

国際貿易と保護主義

International Trade and Protectionism

J4-230851

理科I類30組2年 理学部情報科学科

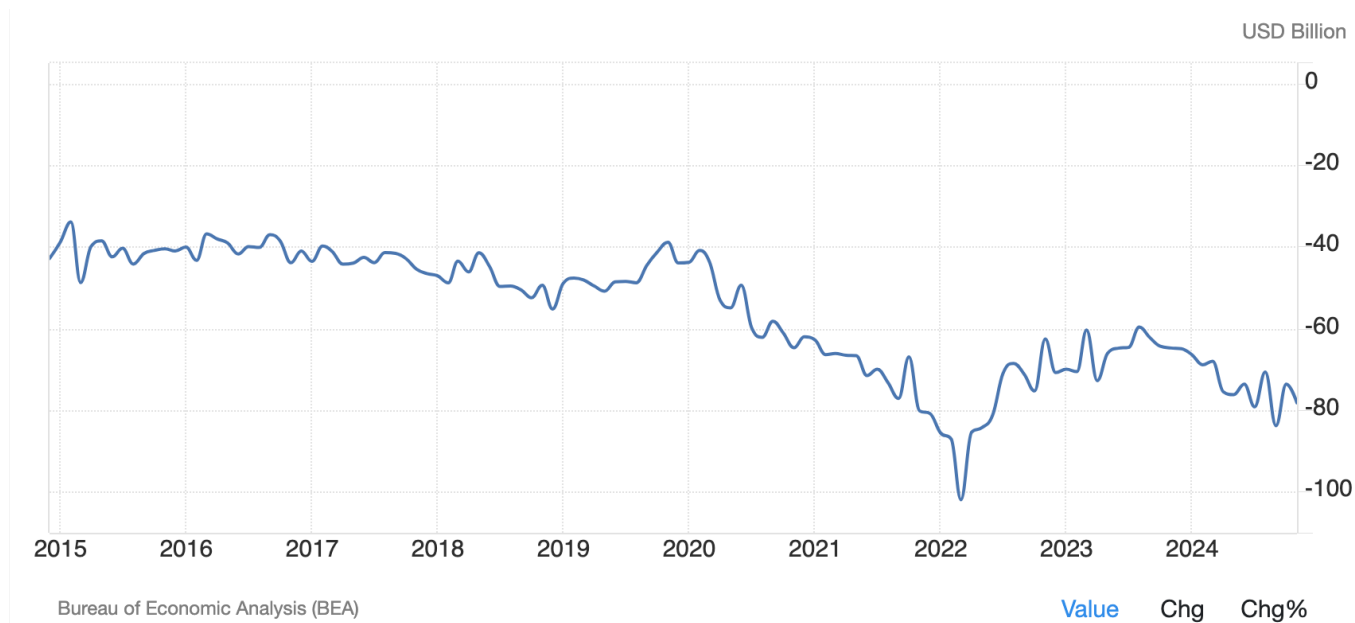
B.Y. Chen

発表の(おおよその)流れ

- ▶ 国際貿易の意義 → そもそも何で貿易をするのか
- ▶ 自由貿易
- ▶ 保護主義の台頭

根本的な問題：なぜ国際貿易をするか

- ▶ 国内で生産できないモノは輸入に頼らなければならない (e.g. ハイテク製品、エネルギー類 etc.)
- ▶ ただし、資源豊富で最先端技術も持つアメリカは世界最大規模の貿易赤字を抱えている → “やむを得ない”理由以外の要素の存在



絶対優位 (Absolute advantage)

- ▶ Adam Smithによって提唱された概念
- ▶ もしある国Aが他国Bに比べて効率的に（小さいコストで）財 x を生産できるのであれば、ある国Aは財 x の生産に関して**絶対優位**を持っていると言う

Maximum Output Table

	Chairs	Tables
A	40	20
B	20	40

2. Output after Specialization

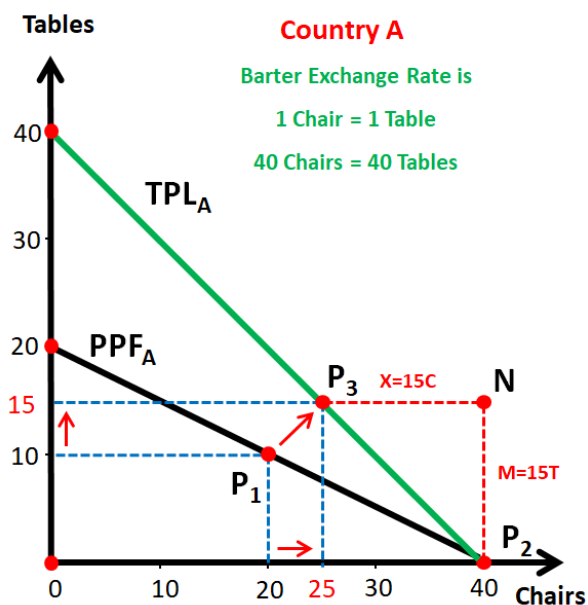
	Chairs	Tables
A	40	0
B	0	40

1. Self Sufficiency Output

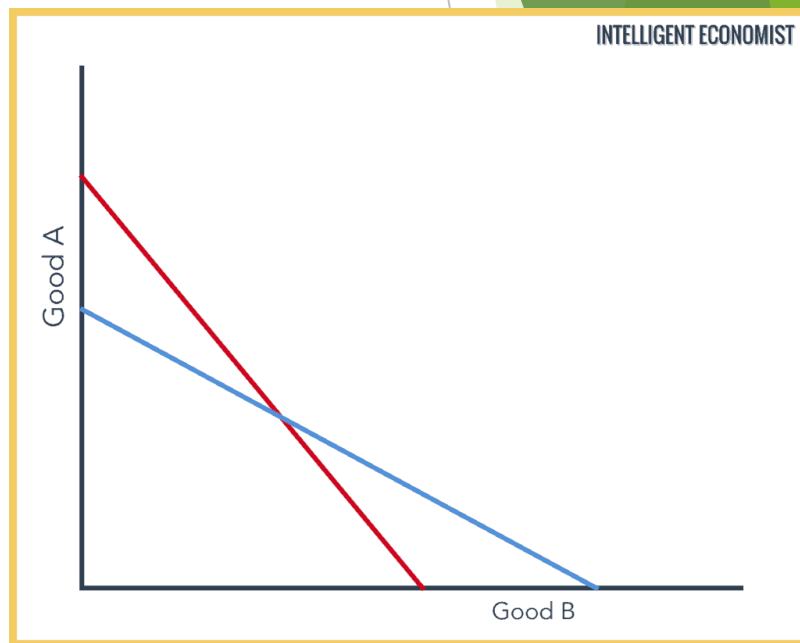
	Chairs	Tables
A	20	10
B	10	20

3. Output after Int'l Trade

	Chairs	Tables
A	25	15
B	15	25



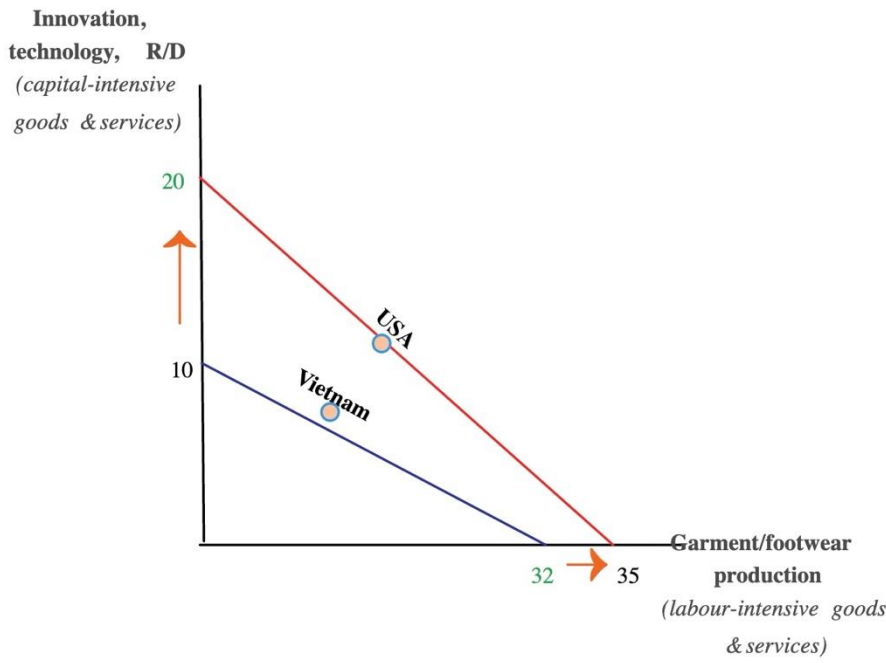
www.economicsonline.co.uk



- ▶ 各国は強み(絶対優位)を持つ産業に専念した方が良い（イメージとして、例えばシケタイの担当科目を割り当てるとき、各シケタイがそれぞれの得意科目を担当した方が効率が良い）

比較優位 (comparative advantage)

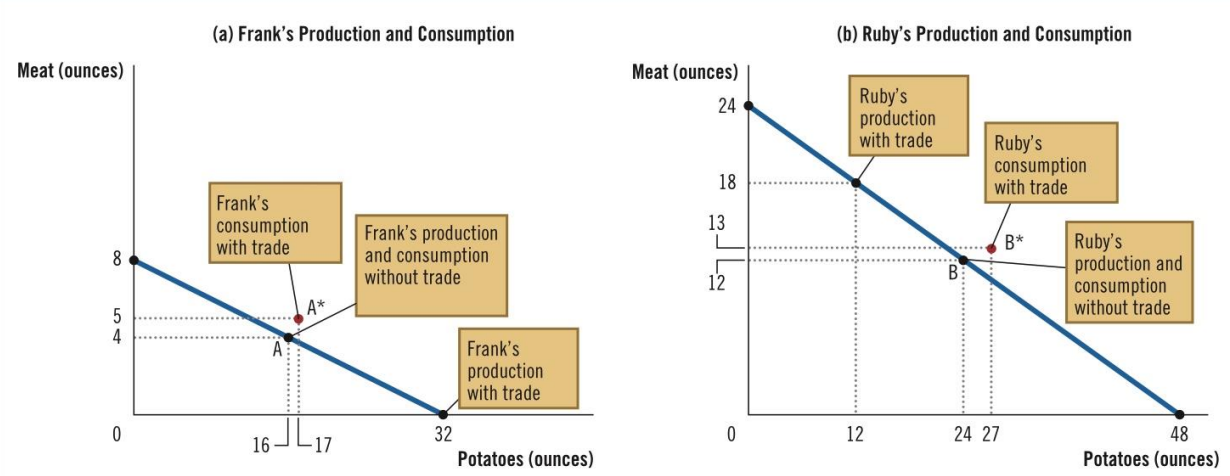
- ▶ Richardoが提唱
- ▶ 機会費用の少ない財の生産に特化すべき



各国は強み (絶対優位) を持つ産業が複数あるとき、その中でも最も強い方に集中すべき (どの科目も得意という天才がいるとしても、その人に全ての科目の試験対策を担当させるわけにはいけないので、最も得意な科目を担当してもらう、というイメージ)

Figure 2
How Trade Expands the Set of Consumption Opportunities

The proposed trade offers Frank and Ruby a combination of meat and potatoes that would be impossible without trade. In panel (a), Frank consumes at point A* rather than point A. In panel (b), Ruby consumes at point B* rather than point B. Trade allows each to consume more meat and more potatoes.



(c) The Gains from Trade: A Summary

	Frank		Ruby	
	Meat	Potatoes	Meat	Potatoes
Without Trade:				
Production and Consumption	4 oz	16 oz	12 oz	24 oz
With Trade:				
Production	0 oz	32 oz	18 oz	12 oz
Trade	Gets 5 oz	Gives 15 oz	Gives 5 oz	Gets 15 oz
Consumption	5 oz	17 oz	13 oz	27 oz
GAINS FROM TRADE:				
Increase in Consumption	+1 oz	+1 oz	+1 oz	+3 oz

国際貿易は輸出国に利益をもたらせる

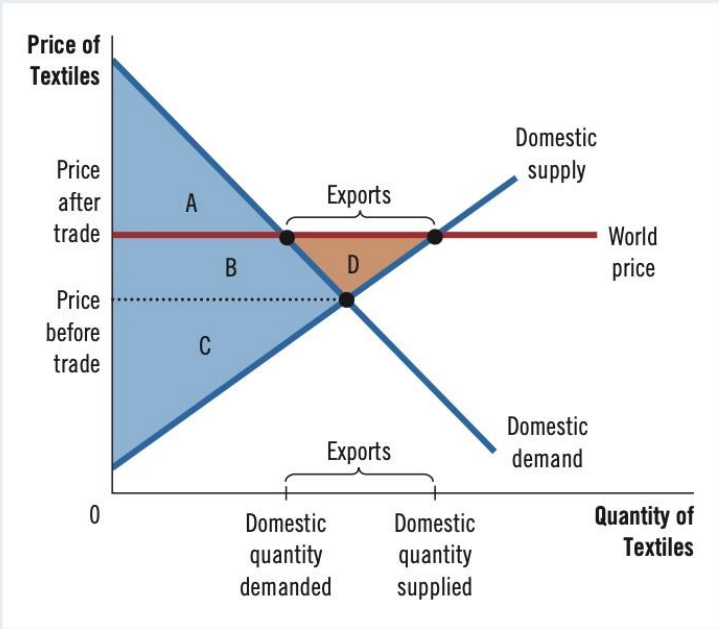
Figure 2

International Trade in an Exporting Country

Once trade is allowed, the domestic price rises to equal the world price. The supply curve shows the quantity of textiles produced domestically, and the demand curve shows the quantity consumed domestically. Exports from Isoland equal the difference between the domestic quantity supplied and the domestic quantity demanded at the world price. Sellers are better off (producer surplus rises from C to B + C + D), and buyers are worse off (consumer surplus falls from A + B to A). Total surplus rises by an amount equal to area D, indicating that trade raises the economic well-being of the country as a whole.

	Before Trade	After Trade	Change
Consumer Surplus	A + B	A	-B
Producer Surplus	C	B + C + D	+ (B + D)
Total Surplus	A + B + C	A + B + C + D	+ D

The area D shows the increase in total surplus and represents the gains from trade.



▶ 輸出国の生産者はより多くの利益を得られる

国際貿易は基本的に輸入国に利益をもたらせる

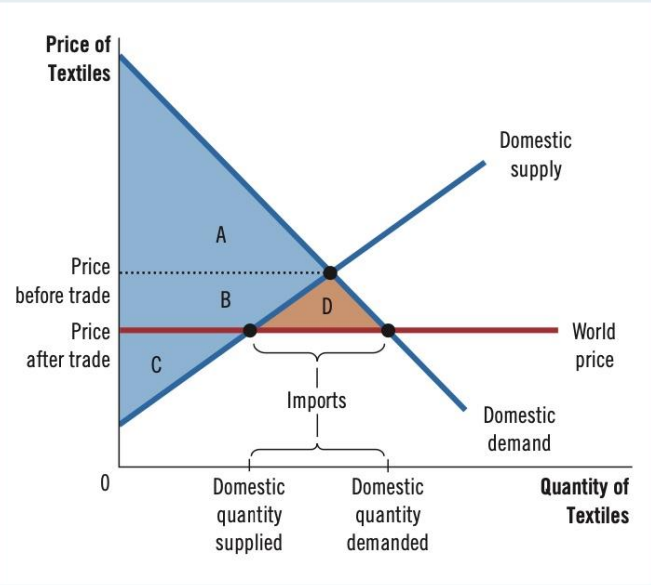
Figure 3

International Trade in an Importing Country

Once trade is allowed, the domestic price falls to equal the world price. The supply curve shows the amount produced domestically, and the demand curve shows the amount consumed domestically. Imports equal the difference between the domestic quantity demanded and the domestic quantity supplied at the world price. Buyers are better off (consumer surplus rises from A to A + B + D), and sellers are worse off (producer surplus falls from B + C to C). Total surplus rises by an amount equal to area D, indicating that trade raises the economic well-being of the country as a whole.

	Before Trade	After Trade	Change
Consumer Surplus	A	A + B + D	+ (B + D)
Producer Surplus	B + C	C	-B
Total Surplus	A + B + C	A + B + C + D	+D

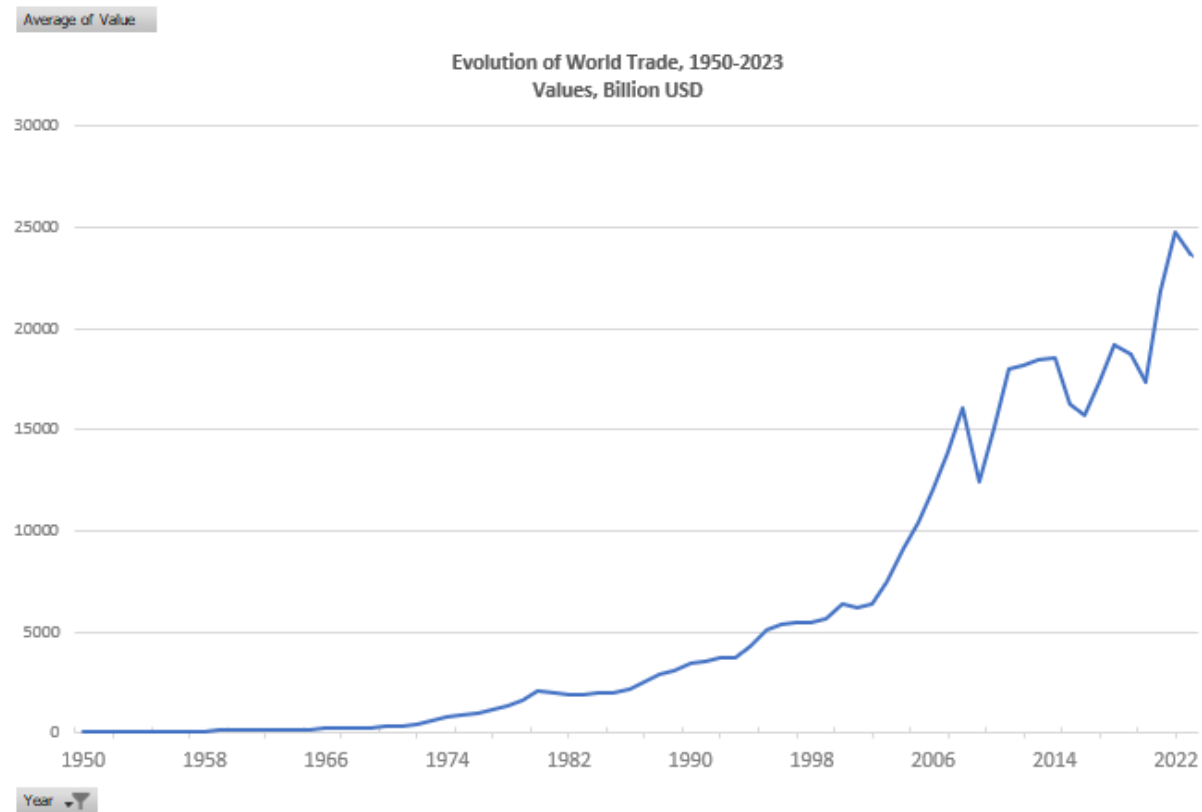
The area D shows the increase in total surplus and represents the gains from trade.



- ▶ 輸入国の消費者は低価格で商品を手に入れられる

自由貿易

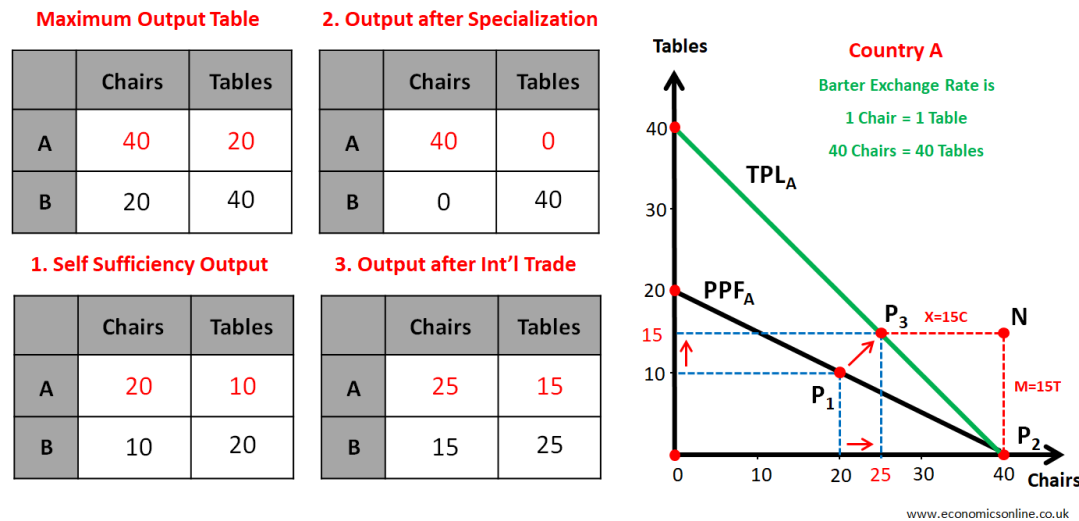
- ▶ 先週能松さんの発表の通り、第二次世界大戦後は自由貿易、グローバル化の時代（今まで？）



出典：World Trade Organization

貿易保護主義の台頭

- ▶ 以上の議論より、自由貿易は全ての国々に利益をもたらしたように見える(国全体の surplus で考えれば)
- ▶ しかし、自由貿易を主導してきたアメリカでは自由貿易に猛反対し、過激な関税政策を掲げた大統領が誕生した（余談ですが、トランプ氏の他の政策と比べれば、貿易政策は大して過激ではないように感じてしまう）
- ▶ 自由貿易の問題点：特定の産業は安い輸入品によって一気に潰れてしまう可能性があり、失業者の増加。
- ▶ 生まれた失業者は優位を持つ産業に消化されればいいですが、なかなか簡単ではない（例えば、テーブルと椅子の例では、A国でテーブルを生産する人は椅子業界に転職すればいいですが、実世界では自動車を生産する人はすぐに情報産業に就職できるわけではない）



自由貿易の問題点

- ▶ 各国にとって、潰れてもいい産業と絶対潰れてはいけない産業がある（テーブルを生産する産業は別に潰れてもいいかもしれないが、鉄鋼と自動車は？）

(a) There is credible evidence that leads me to believe that (1) Nippon Steel Corporation, a corporation organized under the laws of Japan (Nippon Steel); (2) Nippon Steel North America, Inc., a New York corporation (Nippon Steel NA); and (3) 2023 Merger Subsidiary, Inc., a Delaware corporation (together with Nippon Steel and Nippon Steel NA, the Purchasers), through the proposed acquisition by the Purchasers of United States Steel Corporation, a Delaware corporation (U.S. Steel), might take action that threatens to impair the national security of the United States; and

(b) Provisions of law, other than section 721 and the International Emergency Economic Powers Act (50 U.S.C. 1701 *et seq.*), do not, in my judgment, provide adequate and appropriate authority for me to protect the national security in this matter.

- ▶ 過当（場合によって違法）な競争に晒される フェアな競争環境が整備されていない

B B C

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Annabelle Liang
Business reporter



BBC News

January 13 at 2:03 PM · 

"If there are 31 days in a month, I will work 31 days."



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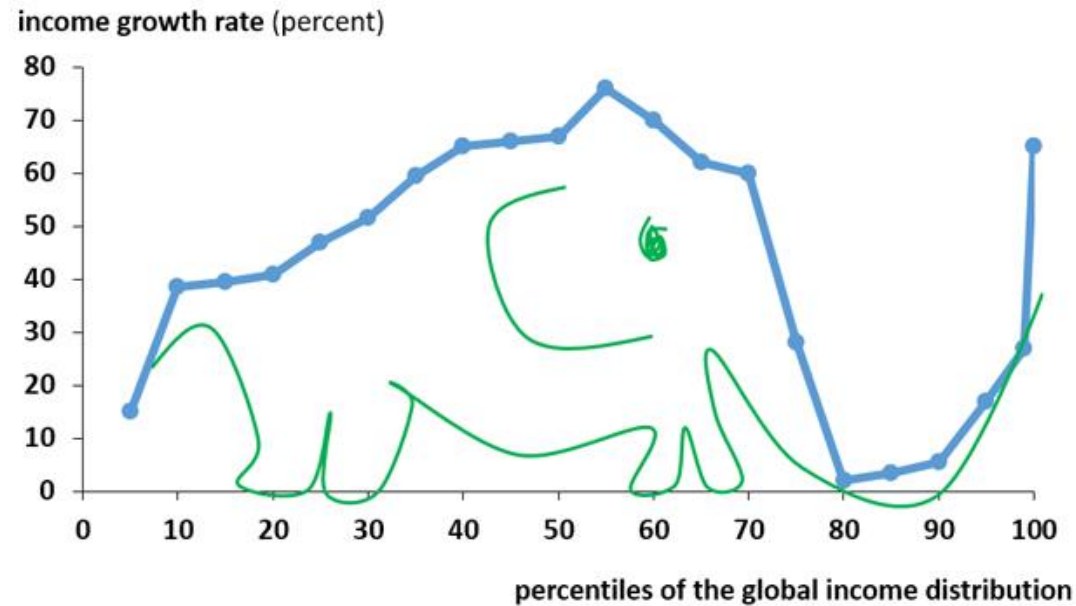
BBC.COM

Inside the Chinese factories fuelling Shein's success

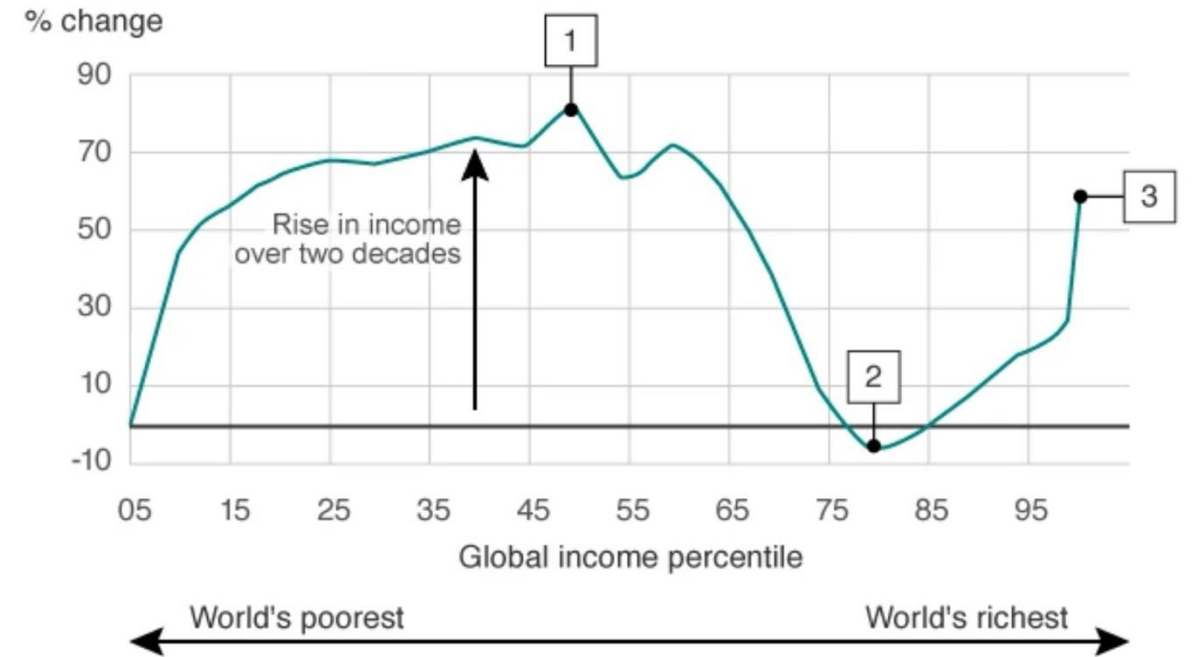
自由貿易の問題点

- ▶ そもそも自由貿易で、誰が一番得している？
- ▶ Elephant Curve

Global inequality has declined: Growth incidence curve, 1988-2008



Change in real income between 1998 and 2008



Source: Branco Milanovic, Global Inequality: A New Approach for the Age of Globalization

BBC

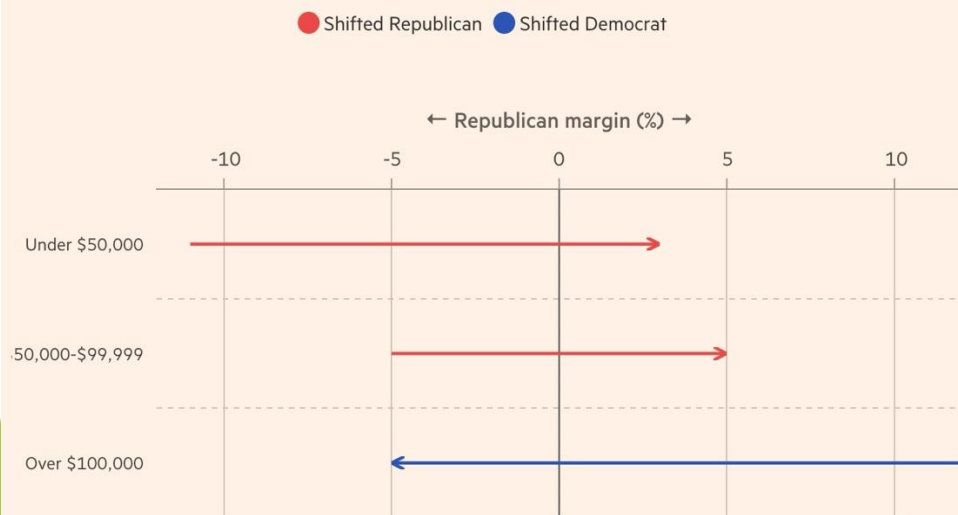
1. Middle classes in countries such as China, India and Brazil
2. Lower earners in countries such as the USA and UK
3. The richest individuals around the globe

Poorer voters flocked to Trump – and other data points from the election

FT analysis of this week's election results paint a dire picture for the Democrats

Trump increased his support among lower-income groups according to exit poll data, while Harris saw a majority of high-income voters go her way

Republican margin over Democrats, change since 2020, by demographic group

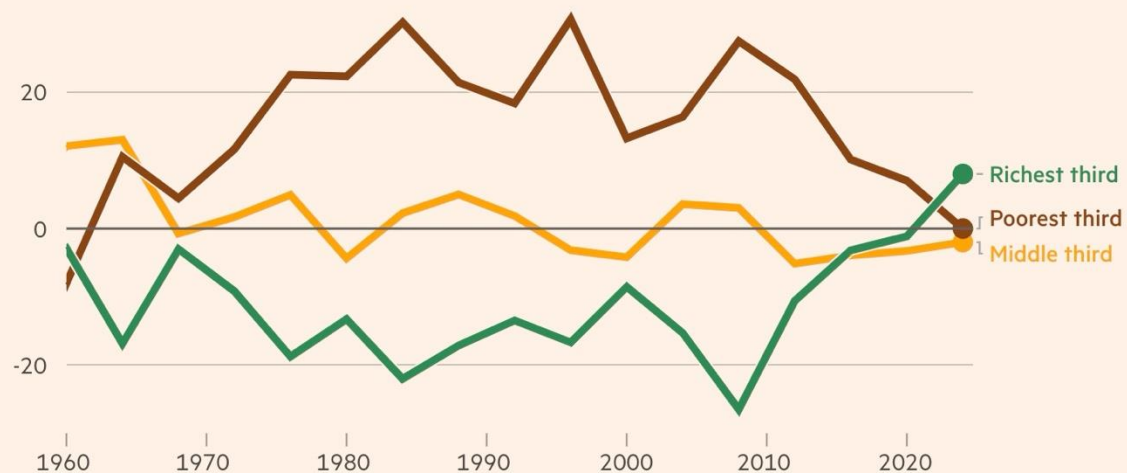


Source: Catalyst, Edison Research • Exit poll data is preliminary
FT graphic: Joel Suss

FINANCIAL TIMES

Democrats fared better with the richest Americans than the poorest for the first time in decades

Democratic-Republican margin (% pts) in US elections, by income group



Source: FT calculations, American National Election Studies, Edison research
FT graphic: John Burn-Murdoch

FINANCIAL TIMES

貿易保護主義の影

▶ 関税は消費者の負担となり、インフレを加担する恐れもある

CALIFORNIA

Newsom dubs Trump's proposed tariffs a 'betrayal' of American consumers

The California governor criticized the president-elect on trade during a stop at the Mexico border.

- ▶ 関税も一種の税なので、deadweight lossの発生
- ▶ 保護される産業は競争力低下の恐れ（アメリカ伝統の自動車産業は保護されているが、それによって復活できたわけではない）

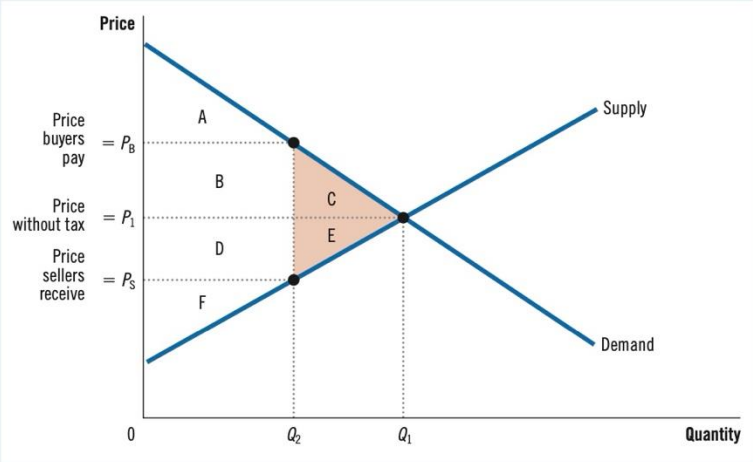
Figure 3

How a Tax Affects Welfare

A tax on a good reduces consumer surplus (by the area B + C) and producer surplus (by the area D + E). Because the fall in producer and consumer surplus exceeds the tax revenue (area B + D), the tax is said to impose a **deadweight** loss (area C + E).

	Without Tax	With Tax	Change
Consumer Surplus	A + B + C	A	− (B + C)
Producer Surplus	D + E + F	F	− (D + E)
Tax Revenue	None	B + D	+ (B + D)
Total Surplus	A + B + C + D + E + F	A + B + D + F	− (C + E)

The area C + E shows the fall in total surplus and is the **deadweight** loss of the tax.



ご清聴ありがとうございました