the Judicial Committee in 2016. She was Senior Adviser to President Ma Ying-Jeou at the National Security Council of ROC 2008-2010, Director General of International Secretariat of Pacific Economic Cooperation Council (PECC) 1999-2001; Director (Research) at the International Secretariat of Asia-Pacific Cooperation Council (APEC) 1996-1999, and Chief of Staff at the APEC Business Advisory Council (ABAC). In addition, she used to serve as Research Associate at the Harvard University Negotiation Roundtable—a consortium organized by Schools of Law, Business, and Government.



**Prof. Sachin
CHATURVEDI**

Director General
Research and Information
System for Developing
Countries(RIS)

Prof. Sachin Chaturvedi is currently Director General at the Research and Information System for Developing Countries (RIS), a New Delhi-based Think-Tank. He works on issues related to development economics, involving development finance, SDGs and South-South Cooperation, apart from trade, investment and innovation linkages with special focus on WTO. Currently he is Vice Chairman of Madhya Pradesh State Policy and Planning Commission and Vice Chairman, Atal Bihari Vajpayee Institute of Good Governance and Policy Analysis; and Member, Board of Governors, Reserve Bank of India. Hewas Global Justice Fellow at the MacMillan Center for International Affairs at Yale University; Developing Country Fellow at the University of Amsterdam (1996); Visiting Fellow at the Institute of Advanced Studies, Shimla (2003); and Visiting Scholar at the German Development Institute (2007). He has served as a Visiting Professor at the Jawaharlal Nehru University (JNU) and has been closely associated with the UN Food and Agricultural Organization, World Bank, UN-ESCAP, UNESCO, OECD and many other agencies. His book “The Logic of Sharing -Indian Approach to South-South Cooperation” has been acclaimed internationally as one of the best volumes on international development cooperation. Apart from this he has authored/edited 21 other books, apart from contributing several chapters in the edited volumes and publishing several research articles in prestigious journals.



**Daw Khine Khine
NWE**

Secretary General,
The Republic of the Union
of Myanmar Federation
of Chambers of Commerce
and Industry

Khine Khine Nwe (Rosaline) is the first elected female Secretary General (2022-2025) of the Republic of the Union of Myanmar Federation of Chamber of Commerce and Industry (UMFCCI) since its establishment in 1919. Rosaline holds many positions including, Honorary Principal of UMFCCI Training Institute, Head of Responsible Business and Natural Resource Development Committee in UMFCCI, Trustee for the Board of ASEAN CSR Network (ACN) and a Board member of the UNGC Local Network Myanmar. She is also Managing Director of Best Industrial Co. Ltd. and the Secretary General of Myanmar Garment Manufacturers Association (MGMA) and Chairperson of Myanmar Garment Human Resource Development Center (MGHRDC).



Dr. Josef T. YAP

Senior Research Fellow,
Ateneo School of
Government

Josef T. Yap was President of the Philippine Institute for Development Studies, where he worked for 26 years until his retirement on June 30, 2013. While at PIDS, he specialized in macroeconomic policy and applied econometrics. Dr. Yap finished his undergraduate and doctoral studies at the University of the Philippines Diliman and went to the University of Pennsylvania on a post-graduate program. In 2010, Dr. Yap was honored as one of the 100 outstanding alumni of the UP Diliman College of Engineering as part of its Centennial celebration. His current research interest centers on regional economic integration in East Asia and promoting energy security in the Philippines. Dr. Yap was the regional coordinator of the East Asian Development Network and was actively involved in the establishment of the Economic Research Institute for ASEAN and East Asia (ERIA). From March, 2019 to April, 2022, Dr. Yap was Senior Technical Advisor to the ASEP-CELLs Project (Access to Sustainable Energy Program, Clean Energy Living Laboratories) which was implemented under the auspices of the European Union and the Ateneo School of Government (ASoG).

He is co-author of the books *The Philippine Economy: East Asia's Stray Cat? Structure, Finance and Adjustment* and *Lessons from Nationalist Struggle: The Life of Emmanuel Quiason Yap*. At present, Dr. Yap is a Senior Research Fellow at ASoG.



Dr. Tri Thanh VO

Chairman of Vietnam
National Committee for
Pacific Economic
Cooperation (VNCPEC)

Dr. Tri Thanh Vo is the new Chair for the Vietnamese committee for the Pacific Economic Cooperation Council (PECC). Dr. Vo is also currently a member of the National Financial and Monetary Policy Advisory Council. Dr. Vo mainly undertakes research and provides consultation on issues related to trade liberalization and international economic integration and macroeconomic policies. His other areas of interests include institutional reforms, financial system and economic development. He has received a bachelor of science from the Moscow State University, and a master's degree and PhD in economics from the Australian National University.



Prof. Frank JOTZO

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6. 議事要旨

(1) 日本語

以下の日本語サマリーは、共催団体であるオーストラリア国立大学（ANU）が作成した英文サマリーを和訳したものである。

2022 年度日アジア太平洋フォーラム

世界の分断とアジア太平洋経済

2022 年 12 月 1 日（木）～2 日（金）

はじめに

本フォーラムは、「世界の分断とアジア太平洋経済」と題し、一般財団法人国際経済交流財団がオーストラリア国立大学 Australia-Japan Research Centre の協力のもとで開催した。2 日間の開催にわたり、各地域から様々なスピーカーとパネリストが一堂に会し、分断された世界経済に対する現在の課題や潜在的な解決策を議論した。

新型コロナウイルス、ロシアによるウクライナへの軍事侵攻、米中对立、そして気候変動はいずれも世界経済安定化の逆風となっている。こうした衝撃的な出来事に加えて、サプライチェーンの分断や保護主義の台頭、技術のデカップリングの継続が、ルールに基づく多国間主義的な秩序の強化を阻み続けている。本フォーラムには、こうした情勢を分析して世界経済の安定を取り戻しうる道筋を提案する各地域の専門家に参加いただいた。

基調講演

本年度のフォーラムでは、Craig EMERSON 氏が基調講演を行った。基調講演では、1948 年の関税及び貿易に関する一般協定（GATT）制定以来、世界貿易システムは最大の圧力を受けていることが強調された。GATT の目的は相互依存関係を促進することであり、それにより各国は他国を犠牲にするのではなく、共に繁栄することができる。この相互依存関係により、他国を攻撃する動機も削減される。このシステムは、米国と中国の戦略地政学的な対立関係が生じるまでは機能していた。

この戦略地政学的な対立関係はトランプ政権時代に拡大した。トランプ元大統領は、輸出を良しとし輸入を悪とする重商主義の時代に米国を引き戻した。彼は、米国の製造業が比較優位ではなく不当な貿易慣行により空洞化しているという考えに基づき関税を課した。製造部門を再建することが必要であるというアメリカの考えは今なお明白であり、それにより世界貿易は保護主義に傾倒し続けている。

この状況を踏まえると、中国、米国、その他の WTO 加盟国間で貿易協定の合意に至ることは不可能であろう。そこで我々が進むべき道は複数国間による協定である。複数国間であれば、我々はすばらしい一括受諾方式の出現を待つのではなく、別の解決策にたどり着くことができるであろう。ASEAN や RCEP、APEC、CPTPP はいずれも地域の複数国間協定の例であり、こうした協定よりも大きな枠組みを構築させる余地はある。アジア太平洋自由貿易圏（FTAAP）は、既存の協定を土台とすることで、そして拘束力のない自発的で非特惠かつ無差別の加盟資格を提供することで、実現させることが可能な構想である。

気候変動はこの地域が直面するもう一つの課題である。ここでも比較優位が適用される。アジア太平洋地域のすべての国が同じように排出量を削減することができるわけではないからである。カーボンクレジット取引のために APEC またはアジア地域内で二国間及び複数国間協定を締結することで、自国の排出量削減に課題を抱える国への圧力は和らぐであろう。また、こうした貿易協定は、グリーン水素のような脱炭素化技術の共有も促進させるであろう。

現代は、二国間及び複数国間の協定が大きな多国間協定を補完するというボトムアップの世界である。我々は、非常に多くの複数国間協定を遂行するうえで、そうした協定が多国間システムの強化につながることを保証しなければならない。

セッション 1：ウクライナ戦争後の地政学と世界経済システム

近年、世界経済を脅かす数多くの衝撃的な出来事が発生している。米中対立、新型コロナウイルス、そしてロシアのウクライナにおける軍事侵攻はいずれも、多国間主義でルール・ベースの世界経済システムを弱体化させる脅威となっている。こうした衝撃は、サプライチェーンの分断や保護主義の台頭、世界秩序の分裂といった他の懸念される趨勢を生じさせている。新型コロナウイルスは世界経済に大きな打撃を与え、回復の兆しは不均等かつ分裂的であり、その傾向は続くであろう。

地域のマクロ経済面では、米国連邦準備制度理事会の一連の政策金利引き上げによる「キングドル」の回帰が多く地域通貨を弱体化させている。これにより、アジア太平洋経済圏の多くの国は、為替相場の安定、自由な資本移動、金融政策の独立性という 3 つの政策目標を同時に達成させることができないという実現不可能な三位一体の原則（トリレンマ）に苦しむ状況に陥っている。本セッションは、こうした問題やアジア太平洋地域に与える影響に焦点を当てた。

米中対立

米国と中国の戦略的競争の拡大により、多国間主義の秩序は緊迫している。世界及び地域の影響力を維持しようとする米国は、協力よりも中国との対立をより重視し、より一層競争的な態度をとっている。この対立は、二国間の貿易戦争が世界経済にまで広がると考えたトランプ政権時代に拡大した。中国も自国の利益に関してますます独断的かつ妥協しない姿勢

である。米国の政策は、地域への影響力は中国の攻勢に屈しないことと同義であるという考え方に基づくため、緊張関係は拡大し続ける。こうした情勢が建設的な対話を難しくさせてはいるものの、G20 で開催された米中首脳会談は、両国のリーダーが対話の重要性を理解していることを示す前向きな兆候である。

経済の分断化により世界は米国圏と中国圏に二分化されている。この二大国が、貿易慣行を安全保障の懸念に関連付けて一方的な輸出規制を戦略的に行使し続ければ、周辺諸国は「キンドルバーガーの罠」に陥ることに気付く。この分断化された世界では、サプライチェーンにおいて重要なプレイヤーとなる場合が多い輸出志向の経済圏は、拡大する保護主義に対して GDP の 3% を損失するリスクがある。

ASEAN 諸国は、対立の拡大と、どちら側に足並みを揃えるのかという両国の期待に苛立ちを見せている。中立的な立ち位置は、両大国に対する ASEAN の貿易関係の表れであり、ASEAN はサプライヤーに対していかなる差別的政策の適用も拒否している。ASEAN 諸国は、米国と中国の双方に対して信頼を失くし、不信感を持っている。緊張の高まりに対して、ASEAN 諸国は ASEAN 内連携の強化を模索しており、信頼できる大国である日本が地域において大きな役割を担うことにも目を向けられている。米国から制裁を課されることなく、中国と貿易を継続し、中国からの直接投資を受けることは ASEAN 諸国にとっての利益なのである。

戦略的競争が繰り返される昨今において、米国は半導体チップ及びその製造に使用される機器の中国への輸出を禁止している。これにより、韓国の半導体企業の中国での製造に深刻な影響を及ぼしており、そうした企業は ASEAN 諸国やインドへの移転を検討している。

ロシア・ウクライナ情勢

ロシアのウクライナ侵攻は、ルールに基づいた国際秩序をさらに覆す影響をもたらしている。ロシア側は自国の利益のために侵攻を進めており、合意された国際規範が軽視されたものである。この侵攻への対抗措置として米国、NATO、その他の大国は協調し、主に制裁を通じてルール・ベースの国際社会からロシアを孤立させている。制裁措置に対抗して、ロシアは石油やガスの供給を停止しており、石油・ガス価格高騰や激しいインフレ、世界各地の景気後退を引き起こしている。

アジア太平洋地域はロシアとの貿易への依存度は低く、そのためこの情勢から被る影響は比較的少ないものの、域内のサプライチェーンは制裁措置により深刻な影響を被っている。多くのアジア太平洋諸国は輸出志向であり、世界的なサプライチェーンの重要なプレイヤーであるが、制裁措置によりその輸出量の減少は避けられない。しかしながら、地域の多国間協定のネットワークはそうした制裁措置の緩衝材として機能しており、そのことがルール・ベースの秩序を共に守り、危機的状況においてもそれを貫くことで多国間協定の価値をさらに高めている。

食糧、石油、ガスの価格高騰を受け、国内供給を確保するために輸出規制政策を適用する国もあった。インドネシアはパーム油の輸出禁止し、インドは小麦の輸出を禁止した。こうし

た政策は供給を抑制して地域の繁栄を犠牲にしていることから、自由市場の価格シグナルを歪め、国際貿易システムに損害を及ぼしている。

影響

パンデミック、戦略的競争、そしてヨーロッパにおける軍事侵攻という、三つの経済及び地政学の課題は、さらに懸念される複数の状況を生み出している。大国間競争という舞台において貿易と投資がますます利用される中で、オンショアリングやフレンド・ショアリングの政策が当たり前となっている。オンショア生産に政府の補助金を活用したり、重要な鉱物の国内供給を支えるために輸出規制を実施したりすることは自国の利益を優先した行動であり、比較優位の原則を損なうものである。比較優位は国際貿易システムの成功を大きく支えるものであることから、これは危険な傾向である。

また、そうした衝撃的な出来事により、安全保障が貿易・投資関係の中心的要因となっている。例えば、日本では2022年5月に経済安全保障推進法が可決された。同法は、半導体等の需要物資・部品のサプライチェーン強化を求めるものであり、これにより、政府はサイバー攻撃対策として必須の機器やコンピューターシステムの中核インフラへの設置を監督できる。貿易においては安全保障を優先することは非効率的で比較優位や最恵国待遇の原則を損なうものであり、その結果、経済成長は停滞するであろう。経済成長は、国の競争力を高めるための研究開発に必要な大きな資源をもたらすものであり、そのような考え方は逆効果である。競争力のある国は、非同盟国からの攻撃に対する脆弱性が低い。

機能的な多国間システムの下では、相互依存関係により国家は敵対的姿勢を持たないように強化され、安全保障を提供する。しかし、大国が多国間秩序のルールの公約を無視している現状では、相互依存関係は兵器化されている。相互依存関係がますます脆弱性やリスクの源と見なされ、もはやルール・ベースの秩序が仲介できなくなる中、地域は分断するであろう。ルール・ベース秩序の有効性に対する不確実性は、米国がWTO上級委員会への判事任命を拒んだことにより拡大している。紛争解決の仕組みがなければ、ルールを執行することはできず、これにより国際貿易システムは信用を損ない、保護主義の台頭を許している。

解決策

多国間システムが困難に直面して保護主義が台頭する中で、複数国間協定やミドルパワーが積極的に地域の経済的な成果と協力を形成する余地はある。同じ考えを持つ小国やミドルパワーは、ルール・ベースを尊重し、自由貿易の扉を開き、投資体制を維持するために連帯するべきである。米国のインド太平洋経済枠組みは包摂的なものでなければならず、ミドルパワーはその実現のために枠組みの様々な柱やアジェンダを形成することができなければならない。

現在の状況において、貿易の継続させることで各国は大きく成長できるであろう。大国間が対立する状況においては、無差別で非独占的な貿易政策が必要である。こうした重要な地政学的衝撃が地域に反響する中で、多国間外交やプロセスの重要性が再認識されている。

ミドルパワーは機能的なルール・ベースの秩序から大きな恩恵を受けており、WTO 紛争解決メカニズムの再生を牽引する役割を担うことができる。例えば、ニュージーランド、オーストラリア、中国、シンガポールは、常任委員が任命されるまでの間、貿易紛争を解決することができる多国間暫定上訴アレンジメントに参加している。日本はまだ署名していないが、国際経済交流財団や他の政府団体がこれを推奨している。ASEAN は米国と中国に対して中立的な立場であることから、両国を交渉の場に就かせるための中心的な役割を担うことができる。

セッション 2：ルール・ベースの経済の回復

現在の問題

世界経済は、安全保障問題及び緩和政策の正常化により、その影を薄めている。これまでのところ、世界経済は正常化政策に向けて連携し、協調した取り組みを示せないでいる。しかしながら、コロナ禍からの回復はよりグリーンな世界経済を推進する機会であり、そこで重要となるのは WTO のルールと規範である。しかし、WTO は懸命に模索するものの、紛争解決のための解決策を見いだせていない。紛争解決に対応する新しい仕組みが切に求められており、それをなくしては組織の信用は弱体化するであろう。差別的かつ制限的な貿易政策の増加も、組織の信用を失わせている。

現在の状況は、金融及び財政政策の調和に失敗したことも由来している。この点については G20 サミットにおいても解決策が見い出されなかった。コロナ禍からの経済回復はバランスがとれたものでなければならず、このバランスを実現するためには世界債務の再構築が必要である。発展途上国の 60% は債務に陥っている。この経済回復を支援するルール・ベースの金融政策は極めて重要となるであろう。

各国はインフレ圧力と生産性向上率の低下に直面しているため、当面の焦点はウクライナ情勢の影響である。ウクライナ情勢により、食糧とエネルギーの価格及び高い金利が主要な懸念事項となっている。こうした問題は貿易、テクノロジー、そして通貨戦争により悪化し、カップリングや連合、そしてサプライチェーン・コネクティビティを回復させるための我々の取り組みを阻んでいる。サプライチェーンの長期的な脆弱性を監視する仕組みが必要であり、それは重要品目を供給する市場が限定的であるという構造的に依存してきたことに大きく由来するものである。地域の数多くの国が、サプライチェーンの分断により食糧危機に直面している。

世界経済は内向き志向が強まっている。過去 40 年にわたり、国際経済において中国の遊休資源の取り込みは最も重要なドライバーであった。中国製品は比較的安定した価格で収益の成長を推進させるが、ここから適応の問題が生じている。競合製品はいとも簡単に中国製品に取って代わり、仕事や地域社会を崩壊させている。こうした地域社会の多くはより安価な商品やサービスを提供するのではなく、保護主義に活路を見出している。資源は、配分の抑制が最小である場合に、最大限の経済厚生を生み出す。こうした保護主義政策による人、モ

ノ、サービス、投資の移動制限の拡大は、国際的な経済厚生を妨げる制約となる。米中対立に加え、地域貿易を遮断する非関税障壁も問題となっている。インド洋地域は太平洋地域の経済をつなぐ大きな役割を担うことができ、経済ガバナンスにより多くの次元をもたらすであろう。海上航路が安全であり、保険で補償されていることで、貿易を促進させることができる。米国のインド太平洋経済枠組みは、貿易と投資の積極的な進化に貢献できる。

複数国間協定

複数国間協定は現在の地経学的問題を解決に導くが、多国間秩序ではそれは不可能である。自発的で非拘束的かつ無差別のアプローチを複数国主義に適用すれば、幅広い参加と連携が推進されるであろう。地域には、近々後発開発途上国から卒業し、開発途上国ステータスになる 10 カ国以上の国があり、そうした国を取り込んでいくことが必要である。

GATT 制定のために複数国間協定が活用されたが、それには多くの多様な利害関係が伴うという課題も確認された。それでも、多国間協定では一括受諾方式に基づく意思決定は実現することができないため、複数国間協定は採るべき最善の道であると思われる。

複数国間協定が益々増加することが前進への道筋である。小国はルールしぼられる傾向があり、より大きな経済圏は自国の考えを強制しようと試みるものの、自らも他の大国や監視と執行の費用により制約される。様々な政策領域にかかるルールは一貫性がなければならない。一つの領域における不一致は他の領域における合意事項に影響を与える。複数国間協定により、我々は総意と妥協を目指すことができる。多くの複数国間協定を策定できることは、閉鎖経済に後退するよりもより安全である。

多国間協定の中に生産的な複数国間協定のイニシアチブがあることは貿易自由化やルール作りの進むべき道であることを示唆している。しかし、それが多国間主義のプロセス内にしっかりと根付き、その原則である開放性に訴えるものである場合に限り、複数国間主義を解決策として模索すべきである。フレンド・ショアリングの路線に屈し、信頼するパートナーとのみ貿易を行うのであれば、我々は貧しい世界への道を辿るであろう。生産ネットワークとサプライチェーンの分断は、コストを大きく増加させる。そこでカギとなるのは開放性であり、故に我々はインド太平洋経済枠組みの中国を排除しようとする取り組みに対して慎重にならなければならない。アジア太平洋コミュニティの形成は、排他性を回避し、様々な域内の複数国間協定参加国による多国間協定の特性を持つグループの形成を保証することを意味するであろう。

複数国主義はいくつかの解決策を提供するが、あまりにも過度に追及すると、地域はルールとグループとで過密な状態になるであろう。協調した地域貿易協定はこれに対処することができる。

APEC

APEC にはピアレビューの仕組みが構築されている。WTO 危機を踏まえると、ピアレ

ビューの仕組みを取り入れることでさらなる開放性と改革を推進することができるであろう。2040年までにアジア太平洋経済コミュニティを実現しようとするのであれば、アジア太平洋とインド太平洋をどのようにつなぐことができるかを検討し、CPTPPとRCEPをつなぐ可能性を探求することが必要である。

APECに対する考え方は複雑である。ビジョンと推進力の欠如によりその役割は低下したという考え方もあり、統合されたアジア太平洋に対する政治的な支援が減少したことを意味している。米国は来年度のAPECホスト国であり、米国が前言撤回し再考する望みは残る。APECはサプライチェーンの安全保障を解決するための手段として、そして地域を統合し、デジタル貿易を統合するための場として活用されるべきである。

セッション3：気候変動とエネルギーが意味するもの

現在、世界はクリーンエネルギーへの歴史的な移行を進めている。気候変動がもたらす脅威を緩和するためには、2050年頃までに実質CO₂排出量ゼロを実現しなければならない。しかし、このターゲットを達成するためには大きな財政支援と国際協力が必要である。本セッションでは、世界的なエネルギー大転換を支えるための多くの重要な手段を特定した。より大きな官民連携やグリーンファイナンス、発展途上経済圏への財政支援等が含まれる。

官民パートナーシップ

このディスカッションで、気候変動に対処する幅広い範囲での官民連携が確認された。民間セクターはイノベーションに不可欠であり、イノベーションを活用すればエネルギー効率を高めることができる。また、人工知能(AI)の活用を推進することで、例えば天候データを用いた農業投入量を事前に計画することができる。サプライチェーンにおいて技術のアクセシビリティをより幅広く支持し拡大させることで、クリーンエネルギー開発の取り組みは推進されるであろう。

また、民間セクターは消費者の選択と行動を形成する立場にあり、企業はより持続可能な消費財の採用を先導し、マーケティングを通じて消費者の選択を導くべきである。部門別のアプローチが望ましく、農業部門はデータを活用して所要水量を削減することができ、建設部門は太陽光パネルの取り込みを改善することができ、ホスピタリティ部門はもっぱら生分解性製品を使用して食品ロスを削減するべきである。企業は、カーボンクレジットで削減義務を回避するのではなく、森林再生やアグロフォレストリー等の自然を基盤とした解決策を実行することで、自社のサプライチェーンからの排出量を削減することができる。過去数年間で、数多くの企業が「グリーンウォッシュ」で罰金を科せられており、これは民間セクターが気候へのコミットメントに対して責任があるというまぎれもないあらわれである。企業、政府、そして消費者の責任のある行動は、エネルギー大転換の重要なドライバーとなるであろう。

より大きな官民連携を支持するためには、多くの障壁を乗り越えなければならない。そこで、

責任ある投資の原則である環境、社会、ガバナンス（ESG）の基準が導入されることが望ましい。政府は、民間セクターと消費者を気候変動を意識した経済活動に導くために税制とインセンティブを活用し、中小企業に持続可能な活動ができるように推奨することも可能である。企業は世界がクリーンエネルギーに適応するための積極的な利害関係者とならなければならないが、そのためには首尾一貫した政府の制作が必要となるであろう。

有償貸付と無償融資で民間投資を補完することは可能である。貿易促進、基準類の調和化、排出量取引、技術の共有といった非資金協力で民間セクターのイニシアチブを支援することができる。政府の強力な政策が機能するとともに企業やメディアにも関わるトップダウンとボトムアップの同時的なアプローチが非常に重要となるであろう。政府は、民間資本を動員することが必要とされる「触媒」資金を提供することが望ましい。例えば、グリーンバンクは、政府資金を着手金に活用した資金調達手段と民間セクター資金の活用を融合して、様々なプロジェクトに資金提供を行っている。この取り組みを既に進めている国内銀行もあるが、そうした銀行がグローバルな規模で運用できるかどうかは課題であろう。

グリーンファイナンス

クリーンエネルギーへの移行を実現するためには、エネルギーへのグリーン投資を年間2兆米ドルから4~5兆米ドルにまで増額することが必要である。とりわけウクライナ情勢の観点から見ると、エネルギー供給の安全保障に対する懸念は拡大し、政策と投資を決定する要因となっている。クリーンエネルギーに対する持続的な資金支援は、政府介入だけでなく市場圧力のもとに変化が見え始めるであろう。

ESG やグリーン・グローブ認証要件等の基準の調和は、グリーンファイナンスの要である。ESG の評価基準に一貫性がなければ、企業は ESG 債のためにフォーラム・ショッピングを行い、つまり高スコアを与えてくれる格付け機関を見つけ出そうとし、それが市場に歪みをもたらす。

包摂的で持続可能な開発を促進させるために、世界的な資本規制も活用することができる。2020年、世界で利回りを下回った債権残高は約18兆米ドルであった。バーゼルⅢのような世界的な資本規制に持続可能性指標を組み入れることで、銀行がより多くのグリーン債権を保有し、より多くのグリーンボンドを発行する動機付けをすることで、この資本が正しく活用されるよう導くことができる。世界的な資本規制の再形成は国際協力の潜在的な分野であり、発展途上経済圏に大きな恩恵をもたらすことにもつながる。

発展途上経済圏は、エネルギー大転換への資金調達という点では喫緊の課題に直面する。例えば、ベトナムはSDG達成に向けた野心的なコミットメントを掲げ、2050年までに実質排出量ゼロの達成を公約に掲げているが、そうした取り組みを支えるためにはさらに3680億米ドルが必要である。発展途上経済圏は単独でエネルギー大転換を行うことはできない。国際協力と支援が絶対的に必要とされる。そこで、エネルギー大転換を通じて発展途上経済圏を支援するにあたり、グリーンファイナンスは大きな役割を果たすことができる。

米中間の障壁

クリーンエネルギーへの転換は中国からの技術輸出に依存するため、米中関係の悪化は国際エネルギー協力を大きな脅威を及ぼしている。二国間の緊張により他国の排出量削減が損なわれることがないよう、技術においては米中のより深い関与が必要とされる。米中間の緊張は、他国との協力が第三国との関係に影響を及ぼす場合は協力を思いとどまらせるといった波及的影響がある。二大国が気候変動による危機に対処するために協力することを拒むのであれば、小国やミドルパワーにも自国の責任を逃れる言い訳を与えることになる。米中のより大きな気候変動に関する連携を推奨することは、世界的なエネルギー大転換にとって極めて重要である。G20 で開催したバイデン米国大統領と習近平中国国家主席との最近の会談では、両首脳は国際的な気候交渉を模索することで合意し、気候変動に関する協力は二国間関係の他の問題とは切り離して検討することが可能であるという前向きな兆候を示している。

連携

アジア太平洋諸国は、世界の温室効果ガス排出量の 3 分の 1 を、そして世界の石炭供給量の 60% を占めている。こうした経済圏は、エネルギー転換のための協力強化手段を探求するべきである。水素、陸上交通、鉄鋼及び農業が重要な連携分野である。

すでに CPTPP と EVFTA は、既に再生可能エネルギー及びグリーンエネルギーへの移行に関する強いコミットメントを掲げている。その支援のために、APEC と ASEAN の両加盟国はアジェンダを実行するための個別のアクションプランを策定すべきである。APEC のビジョン 2040 はより大きな連携と対話、そしてグリーンタクソノミーの策定を掲げている。米国のインド太平洋経済枠組みには、クリーン経済の柱が含まれているが、その実施のためには国際連携が必要である。APEC には、クリーンエネルギーの取り組みを支援するリーダーを任命し、発展途上経済圏がグリーンへの移行に必要とされる支援を受けることを確保する余地がある。

循環経済は成長に関する新しい考え方を提案する。経済成長だけでなく、グリーン成長に焦点を当て、経済を線状ではなく循環としてとらえるものである。ASEAN はこの「循環経済」の考え方を採用し、包摂性と強靱性の原則によりグリーンへの移行の実現に向けて取り組んでいる。循環経済には、協力とマルチステークホルダー連携が必要である。

おわりに

3 つのセッションで議論されたトピックでは、苦悩する多国間主義の秩序が直面する課題が強調された。新型コロナウイルス、ロシアのウクライナ侵攻、そして米中対立は世界秩序を覆しており、頑健な多国間主義の秩序回復につながるオープン・トレードや国際協力を支持するための代替的手段を策定する機運が高まっている。本フォーラムの議論の多くで、その取り組みにおいて複数国主義が果たしうる役割が強調された。複数国主義を発展させることは、保護主義やフレンド・ショアリング、差別的貿易政策の拡大防止につながるであろう。

米国と中国の大国間の戦略的競争は、多国間主義の秩序を回復させるための大きな課題となっており、ミドルパワー諸国は両国が関与する分野を探すべきである。気候変動はそうした分野の一つである。気候変動危機がもたらす、実存する厳しい脅威がある中で、この分野に対する米中協力は必要不可欠であるだけでなく、より大きな連携のための第一歩となるのかもしれない。

(2) 英語

English Summary drafted by Australia-Japan Research Centre, The Australian National University (ANU)

Asia Pacific Forum 2022

Global Fractures and the Asia Pacific Economy

1 – 2 December 2022

Introduction

This conference, titled ‘Global Fractures and the Asia Pacific Economy’, was hosted by the Japan Economic Foundation in collaboration with the Australia-Japan Research Centre at The Australia National University. Over two days, various speakers and panellists from across the region joined together to discuss the current challenges and potential solutions to the fragmented global economy.

COVID-19, Russia’s war in Ukraine, the US–China rivalry, and climate change are all upending global economic stability. In addition to these shocks, continued supply chain disruptions, rising protectionism and technology decoupling, are continuing to undermine the strength of the rules-based multilateral order. This conference saw experts from across the region analyse these trends and offer potential pathways to restoring the stability of the global economy.

Keynote Speech

Dr Craig Emerson delivered the keynote speech for this year’s conference. He highlighted that the world trading system is under the most pressure that it has experienced since the establishment of the General Agreement on Tariffs and Trade (GATT) in 1948. The purpose of the GATT was to encourage interdependence, so that nations could prosper together rather than at the expense of one another. Interdependence also reduces the incentive to attack another country. This system was working until the geostrategic rivalry between the United States and China emerged.

This geostrategic rivalry escalated during Donald Trump’s presidency. President Trump took the United States back to a mercantilist age — where it was believed that exports are good and imports are bad. He imposed tariffs because he believed that American manufacturing was being hollowed out due to unfair trading practices, rather than comparative advantage. The view that America needs to rebuild its manufacturing sector is still apparent and is keeping us in a world of US protectionism.

Given this environment, it will be impossible to achieve a trade agreement that China, the United States, and other WTO members will agree to. But plurilateral agreements

offer a way forward. Plurilaterals will enable us to achieve something, rather than waiting for a great single undertaking. ASEAN, RCEP, APEC and CPTPP are all examples of regional plurilaterals, and there is room to make something bigger out of these arrangements. A free Trade area of Asia and the Pacific (FTAAP) can be achieved by building on existing agreements, and through offering non-binding, voluntary, non-preferential and non-discriminatory entry.

Climate change is another challenge confronting this region. Comparative advantage applies here too, and not every member of the Asia Pacific community will be equally adept at reducing emissions. Establishing bilateral and plurilateral agreements within APEC or East Asia to trade carbon credits will take the pressure of countries finding it difficult to reduce their emissions. These trade agreements will also facilitate the sharing of decarbonisation technologies, such as green hydrogen.

We are living in a bottom-up world now, where bilateral and plurilateral agreements are supplementing giant multilaterals. In pursuing so many plurilaterals, we must ensure that they contribute to the strength of the multilateral system.

Session 1: Geopolitics and the Global Economic System Post-Ukraine Conflict

There have been a number of shocks to the global economy in recent years. The US–China rivalry, COVID-19 pandemic, and Russia’s war in Ukraine have all threatened to undermine the multilateral, rules-based global economic system. These shocks have given rise to other concerning trends — supply chain disruptions, protectionism, and the bifurcation of the world order. The Covid-19 pandemic was a major shock to the global economy from which recovery has been and will continue to be uneven and disruptive.

On the regional macroeconomic front, the return of “King dollar” due to a series of steep interest hikes by the US Federal Reserve has weakened many regional currencies. As a result, many Asia-Pacific economies have suffered the impossible trinity principle (trilemma), in which the three policy objectives of fixed exchange rate, free flow of capital, and monetary sovereignty cannot be achieved simultaneously. This session focussed on these issues and their impact on the Asia-Pacific region.

US–China Rivalry

Growing great power strategic competition between the United States and China has strained the multilateral order. The United States, intent on maintaining its global and regional influence, is behaving increasingly competitively, focused more on confrontation with China than cooperation. This competition escalated during the Trump administration, which saw a bilateral trade war spread through the global economy. China has also become increasingly assertive and uncompromising on its national

interests. In this context, tensions continue to escalate, as US policymaking is driven by the idea that maintaining regional influence means not bowing to China's aggression. This trend has also made constructive communication difficult. However, the US–China summit meeting during the G20 is a positive sign that both leaders understand the importance of dialogue.

Growing economic fragmentation is dividing the world into US and China-led blocs. As these two big powers increasingly orient their trade practices around security concerns — exercising unilateral export controls strategically — regional countries are finding themselves in a Kindleberger trap. In this fragmented world, export-oriented economies, which tend to be key players in supply chains, risk losing 3 per cent of GDP to growing protectionism.

ASEAN countries are frustrated by the growing rivalry, and the expectation to align with one or the other. This non-alignment is evident in ASEAN's trading relationship with both powers, wherein ASEAN has refused to apply any discriminatory policies on their suppliers. ASEAN countries lack trust and confidence in both the United States and China. In response to the growing tension, ASEAN countries are seeking to strengthen their unity, and are also looking towards Japan, as a trustworthy power, to play a greater role in the region. It is in the interest of ASEAN countries to continue trading with and receiving foreign direct investment from China, without being punished by the United States.

In the latest iteration of strategic competition, the United States has banned the export of semiconductor chips and the equipment used to produce them to China. This has seriously compromised the ability of South Korean semiconductor companies to operate in China, and they are now looking at relocating to ASEAN countries or India.

Russia–Ukraine

Russia's invasion of Ukraine further upended the rules-based international order. The invasion was driven by national self-interest, with little regard for accepted international norms. In responding to the invasion, the US, NATO and other powers have formed a solid coalition of resistance that has collectively isolated Russia from the rules-based international community, largely through sanctions. In response to the sanctions imposed upon it, Russia has cut off oil and gas supplies, which has triggered spiralling oil and gas prices, rampant inflation, and recession in numerous corners of the world.

While the Asia-Pacific region is less dependent on trade with Russia, and for this reason has suffered comparatively less from the conflict, the sanctions have had serious impacts on supply chains in the region. Many Asian and Pacific countries are export-oriented, and therefore are key players in global supply chains, and sanctions have inevitably compromised their export ability. However, the region's network of multilateral

arrangements has served as a buffer against these sanctions, which further highlights the value of multilateral arrangements in binding the rules-based order together and carrying it through crisis.

Spiralling food, oil and gas prices led some countries to adopt export control policies to ensure domestic supply. Indonesia implemented a ban on palm oil exports, while India banned wheat exports. These policies distort free market price signalling and are damaging to the international trading system, as they choke supply at the expense of the region's greater prosperity.

Consequences

The trifecta of economic and geopolitical challenges — the pandemic, strategic competition and war in Europe — has given rise to several concerning trends. As trade and investment is increasingly used as an arena for great power competition, onshoring and friend-shoring policies have become commonplace. Using government subsidies to onshore production, or implementing export controls to shore up domestic supply of critical minerals are self-interested actions that undermine the principle of comparative advantage. This is a dangerous trend, as comparative advantage largely underpins the success of the international trading system.

These shocks have also led to security becoming a central factor in trade and investment relations. For example, Japan passed an economic security bill in May, 2022. The law calls for supply chains for key materials and parts, such as semiconductors, to be strengthened, and allows the government to oversee the installation of vital equipment and computer systems in core infrastructure, in order to guard against cyberattacks. Prioritising security when it comes to trade is inefficient, it undermines principles of comparative advantage and most favoured nation, and economic growth will suffer as a result. Such thinking is counterproductive, as economic growth provides governments with greater resources to undertake research and development to improve the competitiveness of a country. A competitive country is less vulnerable to attack from non-allied countries.

Interdependence, in a functional multilateral system, incentivises states to not behave antagonistically — it can provide security. But in the current environment, where major powers are exhibiting a lack of commitment to the rules of the multilateral order, interdependence is being weaponised. As interdependence is increasingly seen as a vulnerability and a source of risk, that the rules-based order can no longer mediate, the region will become fragmented. Uncertainty surrounding the efficacy of the rules-based order is exacerbated by the United States' refusal to appoint judges to the WTO appellate body. Without a dispute settlement mechanism, rules are less enforceable, and this has

eroded confidence in the international trading system, consequently giving rise to protectionism.

Solutions

In the face of a struggling multilateral system and growing protectionism, there is room for plurilateral agreements and middle powers to positively shape economic outcomes and cooperation in the region. Like-minded small and middle powers should unite to sustain the rules-based, open free trade and investment regime. The United States' Indo-Pacific Framework needs to be inclusive, and middle powers have the capacity to shape the various pillars and agendas of the framework to achieve this.

Ensuring that trade continues in the current environment will help push countries towards greater levels of growth. Non-discriminatory and non-exclusive trade policies are needed amid this great power rivalry. As these key geopolitical shocks have reverberated across the region, the importance of multilateral diplomacy and processes has been reaffirmed.

Middle powers — who stand to benefit significantly from a functioning rules-based order — have the capacity to lead the resurrection of the WTO dispute settlement mechanism. For example, New Zealand, Australia, China and Singapore have all signed up to the Multi-Party Interim Appeal Arbitration Arrangement, which can resolve trade disputes until the appellate judges are appointed. Japan is yet to sign up to this, but there is encouragement from the Japan Economic Foundation and other governmental camps to do so. Given that ASEAN does not want to choose between the United States and China, they can play a central role in bringing both powers to the table.

Session 2: Rules-based economic recovery

Current problems

The global economy is overshadowed by security issues and the normalisation of expansionary policy. The global economy has so far failed to come up with a coordinated, concerted effort towards a normalisation policy. At the same time, the COVID recovery is an opportunity to push for a greener global economy — and rules and norms in the WTO are vital to that. But the WTO is flailing, and there is no solution for settling disputes. A new mechanism to deal with dispute settlement is sorely needed, otherwise confidence in the organisation will be undermined. Increased use of discriminatory and restrictive trade policies is also eroding confidence in the organisation.

The current situation also stems from a failure to coordinate on monetary and fiscal policy. This was also not resolved at the G20 summit. The economic recovery from COVID needs to be balanced, and achieving this balance will require a restructuring of global

debt. 60 per cent of developing countries are trapped in debt. Having a rules-based monetary policy to finance this economic recovery will be crucial.

Countries are facing inflationary pressures and declining rates of productivity growth, so their immediate focus is on the effects of the Ukraine conflict. The Ukraine conflict has made food and energy prices and higher interest rates, the primary concern. These problems are aggravated by trade, technology and currency wars, which prevents coupling, coalitions, and our ability to restore supply chain connectivity. We need mechanisms to monitor long term supply chain vulnerabilities, which largely stem from structural reliance on concentrated markets for the supply of critical goods. Numerous countries in the region are facing a food crisis due to supply chain disruptions.

The global economy is shifting inwards. For the last 40 years, the single most important driver of the international economy has been the incorporation of unemployed resources in China. Chinese products have facilitated growth in incomes at relatively stable prices, and adjustment issues have emanated from this. Chinese products easily supplanted competing products, disrupting jobs and communities. Rather than finding consolation in cheaper goods and services, many of these communities have pushed for protectionism. Resources will generate maximum economic welfare if there are as few restraints on their allocation as possible. Growing restrictions on the movement of people, goods, services and investment through these protectionist policies are a constraint which is hindering international economic welfare.

In addition to the US-China rivalry, there are non-tariff barriers that are blocking regional trade. The Indian Ocean can play a larger role in connecting Pacific economies, and this will provide larger dimensions for economic governance. Shipping lanes need to be secure and insured so that they can facilitate trade. The United States' Indo-Pacific Economic Framework can contribute to the positive evolution of trade and investment.

Plurilateralism

Plurilateralism can help address current geo-economic problems while the multilateral order is unable to do so. Adopting voluntary, non-binding and non-discriminatory approaches to plurilateralism will encourage wider participation and collaboration. The region is home to 10 least developed countries that will soon graduate to the status of developing country, and they need to be brought into the fold.

Plurilateralism was used to set up the GATT, but this came with its challenges as it brings along many diverse interests. Plurilateralism still appears to be the best way forward, because the multilateral level is trapped trying to make decisions based on a single undertaking approach which is not feasible.

Incremental developments in plurilateralism are the way forward. Smaller countries are

predisposed to paper rules, while larger economies attempt to impose their view on others, but even they are constrained by other big countries and the costs of monitoring and enforcing. Rules for different policy domains have to be consistent. Disagreements in one area will influence agreement in other areas. Through plurilateralism, we can aim for consensus and compromise. Having the ability to draw on a wide range of plurilateral alternatives is more secure than a retreat towards autarky.

There have been productive plurilateral initiatives within the multilateral system, and this suggests that it is a good way forward on trade liberalisation and rule making. But pursuing plurilateralism as the solution should only be done if it is firmly rooted within the multilateral process, and appeals to the multilateral principles of openness. If we go down the route of friend-shoring, and trading only with trusted partners, we will be on a pathway to a poorer world. Breaking up production networks and supply chains will increase costs significantly. Openness is key, and because of this we need to be wary of the Indo-Pacific Economic Framework's efforts to exclude China. Forming an Asia Pacific community will mean avoiding exclusivity and ensuring that the members of various regional plurilaterals make their groupings multilateral in character.

Although plurilateralism offers some solutions, if pursued too excessively it will overcrowd the region with rules and groupings. Harmonising regional trade agreements can address this.

APEC

APEC has a peer review mechanism embedded in it. Against the backdrop of the WTO crisis, adopting a peer review mechanism could help further openness and reform. If we are to achieve an Asia Pacific Economic Community by 2040, we need to think about how we can link the Asia Pacific and Indo-Pacific, and explore possibilities for linking CPTPP and RCEP.

Views towards APEC are mixed. Some believe its role has declined due to a lack of vision and lack of momentum, which has meant that political support for an integrated Asia Pacific has declined. The United States is hosting APEC next year, which leaves room for hope that they will retract and rethink. APEC should be leveraged as an avenue to resolve the security of supply chains, and as a place to integrate the region and integrate digital trades.

Session 3: Implication of Climate Change and Energy

The world is currently undergoing a monumental transition to clean energy. Net zero emissions need to be reached by around 2050 in order to mitigate the threats posed by climate change, but reaching this target will require greater financial support and

international cooperation. This session identified a number of key avenues to support the global energy transition, including greater public-private sector collaboration, green financing, and financial support for developing economies.

Public–Private Partnership

This discussion revealed that there is extensive scope for public-private sector collaboration in tackling climate change. The private sector is a crucial source of innovation and can leverage this to improve energy efficiency. The private sector can also help incorporate artificial intelligence (AI), which can be used to pre-plan agricultural inputs using weather data, for example. Supporting and expanding the accessibility of technology along supply chains more broadly will elevate efforts to develop clean energy. The private sector is also well positioned to shape consumer preferences and behaviour. Businesses should take the lead in adopting more sustainable consumer goods, and guide consumer preferences through marketing. Sector specific approaches should be adopted — the agricultural sector can use data to reduce water requirements, the construction sector can improve solar panel uptake, and the hospitality sector should exclusively use biodegradable products and reduce its food waste. Companies can reduce emissions from within their own supply chains by implementing nature-based solutions such as reforestation and agroforestry, rather than evading their obligations through carbon credits. In the past few years, a number of companies have been fined for ‘greenwashing’, and this is a positive sign that the private sector can be held accountable to its climate commitments. Accountable action — for businesses, governments and consumers — will be an important driver of the energy transition.

A number of barriers need to be overcome to support greater public-private collaboration. Standard environmental, social and governance (ESG) principles for responsible investment should be employed. Governments can also use taxes and incentives to direct the private sector and consumers towards climate conscious economic activities, and encourage small and medium-sized enterprises to engage in sustainable practices. Businesses need to become active stakeholders in helping the world adapt to clean energy, but doing so will require coherent and consistent government policies.

Financial and concessional loans can complement private investment. Non-financial cooperation — promoting trade, harmonising standards, carbon trading and technology sharing — can support private sector initiatives. A simultaneous top-down, bottom-up approach, where strong government policy works alongside engagement with enterprises, businesses and the media, will be crucial. Governments should provide the ‘catalyst’ funding that is needed to mobilise private capital. For example, green banks are blended financial vehicles that take some government money to launch, and then leverage

private sector money to fund different projects. There are some domestic banks which already do this, but can they operate on a global scale?

Green Financing

Global investment in energy will need to increase from US\$2 trillion a year to US\$4-5 trillion in order to realise the transition to clean energy. Energy supply security, particularly in light of the Ukraine conflict, is a growing concern and driver of policy and investment. Sustained financial support for clean energy will see changes begin to happen under the pressure of the market, not just government intervention.

Harmonising standards will be key to green financing. This includes ESG standards and green globe certification requirements. Inconsistent ESG standards means that firms go forum shopping for ESG bonds — trying to find a rating agency that will give them a high score — and this distorts the market.

Global capital rules can also be leveraged to promote inclusive and sustainable development. In 2020, around US\$18 trillion sat in negative yielding bonds worldwide. Incorporating sustainability metrics in global capital rules like Basel iii can help channel this money by incentivising banks to hold more green debt and issue more green bonds. Reshaping global capital rules is a potential area for international cooperation that will also deliver significant benefits to developing economies.

Developing economies face acute challenges when it comes to financing their energy transition. Vietnam, for example, has set ambitious SDG commitments and has pledged to achieve net zero emissions by 2050. But it needs an additional US\$368 billion to support these efforts. Developing economies cannot undergo the energy transition alone — international cooperation and support is sorely needed. This is where green financing can play a greater role in supporting developing economies through their energy transition.

US-China barriers

Deteriorating US-China relations pose a significant threat to international energy cooperation, because the clean energy transition is dependent on technology exports from China. Greater US-China engagement is needed in technology to ensure that bilateral tensions do not harm other states' ability to reduce emissions. The tension between the United States and China has ripple effects — states are disincentivised from cooperating with one country in case it affects their relationship with another country. When two great powers are refusing to work together to address the climate crisis, it provides small and middle power countries an excuse to shirk their responsibilities too.

Encouraging greater US-China climate collaboration, will be crucial to the global energy transition. The recent meeting between US President Joe Biden and Chinese President

Xi Jinping during the G20, where the two leaders agreed to pursue international climate negotiations, is a positive sign that climate cooperation can be siloed from the other issues in the bilateral relationship.

Collaboration

Asia Pacific countries account for one third of global green-house gas emissions and 60 per cent of the world's coal supply. These economies should explore avenues to strengthen cooperation in energy transition. Key areas for collaboration include hydrogen, road transport, steel and agriculture.

CPTPP and EVFTA already include strong commitments regarding the transition to renewable and green energy. To support these, APEC and ASEAN members should have individual action plans to implement their agenda. APEC's 2040 vision requires greater collaboration, dialogue, and the development of a green taxonomy. The United States' Indo-Pacific Economic Framework includes a clean economy pillar, but international collaboration is required to implement this. There is scope for APEC to appoint a leader who can support the clean energy initiative and ensure that developing economies receive the support needed to undergo the green transition.

The circular economy offers a new way of thinking about growth. It focusses not only on economic growth, but green growth, and views the economy as circular rather than linear. ASEAN adopted this idea of a 'circular economy' and is committed to making the green transition on the principles of inclusion and resilience. Implementing the circular economy will require cooperation and multi-stakeholder collaboration.

Conclusion

The topics discussed across the three panels highlight the challenges we face in the context of a struggling multilateral order. COVID-19, Russia's invasion of Ukraine, and the US-China rivalry have upended the global order. There is growing impetus to develop alternative avenues to support open trade and international cooperation that help to restore a robust multilateral order. Much of the discussion during this conference emphasised the role that plurilateralism can play in this effort. Nurturing plurilaterals will help prevent rising protectionism, friend-shoring and discriminatory trade policies. Great power strategic competition between the US and China is a key challenge to restoring the multilateral order, and middle power countries should look for areas where they can engage both powers. Climate change is one of these areas. Given the severe existential threat posed by the climate crisis, US-China cooperation in this area is not only essential, but may provide an initial step to greater collaboration.

7. 発表資料

発表資料

パワーポイントスライド、トーキングポイント、メモを活用したスピーカー分のみを掲載

Session 1 : Geopolitics and the Global Economic System

- ① Amb. Murray McLEAN
- ② Dr. Prof.Choong-Yong AHN

Session 2 : Rule-Based Economic Recovery

- ① Dr. Man-Jung Mignonne CHAN

Session 3: Energy and Climate

- ① Daw Khine Khine NWE
- ② Dr. Josef T. YAP
- ③ Dr. Tri Thanh VO

Session 1: ① Amb.Murray McLEAN, Chair, Foundation of Australian and Japanese Studies (NPO) Fellow, Australian Institute for International Affairs

Asia-Pacific Forum 2022

Session 1: Geopolitics and the Global Economic System Post-Ukraine Conflict

1 December 2022

Talking points - Murray McLean

May I express my appreciation to the Japan Economic Foundation and the Australian National University for organising this conference, online. It is regrettable that lingering Covid-related travel restrictions have stood in the way of our welcoming overseas colleagues to Australia in person.

The world is seemingly in chaos. This includes the global economic system, which has overwhelmingly benefitted the world 's economic growth and prosperity over recent decades.

Multilateral trade and investment rules and binding bilateral and plurilateral free trade agreements are being sidelined by geopolitical competition and strategic imperatives, supply chains are being disrupted, protectionism is rampant, and bifurcation of the global economic order is incipient. There is much more, unfortunately, that could be said, but the key geopolitical elements that have led to the chaos and inherent uncertainties that confront us, may be summarised as follows:

- United States/China strategic competition, demonstrated by their competitive positioning aimed at sustaining and enhancing their relative global and/or regional influence, dominates global politics.
 - This competition reached new levels during the Trump presidency with the bilateral trade war spreading through the global marketplace and severely distorting international trade practices and rules.
 - Tensions have been heightened by China's uncompromising assertion of its strategic and nationalistic interests as epitomised by its adoption of wolf-warrior diplomacy, in contrast with its previous long-standing position of lying low and biding its time.
 - On the US side, the Biden presidency is focussed on its overriding interest in maintaining global security based on its pre-eminent global power status and a consequent perceived need for a firm response to what it views as China's ambition to change the world order to its advantage.

- This highly competitive tension makes constructive communication difficult, but such communication is in fact more essential than ever before. Fortunately, the recent US/China summit meeting at the G20, indicated mutual understanding and recognition, on both sides, that dialogue and maintenance of guardrails play an important role in managing the fraught relationship

- The prolonged Covid-19 pandemic further complicated global politics across the board, not least the tense relationship between the US and China. The global economic slowdowns and social repercussions caused by Covid-19 included constrained global demand, the disruption of established supply chains, the reduction of trade and investment, severe restriction of people movement, heavy-handed domestic shutdowns and the prolonged slowdown of China's economic growth - which has hitherto been the major driver of global economic growth -
 - In sum, Covid's impact has had enormous economic and social costs as well as having further exacerbated the already fraught relationships among great powers and economic blocs

- As if Covid-19 was not enough disruption, Putin's attempted invasion of Ukraine spectacularly ignored accepted international norms of behaviour, plumbing the depths of perfidious nationalist self-interest. In so doing, and apparently contrary to his expectations that the US and NATO would appease Russia and simply "roll-over", the attempted invasion has brought together a solid global coalition of resistance to Russia's actions with significant global consequences
 - Russia's illegal invasion isolated it from the rules-based international community and helped stiffen a broadly unified response from the US, NATO and many other key global economies, which has sustained Ukraine's ongoing resistance to the Russian aggression.
 - The imposition of far-reaching sanctions against Russian interests and Russian countermeasures to cut oil and gas supplies has dragged the world economy into a severe economic crisis marked by spiralling oil and gas prices, rampant inflation, and likely recession.

- Climate change, including the impact of more frequent natural disasters, cybercrime, social inequities, poverty and food shortages are amongst other global issues which also inherently challenge the global economic order.

The challenges we face are immense and there are no magic solutions, so it is essential to be clear about what brought about the relatively stable period of consistent economic growth and the deepening economic integration we experienced in the decades prior to the Covid-19 pandemic.

These include:

1. relative global stability and equilibrium allowing globalisation and all the benefits that it delivered worldwide.
2. the WTO and the Bretton Woods construct underpinned the liberalisation and regulation of global trade and investment by providing an essential framework for rules-based trade and investment. Multiple bilateral and plurilateral agreements provide additional vehicles for liberalisation and regularisation of trade and investment
3. intra-regional groupings such as ASEAN and APEC which have bred and sustained regular habits of consultation and multilateral engagement promoting trade liberalisation. Regular engagement in consultative, consensus-based groupings has become vital in guaranteeing that the interests and concerns of smaller or medium-sized countries are heard and facilitated.

A return to, or at least having a deeper regard for the benefits to be derived from, those elements mentioned above will be very important in finding a path out of the current global imbroglio.

Less megaphone diplomacy and more measured and courteous exchanges are also essential, instead of the name-calling and sabre-rattling which have caused unnecessary tensions and instability. The world observed, during the formal G20 meeting adeptly hosted by Indonesia, that middle powers can help bridge differences amongst the global powers. That together with the many side-meetings between leaders at the recent Summit meetings in Southeast Asia, showed that common courtesies and measured language helps reduce tensions and can lead to more productive interactions.

Let's see more of it.

Session 1: ② Dr. Prof. Choong-Yong AHN, Distinguished Professor, Graduate School of International Studies, Chung-Ang University

December 1, 2022 at the Asia-Pacific Forum 2022

Coalition of middle powers toward minilateralism /multilateralism in the Asia-Pacific

By Choong Yong Ahn

Distinguished Professor

Graduate School of International Studies

Chung-Ang University

Thank you for inviting me to this great forum.

The Asia Pacific economies face currently several major headwinds and challenges: To name important ones; First, a rising geo-economic fragmentation where the world is divided in blocs due to the restrictive trade measures and lingering uncertainty spiked by the US-China trade war and further aggravated by the War in Ukraine; Second, a global financial tightening to fight the rising core inflation; Third, the war in Ukraine has caused rapid rise of energy and food prices; Fourth, a sharp and uncharacteristic slow down of the Chinese economy due to zero covid-19 lockdowns and crisis in real property sector, impacting negatively many of regional economies; Fifth the impending global climate change.

Thus, most Asia-Pacific economies are experiencing a broad-based and sharper-than-expected slowdown, with inflation higher than seen in several decades. All the headwinds weigh heavily on the regional economic outlook in the Asia-Pacific.

In terms of regional macroeconomic front, “King dollar” due to a series of big step interest hikes by the US FED has weakened many regional currencies, causing many of the Asia-Pacific economies to suffer the impossible trinity principle (trilemma), in which three policy objectives of fixed exchange rate, free flow of capitals, and monetary sovereignty cannot be achieved simultaneously. For the best policy option for the regional economic revival in the Asia Pacific, monetary policy should stay the course to restore price stability, and fiscal policy should also aim to alleviate the cost-of-living pressures while maintaining a sufficiently tight monetary policy. This requires well coordinated prudential macroeconomic policies among major economies in the region. For the best policy option for the regional economic revival in the Asia Pacific, monetary policy should stay the course to restore price stability, and fiscal policy should aim to alleviate the cost-of-living pressures. This requires well coordinated prudential macroeconomic policies among major economies in the region.

To a great dismay, trade policy formulations by big powers recently have been made under rising security-economy nexus. Under the name of economic security, big powers can constrain unilaterally cross-border flows of many high tech products and strategic raw materials, being easily subject to export controls for security reasons. Occasionally, they have also been “weaponized” by major powers to protect their national interests. Where we can draw a demarcation line between security items and ordinary tradable goods remains a big question.

Despite the existence of a variety of regional economic and security architectures in the Asia-Pacific such as CPTPP, RCEP, IPEF, Chip 4, Digital Economy Partnership Agreement, Quad, and Quad plus, the regional economies likely suffer a “Kindleberger trap,” where the largest economic powers are not capable of providing global public goods.

On-going neo-mercantilism such as reshoring and/or near and friendly shoring policy with the government subsidies and export controls of strategic materials as a means of retaliations for geopolitical reasons are destabilizing the fundamental free trade pillars of non-discrimination and most favored nations principle, which have assured long-run post war global prosperity.

Given the macroeconomic trilemma and aggravating geo-economic fragmentation, the likeminded middle and small powers in the region are highly urged to unite for sustaining a rule-based free trade and investment regime against rising inward-looking protectionism by the key players in the region.

Middle and small powers should work together to assure that the US and China maintain a stable U.S.-China relationship, and moving forward minilateral/ multilateral cooperation to search for fast-tracking recovery, the green energy transition, and preventing supply chain disruptions and further geo-political and geo-economic fragmentation.

In a fragmented world, Asia-Pacific economies risk losing more than anybody else because it is key players in global supply chain. If the world fragments into two separate blocs, then the losses become significant. Global losses are of 1.5% of GDP. But whereas those of Asia are slightly over 3%, losses are especially large for countries with a high level of openness and that have production structures that straddle both blocs.

Some of key priorities for the likeminded regional middle powers to overcome these regional challenges are suggested as follows, advancing to minilateralism in the region as well as multilateralism globally.

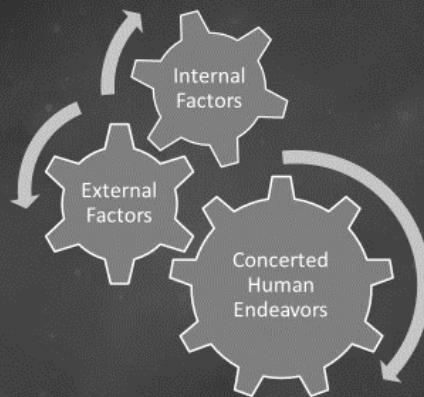
1. Middle powers should call for in unison for the US to reactivate the defunct WTO dispute settlement mechanism by restoring the appellate body so that abuse of protectionist policies could be avoided. This would help reduce the protectionists’ measures such as the US enacted “inflation reduction act” and China’s trade policy constraining cultural products flows and intra-regional tourism.

2. The US initiated Indo-Pacific economic framework needs to be inclusive so that any country willing to join the four fundamental pillars of IPEF could be a member. The middle powers should take initiatives in formulating specific action agenda for the each of four pillars contained in the IPEF.
3. Middle powers should agree on green growth initiative and register a viable green growth technology standard.
4. Middle powers are urged to take formidable initiative to expand the existing Digital Economy Partnership Agreement (DEPA) between Singapore, New Zealand, and Chile to ensure free flow of especially SME products.

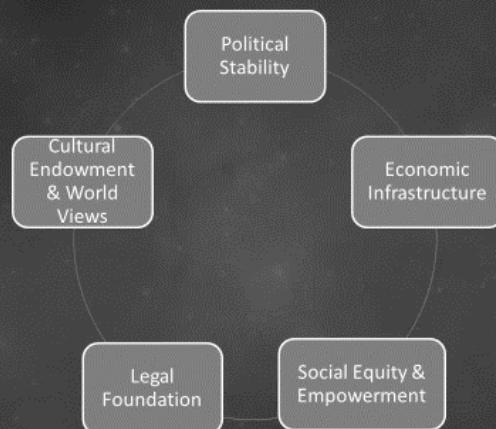
Session 2: ① Dr. Man-Jung Mignonne CHAN, Research Fellow & Professor, Taiwan Center for Strategic Studies, National Chengchi University



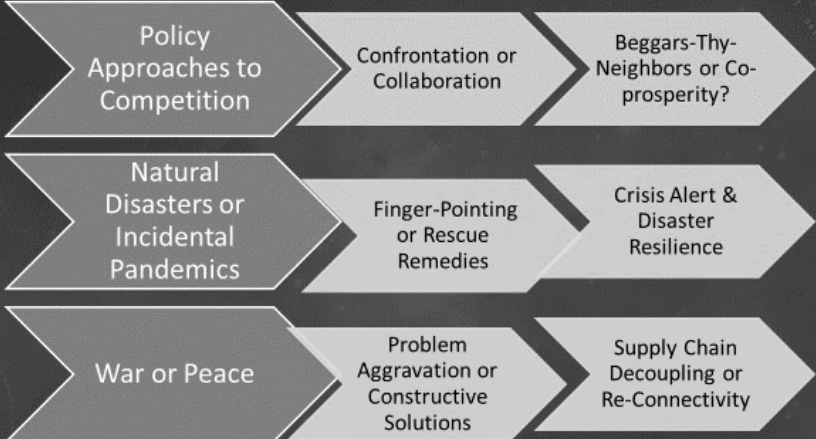
LINKAGE OF ECONOMIC RESILIENCE



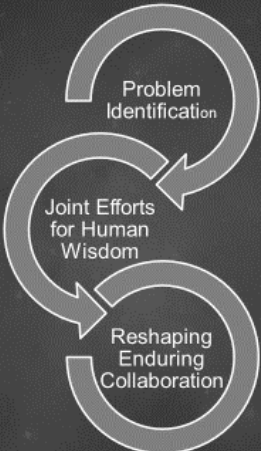
INTERNAL FACTORS



EXTERNAL FACTORS



CONCERTED HUMAN ENDEAVORS



Session 3: ① Daw Khine Khine NWE, Secretary General, The Republic of the Union of Myanmar Federation of Chambers of Commerce and Industry

Role of the Private Sector in Climate Change Resilience and Energy Security

Khine Khine New
Secretary General
Republic of the Union of Myanmar
Federation of Chambers of Commerce and Industry
(UMFCCI)
December 2, 2022

“If we’re going to keep 1.5 degrees alive – and that is our goal – we have an enormous challenge ahead of us to bring to scale new technologies, and to harness the deeply capable capacity of the private sector and entrepreneurs , to bring them to the table,”

-US Special Presidential Envoy for Climate **John Kerry**
at First Move’s Coalition Leaders event, COP27

Private sector's role

Private sector has always been a crucial source of innovation for technology.

Leverage private sector resources and expertise for:

- Reducing impact of climate change
- Improving efficiencies (energy; water; data-driven)
- Supporting and expanding access to adaptation
- Investing in climate resilient development and regenerative practices
- Advocacy and marketing to consumers
- Sector-specific approaches

Promoting responsible business practices

- **Beyond greenwashing:** proper compliance and actual effort to address the contributing factors of climate change
- **Carbon insetting** to reduce emissions from within own supply chain.
- Employing **ESG principles** for investment
- Transitioning towards a **circular economy**
- Accountable action beyond buzzwords

Public-private partnerships

- Role of government to channel and galvanize private sector innovation
- Supporting and empowering businesses in developing economies for climate change adaptation
- Bringing onboard MSMEs as well as large conglomerates
- Co-financing for climate resilient development
- Policy clarity, continuity and consistency; creating a level-playing field

International Cooperation, Energy Transition, and Climate Change

Remarks by *Josef T. Yap*
Asia – Pacific Forum
01-02 December 2022

**Energy Transition Holds Key to
Tackle Global Energy and Climate
Crisis (IRENA 2022)**

International cooperation is crucial to successful energy transition. The Breakthrough Agenda is designed to strengthen international collaboration where it is most needed: power, hydrogen, road transport, steel, and agriculture (IEA, et al. 2022)

Two general cross-cutting areas for cooperation

- Provision of finance: e.g. concessional loans that complement private investment
- Non-financial cooperation: e.g. promoting trade, harmonizing standards, carbon emission trading market, best practices including technology sharing

FOR DISCUSSION: Asia-Pacific economies can explore avenues to strengthen cooperation in energy transition

This presentation: Highlight primary threat to international cooperation in energy transition

- Deteriorating US-China relations
- Makes US clean energy transition more difficult, given its dependence on China's technology exports
- US-China engagement on climate is sorely needed in areas of trade, supply chains, and technology, to ensure that bilateral tensions do not irreparably harm the ability to reduce emissions in either country and the world (Gunia 2022)
- "Countries like to hide between the U.S. and China and say, 'The two biggest polluters aren't working together, aren't doing much, so why should we?'" (Bernice Lee, climate policy expert at Chatham House).
- **QUESTION:** Will these tensions affect cooperation in the aforementioned areas, e.g. provision of concessional loans? What is the role of regional organizations and individual countries (apart from US and China) in ensuring international cooperation amid these tensions?

POSTSCRIPT: President Biden and President Xi Jinping of China agreed on Monday (November 14) to restart talks between their countries as part of international climate negotiations

Hopefully, this is a sign that issues on energy transition and climate change can be isolated (or "siloed") when it comes to bilateral relations between the US and China.

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Vietnam's Green Growth: Commitments, Reality & Challenges




**NATIONAL STRATEGY
ON GREEN GROWTH
FOR 2021-2030, VISION TO 2050**



	2030	2050		2030	2050
 Reducing the intensity of greenhouse gas per GDP compared to 2014	≤15%	≥30%	 Ratio of green public purchase within total public purchase	≥35%	≥50%
 Reducing primary energy consumption per GDP	1-1.5 times reduced	1 times reduced	 Human Development Index	>0.75	>0.8
 Proportion of renewable energy over the total primary energy supply	15-20%	25-30%	 Ratio of solid waste is collected and processed in accordance with regulations	95%	100%
 Digital economy	30% GDP	50% GDP			

APF, 01-02 Dec 2022



Commitments

- Qualitative changes in perceiving dev't issues
 - From "economic growth" to "sustainable and inclusive dev't"
 - From "brown economy" to "green economy";
 - From "linear economy" to "circular economy"
 - From "real economy" to "real-digital economy/"real economy"
 - From "market" to "market with a state/a society that promotes innovation"
- Ambitious commitments for SDGs since 2015, and most recently at COP26 ("net zero emission" by 2050).
- Renew approach to promote green growth
 - New Green Growth Strategy (2021); Action Plan to implement Green Growth Strategy (2022); New Power Dev't Master Plan (Electricity Scheme VIII).
 - The implementation of international commitments, especially in high-quality FTAs (CPTPP, EVFTA,...)
 - Individual Action Plan to implement Enhanced APEC Agenda for Structural Reform 2021-2025 also includes an action on promoting CE dev't in VN (and in the ASEAN Framework for CE)

Green Growth (2021)	Action Plan (2022)
<p>04 Group targets</p> <ol style="list-style-type: none"> 1. The intensity of emissions per GDP compared to 2014 must decrease by at least 15% by 2030 and 30% by 2050 2. Greening economic sectors 3. Greening lifestyles and promoting sustainable consumption 4. Greening the transition on the principles of equality, inclusion, and resilience 5. Commitment to net zero emissions at COP26 	<p>09 overall themes:</p> <ol style="list-style-type: none"> 1. Building and perfecting institutions and policies; improve the effectiveness and efficiency of state management in association with green growth goals 2. Communication, education and raising awareness 3. Developing human resources and green jobs 4. Mobilizing financial resources and promoting investment for green growth 5. Science, technology, innovation 6. International integration and cooperation 7. Equality in green transition 8. Waste management 9. Green, sustainable consumption and shopping <p>10 priority area/sector themes: Energy; Industry; Transportation; Construction; Agriculture & rural areas; Air quality management; Management of water resources, Land resources and biodiversity; Blue sea economy; Medical; Tourism</p>

<i>Real proofs</i>	
<ul style="list-style-type: none"> ■ Not only political commitment, but also market pressure: New consumption pattern (green, safe, humane,...) + New business areas: "circular economy"; "smart city"; "creative economy"... ■ Agriculture <ul style="list-style-type: none"> • VAC (garden-pond-stall model) → VACB (+ biogas model), VACR (+ forest model), VAH (+ rice & shrimp...) • Vinamilk: "Green Circle" in dairy farms ■ Industrial production <ul style="list-style-type: none"> • Businesses that develop sustainably according to Corporate Sustainable Index (CSI) • Pilot building Eco-Industrial Parks (MPI) • Private initiative to build Nam Cau Kien Eco-Industrial Park and DEEP C Industrial Park, both in Hai Phong • Heineken: Circular economy model RESOLVE (REgenerate, Share, Optimize, Loop, Virtualize, Exchange) ■ Services: Wellness tourism 	<p style="text-align: center;">What studies show?</p> <ul style="list-style-type: none"> ■ <i>VCCI (2021)</i>: CSI-certified businesses are more resilient, even during the covid-19 pandemic (according to VCCI). ■ <i>Nielsen vn, 2019</i>: Brands with commitment to go "green" and "clean" grow faster than the whole market by 2.5% - 11.4% ■ UNDP & NEU (2019): Social impact enterprises (SIB) have very positive performance in recruiting/supporting female and disadvantaged people



Challenges & Key Issues

- VN has paid quite significant price for growth (resource degradation, environment pollution, especially in big cities).
- Action Plan of the Green Growth Strategy 2011-2020: Only 3/12 goals achieved, low spillover impact
- It is *a process* facing several challenges/problems:
 - Awareness; institutional reform; education; media
 - Need to have both "bottom up" and "top down" approaches. The adjustment cost for firms and the whole economy is not small
 - Raising "green finance" and its effective realization? WB (2022): VN need an additional capital of USD 368 bill.
 - National efforts and international cooperation. Prime Minister of VN (May 2022): To achieve the development goals, we cannot go alone. To go far, we must have friends.



Some Thoughts for APEC

- APEC PUTRAJAYA VISION 2040: "Our Vision is an open, dynamic, resilient and peaceful Asia-Pacific community by 2040, for the prosperity of all our people and future generations". 3 driving forces: Trade and investment; Innovation and digital transformation; Strong, balanced, sustainable, and inclusive growth
- What APEC can do?
 - Foster cooperation, including dialogues and development of green taxonomy, for sustainable/low-carbon value chains.
 - Take forward work in areas, such as SMEs and food security to support the decarbonization of supply chains
 - Watch out for the discussion of Clean Economy pillar of IPEF
 - Facilitate multi-stakeholder collaboration to facilitate implementation of CE in the region.
 - Support technical cooperation and capacity building for green transition and CE in particular
 - Funding to support initiatives towards green transition
 - Harmonize ESG standards to enable green financing

8. 活動と成果

1. 活動

国際経済交流財団では毎年世界の4地域に焦点を当て、フォーラムやダイアログなどを開催している。アジア太平洋を対象としたこのフォーラムの特徴は、対象となる地域から15もの機関の代表が集まり、今や世界の経済と密接な関係を持つようになった自らの地域が抱える課題と、その解決に向けた持論を述べ、共に何ができるかを様々な立場から議論するところにある。この取り組みも、今年で21回目を迎えるまでになった。

今回は、共催機関としてオーストラリア国立大学 Australian National University

(ANU) を迎え、14人の代表が出席した(シンガポールは欠席)。各国のコロナ状況が異なるため、今年度も残念ながらオンラインによる開催となった。

アジア太平洋は今後も更なる成長が期待される地域であるが、各国の経済発展度合いが異なり、政治経済制度も一律ではない上、周辺地域との関係にも濃淡がある。今後更なる成長が期待され、日本にとっても重要なこの市場が持続的な発展と成長を遂げるために様々な意見が出された。

ディスカッションは、下記のとおり各地で起こる分断、ルールに基づく経済システムの重要性、気候変動とエネルギーについて、の3テーマに沿って行われた。

(1) 開催日時 2022年12月1日(木) 11:30~13:30

2022年12月2日(金) 11:30~14:10

(2) 開催形式

- ・参加者各自がネットにつなぐオンライン方式 (Zoom)
- ・英語のみによるラウンドテーブル・ディスカッション
- ・チャタムハウスルール採用

(3) 共催：オーストラリア国立大学

The Australian National University (Australia-Japan Research Centre)

(4) 全体テーマ：世界の分断とアジア太平洋経済

Global fractures and the Asia Pacific economy

① セッション1：ウクライナ戦争後の地政学と世界経済システム

Geopolitics and the Global Economic system Post-Ukraine Conflict

② セッション2：ルール・ベースの経済の回復

Rule-Based Economic Recovery

③ セッション3：気候変動とエネルギーが意味するもの

Implication of Climate Change and Energy

(5) 参加者

日本、アジア太平洋地域 13 カ国・地域 [インドネシア、マレーシア、ミャンマー、フィリピン、タイ、ベトナム、中国、韓国、台湾、インド、オーストラリア、ニュージーランド、ERIA] の大学・研究機関・企業連合代表 14 名、主催・共催機関関係者 6 名、オブザーバー 30 名の計 50 名

(6) 議論要旨

・基調講演では、世界貿易のシステムが各国の相互依存関係を促進し、他国の犠牲の上ではなく、共存共栄することこそが自国の繁栄にも繋がる道であることが強調された。しかし、現実の世界は自国優先の保護主義に傾いている。ここで、講演者は進むべき方向は複数国間システムであり、その積み上げが全会一致を待って解決されない課題解決に向けての前進力となると語った。気候変動など、全員が一様に対処できない分野についても協力可能な国同士がまず対処すればよく、多国間システムの強化にもつながるようにしていくべきだとした。

・3つのセッションではコロナ、ロシアによるウクライナ侵攻、米中対立の継続など大国間の戦略的な競争をもたらす多国間主義の秩序が直面している課題の回復が強く求められた。そうした中、複数国間主義が果たし得るいくつかの役割について意見が集中した。世界全体にとっての危機・気候変動は対立する大国も小中規模の諸国が共に取り組み、連携の必要性が確認できる分野であることが確認された。

以下に各セッションで出されたスピーカーからの意見のポイントを記載する。

・セッション1のトピックである「地政学と世界経済システム」においても、基調講演で言及があった米国トランプ政権時代に端を発した保護主義や分断、維持できなくなる秩序、世界が共有していたルールに従わず行き過ぎた自国主義を唱える国の台頭などが話題となった。

ー米中圏の二分化により戦略的品目の輸出制限が行われ、貿易と安全保障を結びつける動きは世界のサプライチェーンを崩壊させている。輸出志向型の産業を抱えるアジア太平洋地域への影響は深刻。

ー中国との結びつきが強い ASEAN だが、いずれの立場にも立たないのが原則。中立的立場の保持に努めているが、米中二極化の動きは域内にも分断を生じさせている。一方、戦略的競争により対中輸出が困難な企業の ASEAN シフ

トが起き、インドの可能性についても検討されている。

－ウクライナ戦争では、ロシアが国際ルール秩序を乱し、発動された対ロシア制裁は世界中でエネルギー不足、食糧不足、価格高騰によるインフレを起こして景気の後退を呼んだ。大国間の競争では益々貿易投資が利用され、オンショアリングやフレンドショアリングにより自国用燃料・食糧供給確保の輸出規制が起き、重要物資・部品のサプライチェーンも崩れた。その結果、世界の国々のみならず自国の繁栄も阻害され、自由市場と国際貿易システムに影響を及ぼしている。

－貿易で安全保障を優先すれば、国の競争力を高める経済成長は停滞する。機能的な多国間システムにはルールの秩序があり、相互依存関係を深め、安全保障が進む。

・セッション2では、ルールに基づいた経済の回復について意見を戦わせた。

－世界経済の課題が安全保障と景気拡大策の影になっているが、コロナからの回復期を良い機会ととらえ、経済のグリーン化を推し進めるためにはWTOのルールと規範、紛争解決のための仕組みがないのは致命的である。途上国が債務に陥り世界の経済回復がバランスを欠く中、ルールに基づく金融政策による支援は必須。多くの重要品目が限定的な市場からだけ供給される構造ができ上がり、内向き志向の経済が広がって世界のサプライチェーンが分断され、多くの国が食糧やエネルギー危機に直面している。

－安価な中国製品が入って来て地域の雇用と社会の崩壊が起き、それが保護主義となってヒト・モノ・サービスや投資の抑制が起きれば、世界中の経済的繁栄を妨げることになるだろう。

－インド洋は太平洋経済をつなぐ、より広い役割を担うことができる。安全性が担保された海上航路を使うことで貿易は促進される。米国のIPEFは貿易投資の積極的な発展につながるだろう。

－自発的かつ拘束せずは無差別的なアプローチをとる複数国間連携協定では、幅広い参加と連携が進む。現在起きている地経学的課題も、多国間主義ではなく、複数国間協定により解決策が導き出せる。一括受託方式を採るために先に進めない多国間主義より複数国間主義では総意と歩み寄りを得やすい。多国間

主義の中で複数国間主義が開放性の原則の下、自由貿易のルールを作り、協調してその趣旨を根付かせて解決策を模索すべき。アジア太平洋コミュニティは排他性を取り除き、域内複数国間協定の参加国によるグループの形成を保証する。

ーアジア太平洋とインド洋・CPTPP と RCEP をつなぐ可能性の探求が必要。APEC はサプライチェーンの安全保障手段として地域とデジタル貿易の統括の場として活用されるべき。

・セッション3では気候変動とエネルギーに関する議論を行った。ここでは、2050年までの実質二酸化炭素排出ゼロの実現に向け採り得る手段の特定を行った。

ーエネルギーの高効率化、人工知能活用、サプライチェーンへの技術の導入において民間技術を活用したイノベーションは不可欠であり、官民連携を進める必要がある。民間セクターは消費者の選択と行動を形成するため、持続可能な消費財を選択し消費者教育を行うなど、政府と共にエネルギー転換を進めていくことができる。

ー政府には民間企業と消費者に対し、税制や貿易促進、基準類の調和化、排出量取引、技術共有といった非資金協力等のインセンティブをもって気候変動を意識した経済活動に導いていく責任がある。トップダウンとボトムアップの同時アプローチで民間サイドと共に進める、強力な政策が重要。政府は、民間資本が使われるようにグリーンバンク等の資金提供が望まれる。

ークリーンエネルギーへの移行実現のためには、ウクライナ情勢によるエネルギー供給懸念も拡大する中、グリーン投資を年間2兆米ドルから4~5兆米ドルにまで増額することが必要だが持続的な資金投入は政府だけでなく市場圧力によっても変化している。認証要件等の評価基準には一貫性が必要。包括的で持続可能な開発の促進のために世界的な資本規制を活用すれば国際協力と支援が進み、エネルギー転換の資金調達が難しい発展途上経済圏に大きな恩恵をもたらす。こうした経済圏は単独でのエネルギー大転換は不可能。

ー一方、クリーンエネルギー転換のためには中国の技術輸出が不可欠。米中間の関係悪化を越えた関与が必要。両国が気候変動危機に対応しなければ、他の中小規模諸国も取り組まなくなるという悪影響を及ぼす。

－アジア太平洋諸国は、世界の温室効果ガス排出量の1/3、世界の石炭供給量の60%を占める。この地域のエネルギー転換には国際連携が必須。APEC、ASEANによるアジェンダ実行には個別のアクションプラン策定が必要。

－ASEANが採用する循環経済の成長は、経済とグリーン成長の循環となる。この考え方にはマルチステークホルダーによる協力と連携が必要である。

2. 成果

顔が見える状況で行う会議では発言の広がりも期待でき、前後のファンクションでの会話も弾むはずだったが、今年度もコロナ禍の収束に向かってはいたものの参加各国・地域の数が多く、それぞれの事情が大きく異なったため、3年連続でのデジタル開催を余儀なくされたことは大変残念であった。

ただ、オンラインでの会議にも慣れ、共催国の聴衆が遠方への移動なく参加できる環境のメリットも少なくなかった。今回は聴衆として参加した30名からアンケートの結果を聴取することができた。

フォーラム全体に対する評価は100%が満足と回答、内容の質は期待より高いまたは期待どおりが100%、トピックについても100%が今日のテーマに沿っていると回答した。

セッションごとの評価では、「地政学と世界経済システム」に最も関心が集まった。「ルールに基づく経済回復」に関しては半数以上が満足、「エネルギーと環境」でも半数以上が満足またはやや満足と回答した。

参加者自身の仕事に役立ったかとの問いには9割以上が役立ったと答えており、選定したトピックがアジア・オセアニア地域でも関心が高かったことをうかがわせた。ビジネス界、大学教授、研究者がほぼ均等な割合で参加しており、政府関係者や学生の参加もあった。

経済発展が進み、世界が注目する地域であり、地理的に日本から最も近い場所にあるこの地域の重要性を再認識した会議であった。世界との繋がりの中で挙げられる諸課題の解決に向け、日本が果たすべき役割について積極的な議論を続けていく必要がある。

9. アンケート集計結果

フォーラム聴衆者 30 名にアンケートを実施 (回答者数 13 名)

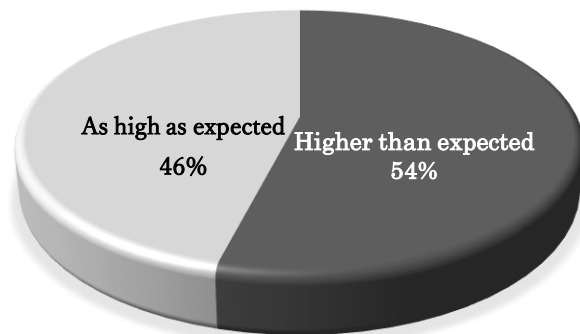
1. Overall Evaluation of the Forum

Evaluation	%
Satisfactory	100
Somewhat satisfactory	0
Somewhat unsatisfactory	0
Unsatisfactory	0



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

Evaluation	%
Higher than expected	54
As high as expected	46
As low as expected	0
lower than expected	0



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

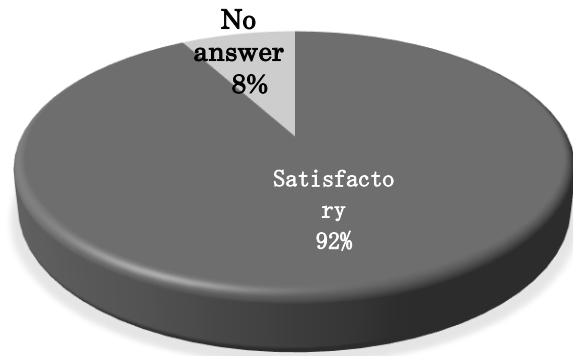
Evaluation	%
Agree	100
Somewhat agree	0
Somewhat disagree	0
Disagree	0



4. Session by Session Evaluation.

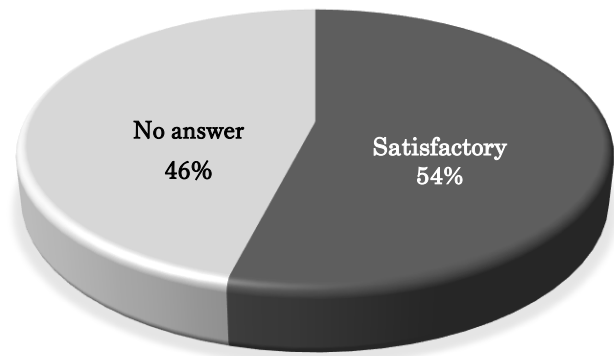
Session 1

Evaluation	%
Satisfactory	92
Somewhat satisfactory	0
Somewhat unsatisfactory	0
Unsatisfactory	0
No answer	8



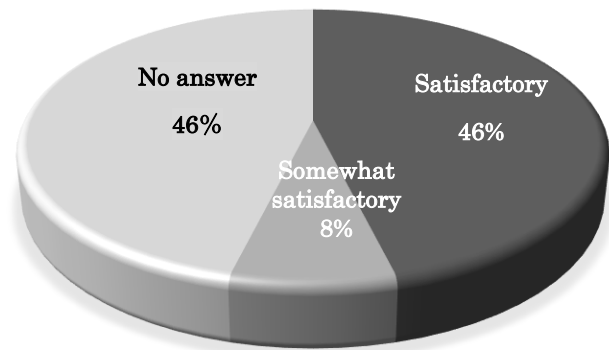
Session 2

Evaluation	%
Satisfactory	54
Somewhat satisfactory	0
Somewhat unsatisfactory	0
Unsatisfactory	0
No answer	46



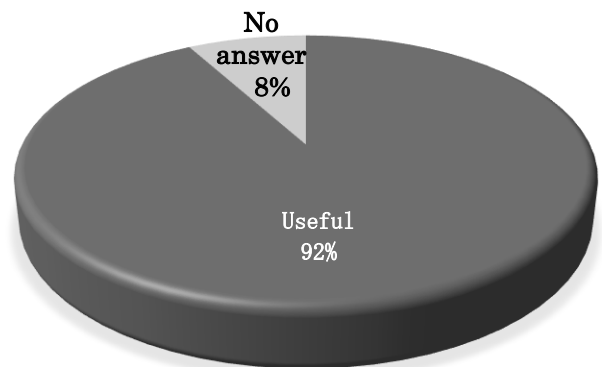
Session 3

Evaluation	%
Satisfactory	46
Somewhat satisfactory	8
Somewhat unsatisfactory	0
Unsatisfactory	0
No answer	46



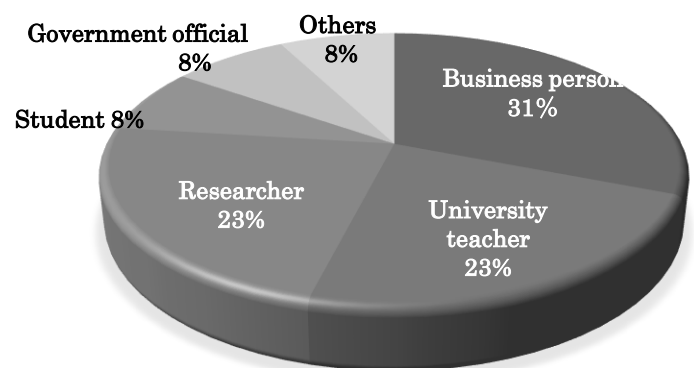
5. Were today's discussions useful for your work/research?

Evaluation	%
Useful	92
Somewhat useful	0
Somewhat useless	0
Useless	0
No answer	8



6. You are:

Affiliation	%
Business person	31
University teacher	23
Researcher	23
Student	8
Media	0
Government official	8
Others	8



「Others」の回答

- Writer, editor, translator

10. 共催団体紹介



一般財団法人 国際経済交流財団
Japan Economic Foundation (JEF)

The Japan Economic Foundation (JEF) was established in July 1981 to deepen understanding between Japan and other countries through activities aimed at promoting economic and technological exchange.

With this goal in mind, JEF engages in a broad range of activities such as providing information about Japan and arranging venues for the exchange of ideas among opinion leaders from many countries in such fields as industry, government, academia and politics in order to build bridges for international communication and to break down the barriers that make mutual understanding difficult.

URL: <https://www.jef.or.jp>



Australia-Japan
Research Centre

オーストラリア国立大学

オーストラリアー・ジャパン リサーチセンター

Australia-Japan Research Centre

The Australian National University

The Australia-Japan Research Centre (AJRC) is the centre of research, teaching and outreach on the Japanese economy in Australia. AJRC also conducts research to better understand the Australia-Japan relationship and both countries' strategic interests in the regional economy. AJRC was established in 1980 with support from the governments and business communities in both Australian and Japan, with its research encompassing areas such as finance, macroeconomics, and international economic relations. Associate Professor Shiro Armstrong is the Director of AJRC along with Professor Ippei Fujiwara as the Japan Director.

URL: <https://ajrc.crawford.anu.edu.au>

11. 事務局

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2023年3月

一般財団法人 国際経済交流財団

JAPAN ECONOMIC FOUNDATION (JEF)

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