

2020 年度日欧フォーラム
JEF-DGAP International Symposium 2020

A Brave New Economic World Order

報 告 書

2020 年 10 月 7 日 (水) ~8 日 (木)
(オンライン 開催)

一般財団法人 国際経済交流財団

2020年度日欧フォーラム（ドイツ） 2020年10月7日（水）、8日（木）
オンライン開催時の様子

●1日目：10月7日（水）



開会の辞：DGAP Ambassador Rolf Nickel



開会の辞：JEF 日下会長



開会時のオンライン画面の様子



Panel 1 モデレーター：JEF 原岡専務理

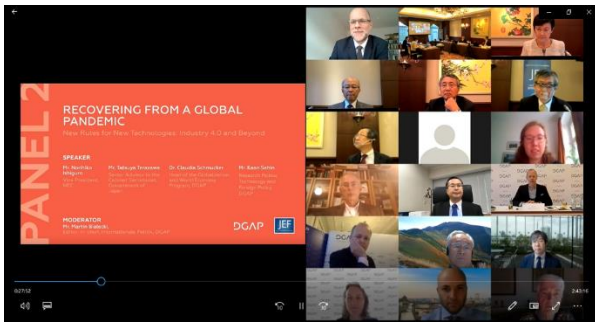


Panel 1 スピーカー：鈴木氏



オーディエンスが参加している様子

● 2日目：10月8日（木）



Panel 2 の画面の様子



Panel 2 スピーカー：石黒氏



Panel 3 モデレーター：Dr. Henning Hoff



Panel 2 & 3 スピーカー：寺澤氏



Panel 3 スピーカー：細谷氏



Panel 3 スピーカー：小掠氏



オーディエンスが参加している様子

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1. 開催趣旨

国際経済交流財団は、我が国と諸外国との経済交流を促進するため、各年における経済問題を取り上げ、日欧の有識者間でこれらの問題解決等について議論を重ねてきている。

日欧フォーラム事業は、政界、官界、学界、産業界など政策提言に影響力がある日欧関係の有識者が一堂に会し、両地域の共有する課題などにつき忌憚のない意見交換を行って、我が国の政策立案に資すると共に日欧関係の一層の強化を図ることにより、その成果を広く普及させることを目的としている。

今年度のフォーラムは、コロナパンデミックの影響により、オンライン形式で2020年10月7日(水)、8日(木)の2日間、ドイツ外交評議会 (German Council on Foreign Relations (DGAP) / Die Deutsche Gesellschaft für Auswärtige Politik e.V.)との共催で実施した。

メインテーマ：勇敢なる新世界経済秩序

“A Brave New Economic World Order”

1. 世界的パンデミックからの回復

“Recovering from a Global Pandemic”

(1) パネル1：コロナ後の世界貿易と投資における成長回復

Panel 1: Restoring Growth in Global Trade and Investment after the Coronavirus Pandemic

(2) パネル2：新技術の新ルール：インダストリー 4.0 以降

Panel 2: New Rules for New Technologies: Industry 4.0 and Beyond

2. コロナ危機への対応 持続可能な世界的成長と地政学的安定：連結性の役割

“Countering the Coronavirus Crisis and Beyond: Toward Sustainable Global Growth and Geopolitical Stability”

(3) パネル3：日欧の連結性の役割

Panel 3: The Role of Japanese and European Connectivity

2. 開催概要

1. 開催日時：

2020年10月7日（水）16:00～17:15

2020年10月8日（木）15:15～18:15

2. 主催者：

<日本> 一般財団法人国際経済交流財団

Japan Economic Foundation (JEF)

<ドイツ> ドイツ外交評議会

(独)Die Deutsche Gesellschaft für Auswärtige Politik e.V. (DGAP)

(英)German Council on Foreign Relations

3. 形式：オンライン（ZOOM）

4. テーマ：

メインテーマ：勇敢なる新世界経済秩序

1. 世界的パンデミックからの回復

(1) パネル1：コロナ後の世界貿易と投資における成長回復

(2) パネル2：新技術の新ルール：インダストリー 4.0 以降

2. コロナ危機への対応 持続可能な世界的成長と地政学的安定：連結性の役割

(3) パネル3：日欧の連結性の役割

5. 出席者：日欧よりスピーカー、並びにオブザーバー計40名

<日本側>（敬称略／登壇順）

日下 一正 一般財団法人国際経済交流財団 会長

原岡 直幸 一般財団法人国際経済交流財団 専務理事

鈴木 英夫 日本製鉄株式会社 常務執行役員

石黒 憲彦 日本電気株式会社 取締役 執行役員副社長

寺澤 達也 経済産業省 顧問

細谷 雄一 慶應義塾大学法学部 教授

小掠 義之 日立ヨーロッパ社 相談役

<ドイツ側>（敬称略／登壇順）

Rolf Nikel, Vice President, German Council on Foreign Relations, DGAP

Claudia Schmucker, Head of the Globalization and World Economy Program,
DGAP

Klemens Kober, Head of Trade, Transatlantic Relations, and EU-Customs,
German Chamber of Industry and Commerce Brussels (DIHK)

Kaan Sahin , Research Fellow, Technology and Foreign Policy, DGAP

Martin Bialecki , Editor-in-chief, Internationale Politik , DGAP

Henning Hoff, Executive Editor, Berlin Policy Journal, DGAP

Romana Vlahutin, EU Ambassador at Large for Connectivity, EEAS Special
Coordinator for Connectivity Strategy (当日は Asad Beg が代理登壇)

Alexander Schönfelder, Representative for Technology, Trade, Finance and
Sanctions Policies, Federal Foreign Office

Jacopo Maria Pepe, Research Associate, Global Issues Division, German
Institute for International and Security Affairs (SWP)

Vera Philipps, Head of East Asia Division, Association of German Chambers of
Commerce and Industry (DIHK)

6. 形式 : オンライン・ラウンドテーブル・ディスカッション

7. 使用言語 : 英語

3. 詳細日程



A Brave New Economic World Order

4th JEF-DGAP International Symposium

Digital Conference

Wednesday, October 7, 2020

Official Welcome

9:00–9:15 AM (CET), 4:00–4:15 PM (JST)

- H. E. Rolf Nickel, Vice President, German Council on Foreign Relations
- Mr. Kazumasa Kusaka, Chairman and CEO, Japan Economic Foundation

Recovering from a Global Pandemic

The coronavirus pandemic – or Great Lockdown, as the IMF has called it – has caused a severe global recession. The health and economic crisis has also affected large global institutions such as the WTO. Twenty-five years after the conclusion of the Uruguay Round, the WTO's global trade regime has become unfit for its purpose in the eyes of major stakeholders including the United States, the EU, and Japan. Their criticism focuses mainly on the WTO's inability to rein in China, which has led to a severe crisis within the organization. The WTO has also proved unable to counter the protectionist measures that various states introduced at the beginning of the crisis. Preserving global trade and investment is, however, essential for generating sustainable global economic growth, especially as new technologies lead to the creation of digital economies

and industry 4.0. The first session will address this dichotomy.

Panel 1: Restoring Growth in Global Trade and Investment after the Coronavirus Pandemic

9:15–10:15 AM (CET), 4:15–5:15 PM (JST)

According to the WTO, world trade is due to slump by between 13 and 32 percent this year. While the WTO currently expects an upswing in 2021, that will depend on the length of the coronavirus outbreak and the effectiveness of the countermeasures introduced so far. Even before the pandemic, the rise of anti-globalism and protectionism, as well as outdated WTO rules, imposed constraints on free trade and investment. A number of FTAs and some “Mega FTAs” have been concluded to balance these trends. One of the most important examples is the EU-Japan Economic Partnership Agreement that was signed in February 2019 to establish a leadership role against a backdrop of a dysfunctional WTO. Earlier, in September 2018 after consultations in Tokyo, German Foreign Minister Heiko Maas initiated the Alliance for Multilateralism, which also aims to uphold the rules-based multilateral trading system.

Key Questions:

- What role can the WTO play in fighting the coronavirus crisis?
- How can the EU and Japan work together to rescue and reform the WTO system (e.g. in the Trilateral Initiative)?
- What role do ambitious trade agreements such as the EU-Japan Economic Partnership Agreement play?
- How can both countries support global trade and investment rules after the coronavirus pandemic?

Speakers:

- Mr. Hideo Suzuki, Managing Executive Officer, Nippon Steel Corporation
- Dr. Claudia Schmucker, Head of the Globalization and World Economy Program, DGAP
- Mr. Klemens Kober, Head of Trade, Transatlantic Relations, and EU-Customs, German Chamber of Industry and Commerce Brussels (DIHK)

Moderator:

- Mr. Naoyuki Haraoka, Executive Managing Director, JEF

Thursday, October 8, 2020

Welcome to the Second Day

8:15–8:30 AM (CET), 3:15–3:30 PM (JST)

Panel 2: New Rules for New Technologies: Industry 4.0 and Beyond

8:30–9:30 AM (CET), 3:30–4:30 PM (JST)

Calls for new rules for digital trade and the use of technologies have become more pronounced over the course of the pandemic. Even before the crisis, Japan and the EU set out to recognize the equivalency of each other’s data protection systems, prospectively allowing the free exchange of data between them. Thus, they are working toward creating the world’s biggest area of safe data flows, potentially vitalizing their respective economic digitalization. Questions of security – relating, for instance, to allowing Chinese companies like Huawei to play a part in setting up 5G infrastructure – and addressing the dominance of the “big five” US technology firms (Google, Apple, Facebook, Amazon, and Microsoft) will, however, play a crucial role.

Key Questions:

- How should the EU and Japan’s governments and private sectors cope with the US- China tech cold war?
- What are the chances of creating an EU-Japanese secure digital space?
- How can Japan and the EU advance the plurilateral e-commerce negotiations at the WTO, which also include the US and China?
- Is competition policy the best tool to address the dominance of the “big five”?
- Can accelerated digitalization in the EU and Japan help avert a global slowdown?

Speakers:

- Mr. Norihiko Ishiguro, Senior Executive Vice President and Member of the Board, NEC Corporation
- Mr. Tatsuya Terazawa, Senior Advisor to the Cabinet Secretariat, Special Advisor to the Minister, Former Vice-Minister for International Affairs, Ministry of Economy, Trade and Industry, Government of Japan
- Mr. Kaan Sahin, Research Fellow, Technology and Foreign

Policy, DGAP Moderator:

- Mr. Martin Bialecki, Editor-in-chief, Internationale Politik, DGAP

Panel 3: The Role of Japanese and European Connectivity

10:00–11:00 AM (CET), 5:00–6:00 PM (JST)

The coronavirus pandemic has badly affected multiple facets of the global economy: production, supply chains, trade, and the movement of people. Consequently, it has also had an effect on large geo-economic projects. These include China's Belt and Road Initiative (BRI), which has signaled China's ambition to remake the world in its image, and the EU's connectivity strategy, which is Europe's answer to the BRI. In September 2019, Japanese Prime Minister Shinzo Abe and then European Commission President Jean-Claude Juncker signed the "Partnership on Sustainable Connectivity and Quality Infrastructure between the EU and Japan" to increase bilateral and multilateral connectivity in digital, transport, energy, and people-to-people exchange. Both sides emphasized "the high standards of economic, fiscal, financial, social, and environmental sustainability" (underlining its contrast to BRI projects). Japan also promotes a "Free and Open Indo-Pacific Vision" to create dynamism for stability and prosperity by closer connecting Asia

and Africa. Key Questions:

- How will the coronavirus crisis affect the Belt and Road Initiative (BRI) and the EU's connectivity approach?
- Where is common ground between EU and Japanese perspectives on

the BRI? Where are differences?

- Is the EU's connectivity approach the right answer to the BRI? Which role do private sectors play?
- How can the EU relate to Japan's "Free and Open Indo-Pacific Vision"?
- Can the EU and Japan become geopolitical actors?

Speakers:

- Dr. Yuichi Hosoya, Professor of International Politics, Faculty of Law, Keio University
- Mr. Tatsuya Terazawa, Senior Advisor to the Cabinet Secretariat, Special Advisor to the Minister, Former Vice-Minister for International Affairs, Ministry of Economy, Trade and Industry, Government of Japan
- Mr. Yoshiyuki Ogura, Senior Executive Advisor, Hitachi Europe, Ltd.
- Ms. Romana Vlahutin, EU Ambassador at Large for Connectivity, EEAS Special Coordinator for Connectivity Strategy
- Mr. Alexander Schönfelder, Representative for Technology, Trade, Finance and Sanctions Policies, Federal Foreign Office
- Dr. Jacopo Maria Pepe, Research Associate, Global Issues Division, German Institute for International and Security Affairs (SWP)

Moderator:

- Dr. Henning Hoff, Executive Editor, Internationale Politik Quarterly, DGAP

Official Closing

11:00-11:15 AM (CET), 6:00-6:15 PM (JST)

- H. E. Rolf Nickel
- Mr. Kazumasa Kusaka

4. 出席者

日本側（7名）

（五十音順 敬称略）

石黒 憲彦	日本電気株式会社 取締役 執行役員副社長
小掠 義之	日立ヨーロッパ社 相談役
日下 一正	一般財団法人国際経済交流財団 会長
鈴木 英夫	日本製鉄株式会社 常務執行役員
寺澤 達也	経済産業省顧問
原岡 直幸	一般財団法人国際経済交流財団 専務理事
細谷 雄一	慶應義義塾大学法学部教授

ドイツ側（10名）

（アルファベット順 敬称略）

Martin Bialecki, Editor-in-chief, Internationale Politik , DGAP
Henning Hoff, Executive Editor, Berlin Policy Journal, DGAP
Klemens Kober, Head of Trade, Transatlantic Relations, and EU-Customs, German Chamber of Industry and Commerce Brussels (DIHK)
Rolf Nickel, Vice President, German Council on Foreign Relations, DGAP
Jacopo Maria Pepe, Research Associate, Global Issues Division, German Institute for International and Security Affairs (SWP)
Vera Philipps, Head of East Asia Division, Association of German Chambers of Commerce and Industry (DIHK)
Kaan Sahin, Research Fellow, Technology and Foreign Policy, DGAP
Claudia Schmucker, Head of the Globalization and World Economy Program ,DGAP
Alexander Schönfelder, Representative for Technology, Trade, Finance and Sanctions Policies, Federal Foreign Office
Asad Beg (Standing in for Romana Vlahutin, EU Ambassador at Large for Connectivity, EEAS Special Coordinator for Connectivity Strategy)

5. 略歴

Martin Bialecki



Martin Bialecki has been editor-in-chief of the journals *Internationale Politik (IP)* and *Berlin Policy Journal (BPJ)* since September 2018.

Prior to that, Bialecki was bureau chief and correspondent for North America at the German Press Agency (dpa), where he covered Barack Obama's last year in office, as well as Donald Trump's campaign and the first two years of his presidency. Bialecki is a member of the White House Correspondents'

Association and the German Executive Roundtable (Washington, DC). He has also been a guest speaker at George Washington University and Harvard Law School on topics related to politics and the media.

From 2011 to 2015, Bialecki was head of dpa's political department, leading the desks for domestic and foreign affairs, as well as dpa's team of correspondents covering the German government. From 2009 to 2010, he served as managing director of the public affairs agency PLATO Kommunikation. In earlier roles at dpa, he oversaw reporting on politics and topics related to culture, media, and science.

Bialecki studied political science, history, literature, and sociology at the Friedrich Alexander University in Erlangen and the Freie Universität Berlin with a focus on international relations.

Naoyuki Haraoka

Naoyuki Haraoka has been Executive Managing Director of the Japan Economic Foundation (JEF) since 2007.

He previously held a variety of posts as an economist with the Japanese Ministry of International Trade and Industry (MITI, later METI). Amongst others he served as Deputy Director and Director of the Research Division of International Trade Policy Bureau and Director of Administration of the Research Institute of Economy



Trade and Industry. Haraoka's international experience has led him to the Organization of Economic Cooperation and Development (OECD) as a Principal Economist and Counselor to the Japanese Delegation as well as acting as Chief Executive Director of the Japan External Trade Organization (JETRO) in San Francisco.

Haraoka studied Economics at the University of Tokyo and Public Administration at Woodrow Wilson School of Princeton University. 10

Dr. Henning Hoff



Dr. Henning Hoff is executive editor of *Internationale Politik Quarterly* (formerly *Berlin Policy Journal*) and editor-at-large of *Internationale Politik*, both published by the German Council on Foreign Relations (DGAP).

He joined DGAP in 2011, after nearly a decade as foreign correspondent in London, where he worked for German and international media, including DIE ZEIT/ZEIT online, Frankfurter Allgemeine Zeitung, International Herald Tribune, and TIME. He is also co-founder and director of the WELTKIOSK publishing company (London/Berlin) which specializes in international journalism.

An international historian by training, he holds a PhD in Contemporary History from Cologne University, Germany (2001).

Yuichi Hosoya, Ph.D.

Yuichi Hosoya is professor of international politics at Keio University, Tokyo.

He holds research fellowships with the Asia-Pacific Initiative, the Nakasone Peace Institute, the Tokyo Foundation for Policy Research and the Japan Institute of International Affairs (JIIA).

He was a member of Prime Minister's Advisory Panels on Reconstruction of the Legal Basis for Security and on National Security and Defense Capabilities.



Hosoya has been visiting professor and Japan Chair at Sciences-Po in Paris and a visiting Fulbright Fellow at Princeton University. His research interests include the postwar international history, British diplomatic history, Japanese foreign and security policy, and contemporary East Asian international politics.

His most recent publications include, *Security Politics: Legislation for a New Security Environment* (Tokyo: JPIC, 2019) ; *History, Memory & Politics in Postwar Japan* (Co-editor, Lynne Rienner: Boulder, 2020); and “Japan’s Security Policy in East Asia”, in Yul Sohn and T.J. Pempel (eds.), *Japan and Asia’s Contested Order: The Interplay of Security, Economics, and Identity* (Palgrave, 2018). His comments appeared in the New York Times, Washington Post, Financial Times, USA Today, Die Welt and Le Monde, as well as major Japanese media.

Hosoya holds degrees in international politics from the Universities of Rikkyo, Birmingham and Keio.

Norihiko Ishiguro



Norihiko Ishiguro is Senior Executive Vice President and Member of the Board at NEC Corporation and is in charge of Global Government Relations. He joined NEC in 2016.

He previously served as Vice Minister responsible for International Affairs at the Ministry of Economy, Trade and Industry (METI) leading all international operations of METI and advising the Prime Minister on industrial policy and international trade and investment issues. Previous posts within the ministry included the Director General of the Economic and Industrial Policy Bureau and the Director-General of the Commerce and Information Policy Bureau.

Ishiguro served as Director-General of the Economic and Industrial Policy Bureau and led government-wide policy coordination for developing growth strategy. Previously, he served as Director-General of the Commerce and Information Policy Bureau.

He spent three years at the New York office of the Japan External Trade Organization (JETRO) promoting US-Japan trade and investment. He has taught economic policy at the Graduate School of Business of Rikkyo

University as a special appointed professor.

Ishiguro holds degrees in law from Tokyo University and Stanford University.

Klemens Kober

Klemens Kober is Director of trade policy, EU customs and transatlantic relations at the Association of German Chambers of Industry and Commerce (DIHK) in Brussels. He represents DIHK in a number of European and international bodies.

Previously, he worked at the Directorate General for Trade of the European Commission after graduating in law and economics. 12



Kazumasa Kusaka



Kazumasa Kusaka has been Chairman and CEO of the Japan Economic Foundation (JEF) since 2013, and is a Professor at the University of Tokyo Graduate School of Public Policy.

He previously served in Japan's Ministry of International Trade and Industry (MITI), rising to become vice-minister for international affairs in the reorganized Ministry of Economy, Trade and Industry (METI) in 2004. During his long career in public service, Kusaka was seconded to the

International Energy Agency (IEA)/OECD and was Japan's senior official for Asia-Pacific Economic Cooperation (APEC). He played a central role in Asia's economic integration, promoting FTAs in the region as well as serving as a senior official negotiating the Doha development agenda of the WTO. Kusaka was head of Japan's Energy Agency and held director-general positions in technology and environmental policy in addition to trade and investment-related areas within METI. He was also instrumental in finalizing the Kyoto Protocol, and developing Japan's energy and environment policies.

Among many other posts Kusaka has held are Special Adviser to the Prime Minister on Global Warming, senior vice president of Mitsubishi Electric,

executive adviser to Dentsu Inc., and president of the Japan Cooperation Center for the Middle East.

Ambassador Rolf Nickel



Rolf Nickel joined the German Council on Foreign Relations as Vice President in 2020.

His previous diplomatic career last had him serve as German Ambassador to Poland. Other international posts included the U.S., France, Kenya and Russia.

Nichel furthermore took on advisory roles representing the Foreign Office within Germany, amongst others, as Federal Commissioner for Arms Control and

Disarmament and Deputy Foreign and Security Policy Advisor to the Federal Chancellor.

He holds degrees in political science, international law and economics from the Goethe University in Frankfurt, Duke University and Sciene-Po Paris. 13

Yoshiyuki Ogura



Yoshiyuki Ogura is Senior Executive Advisor of Hitachi Europe Ltd.

In his long career within the Hitachi Group he has – amongst others – served as Chairman of the Board of Hitachi Europe Ltd. and Corporate Officer of Hitachi, Ltd, and has held a number of leadership roles for IT, Energy and Environmental related business mainly in Europe. Early in his career, he worked as the sales representative for Hitachi's IT business in Beijing.

After a long-term assignment overseas, he served Hitachi, Ltd. in Japan as General Manager of the Innovative Marketing Center of the International Strategy Division. There he took the responsibility of Hitachi's globalization in the markets of EMEA and Americas.

Ogura serves as a vice president of the Japanese Chamber of Commerce in Düsseldorf, Germany and a senator of Deutsche Akademie der Technikwissenschaften.

Jacopo Maria Pepe

Jacopo Maria Pepe is a Researcher on Global Energy, Trade and Logistics at the German Institute for International and Security Affairs (SWP) and Adjunct Professor at the Edwin Reischauer Center for East Asian Studies at Johns Hopkins University, in Washington, DC.



Between 2017 and 2019 he worked as research fellow at the Robert Bosch Center for Central Eastern Europe, Russia and Central Asia at the German

Council on Foreign Policy (DGAP) where he headed the project „The EU-Russia-China-Central Asia strategic dialogue on connectivity“. Between 2010 and 2015 he worked at the Berlin Center for Caspian Region Studies at the Freie Universität Berlin.

An analyst of global and Eurasian geopolitics and geo-economics, his main research interests are the political economy of transport, logistics, and energy in the post-Soviet space and in greater Eurasia, with a major focus on the China-Russia-Central Asia and Europe-Asia relations. He also focuses on the geopolitics of trade, value and supply chains. His latest book “Beyond Energy: Trade and Transport in a Reconnecting Eurasia” has been published with Springer Verlag in January 2018.

Pepe holds a master’s in international relations and international political economy from Freie Universität Berlin, the University of Potsdam, and the Humboldt University and a PhD in International Relations from the Freie Universität Berlin. 14

Vera Philipps



Vera Philipps has been the Director for East Asia at the Association of German Chambers of Commerce and Industry since 2016, closely watching the economic relations with Greater China, Japan and Korea.

She started her career setting up and managing an environmental project consultancy and a project office for the private foundation Stiftung Mercator in Beijing and went on to be in charge of the programmes

“Intercultural Competence/Exchange Projects” and “Cooperation for Sustainable Urban Development”, both with a focus on China for Mercator in Germany.

Philipps studied Area Studies East Asia with a focus on China, macroeconomics and international relations in Cologne and Chongqing. Upon graduation she was a scholar of the German Fellowship Program on International Affairs.

Kaan Sahin

Kaan Sahin joined the German Council on Foreign Relations (DGAP) as Research Fellow for Technology and Foreign Policy in April 2019.

He previously worked with Deloitte as a consultant for Cyber Risk and Public Sector. Prior to that, he was Fellow of the Mercator Fellowship on International Affairs, specializing on strategies to combat hybrid threats. In this capacity, he was



based with the International Institute for Strategic Studies (IISS), with the Special Representative of the OSCE for the Southern Caucasus, with Carnegie Europe, and with the Strategic Analysis Capability Section at NATO Headquarters.

He studied political sciences at the University of Duisburg-Essen and international politics and peace research at the University of Tübingen, the University of Connecticut and Koç University in Istanbul. 15

Dr. Claudia Schmucker

Claudia Schmucker has been Head of the German Council on Foreign Relation’s (DGAP) Globalization and World Economy Program since 2002.



She has published extensively on European and Transatlantic Trade Policy, the World Trade Organization (WTO) and the Doha Round as well as on the role of informal global forums such as the G7 and the G20.

She studied at Rheinische Friedrich-Wilhelms Universität in Bonn, at Elmira College in New York State, and at Yale University. She holds an MA in North American studies and a PhD in economics from the Freie Universität Berlin.

Alexander Schönfelder



Alexander Schönfelder has been the Deputy Director General for Trade, Finance and Sanctions Policy, Investment Promotion and Technology Policy in the Division for Economy and Sustainable Development at the German Federal Foreign Office since 2018.

He previously held positions in the Foreign Office's Divisions for International Economic and Financial Policy and International Energy Policy. His international postings took him to the United States, Thailand, Japan, Iraq and Algeria. Before joining the Foreign Office, he focused on development politics, amongst others at the German Development Institute and UNIDO.

Hideo Suzuki



Hideo Suzuki has been Managing Executive Officer of Nippon Steel Corporation since 2016.

He previously served as Director-General of Trade Policy Bureau at the Japanese Ministry of Economy, Trade and Industry (METI) and Cabinet Councilor where he was responsible for external economic relations, such as negotiations of TPP, Japan-EU EPA, and strategic relations with China, ASEAN, India, Israel, Saudi Arabia. He furthermore was Director-General of Industrial Science and Technology

Policy and Environment Bureau and Director-General of Acquisition Reform of the Ministry of Defense. Suzuki was also responsible for MOD operations against Fukushima No1 Nuclear Power Plant Accident. He was Director-General of the Department of Multilateral Trade Systems, and Deputy Director-General for Economy and Industrial Policy. He was seconded to the Department of Trade and Industry of the United Kingdom from 1996 to 1998. He is an author of “Tax Reform for Revitalizing Japan”, and “China VS Japan-USA TPP Alliance”, and co-author of “Financial Service for Industry in 21st Century”.

Suzuki graduated from the University of Kyoto, Faculty of Law, and holds a MA in International Development Economics by Yale University, and an LLM by the University of Washington, School of Law.

Tatsuya Terazawa

Tatsuya Terazawa was appointed as the Senior Advisor to the Cabinet Secretariat in November 2019 to advise the National Security Secretariat (NSS) on economic security issues. He is also assuming specific missions requested by the Minister for the Ministry of Economy, Trade and Industry (METI).

Terazawa previously served as Vice Minister for International Affairs at METI until July 2019 where he led METI’s international policy operations and negotiations and advised the Prime Minister on industrial and energy policy, as well as international trade and investment issues. He played a major role in coordinating the communique for the G20 Osaka Summit especially on trade and data related issues.

In other posts at METI he has served as Director-General of the Commerce and Information Policy Bureau, Director-General of the Trade and Economic Cooperation Bureau and Director-General for the Multilateral Trade System Department. Previously, he also was the executive secretary to the Prime Minister and Special Advisor to the Minister at the Japan External Trade Organization (JETRO) office in New York.

He holds a degree in law from the University of Tokyo and an MBA from Harvard University. 17





Ambassador Romana Vlahutin

Romana Vlahutin has been the Special Coordinator and Ambassador at Large for Connectivity in the European External Action Service since 2019.

Vlahutin is a career diplomat. Before joining Croatian Ministry of Foreign Affairs in 1999 she worked as an analyst for the Bassiouni UN Commission for former Yugoslavia, the UN Tribunal (ICTY) in The Hague and the Council on Foreign Relations in Washington DC. As a Croatian diplomat she served in embassies in Washington (Head of Political Section) and Belgrade (Deputy Ambassador), and as the Head of Strategic Analysis and Policy Planning at the MFA in Zagreb (2000-2004). She also served as a Political Director of the OSCE Mission in Kosovo (2006-2007). From 2010-2014 she was the Foreign Policy Advisor to the President of Croatia. Most recently she was posted as the EU Ambassador to Albania (2014-2018). Vlahutin is a graduate of Zagreb University and J. F. Kennedy School of Government at Harvard University. She is a member of the European Council on Foreign Relations.

6. 議事要旨

(日本語)

以下の日本語サマリーは、ドイツの外交評議会 (DGAP) が作成した英文サマリー(後掲)を当財団で和訳したものである。

第4回 JEF-DGAP 国際シンポジウム 勇敢なる新世界経済秩序

オンライン会議
2020年10月7-8日

開会の辞

本会議は国際経済交流財団 (JEF) の日下一正会長およびドイツ外交評議会 (DGAP) 副所長であるロルフ・ニーケル大使によるあいさつで幕を開けた。ともに、本会議のイニシアチブ、両機関の長年の協力関係、そしてコロナ禍においてオンライン会議を開催できたことを賛した。

本会議のタイムリーな開催についても触れた。その目的は、持続可能で包括的な経済成長について議論し、今新たにコロナ禍の影響を受ける新世界経済秩序を模索することにある。多国間主義の弱体化、自由貿易の混迷、日本での安倍前首相の辞任に伴う政権交代に加え、ドイツと米国では選挙が近い。

一方で、中国の台頭は各国政府や外交関係のみならず、景気循環にまで圧力を与えている。先進7カ国 (G7) 加盟国であるドイツと日本にはともに、こうした難題に対処する責任がある。また、両国とも輸出主導型経済であり、ルールに基づく秩序と自由貿易を支持する似たような地政学的、地経学的利害を有している。こうした価値観を守ることは、世界的に保護主義が拡大し、世界貿易機関 (WTO) への不信感が募る今、とりわけ重要である。

WTO など国際機関には、実情にあったルール調整を行い、データや投資の流れといったこれまで扱われてこなかった分野に対応できるようにするなどの、改革が必要である。不確実な状況下において当然ながら企業は臆病になっているが、コロナ後に投資を活性化させるためにも、ルールによる安定性を提供することが重要となるだろう。

パネル 1

世界的パンデミックからの回復

コロナ後の世界貿易と投資における成長回復

コロナ禍の影響を受け、貿易はかつてないほど縮小し、大変な課題を突き付けられていると、パネリストらは警鐘を鳴らした。しかし、コロナ以前に既に、世界ではポピュリズム、反グローバリズム、保護主義の広がりが見られ、多国間主義は危機的状況に陥っていた。

パネル 1 では WTO をどうすれば実効力のある組織に復活させうるか、自由貿易協定 (FTA) は多国間主義の復活においてどんな役割を果たしうるかが話し合われた。さらに、コロナ対策やそれに伴う医療品等生活必需品の輸出規制に関して WTO の役割はどうありうるか、あるべきかについてが問われた。議論はドイツと日本がコロナ後の国際投資をどう後押しできるかという問題にも及んだ。

多国間貿易の危機はコロナ拡大よりはるか以前に生じていたことをパネリストらは強調した。マイルストーンとしては、ドーハ・ラウンド交渉の決裂、2008 年の金融危機、それに伴う中国の台頭などが挙げられる。ますます保護主義的、国家主義的になる状況下で、WTO は解決策を見いだせずにいる。

WTO が直面している危機の原因の一つとして、この 10 年における保護主義の台頭が挙げられる。それはコロナ危機の中でピークに達した。さらに、米国や中国など関係国の自国中心主義的貿易政策により組織の機能はひどく損なわれた。そのうえ、20 カ国・地域首脳会合(G20)を中心とする加盟国が、コロナ対策に関わる緊急危機会議において WTO を考慮に入れることさえなかったために、さらに軽視されることとなった。

WTO の三大機能である紛争処理、貿易投資の自由化、そして WTO ルールの順守は、すべて機能不全に陥っている。これは米国が上級委員会の委員任命を阻止し、WTO のルール上不可欠である加盟国の全会一致が難しくなったためである。最後に、WTO はその監視機能を果たすために透明性の確保を加盟国に頼っているが、全ての国がこれに対応しているわけではない。

監視機能のこの弱体化の一例が、コロナ禍における生活必需品の輸出禁止だった。輸出禁止自体は WTO ルールに反するものではない。例外が認められており、国家安全保障はその一つである。ただし、その定義を拡大しようとする傾向が認められる。世界貿易に関する透明性を確保できるよう WTO は単に輸出禁止の通報を求めている。しかし、コロナ禍の中、多くの国が通報を行っているわけではない。

WTO ルールと矛盾しているわけではないが、輸出禁止は世界貿易とは相いれない。特に医療機器の生産に関しては完全に経済的に自立できる国はない。輸出禁止は貿易機関に対する信頼の欠如を示す証しと理解すべきである。従って、バリューチェーンやサプライ

チェーンに対する信頼を取り戻し、あらゆる国が必要な機器を確実に入手できるようにすることに注力しなくてはならない。

同様に制裁措置政策も国家安全保障の問題に該当するため、WTO がそれを阻むことはできない。制裁措置はまた、分断化された事業環境を切り抜けていかなければならない国際ビジネスに影響を与える要因としてますます重要なものとなりつつある。とりわけ制裁措置が今後も増え続ければ自らの正当性が損なわれることとなるため、長期的には WTO はこれに対処しなければならない。

その正当性がさらに損なわれることのないよう、今後数カ月の WTO の動きは重要になる。WTO は加盟国組織として、コロナにいかに対処するか重要なメッセージを送らなければならない。そうすれば将来的にはその正当性が裏付けられる。そのため、国際的なバリューチェーンの分断を確実に抑え、加盟国に医薬品や医療機器に対する関税を撤廃するよう合意させ、非差別的なデジタル貿易に関する世界ルールを構築しつつ、気候政策、輸出禁止にいかに対処するかといった問題への答えを見いだす必要がある。特に気候変動や電子商取引については、現在交渉中の多国間合意が WTO 全体でのアプローチが見つかるまでの先鞭をつけることになるだろう。

ビジネス上はしかし、WTO の正当性とルールに基づく枠組みの改革が重視されるべきである。特に中小企業はこのグローバルシステムに依拠しているためだ。ドイツ貿易の 3 分の 2 は WTO ルールにのみ依拠しており、他の FTA が取引に絡んでくることはない。変わり続ける数々の協定やルールに対応していく能力はとりわけ中小企業にはない。そのため、WTO 内部から一連の国際ルールをまとめることが望ましい。

欧州連合(EU)と日本が WTO 改革をさらに進めるために何ができるかを考えると、まずは紛争処理である。2019 年以降、上級委員会は米国の委員任命阻止により機能不全に陥っている。そのため、多国間暫定上訴制度を創設するという EU のコミットメントは、それが一時的なものであっても、極めて有望である。日本はまだこのイニシアチブに参加していないが、参加には大きな期待が寄せられている。長期的には、上級委員会にはさらに総合的な改革が必要となるが、その実現は米国の新政権移行後になるだろう。

また、EU と日本のリーダーシップと事務局の強化により、WTO 改革をさらに推進する必要がある。WTO は合意により動く加盟国主体の組織だが、このことが多くの問題を呈し、何もできずに終わっている。事務局を強化すれば WTO の実効力は高まるだろう。

米中デカップリングについては、それが今後も続くマクロトレンドであり、それゆえこれに適応する必要があることを、全加盟国が認識すべきだとパネリストらは指摘した。保護主義拡大の傾向が EU 内でも認められる今、EU が開けた状態を続けその流れに飲み込まれないようにすることが企業のためになる。ここで重要な用語が「開放的かつ戦略的な自立性 (Open Strategic Autonomy)」である。

パネル 2

世界的パンデミックからの回復

新技術の新ルール：インダストリー 4.0 以降

本パネルではデジタル貿易や技術の活用に係る新ルール、そして、特にそれがデータ保護システムやデータの自由なやり取りにどう関係するかについて議論が交わされた。この点で重要なファクターは、データセキュリティの問題に加え、デジタルデータ分野における「ビッグ5」と呼ばれる、米国のテクノロジー企業の支配である。スピーカーらは日本とEUがこの分野でどのような立場をとるべきか意見を述べた。

日本、米国、EU が長年享受してきた業界での指導的地位は中国の進出に脅かされつつあることは周知の状況である。例えば、第5世代通信規格（5G）における中国の支配的地位は国家安全保障や国防上の脅威となっており、信頼に足る5Gネットワークが大いに必要とされている。EU、米国、日本の各政府にとっては特に、5Gのセキュリティ面に関する懸念は今までになく高まっている。5Gは、国家安全保障がらみの移動、医療、インフラといったよりミッションクリティカルな分野で利用されるからだ。そのため、5Gネットワークの信頼性を確保するために重要なファクターが三つある。デバイスのセキュリティ、信頼できるベンダーによる安定したサプライチェーン、そして各国政府の政策とベンダー要件に関する政府の透明性である。政府はひとつのベンダーに依存せず、競争市場を創出すべきである。そうすれば、日本やEUは5Gサプライヤーに依拠する安全なデジタル空間を構築することができる。

また、中国が実践し世界に広めている監視社会の拡大は民主主義と人権に課題をつきつけている。ICT分野での中国の台頭は商業上の脅威であるばかりか、国家の価値観にとっても脅威となっていることに注目すべきである。それは、伝統的な外交関係をもむしばむ恐れがある。例えば、東南アジアでは、中国の存在感が増すにつれ日本の従来強力な同盟関係が脆弱（ぜいじゃく）化している。

米中の技術戦争に関して、本パネルは、日本とEUの役割について三つの観点があると指摘された。第一に、EUと日本を戦争の犠牲者と見る立場である。この場合、サプライチェーンの拡充や自国生産に向かう消極的アプローチ、あるいは米中発の脅威に立ち向かえる競争力の強化に向かう積極的アプローチのいずれかをとることになる。第二に、脇役に甘んじることなく、例えば、場当たりの制裁措置により生じた紛争の波を抑えるために積極的な役割を果たし、ルールに基づくシステムを重視する立場である。これはEUと日本の利害の一致するところであり強みでもある。第三に、EUと日本を米国の同盟国ととらえ、特にICT分野における中国の台頭により生じた問題は三者に共通するものとみなす立場である。

米中対立の結果について、パネルは、EUと日本が技術戦争のもたらす影響に立ち向かおうとより自己主張しようとしていることは驚くに当たらないと指摘した。この点に関して、よく取り上げられる用語がデジタル統治（digital sovereignty）とデジタルオートノ

ミー (digital autonomy) である。いずれもまだ十分に定義されてはいない。米国や中国でさえ実現はほぼ不可能であるデジタル分野における独裁 (digital autarchy) とデジタル統治を区別することが重要である。後者はデジタル分野で活動する国の能力と理解すべきである。これには、例えば、信頼できる産業技術のサプライチェーンやバリューチェーン、革新能力、依存状況を管理する制度機関の存在、技術進展を規制しデジタル関連の議論を形成する能力などが含まれる。

グローバルレベルで電子商取引の交渉を進めるという選択肢については、この分野での世界的な多国間ルールを重視すべきである。デジタル経済は 21 世紀における、ビジネスのやり方の主流となり、その傾向は増すばかりだろう。しかし、モノやサービスと違い、国境を越えたデジタル貿易を規制し、差別的行為を防止し、基準を整備するための国際ルールはほとんどない。そのため、分裂や単独行動がこの分野を脅かしている。

既存の WTO ルールは創設以来見直されておらず、もはや現代貿易の現実を反映したものとなっていない。デジタル貿易に絞ったルールは制定されていない。2017 年の閣僚会議で創設されたいわゆる共同声明イニシアチブ (Joint Statement Initiatives) は電子商取引の規制について話し合っていることから、大きな突破口となる。今のところ、このイニシアチブが前に進み、電子商取引に関する公平なルールを作るための最善の方法である。日本、中国、オーストラリアのリーダーシップのもと、このイニシアチブはデジタル貿易の新ルールに関するとりまとめ文書を発表しており、大成功とみなすことができるだろう。

さらに、日本は 2019 年の G20 議長国として大阪トラックを発表した。この包括的な枠組みは国境を越えたデータの流れに係る保護を強化するための交渉を促すうえでも役に立っている。

すみやかに総合的な合意に至ることはデジタル貿易にとって重要なステップとなるが、同時に WTO が現代貿易を規制する能力を発揮する重要な方法ともなる。交渉は常に WTO レベルで進め、合法性を保ち地理的に網羅したものとすべきである。これはデジタル貿易にとって非常に重要なことである。EU と日本は 2021 年の次回閣僚会議において電子商取引の規則に関する交渉の、具体的な成果を示すべきである。基本的な現状把握やロードマップ作りを行うだけでは十分ではない。

規則の作成にあたって、特に展開の速いデジタル分野に関しては、官民両セクター間での協力と情報交換や利害が重要であることを、パネリストらは指摘した。ルール作りは政府の手に委ねられるが、その際に政府は新たな問題や難しい課題、ニーズについて知るために企業に大きく頼ることになる。Business20 などの非政府組織は、それぞれの利害を系統立てて示し政府に助言するため、重要である。さらに、産業界は、例えば、デジタル貿易に関して、交渉に建設的な圧力をかけ、政府の交渉を後押しすることができる。進歩の早いデジタル分野においてタイムリーに動けなければ WTO の正当性が損なわれることになる。デジタルセクターは規則という点ではとりわけ興味深いケースである。スピードが

必要なだけに、確立したルールの多くは政府ではなく民間セクターにより作り上げられてきた。業界独自のソフトルールは変わり続ける現実により適応しやすいことから、その方が都合が良い。

欧州はデジタル分野で大きく後れをとっていると考えられることが多いが、状況はそれほど厳しいものではない。実際、半導体産業、AIイノベーション、クラウドコンピューティング市場などで出遅れてはいるが、データ保護戦略、AI白書、そしてGaia-Xのような有望なプロジェクトを発表して、対応策を取り始めている。EUはまた、その強みである規則に注力すべきである。同時に、主に内向き型の規則からシフトし、世界的監視社会の問題などに取り組むべきである。

最後に、パネリストらはEUと日本に共通する主に三つの関心領域を指摘した。まず、米中技術戦争への対処法、例えば、米国の政策措置への対応策、それに伴う生産ラインの多様化に関してベストプラクティスを共有すべきである。次に、デカップリングの傾向に対応するために世界の技術革新ネットワークという考えを推進すべきである。最後に、民主主義的な価値観を共有し、EUでは軽視されがちなAI監視やデジタル権威主義の脅威に、協力して対応すべきである。

パネル 3

コロナ危機への対応

持続可能な世界的成長と地政学的安定：日欧の連結性の役割

安倍前首相が重視してきた連結性(connectivity)は、絡み合い相互依存する関係を表しており、貿易の拡充といった肯定的な意味合いもあれば、国家安全保障が絡んでくるといった否定的な意味合いもある。コロナ禍により多様かつ強靱なバリューチェーンと信頼できる貿易関係の重要性が改めて浮き彫りになったという点で本パネルの意見は一致した。それにより2008年の経済危機以来続く傾向はさらに加速された。それでも、一帯一路(BRI)と日欧の連結性戦略はコロナの影響を受けるだろう。大々的な国内生産化は考えられないが、ニアショアリング(近隣諸国へのアウトソーシング)やサプライチェーンの多角化は予想される。

持続可能な連結性に関するEUのビジョンは、4-3-2-1アプローチに準じている。四つの柱は、デジタル、運輸、エネルギー、人的交流である。三つの作業基準は、物理的ネットワークの構築、共通目標を掲げたパートナーシップでの活動、そして、民間セクターの重要な役割の認識である。二つの重要な基本原則の一つは、環境や財務面も含む持続可能性への包括的アプローチで、単一の主体に過度に依存しないことを目的としている。もう一

つは、企業に平等な競争条件を与えることで、中国との合意形成もここに含まれる。最後に、一つの包括的理念として、世界のより持続可能でグリーンな成長の実現がある。

連結性に係わる EU と日本のパートナーシップをふりかえれば、EU と日本の外務省との間には密接な協力とコミュニケーションが重ねられてきた。その結果、例えば、航空安全協定など数々の協定につながり、共同でグローバルに取り組む 5 大地域として、西バルカン諸国、欧州近隣国、東南アジア、インド太平洋地域、そして、アフリカが特定されている。これまでの成果では十分ではないため、インフラ相互協力の成果を実現する方法について八つのポイントが提案された。第一に、戦略面ではなく具体的なプロジェクトに関する、両者のコミュニケーションをさらに加速し、より直接的なものとすべきである。第二に、例えば、中国の投資家らによるインフラ開発のリスクや考えられるライフサイクル・コストに関して支援し各国を啓蒙することが重要である。この啓蒙プロセスをサポートするためには、既存プロジェクトが特定地域でもたらしてきた経済的、および生態学的影響に関する情報を収集することが重要となる。第三に、EU と日本は中国と比べ遜色のない資金調達メカニズムを用意すべきである。第四に、民間セクターは質の高いインフラへの、持続可能な投資元としてもっと関与すべきである。ここでの課題は、中国と異なり、民間セクターにも財政的に魅力のある EU 事業でのプロジェクト調達として、民間セクターの当事者らにとって魅力ある投資環境を作ることである。第五に、新興市場は外部の融資にずっと頼るわけにはいかないので、自国の融資システムの開発を支援すべきである。第六に、アジアインフラ投資銀行 (AIIB) に加盟する EU は同銀に質の高いインフラプロジェクトへの投資をより重視するよう促すべきである。この点に関しては考えられる影響について議論されている。第七に、EU は透明性のある政府調達に関する WTO ルールを確実に中国に順守させることに注力すべきである。第八に、公平な競争の実現に向け OECD 輸出信用ガイドラインを尊重するよう中国に促すべきである。しかし、市場競争を考えれば、投資に関わるさまざまなインセンティブについて改めて考慮しなければならない。

コロナ禍のもたらした一つの特異な問題は、多くのインフラプロジェクトが深刻な財政難に陥り失敗に終わる可能性があることである。それなのに、プロジェクトを立て直すための融資メカニズムがない。早急にこのメカニズムを再生する必要がある。

日本の立場から見れば、連結性についてはインド太平洋戦略が外交戦略上の最優先事項であるが、この点は曖昧かつ不明瞭なままだ。2016 年に着手した同戦略で、日本の外務省は、太平洋環インド洋地域は東アフリカとともに経済発展の次の中心地であると認識しているため、つながりをより深めるべきである。日本のインド太平洋ビジョンは、航海の自由と法の支配、連結性、および能力構築の三つの柱に支えられている。

この日本の戦略を BRI と結びつけることが重要だが、これもまた両面的でもある。日本政府内には中国と協力することは貿易上相当な利点があると考える者もいれば、日本の安全保障上の脅威と見る懐疑派もいる。2015 年、安倍前首相が質の高いインフラ原則

(Quality Infrastructure Principles) に合致したものであれば日本の連結性戦略と BRI プロジェクトは調和のとれたものとなると述べた時、多くの人々に、特に米国において、大きな驚きをもって受け止められた。日本の経済繁栄を守るために必要なものとの主張であった。

コロナ禍にあって、日本の BRI 観はより批判的なものとなり、日本は対中国の姿勢において米国寄りになりつつある。しかし一方、経済上の理由から中国との緊密な関係を維持することにおけるアセアン 諸国の利害を認識しつつ、バランスをとってもいるのである。

閉会の辞

二日間に渡る充実した議論の末、本会議では 日本と EU の考え方が多くの点で似ていることが改めて確認された。会議のタイトルである「勇敢なる新世界経済秩序」は現状直面しているより見通しがかなり厳しいようではあるが、ともに立ち向かわなければならない問題が山積している。

シンポジウムのスピーカーらは、直面する難題に取り組み、新たな現実に適応させる必要がある既存のルールや制度の中での、より優れたグローバル化とレジリエンスの構築という共通の目的に向かって協力するために、考えられるさまざまな方法を探った。

JEF の日下一正会長および DGAP 副所長であるロルフ・ニーケル大使はそれぞれ、スピーカー、参加者、主催者に謝意を述べ、DGAP と JEF の長年に亘る協力関係をたたえ、友好的なパートナーシップの歴史が続くことを期待した。

シンポジウム終了

English Summary drafted by DGAP.



Summary

A Brave New Economic World Order

4th JEF-DGAP International Symposium

Virtual Conference

October 7-8, 2020

Opening Remarks

The conference was opened by remarks from JEF Chairman Kazumasa Kusaka and DGAP Vice-President Ambassador Rolf Nickel. Both praised the initiative for the conference, the two institution's longstanding cooperation, and the possibility of coming together digitally during times shaped by the coronavirus.

Both commented on the timeliness of the conference: the aim to discuss sustainable and inclusive economic growth and to explore a new economic world order now additionally impacted by the coronavirus outbreak. Multilateralism is weakening, free trade is suffering, and Japan has just seen a change in leadership with former Prime Minister Shinzo Abe stepping down, while both Germany and the US are preparing for their scheduled elections.

Meanwhile, the rise of China is not only putting governments and diplomatic relations under pressure but also business cycles. As members of the G7, Germany and Japan have a shared responsibility to address these challenges. Additionally, both are export-oriented economies that have similar geopolitical and geo-economic interests that favor rules-based order and free trade.

Defending these values is especially relevant in times of growing global protectionism and skepticism toward the WTO.

It is necessary to reform international institutions, such as the WTO, by aligning their rules with the current reality and enabling it to deal with areas so far not covered such as the flow of data and investments. As businesses are naturally timid in an uncertain climate, it will be important to provide stability through rules in order to revitalize investment after the pandemic.

Panel 1

Recovering from a Global Pandemic

Restoring Growth in Global Trade and Investment after the Coronavirus Pandemic

Affected by the outbreak of the coronavirus, trade is declining at an unprecedented level, posing grave challenges, the panelists warned. But even before the pandemic the world saw a rise in populism, anti-globalism, and protectionism, which put multilateralism in a critical situation.

The panel discussed how the WTO can be restored as an effective institution and what role FTAs can play in restoring multilateralism. It further asked what the WTO's role in fighting the coronavirus and export restrictions that went with it could and should be. The debate also turned to the matter of how Germany and Japan can support global investment after the pandemic.

The crisis of multilateral trade can be traced back much further than the outbreak of the coronavirus, the panelists stressed. Milestones were—amongst others—the collapse of the Doha negotiations and the 2008 financial crisis and with it the rise of China. In an increasingly contentious context, the WTO is not in a position to find solutions.

One of the causes for the WTO's crisis is the rise of protectionism over the last decade, which has peaked during the coronavirus crisis. Furthermore, stakeholders such as the United States and China have badly damaged the organization through their unilateralist trade policies. And the WTO was further marginalized by its member states, in particular the G20, who did not even take the WTO into account in their emergency crisis meetings addressing the pandemic response.

The three main functions of the WTO—dispute settlement, liberalization of trade investment, and compliance with WTO rules—are all malfunctioning. This is due to the US blocking the appellate court and the difficulty of finding unanimous agreements among all member states, which is necessary according to WTO rules. Finally, the WTO relies on member states to provide transparency in order to fulfil its monitoring functions, something that has not been done by all.

One example for this weakened monitoring function were export bans put into place during the coronavirus outbreak: Export bans are in and of itself not against WTO rules, as they provide exceptions and national security is one of these, even though there has been a trend to expand

the definition of national security. The WTO merely requires export bans to be reported, in order to be able to provide transparency on global trade. However, this reporting was not carried out by many countries during the coronavirus outbreak.

While not contradicting WTO rules, export bans are contrary to global trade. No country can reach full economic autonomy especially with regards to the production of medical equipment. Export bans should be understood as a sign of a lack of trust in trade institutions so the focus should be on restoring trust in value and supply chains and ensuring that all countries receive the equipment they need.

Equally sanctions policies fall under national security issues and hence can't be intercepted by the WTO. At the same time, sanctions are an increasingly relevant factor affecting international business, which has to navigate a fragmented business environment. In the long term this should be addressed by the WTO especially since a continuation in the rise of sanctions will in the long term undermine the relevancy of the WTO.

In order to prevent a further loss in relevancy, the performance of the WTO in the coming months will be important. If the WTO, as a member state organization, manages to send out relevant signals on how to address the pandemic, that will also underscore its relevancy in the future. It therefore needs to find answers to questions such as how to deal with climate policy, exports bans, giving assurances that global value chains will not be disrupted, getting member states to agree to end tariffs on drugs and medical equipment, and establishing global rules for non-discriminatory digital trade. It is likely that particularly on climate change and e-commerce plurilateral agreements currently being negotiated will lead the way before a WTO-wide approach can be found.

For business though the relevancy of the WTO and reforming its rules-based framework should be stressed since SMEs in particular depend on this global system: Two thirds of German trade relies only on WTO rules, without additional FTAs playing into the transactions. It is beyond the capacities of particularly small firms to navigate a multitude of agreements and rules that are constantly changing. It would therefore be preferable to have one set of global rules from within the WTO.

Addressing what the EU and Japan can do to further the reform of the WTO, a first point is dispute settlement: Since 2019 the appellate body has ceased to function due to the blockage by the US. Therefore, the EU's commitment to create a multi-party interim appeals system is a very promising one, even if temporary. Japan has not yet joined this initiative but there are high hopes that it will do so. In the long term, the appellate body will require more comprehensive reform, but this will only be possible under a new US administration.

Furthermore, a WTO reform needs to be strengthened by an EU-Japan leadership and a stronger secretariate. As the WTO only operates with consensus and is a member-driven organization, this

poses many problems and leads to inaction. A strengthened secretariate would make the WTO more effective.

Turning to decoupling, the panelists pointed out the importance for all countries to realize that this is a macro trend that will continue to happen and hence they need to adapt to it. It is in the interest of business for the EU to stay open and not be put into one of the camps as growing protectionism trends can be seen even within the EU. An important term in this context is “Open Strategic Autonomy.”

Panel 2

Recovering from a Global Pandemic

New Rules for New Technologies: Industry 4.0 and Beyond

This panel discussed new rules for digital trade and the use of technologies and particularly how this relates to data protection systems and the free exchange of data. A relevant factor in this context is the question of data security as well as the dominance of the “big five” US technology firms in the field of digital data. The speakers presented their opinions on where Japan and the EU should position themselves in this field.

The industrial leadership that Japan, the US, and the EU have long enjoyed has been eroding due to China’s advances—a well-known development. The Chinese dominance in, for example, 5G poses a threat to national security and defense and there is much need for a trusted 5G network. Concerns about the security of 5G particularly for the governments in the EU, the US, and Japan are heightened in comparison to its predecessors since 5G will be used in more mission-critical areas such as mobility, medical, and infrastructure related to national security. Therefore, there are three factors relevant to securing the reliability of 5G networks: Device security, stable supply chains with trusted vendors, and transparency of governments about their policies and requirements applied to vendors. Governments should not depend on single vendors but rather create a competitive market. In this way it would be possible for Japan and the EU to establish a secure digital space relying on a trusted 5G supplier.

Furthermore, the increasing mass social surveillance, practiced by China and exported into the world, poses a challenge to democracy and human rights—it should therefore be highlighted that China’s rise in the ICT world isn’t only a commercial threat, but also a threat to nations’ values. It also threatens to erode historic diplomatic relationships as can be seen for example in South-East Asia, where Japan’s traditionally strong alliances have been weakened by China’s stronger presence.

Turning to the US-China technology war, the panel pointed out that are three different perspectives about the role of Japan and the EU in it: The first one is to see the EU and Japan as

victims of this war, which can then lead to either a passive approach, working towards more supply chain and production independence, or an active approach, seeking to strengthen the countries' competitiveness against the threat stemming from the US and China. The second perspective is, rather than being a by-stander, taking an active role to calm the conflict's waves caused by, for example, ad-hoc sanctions, and focusing on a rules-based system. This is a shared point of interest and strength of the EU and Japan. Thirdly, the EU and Japan could perceive themselves as being aligned with the United States and look at the three actors' shared challenges caused by China's rise—especially in the ICT sector.

As a result of the confrontation between the US and China, the panel stressed that it is not surprising that the EU and Japan are seeking to become more self-assertive in order to tackle the tech war's repercussions. In this context two terms that are often mentioned are digital sovereignty and autonomy—though both terms remain as yet ill-defined. It is important to differentiate between digital autarchy, which is nearly impossible to achieve, even for the US and China, and digital sovereignty. The latter should be understood as a country's capacity to act in the digital realm. This encompasses—amongst others—trusted industrial and technological supply and value chains, the capacity to innovate, the availability of institutional instruments to manage dependencies, and the ability to regulate tech advancements and shape digital-related debates.

Looking at options to advance e-commerce negotiations at a global level, global and plurilateral rule in the field should be weighted. The digital economy has become central to how business is done in the 21st century and this trend will only increase. But unlike for goods and services, there are few international rules to control cross-border digital trade, prevent discrimination, and align standards. In the absence of such rules, we have seen fragmentation and unilateral action threatening the sector.

Existing WTO rules have not been updated since the organization's foundation and therefore don't reflect the reality of modern trade anymore. There are no rules provided that are particular to digital trade. The so-called "Joint Statement Initiatives," founded at the ministerial conference in 2017, present a major break-through in this area, as they negotiate on e-commerce regulations. Right now, this initiative is the best way to move forward and create non-discriminatory rules for e-commerce. The initiative, under the leadership of Japan, China, and Australia, has introduced a consolidated text on new rules for digital trade, which can be seen as a great success.

In addition, Japan launched the Osaka track during its G20 presidency in 2019, and this overarching framework also helped to spur the negotiations aiming to enhance protection for cross-border data flow.

Reaching a consolidated agreement soon would be an important step for digital trade but would also be an important way for the WTO to demonstrate its ability to regulate modern trade. The

negotiations should remain at the WTO level to maintain legitimacy and geographic coverage, which is very important for digital trade. It is suggested that the EU and Japan could use the upcoming ministerial conference in 2021 to present specific outcomes of the negotiations on e-commerce regulation. A general stocktaking or roadmap during this conference would not be enough.

In formulating regulations, especially in the fast-developing digital realm, the panelists emphasized the importance of the cooperation and exchange of information and interests between public and private actors. While rule-making is in the hand of governments, in doing so, they are highly dependent on business to learn about arising problems, sensitivities, and needs. Non-government organizations such as the Business20 are important as they formulate their interests and advise governments. Furthermore, business communities can accelerate government negotiations on, for example, digital trade by putting constructive pressure on the negotiations as the WTO will lose relevancy if it is not able to act in a timely manner in the rapidly evolving digital realm. The digital sector is a particularly interesting case in terms of regulations as there is such a need for speed that many established rules have been developed by the private sector rather than by governments. This might be favorable, as the industry's own soft rules are more adaptable to changing realities.

Europe is often perceived as having fallen far behind in the digital realm, though the situation is not as grim as often perceived. Europe is indeed trailing in, for example, the semi-conductor industry, AI innovation, and the cloud computing market. Nevertheless, the EU has started to take some counter measures, for example by issuing a data protection strategy, an AI white paper, and promising projects such as Gaia-X. The EU should, furthermore, focus on its strength: regulation. At the same time, it should move away from mainly inward-looking regulations and tackle, for instance, the issue of global mass surveillance.

Finally, the panelists identified three main areas of shared interests between the EU and Japan: Both actors should share best practices on how to deal with the US-China technology war and, for example, how to react to US-imposed sanctions and thereby the diversification of production lines. Secondly, both parties should promote the idea of a global tech innovation network to counter the trend of decoupling. Finally, the EU and Japan share democratic values and should work together to address the threat of AI surveillance and digital authoritarianism, which so far is vastly underestimated in the EU.

Panel 3

Countering the Coronavirus Crisis

Toward Sustainable Global Growth and Geopolitical Stability: The Role of Connectivity

Connectivity, as former Japanese Prime Minister Abe has highlighted, is an expression of being intertwined and depending on each other, which comes with positive implications, such as strengthened trade, as well as negative ones, such as implicating national security. The coronavirus pandemic has once again demonstrated the importance of diversified and resilient value chains and reliable trade connections, the panel agreed. It has accelerated trends that had been present since the 2008 economic crisis. Nevertheless, the BRI and the EU-Japanese connectivity strategy will be affected by the coronavirus: A significant nationalization of production is unlikely but rather a near-shoring and diversification of supply chains is to be expected.

The EU's vision on sustainable connectivity follows a 4-3-2-1 approach: Its four pillars are digital, transport, energy, and human connectivity. Its three working standards are building physical networks, working on partnerships with shared goals and values, and acknowledging the important role of the private sector. Its two key underlying principles are a comprehensive approach to sustainability, which includes environmental and fiscal aspects and aims to avoid overdependency on single actors, and having a level playing field for businesses, which also includes reaching an agreement with China. Finally, the one overarching philosophy is to achieve a more sustainable and green growth around the world.

Reflecting on the EU-Japan partnership in connectivity, there has been close cooperation and communication between the EU and the Japanese ministry of foreign affairs, that has resulted in a number of agreements including, for example, an air safety agreement and identifying five key regions for the combined global engagement: the Western Balkans, the Eastern Neighborhood, South-East Asia, the Indo-Pacific region and Africa.

Since the fruits born from the EU-Japan partnership so far have been meagre, eight points were suggested on how to deliver results from the EU-Japan infrastructure cooperation: First, communication between the EU and Japan on specific projects rather than strategic aspects should be accelerated and become more direct. Second, it is important to provide assistance and educate countries about the risks and possible lifecycle costs of infrastructure development by, for example, Chinese investors. To support that education process, it would be important to gather information about the economic and ecological impacts that already existing projects have had within specific regions. Third, the EU and Japan should provide financing mechanisms that are competitive with the Chinese ones. Fourth, the private sector should be more involved as a source of sustainable investment for quality infrastructure. Here a challenge is that an attractive investment climate for private sector actors must be created as, in contrast to China, project

procurement within the EU works on the basis of being financially attractive to the private sector. Fifth, emerging markets should receive help in developing their indigenous financing systems, as they cannot rely on outside financing permanently. Sixth, the EU as a member of the Asian Infrastructure Development Bank (AIIB) should encourage the institution to focus more investment on quality infrastructure projects, though the possible effect of this is debated. Seventh, the EU should focus on ensuring China's compliance with the WTO rules on transparent government procurement and, on the same note, eighth, China should be urged to respect the OECD export credit guidelines to enable fair competition. Though, looking at market competition, the different incentive structured mentioned with regards to investment, must again be considered.

One particular challenge caused by the coronavirus outbreak is that many infrastructure projects are likely to face severe difficulties and possibly fail. Yet, there are no financing mechanisms for restructuring projects. These are necessary though to ensure that the failing projects don't end up falling into Chinese ownership by default.

From Japan's point of view when it comes to connectivity, the Indo-Pacific strategy is a top priority of its diplomatic strategy, while at the same time remaining rather vague and undefined. Launched in 2016 it acknowledges that the Pacific and Indian Ocean rim countries are, in the view of the Japanese foreign ministry, the next center of economic development, together with East Africa. They should, therefore, be better connected. The Japanese Indo-Pacific Vision builds on three pillars: Freedom of navigation and the rule of law, connectivity, and capacity building.

Connecting this Japanese strategy to the BRI is important while also ambivalent: Within the Japanese government some have focused on the significant trade advantage of cooperating with China, while others are focused on skepticism and the country's potential threat to Japan's national security. In 2015 it came as a big surprise to many, especially in the US, when former Prime Minister Abe announced that Japan's connectivity strategy should be harmonious with BRI projects if they are consistent with Quality Infrastructure Principles. This is argued to have been necessary to defend Japan's economic prosperity.

Throughout the coronavirus outbreak, the Japanese view of the BRI has become more critical and Japan is moving closer to the US in its stance toward China, while balancing this with acknowledging the ASEAN countries' interest in maintaining a close relationship with China for economic reasons.

Closing Remarks

After two days of fruitful and substantial discussions the conference once again proved the many similarities in views between Japan and the EU. The conference's title, "A Brave New World

Economic Order,” seemed to project a much grimmer outlook than the one being faced. Nevertheless, there is a multitude of challenges that should be confronted together.

The symposium’s speakers explored a variety of possible paths to summit the challenges ahead and to work towards the shared objective of better globalization and building resilience within the existing rules and institutions that need to be adapted to new realities.

Both, JEF Chairman Kazumasa Kusaka, and DGAP Vice-President Ambassador Rolf Nickel, expressed their gratitude to the speakers, participants, and organizers and praised the longstanding cooperation between the DGAP and the JEF and hope to continue in the friendly vein of this partnership.

End of Symposium

7. 発表資料

Part 1: RECOVERING FROM A GLOBAL PANDEMIC

Panel 1 : Restoring Growth in Global Trade and Investment after the Coronavirus Pandemic

①鈴木 英夫氏 日本製鉄株式会社 常務執行役員

Panel 2: New Rules for New Technologies: Industry 4.0 and Beyond

①石黒 憲彦氏 日本電気株式会社 取締役 執行役員副社長

Part 2 : COUNTERING THE CORONAVIRUS CRISIS AND BEYOND: TOWARD SUSTAINABLE GLOBAL GROWTH AND GEOPOLITICAL STABILITY

Panel 3: The Role of Japanese and European Connectivity

①細谷 雄一氏 慶應義塾大学法学部 教授

②小掠 義之氏 日立ヨーロッパ社 相談役

Part 1 Panel 1

①鈴木 英夫氏

Crisis of the WTO

- 3 key functions of the WTO are all disfunctioning
- Issues
 - Dispute settlement system: crisis of the Appellate body
 - Rule making functions
 - a) Liberalization of trade and investment
 - : FTAs and plurilateral agreements (environmental goods)
 - b) New rules of digital trade and e-commerce
 - : G20 Osaka Track 2019
 - c) China's SOEs and industrial subsidies
 - : China Manufacturing 2025
 - d) Alignment of trade and environmental sustainability
 - : EU's Border Carbon Tax Adjustment
 - Compliance to the WTO rules
 - a) No definition of Developing countries
 - b) Notification and transparency requirement

SUZUKI HIDEO 1

WTO's role in fighting the COVID19 Crisis

- Can TRIPs help quicker distributions of vaccin
- WTO must fight against the protectionism and domestic subsidies of the economic recovery measures out of COVID19 crisis
 - reform of the dispute settlement system is ever more urgent
- COVID19 crisis may accelerate rule making of the digital trade and e-commerce
- Green Recovery Policy : compatibility with the WTO rules or need for new rules

1

Japan and EU Partnership

- Japan and EU fully share the importance of multilateral rules-based trade and investment system
- President Trump's America First Policy is a big obstacle: wait for US political change
- Setting basic principals and directions by Trilateral Meeting of the Trade Ministers
- Collaboration in Negotiations in Geneva
- Rules of CPTPP shall be a guiding principal informing new rule making in the WTO
- Upgrading plurilateral agreements

Part 2 Panel 2

①石黒 憲彦氏

Orchestrating a brighter world **NEC**

New Technologies Towards 'New Normal' Era

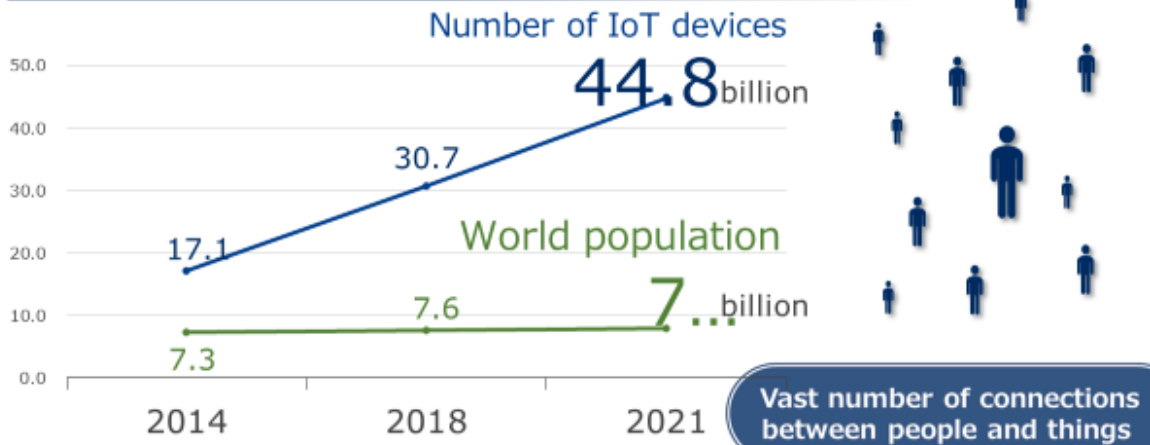
October 8, 2020

Norihiko Ishiguro

Senior Executive Vice President and Member of the Board
NEC Corporation

Progress of Digital Transformation

Wave of rapidly progressing digitization



2

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Orchestrating a brighter world **NEC**

5G Deployments for Telecom Operators

World first commercial 5G Open RAN

NTT docomo

- NEC integrates its 5G RAN Radio Unit via O-RAN compliant Open Front haul in NTT DOCOMO network
- Best-of-breed selection to suit for different scenarios – NEC proactively participated for the RAN multi-vendor interoperability



World first commercial 5G Open virtualized RAN

Rakuten Mobile

- NEC provides network optimization service for fully virtualized, end-to-end cloud-native 5G network
- NEC deploys O-RAN compliant RAN Radio Unit with Massimo MIMO antenna and cloud-native converged 5G Core







3

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Value required under the influence of COVID-19

 Remote/Touchless	Visualize non-mask / fever people by remote video and non-contact sensing in real time.
 Automation	Realize business continuity and infection prevention by remote device control and unmanned transport.
 Trust	Protect privacy and safely exchange information such as quarantine or medical history.
 Resilience	Understand people flow and logistics in real time and flexibly optimize the supply chain.

Orchestrating a brighter world

NEC

Panel 3

①細谷 雄一氏

4th JEF-DGAP International Symposium, “A Brave New Economic World Order”

October 8, 2020

Panel 3: The Role of Japanese and European Connectivity

Japan’s Strategy for the “Free and Open Indo-Pacific” Vision

Yuichi Hosoya (Keio University)

1. Connective “Two Continents” and “Two Oceans”

- Japan aims to connect sub-regions within the Indo-Pacific region to accelerate economic growth.

“Japan has been promoting the “Free and Open Indo-Pacific Strategy.” The Indo-Pacific Ocean links rapidly growing Africa, the Middle East, Asia, and North America. It is indispensable for Japan, US, and like-minded countries such as India and Australia to maintain and develop a free and open maritime order based on the rule of law in this region. ... Japan also intends to pursue economic prosperity through the reinforcement of connectivity by improving infrastructures, such as seaports and railways and roads.” (Speech by Foreign Minister Taro Kono at Columbia University “Diplomacy in Creeping Crises”, September 21, 2017).

Japan has been connecting “**two continents**” and “**two oceans**”. The aim is to improve “connectivity” between Asia and Africa through free and open Indo-Pacific, and promote stability and prosperity of the region as a whole.

2. Three Pillars of the “Free and Open Indo-Pacific” Vision

- ① **Freedom of navigation and the rule of law:**
- ② **Connectivity:**
- ③ **Capacity building:**

*“The Indo-Pacific region, which extends from the Asia-Pacific through the Indian Ocean to the Middle East and Africa, is **the core of global development** where more than half of*

*the global population resides. I am sure that **maintaining and strengthening a free and open maritime order of the Indo-Pacific region as a “global common” will bring stability and prosperity** equally to all countries in this region.*

(Foreign Minister Taro Kono, Foreign Policy Speech to the 196th Session of the Diet, January 22, 2018).

3. The Co-existence of the Two Strategies

- Prime Minister Shinzo Abe clarified that Japan was ready for supporting China's Belt and Road Initiative (BRI) with conditions.

“Reversing his position, Prime Minister Shinzo Abe has indicated that Japan is ready to cooperate with China’s “One Belt, One Road” (OBOR) initiative for cross-continental infrastructure development under certain conditions. He is also now willing to consider Japan joining the China-initiated Asian Infrastructure Investment Bank (AIIB) — of which Japan, along with the United States, sat out when it was set up in 2015 — once doubts about its governance and operation are cleared.”

(“The Editorial: Japan and ‘One Belt, One Road’”, *The Japan Times*, June 24, 2017)

-At the Japan-China Summit meeting on July 8, 2017, Prime Minister Shinzo Abe and President Xi Jinping shared the following view.

*“Japan and China will discuss **how to contribute** to the stability and prosperity of the region and the world, **including the One Belt, One Road initiative.**”*

-Prime Minister Abe and Prime Minister Li Keqiang reaffirmed the importance of coordinate Japan's and China's strategy for the regional stability and prosperity at the summit meeting on November 13, 2017.

*“Both sides shared the view that they will discuss approaches for Japan and China to contribute to the stability and prosperity of the region and the world, **including “the Belt and Road Initiatives.”***

4. The Limit in Japan-China Cooperation

- Japan's approach to the FOIP has become less dynamic as the current U.S.-China's rivalry becomes more tensed than before.

- PM Abe remains firm on his strong belief in the importance of the U.S.-Japan alliance as the cornerstone for the stability in the Indo-Pacific region. However, both President Trump and President Xi, leaders of the two strongest powers, are much less so.
- In the current environment, Japan's government continues to enhance its partnership with like-minded powers, such as the UK, France, Australia, India, Canada among others. As the key country that created both the TPP and the EU-Japan EPA/SPA, Japan needs to further consolidate the rules-based international order which is based on important norms such as democracy, free trade, human rights and freedom of navigation.

5. Japan's Strategy for a Stronger Japan-EU Partnership

- Under the increasing confrontation between the U.S. and China, Japan is enhancing its cooperation with the EU to consolidate the rules-based connectivity.

"We are in an age where the values and principles we have held dear could waver or drift. And yet the EU and Japan, two poles on both ends of Eurasia, forged an SPA and made it begin with a resounding declaration. / The declaration made is that Japan and the EU are able to continue their deep and long-lasting cooperation as strategic partners because they share common values and principles. That is because those values and principles constitute the basis for their cooperation."

"Whether it be a single road or a single port, when the EU and Japan undertake something, we are able to build sustainable, comprehensive, and rules-based connectivity, from the Indo-Pacific to the Western Balkans and Africa. / We are able to engender connectivity that is not merely "connecting things" but rather "connecting things well."

(Speech by Shinzo Abe, "Japan and the EU: The Strong and Steady Pillars Supporting Many Bridges"– Keynote Speech by the Prime Minister at the Europa Connectivity Forum, September 27, 2019)

Panel 3

②小掠 義之氏



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Countering the Coronavirus Crisis and Beyond: Toward Sustainable Global Growth and Geopolitical Stability

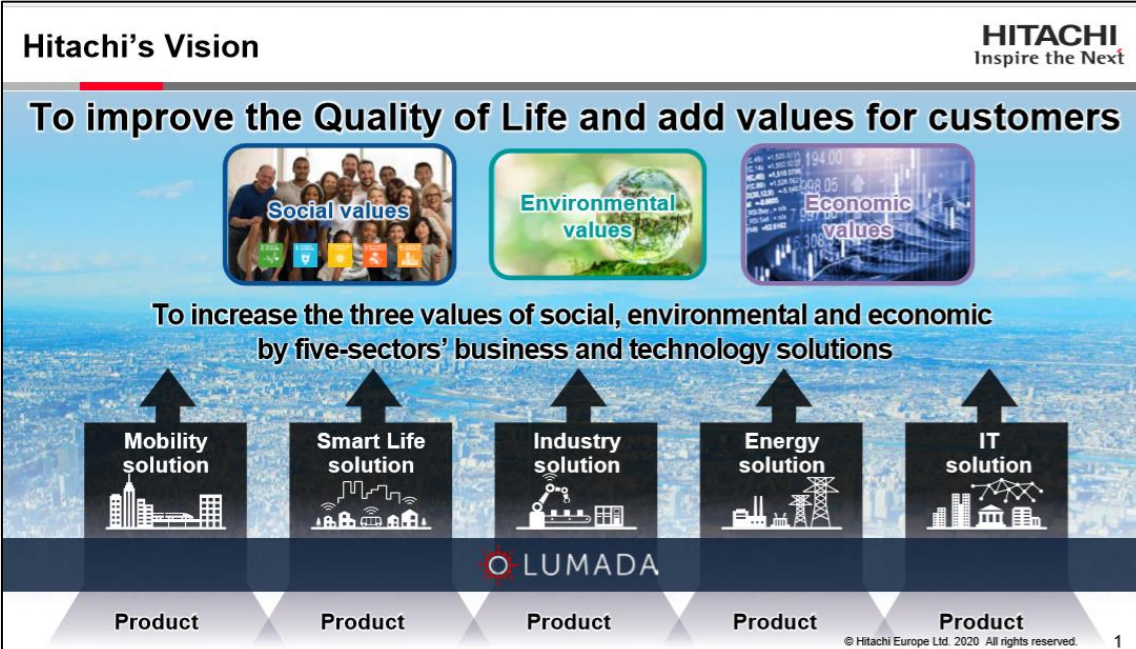
The Role of Japanese and European Connectivity

October 8, 2020

Yoshiyuki Ogura


Senior Executive Advisor of Hitachi Europe Ltd.
Managing Director of Hitachi Europe GmbH

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Hitachi's Vision **HITACHI**
Inspire the Next


To improve the Quality of Life and add values for customers



Social values




Environmental values




Economic values


To increase the three values of social, environmental and economic by five-sectors' business and technology solutions




Mobility solution




Smart Life solution



Industry solution



Energy solution



IT solution

LUMADA

Product

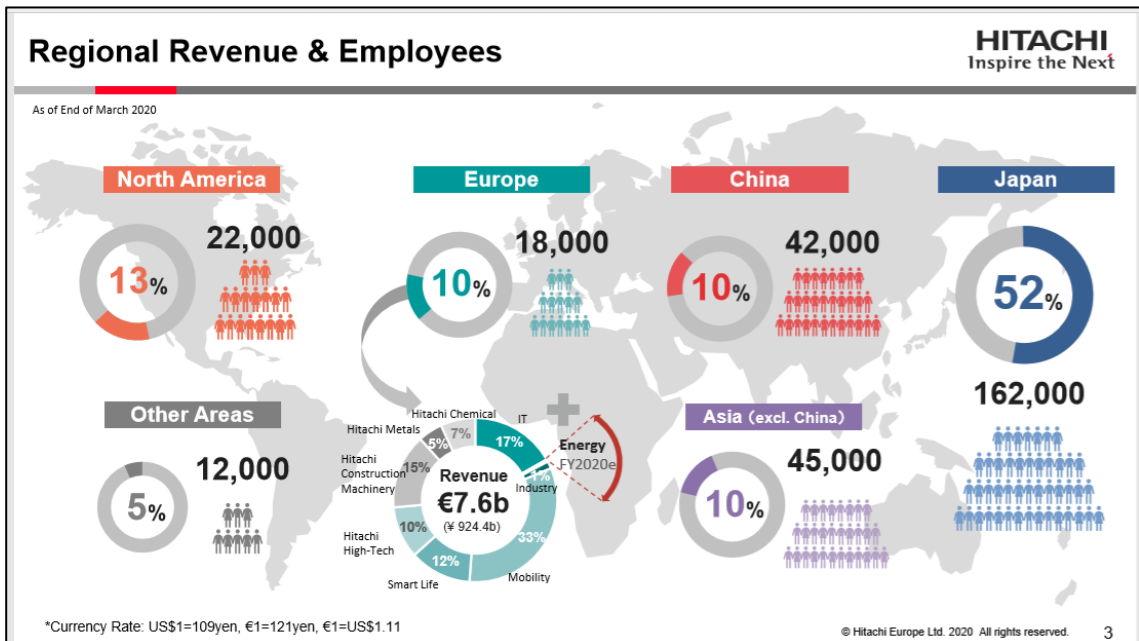
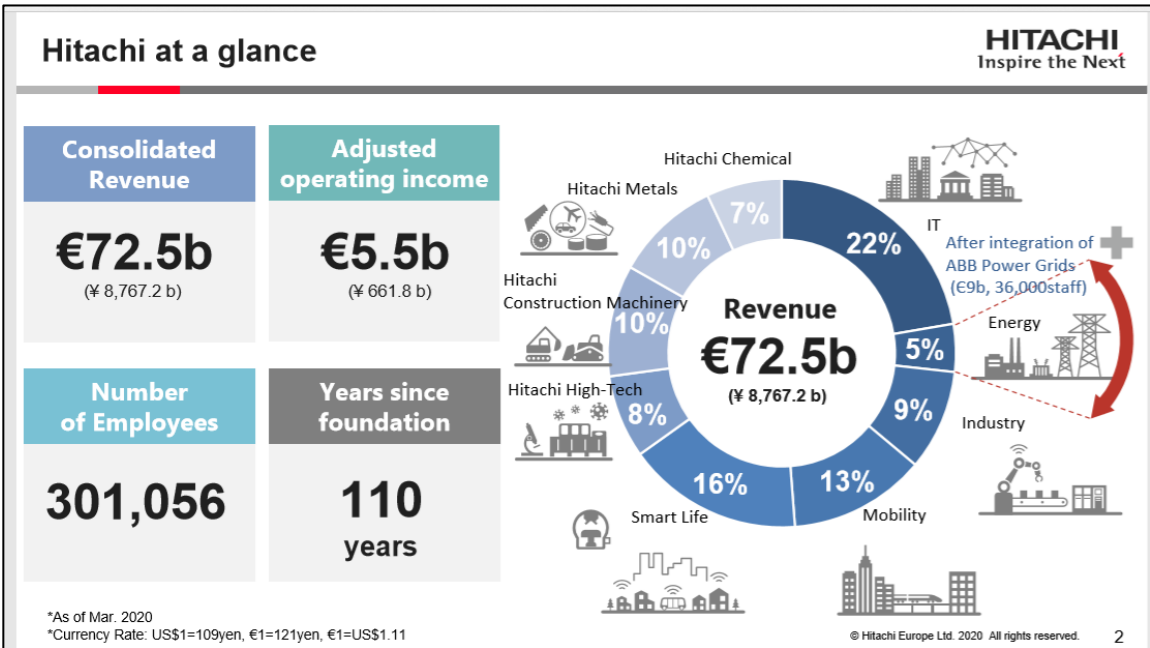
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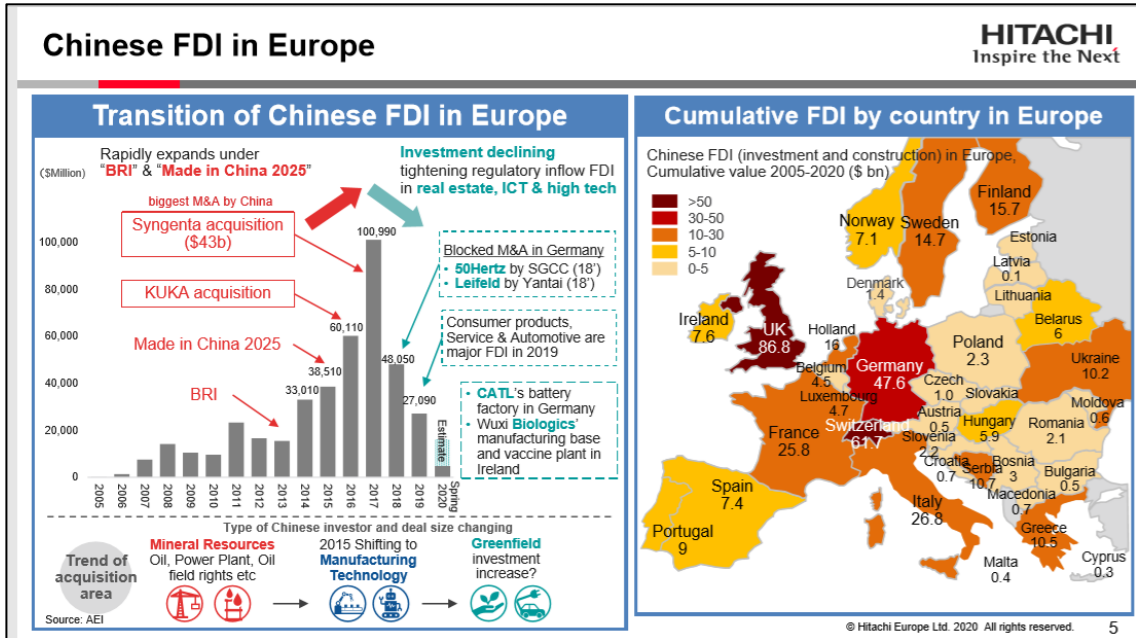
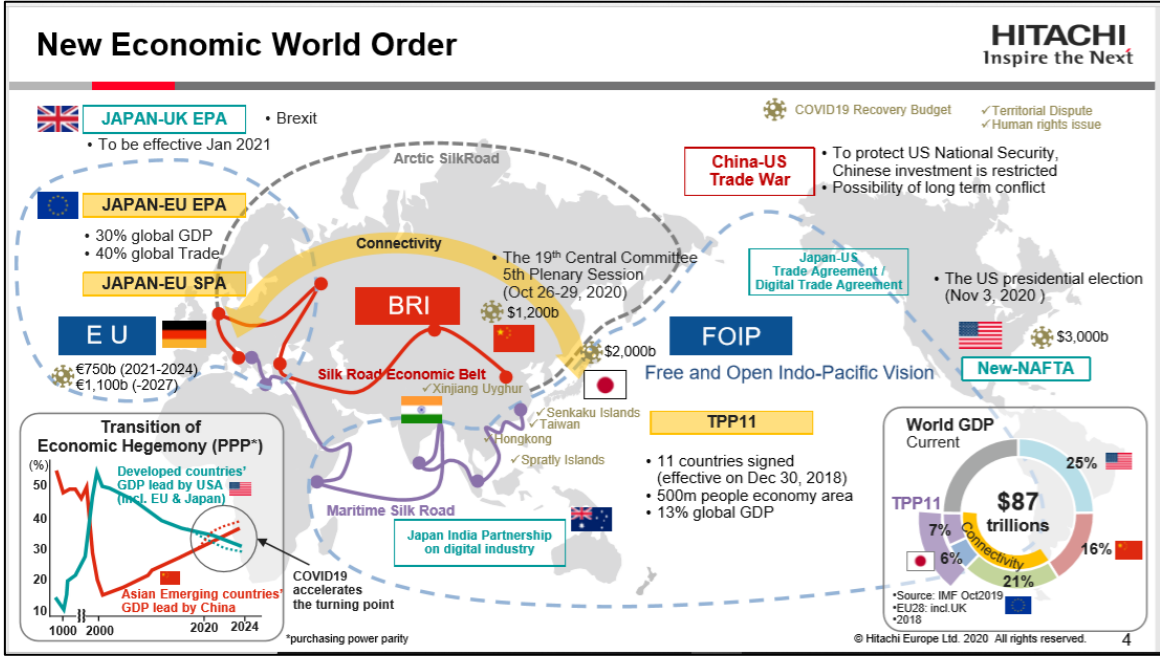
Product

Product

Product

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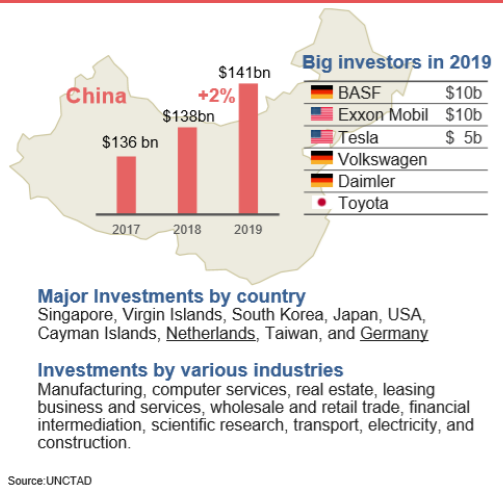




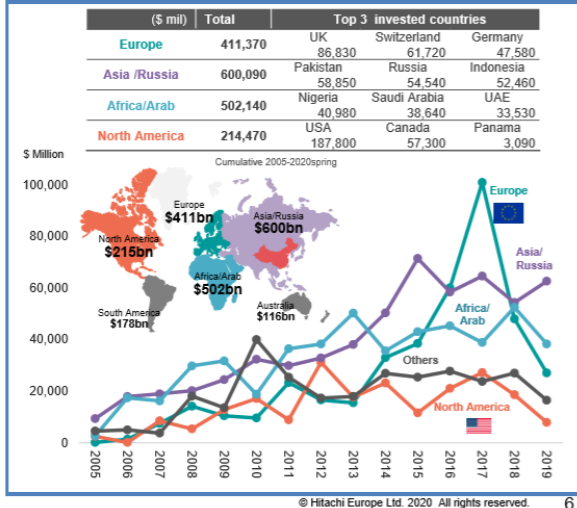
Chinese FDI Inflow & Outflow

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FDI Inflow Transition



FDI Outflow Transition



The Role of Japanese and European Connectivity

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Digital Enterprise and e-mesh SCADA

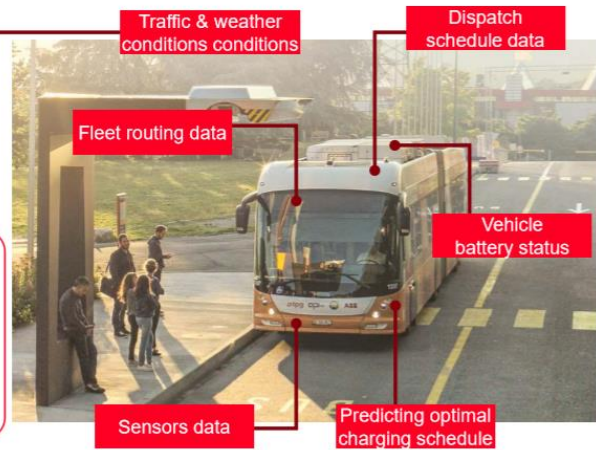
Supervision and orchestration

Electrified depot

- Grid connection
- Charging stations
- Battery storage

Depot functions

- Concurrent charging
- Charge needed based on dispatched route
- Condition monitoring
- Load monitoring
- Maintenance



Hitachi's Role in European Connectivity Mobility

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Hitachi Rail Ltd.
Class 395, Dynamic Headway Solution, Inno Trans, Battery Trains, Frecciarossa 400km/h, double-deck

Hitachi Ltd.
Traffic Simulation, Time Schedule Optimization, Ticketless Solution, Predictive Maintenance, Hydrogen-Hybrid (Fuel Cell) Railway

UX Manufacturing Delivery & Maintenance **DX System, Service & Operation**

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Hitachi's Role in European Connectivity Healthcare

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Hitachi contributes to the health of people around the world for more than 40 years in collaboration with Roche Diagnostics

System Collaboration Business

HITACHI Instruments Reagents → **Roche** Instruments Reagents → **Customers**

Timeline:

- 1971: First CC analyzer launched in Japan (Model 400)
- 1978: Distribution agreement BM/Hitachi
- 1996: Elecsys2010 (First IA analyzer)
- 1997: BM acquired by Roche
- 2006: cobas5000 1st cobas platform by RD/HHT
- 2009: cobas8000 Launch
- 2018: Roche/Hitachi 40th anniversary in 2018

cobas[®] Serum Work Area Systems
> 80,000 installed
analytical units worldwide!

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Germany-Japan Collaboration for Digital Society
Industrie 4.0 & Society 5.0

HITACHI
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Published the Vision of Human-Machine Interaction in Digital Society



Leader
Prof. Kagermann



Co. Leader
Dr. Nonaka

Stepping forward from the discussion that digitalization will replace human to machine, a way of coexistence between human and machine was proposed, where human can perform their creativity for lifetime.



Project Organization



acatech Discussion Paper
Revitalizing Human-Machine Interaction for the Advancement of Society

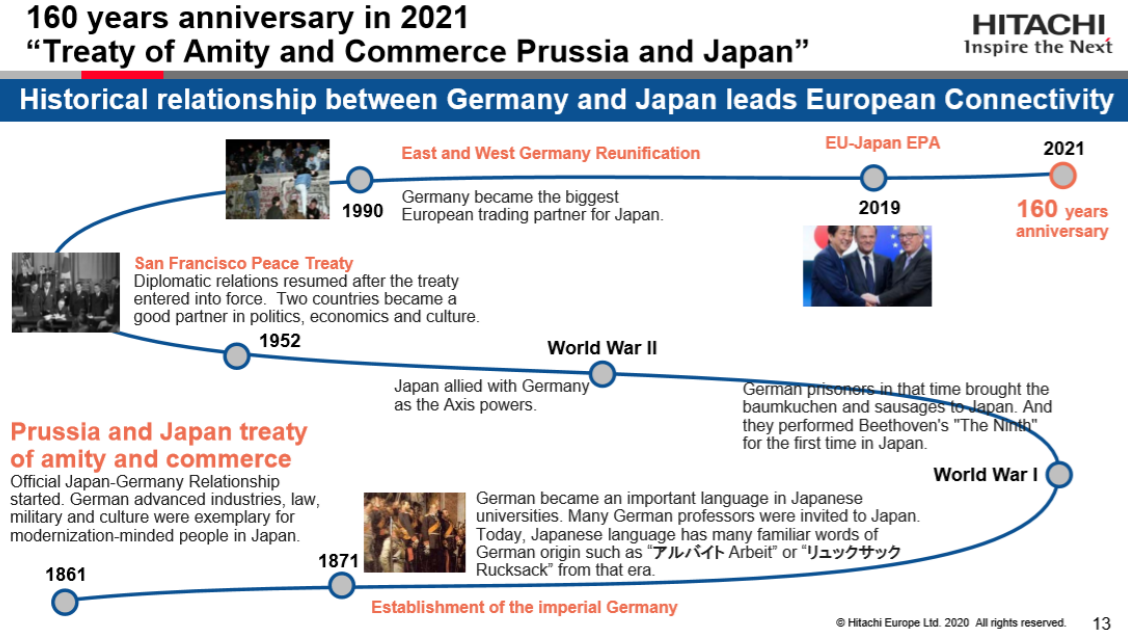
<https://en.acatech.de/publication/revitalizing-human-machine-interaction-for-the-advancement-of-society-perspectives-from-germany-and-japan/>

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160 years anniversary in 2021
“Treaty of Amity and Commerce Prussia and Japan”

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Historical relationship between Germany and Japan leads European Connectivity



1861 Establishment of the imperial Germany

1871 Prussia and Japan treaty of amity and commerce
 Official Japan-Germany Relationship started. German advanced industries, law, military and culture were exemplary for modernization-minded people in Japan.

1952 San Francisco Peace Treaty
 Diplomatic relations resumed after the treaty entered into force. Two countries became a good partner in politics, economics and culture.

World War I
 German became an important language in Japanese universities. Many German professors were invited to Japan. Today, Japanese language has many familiar words of German origin such as “アルバイト Arbeit” or “リュックザック Rucksack” from that era.

World War II
 Japan allied with Germany as the Axis powers. German prisoners in that time brought the baumkuchen and sausages to Japan. And they performed Beethoven’s “The Ninth” for the first time in Japan.

1990 East and West Germany Reunification
 Germany became the biggest European trading partner for Japan.

2019 EU-Japan EPA

2021 160 years anniversary

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160 years anniversary in 2021
"Treaty of Amity and Commerce Prussia and Japan"

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Historical relationship between Germany and Japan leads European Connectivity



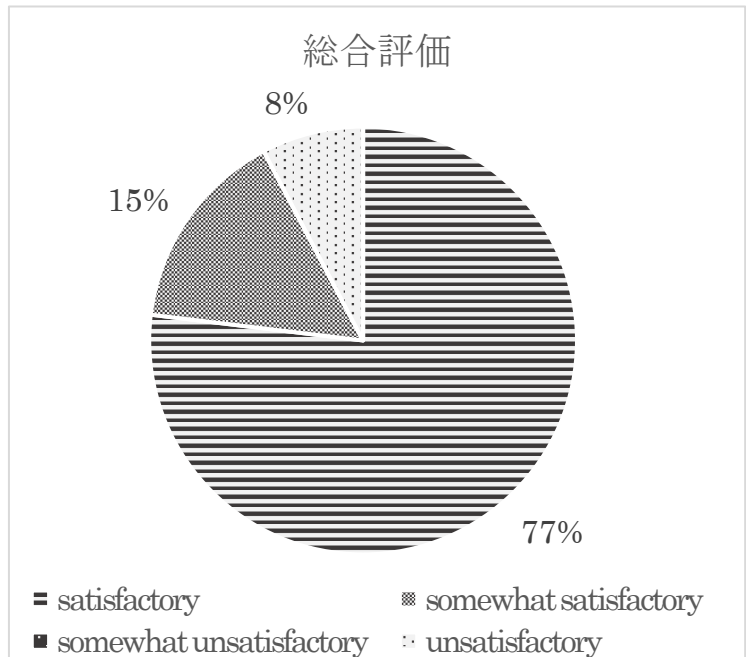
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8. アンケート集計報告

聴衆40名にアンケート調査を実施（回答者数13名／回収率約32.5%）

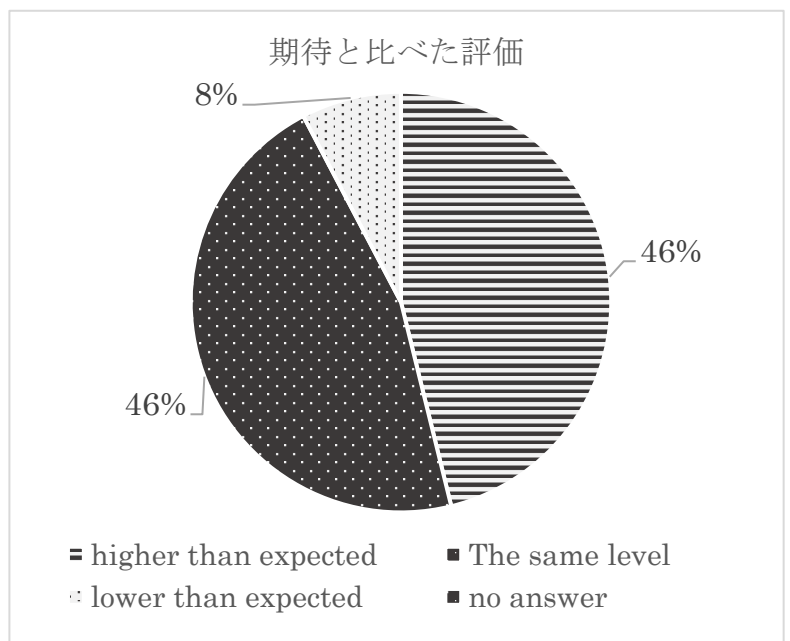
フォーラムの総合評価

評価	%
満足	77
やや満足	15
やや不満	0
不満	8
無回答	0



期待と比べた評価

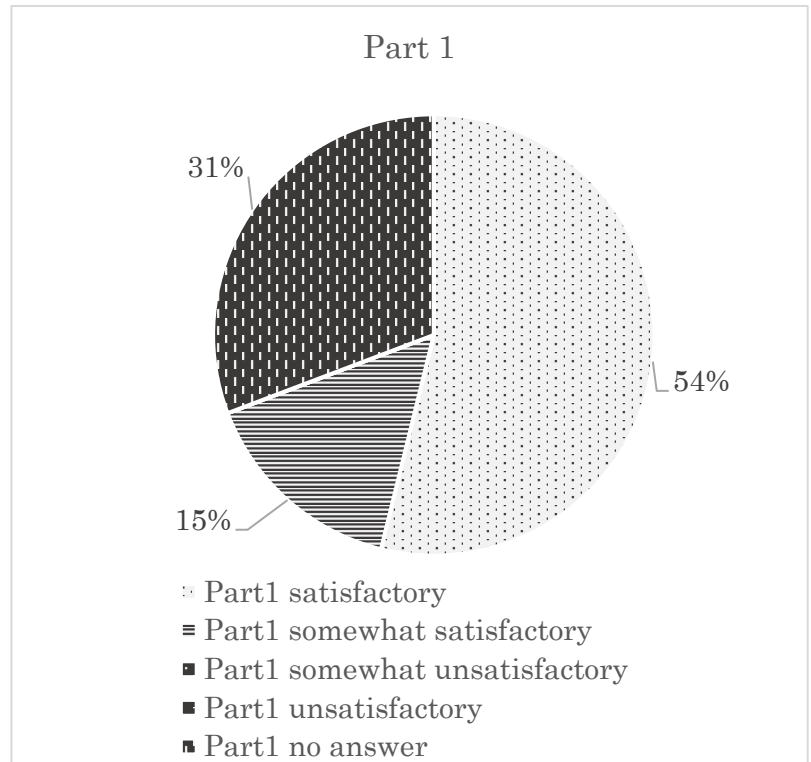
評価	%
期待以上	46
期待どおり	46
期待以下	8
無回答	0



Part 1 までの評価

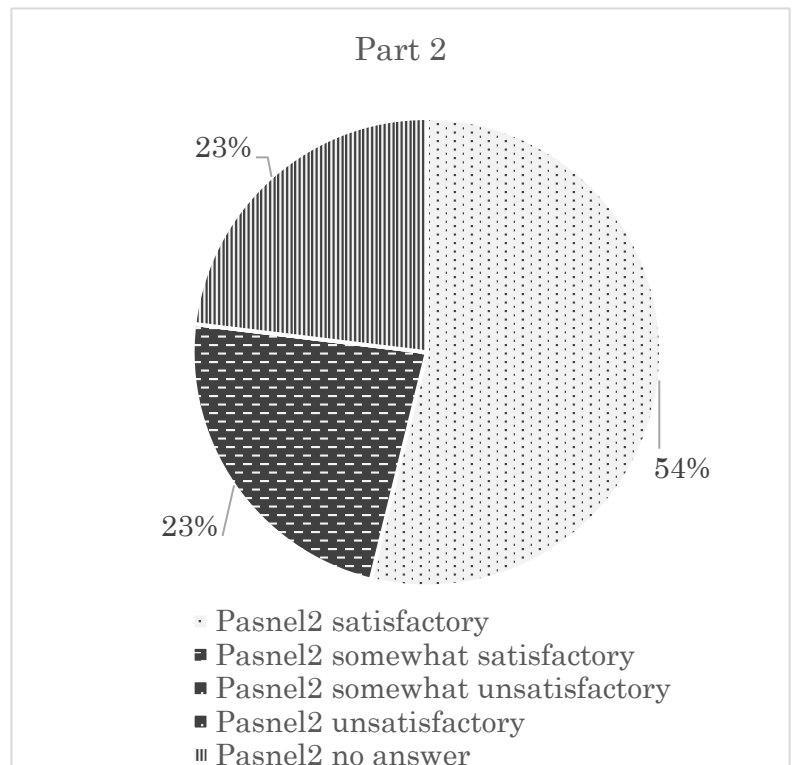
Part 1 :

評価	%
満足	54
やや満足	15
やや不満	0
不満	0
回答無し	3



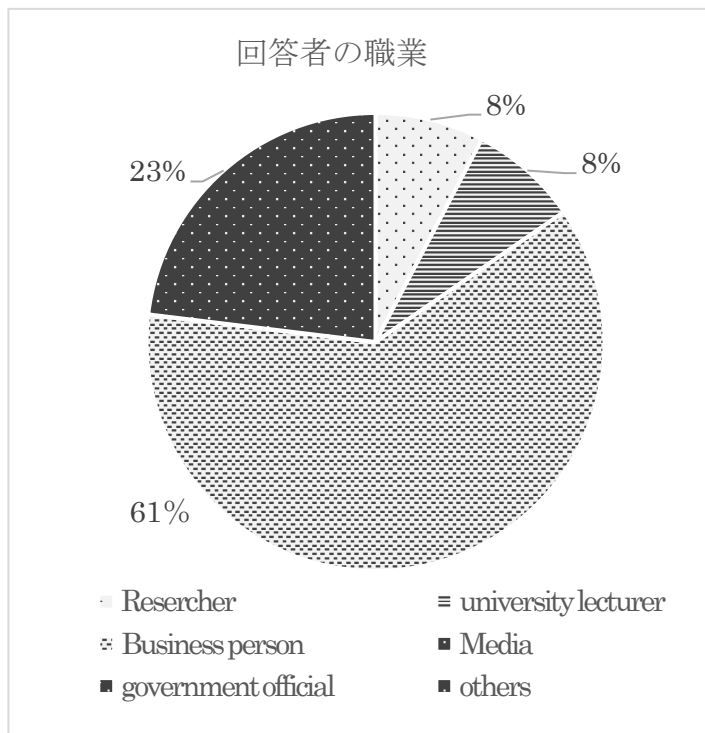
Part 2 :

評価	%
満足	54
やや満足	23
やや不満	0
不満	0
無回答	23



回答者の職業

職業	%
研究者	8
大学教員	8
ビジネスパーソン	61
メディア	0
政府関係者	0
その他	23
無回答	0



9. 活動と成果

1. 活動

当財団では、毎年世界の4つの地域にフォーカスした地域別フォーラムやダイアログを開催している。欧州においては今年で第13回目を数え、毎年、英仏独それぞれのシンクタンクと順に組んで、現地でフォーラムを開催して来た。2020年度の共催機関・ドイツ外交評議会（DGAP Consulting GmbH）とは、4回目の共催となったが、長引くコロナ禍にあって、当初は対面式で行う計画だったものを変更し、当財団にとって初めてのオンライン形式での開催とした。

フォーラムでは、これまで一貫した共通議題として双方の持続的な発展と世界への貢献について議論してきている。開催国それぞれが抱える固有の課題、成長抑制要因などを取り上げ、解決策を見出して実行に結び付けるための政治経済等、複眼的な情報・意見交換と学習の場としても役割を果たしてきた。今回はその観点を持ちつつも、世界中どの地域にも差別なく蔓延した、コロナウィルスの与える社会経済的な影響について、両地域がどのような貢献をすることができるのかが大きな課題として取り上げられた。

これまでも、我々は世界の秩序を揺るがす自国第一主義やポピュリズムの台頭と多国間主義の弱体化、グローバルガバナンスにおけるリーダーの欠如、自由貿易の混迷とその間をついた中国の対外行動の大胆な変容から、地政学的な変化を踏まえた日欧の役割について話し合ってきた。議題は年々増える一方だが、今回はこれに加え、混迷度に追い討ちをかけたコロナ禍の影響を話し合う絶好の機会となった。

フォーラムは二日間にわたり“A Brave New Economic World Order”をメインテーマに、以下2パート3パネルで構成された。

Part 1 : Recovering from a Global Pandemic

10月7日（水）

Panel 1: Restoring Growth in Global Trade and Investment After the
Coronavirus Pandemic

10月8日（木）

Panel 2: New Rules for New Technologies: Industry 4.0 and Beyond

Part 2: Countering the Coronavirus Crisis

Panel 3: The Role of Japanese and European Connectivity

各パートの概要は、スピーカーの 5 分間プレゼンテーション及びその後の質疑応答で構成された。以下は、その内容。

1. 第一部 (Part 1)

「世界的な流行病であるコロナウィルスからの回復」を如何に果たすことができるのか、パネル 1, 2 の各回で登壇者を替えながら、モデレーターを含めドイツ側 2 名、日本側 2 名でディスカッションを行なった。

(1) パネル 1 (Panel 1)

ここでの問題意識は、「コロナ後の世界貿易と投資における成長回復」である。既に以前から兆候が明らかだった政治経済的課題、すなわち多国間主義の危機的弱体化に影響を及ぼした反グローバル主義や保護主義、ポピュリズムはこのパンデミックを経て更に激しくなったが、WTO は効果的な解決策を示せるのか、経済連携協定は多国間主義を復活させることができるのか、パンデミックにおいて生活に必須の医療用品等の生活必需品の輸出規制はどうあるべきか、パンデミック後にどう日独が世界貿易投資を支援していけるかについて話し合った。聴衆も含めたディスカッションの主な内容は以下のとおり。

- ・多国間貿易の危機はコロナウィルスの勃発よりずっと前に遡る。米国による上級委員会の委員の任命に対する妨害や、全員一致による合意など、透明性が確保された場合のみ機能する WTO は、今や解決策を提示することができないでいる。この時代にあり、デジタル貿易、電子商取引、デジタル化が進んだが、いずれも WTO の対象になっていない。今は複数当事者国間 (plurilateral) イニシアチブや協定が重要な位置を占めるようになった。製造業・輸出志向の国である日独はルールに則った貿易を強調していくしかない。

- ・過去 10 年間で保護主義が蔓延し、コロナ危機でピークを迎えた。メンバー国でもある米国・中国などのユニラテラリズムが WTO 組織にダメージを与えた。コロナ禍にあっても、もし WTO がデジタル貿易のグローバル・ルール設定に加え、例えば生活必需品の輸出規制を抑制し、世界のバリューチェーンの崩壊を防いで医薬品・医療機器の関税撤廃するための答を見つけることができれば、今後の存続への妥当性が認められるだろう。日本はその間、紛争解決に向けた臨時上訴機関の設立イニシアチブに加わってほしい。米国の新政権下で状況好転を望む。

- ・独では 2/3 の企業、特に中小企業が WTO ルールに依存しており、その妥当性が強調されるべき。グローバル・ルールに基づいたシステムに依存する企業は、変更が頻繁に行われる FTA ではなく、WTO が網羅するルールで全てが対応できればそれに越したことはない。e コマースや気候変動の基準についても早急な交渉進展が重要。米・中デカップリン

グはマクロトレンドであり、重要なのはEUのビジネスが自律性を保ちオープンであり続けて保護主義に陥らないことだ。

- ・グローバル貿易と輸出規制は相反するものであり、特に医療機器に関しては完全な自国生産は無理。輸出規制は相手国に対する信頼感のなさが原因であり、まずはそのバリュー/サプライチェーンの中で信頼を回復させることに焦点を絞り、すべての国に必要な機材・備品が確保できるようにすべき。

- ・貿易制裁は分裂したビジネス環境の中で益々使用頻度の高い手段になってきているが、国家安全保障に関わるためWTOには対抗策がない。今後益々制裁活動が盛んになればWTOの妥当性は失われかねない。

- ・WTOリフォームの一つとして決定事項を全会一致ではなく、ガイドライン設定する方法ではうまくいかない。紛争処理の最高機関である上級委員会を再度機能させるなど、強制力がなければならない。その場合は、各署名国が内容に責任を持つ複数当事者国間協定(plurilateral agreements)に持っていく方が意味がある。

(2) パネル2 (Panel 2)

ここでは、「インダストリー4.0とその後の新技術に対する新しいルール」について議論すべく、デジタル貿易と自由なデータ流通と保護といった新技術の活用に関する新しいルール及びデジタルデータを占有する米テクノロジー企業のビッグ5についても着目し、日欧はその中で自分たちをどう位置付けるべきなのか、以下のポイントを取り上げた。

- ・中国はISOや国際的な電子評議会、通信連合会等においてプレゼンスを著しく高めている。同国の2023年戦略では、自国基準を世界技術基準として策定すべく動いている。この動きにバランスさせるべく日欧は協働すべきだが、EUがPPP(Public Private Partnership)で動いている一方、中国側は国有企業のため5Gの基準づくりでもアクションが非常に速かった。これに学び、次なる6Gでは日欧も準備し座を取るべき。

- ・公共セクターと民間の情報交換と協力は重要度も増しており、国もビジネス界の抱える課題、ニーズ、受け止め方を踏まえたルール作りを行うことが必須となっている。急発展するデジタル貿易等、スピード感を持って対処すべき分野ではリアルな状況を反映させることができるビジネス界が国家間の交渉やルール策定を加速させることができる。

- ・中国を民主主義に対する脅威と位置付けたスピーカーも多かったが、一方で同国は経済的に困窮する国々にかなり魅力的な支援パッケージを提供している。しかし、多くの国や市民は中国と協力することによる脅威にも気づかなくてはならない。そしてEUや日本は技術的にも経済的にも同等の選択肢を提示できるようにしなくてはならない。

2. 第二部 (Part 2)

「コロナ危機に立ち向かうために」「世界の持続的な成長と地政学的安定を求めて」最終パネルではモデレーターを含めドイツ側 4 名、日本側 3 名が登壇し、4 名がディスカッションを行なった。

(3) パネル 3 (Panel 3)

ここでは、コネクティビティ・他経済との相互依存関係の背景にある、地政学及び地経学（ジオエコノミクス）の観点から課題を深掘りした。主な意見は次のとおり。

・コロナにより世界的に、特に途上国のインフラ開発が滞っている今、立て直しに必要な経済的支援を行うメカニズムがない。こうした事案が次々デフォルトで中国の所有案件となることを防ぐためにも日欧で案件を救う手段を確立していくことを考えないとならない。また、経済のみならず、そうした国々には教育、特にインフラのライフサイクル・コストと経済・環境・生態学リスクを伝えていくことが重要。AIIB に加盟している EU には中国に対して WTO ルールに則り透明性の高い政府調達するよう奨励してほしい。

・コネクティビティとは、互いに絡み合った相互依存関係を指すが、貿易関係の強化など良い面と国家の安全保障への懸念を連想させるマイナス面がある。EU が目指す持続性のあるコネクティビティとは、デジタル、交通、エネルギー、ヒトの 4 本柱で、物理的なネットワーク作り、ゴールや価値を共有したパートナーシップ、民間の重要性を認識するという、三つの基準を作っている。底辺に流れる基本的な考え方は、環境や財政など持続性に対する包括的なアプローチの一つに過ぎない。

・EU が言う持続的なコネクティビティには 4 本の柱があり、デジタル、交通、エネルギー、ヒトにおける繋がりである。そこには三つの基準、物理的なネットワーク構築、共通ゴールと価値を持つ者とのパートナーシップ作り、民間の役割の重要性を認識していることがある。その根底にある二つの重要な原則は、環境や財政的観点を含む包括的な持続性があることであり、一者に頼り過ぎず、平等なビジネス環境があることである。

・今回のパンデミックは改めて多様性と弾力性のあるバリューチェーンや信頼のおける貿易関係（コネクション）の重要性を示してくれた。日欧両地域の繋がりには、スマートで環境に配慮した、持続性の高いものを追求すべき。また他のパネルでの議論同様、多国間情報シェアリングの重要性には力点を置きたい。持続性の低い投資を受けるリスクを防ぐために民間の役割をハイライトしたい。投資を呼ぶだけの魅力的な環境作りが先ず必要。

・パンデミックは折り返し点でもトレンドセッターでもなく、2008 年の金融危機に始まったトレンドを加速させただけだ。国内生産が顕著になるより、沿岸貿易、サプライチャー

ンの多様化を生んだ。そのため、第三市場や物流面でより大きな競争が起きるだろう。バリューチェーンの多様化で欧州にとってはチャンス。その意味で多国間主義という同じ価値観を持つ日欧関係はより重要になってくる。共に民間資本を動かし、異なる投資方法を示していく必要がある。超地域は大陸間と海上のコネクティビティというアプローチの違いにおいても互いに補完し合える関係にある。軸を東西に置くのか(中国)、南北にするのか(トルコ、イラン、ロシア、インド)により、どの国を巻き込むかが変わるため、コネクティビティ戦略を立てる際には、より大きな地政学的な図を描く必要がある。

- ・日欧が合同でより明確に一带一路に対応するためには、失敗案件にリファイナンスし所有権を中国から離すべき。

- ・現在のデジタルコネクティビティの状況を見ると、今そのためのルール作りを行うことで将来的にそれが巨大なパワーとなると認識しなければならず、日欧は規範と基準をもってより強固な同盟を組んでいく必要がある。ただ、民間企業も政治的ゴールに沿って活動できるような環境を作らなければ、戦略は実現できない。

2. 成果・反省点

今年度の開催は、2020年に入り蔓延したコロナウィルスの影響を踏まえ、従来ならば共催国で実施していたものを JEF 始まって以来のオンライン開催とした。

共催機関とは、リモート開催を感じさせずにどこまで臨場感溢れる議論ができるのか、プラットフォーム選択やセキュリティーの課題、スピーカーのオンライン参加可能性、操作性、質疑応答の方法等々、初回ならではの疑問を払拭すべくコミュニケーションを重ねた。実施当日まで心配は尽きなかったが、結果問題なく実行できた実績は、今後のオンライン・フォーラム開催への基礎ともなった。

対面開催には当然良さがあるものの、オンライン方式を採ったことにより両国からより多くの参加者を募ることが出来たメリットがあった。但し、世の中に手軽に参加できるウェビナーが急増したことによる飽和感もあり、引き続きスピーカーのみならず、財団がターゲットとする聴衆にもっと効果的にリーチする方法を模索したい。

このフォーラムでは、議論にもあったとおり、パンデミックの中でこれまで世の中にあった社会・経済に関する課題がより鮮明に、より深刻になった現状が分かった。また、その中で日欧、とりわけ日独が共通課題を認識するに至ったことは成果と考えられる。両国の政官学そして産業界から政策提言に影響力を持つ有識者がスピーカーとしてだけではなく、聴衆としても参加したこのフォーラムから、先が見通しにくい現状の打開につながるヒントが得られたとすれば大変幸いである。

以下は、アンケート結果であるが、今後は回収率も高めていきたい。

- (1) 参加者：日 本 側 スピーカー 7 名
ドイツ側 スピーカー 10 名
聴 衆 40 名
- (2) アンケート回答者：13 名（回答率 32.5%）
- (3) アンケート内容（全て%）
 - ① 総合評価 満足 77、やや満足 15、やや不満 0、不満 8（1 名）
 - ② 期待と比較してどう感じたか 期待以上 46、期待どおり 46、
期待以下 8（1 名）
 - ③ パート 1：満足 54、やや満足 15、やや不満 0、不満 0
（無回答 31）
 - ④ パート 2：満足 54、やや満足 23、やや満足 0、不満 0（無回答 23）
 - ⑤ 職業：研究者 8、大学教員 8、ビジネスパーソン 62、その他 23
 - ⑥ コメント（一部）：
 - Thank you very much for very informative and encouraging conference.
 - Very good discussion among speakers on the sessions of WTO reform
and possible cooperation beyond 5G.
 - Appreciate the good arrangement of the new environment of online
base seminar.

10. 共催団体紹介



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: www.jef.or.jp



The German Council on Foreign Relations

The German Council on Foreign Relations (DGAP) is committed to fostering impactful foreign and security policy on a German and European level that promotes democracy, peace, and the rule of law. Since its founding in 1955, the nonpartisan organization's members and research have continued to shape the debate on foreign policy issues in Germany.

DGAP's experts provide decision-makers in politics, business, and civil society with strategic advice based on their foreign policy research and train young professionals in international leadership programs.

Through its work, DGAP aims to:

- facilitate well-grounded foreign policy decisions
- promote informed debate on foreign policy issues in Germany
- further develop German expertise in foreign policy

For more information please visit: www.dgap.org

11. 事務局

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