



欧州から見た米中対立

伊藤 錬

1. 王毅訪歐(香港、チェコ、5G)



The infographic features a circular portrait of Wang Yi on the left. To the right, there are four blue circular icons: 'TIME', 'COUNTRIES', 'TOPICS', and 'FIRST'. The 'COUNTRIES' section displays the flags of Italy, Netherlands, Norway, France, and Germany. The 'TOPICS' section lists political and economic agenda, global industrial and supply chains, and multilateralism. The 'FIRST' section states it is Wang Yi's first overseas visit since the COVID-19 pandemic. At the bottom, the Global Times logo is present along with source and credit information.

TIME AUG 25 - SEP 1

COUNTRIES ITALY NETHERLANDS NORWAY FRANCE GERMANY

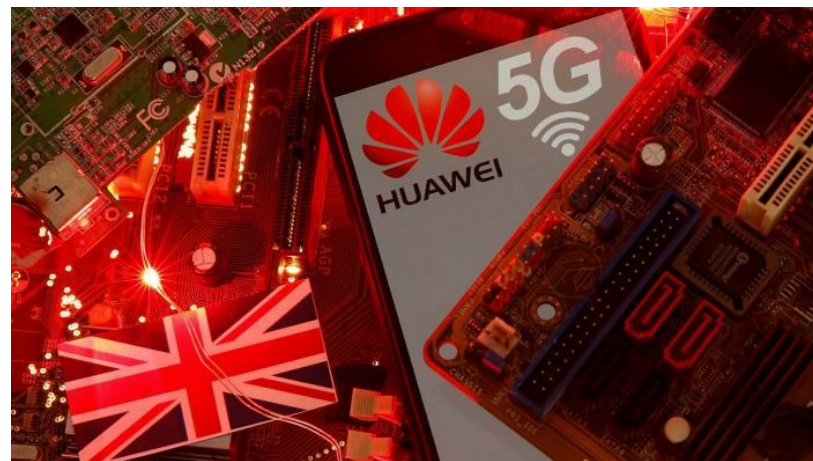
TOPICS Important political and economic agenda, global industrial and supply chains, multilateralism

FIRST It is Wang Yi's first overseas visit since the COVID-19 pandemic.

GLOBAL TIMES Source: Chinese Foreign Ministry
Editors and graphics: Global Times

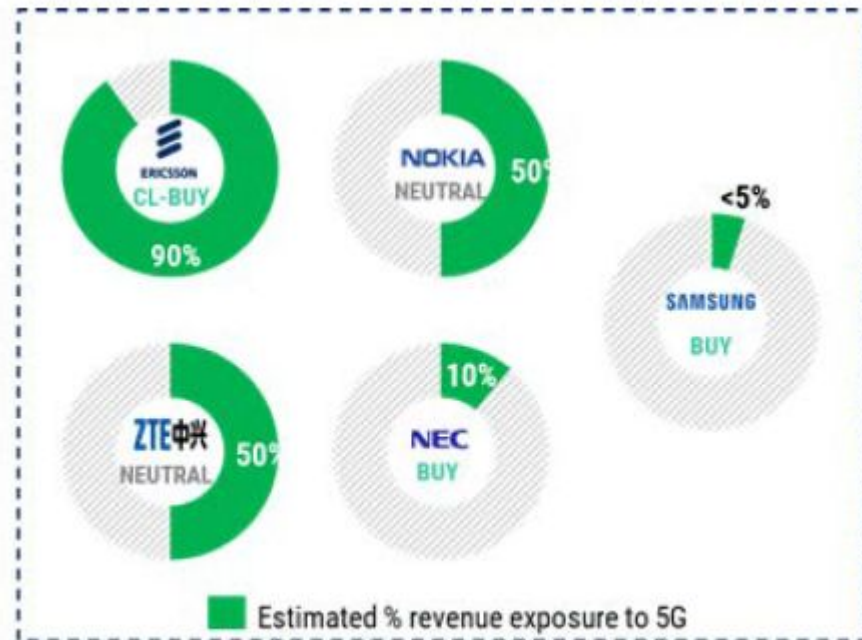
2. 5GネットワークからのHuawei排除

- 2020.7 イギリスの政策変更
- ・35%ルール(2020.1)の撤回
 - ・2027年までに購入済部品も撤去を完了
- 2020.10 ドイツの新規立法(予定)



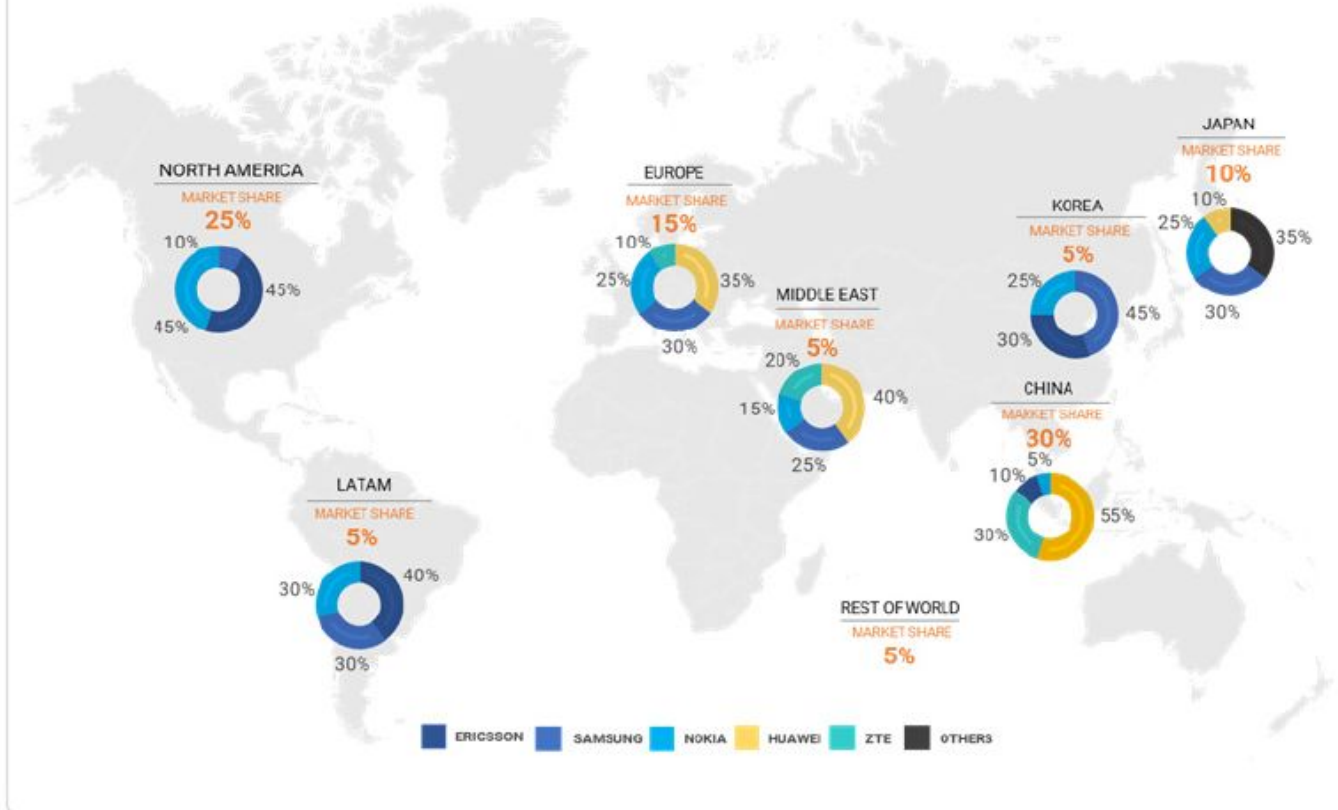
3. 欧州産業界の視点

- ・自前の5G技術への移行
 - Base Station (RAN)ベンダー
 - コアネットワーク(5GC)ソフトウェア
- ・中国の対欧直接投資



Source: Company data, Goldman Sachs Global Investment Research

Global Wireless Hardware: Market Share by Region



*For the Middle East, the Nokia market share includes other small players

Source: Goldman Sachs Global Investment Research



4. 米中「両にらみ」の本音

・「米国新政権にかかわらず、同盟の変質」

“(Biden will) re-design the (alliance) system, as opposed to simply maintaining it”

‘Shields of the Republic’

Mira Rapp Hooper

・「冷戦ではなく、第一大戦前夜(の英独)」

“More important parallel is the UK and Germany before 1914”

‘The War That Ended Peace: How Europe Abandoned Peace for the First World War’

Margaret Macmillan

5. 「西側」協力体制

・データプライバシー

・R&D

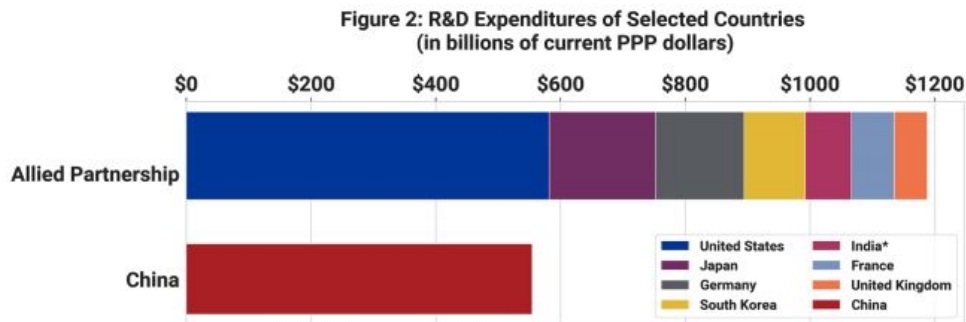
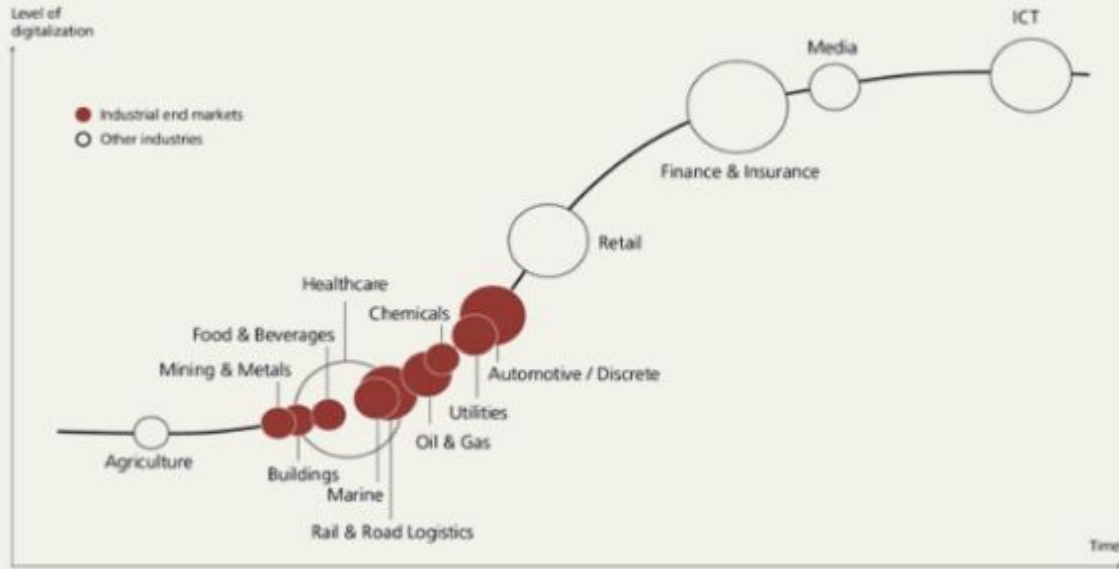


Figure 2: This figure shows the national R&D expenditures for the United States and six potential technical partner nations—Japan, Germany, South Korea, India, France, and the United Kingdom—that collectively make up more than half of the global R&D investment. Data is from OECD 2018 (except for India, which is a 2016 figure from the Global R&D Forecast 2018).⁴

Figure 1: Significant room for increased digitalisation across industries



Note: ICT = Information and Communications Technology

Source: ABB, UBS CIO research