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# 乱局与变局: 复旦国际战略报告2018

## Changes in Turmoil: Fudan International Strategic Report 2018

# 乱局与变局：复旦国际战略报告 2018

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## 1. 国际政治局势：乱中谋变

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2018 年的国际政治舞台可谓是纷扰不断、乱象丛生的一年。美国特朗普政府推行“美国优先”政策，不断搅动国际政治风云，成为制造国际乱局的首要乱源。面对特朗普政府引发并不断激化的国际政治乱局，世界各国在经过一段时间的观望和犹疑之后，开始思考如何应对，并调整其既定政策，谋篇布局。

### 乱局

深究引发 2018 年国际政治乱局的根源，很重要的一个因素就是特朗普政府推行“美国优先”政策，进而导致国际政治体系不确定性大幅增加，大国关系对抗性日趋升高，地区以及全球安全局势屡现异动。

首先，国际政治秩序出现乱局。作为当今世界综合实力和影响力举足轻重的唯一超级大国，特朗普治下的美国成为干扰和冲击现行国际政治秩序的乱源。继 2017 年 1 月退出跨太平洋伙伴协定（TPP）、6 月退出《巴黎气候协定》、10 月退出联合国教科文组织之后，美国在 2018 年继续刷新其“退群记录”，包括 5 月退出伊朗核协议、6 月退出联合国人权理事会、10 月退出《维也纳外交关系公约》中《强制解决争端之任择议定书》及取消与伊朗 1955 年签订的友好条约、10 月退出万国邮政联盟以及美俄《中程导弹条约》等，可谓是“退群成瘾”。特朗普政府的所作所为，使得美国不仅仅是搅动现有国际体系

和秩序的“黑天鹅”，甚至已经成为一头横冲直撞、为祸全球的“黑犀牛”。

其次，国际经济贸易秩序陷入混乱。2018年特朗普政府不顾世界各国的反对，执意打响史无前例的“全球贸易战”，掀起了一轮又一轮的贸易争端。就最为引人关注的中美贸易摩擦而言，2月27日，美国商务部宣布对中国铝箔产品征收高额反倾销税和反补贴税，并于7月6日、8月23日和9月24日，分三批次开始对总额高达2500亿美元的中国商品加征进口关税。由美国单方面挑起的一系列贸易摩擦给中美贸易关系蒙上了浓重的阴影，两国进入了前所未有的贸易摩擦期。在掀起全球第一和第二大经济体之间贸易摩擦的同时，美国还对包括印度、欧盟、日本、加拿大、墨西哥、韩国在内的重要经济体做出加征关税的威胁，试图利用美国的实力优势，修改甚至重塑国际贸易机制，使得既有国际经济和贸易秩序受到严重冲击。

第三，美俄关系继续恶化。针对俄罗斯前特工中毒事件、俄罗斯“干涉”美国大选、俄乌冲突等事件，美国在2018年先后推出多轮对俄制裁措施，包括驱逐俄罗斯外交官、对272个与俄罗斯有关的个人和实体进行制裁、冻结俄罗斯在美资产等，使得美俄关系火花四溅。加之美国不顾俄罗斯的强烈反对退出《中导条约》，决定对其核武库进行全面现代化升级，降低核武器的使用门槛，俄罗斯则以牙还牙，表示将采取一切措施以“确保安全”，增强其核力量以及第二次核打击能力，使得原已十分脆弱的美俄战略互信再遭重击。

第四，中美战略博弈加剧。在中美贸易摩擦不断升温的同时，美国以经贸问题为抓手，在安全、军事、科技、人文交流等各个领域加

大对华施压力度，包括将中国定位为“修正主义国家”以及“战略竞争对手”、积极拉拢日澳印等国推行“印太战略”、延续在南海的“自由航行”行动、限制中国留学生赴美高技术专业深造、借口对俄罗斯军购制裁中国军方高级将领、严审和限制中国对美投资、收紧高科技出口和知识产权转移、渲染中国对美进行“政治渗透”、指责中国发动“网络攻击”等措施，打出一套“组合拳”，使得中美战略博弈的领域不断扩大，烈度不断升高。

第五，中东乱局依旧。在战火不断的叙利亚，虽然叙利亚政府军收复了大片失地，阿萨德政权进一步稳固，极端组织“伊斯兰国”遭到沉重打击，政治解决叙利亚问题也初现曙光，但是美、俄与中东地区各大国之间的角力并未稍有平息。围绕美国牧师布伦森被捕一事，美国对土耳其进行制裁，致使土耳其里拉应声惨跌，令美土同盟关系遭受重创。而在沙特记者卡舒吉遇害事件上的严重分歧，更是令美土关系雪上加霜，同时导致土耳其与沙特的矛盾也陡然上升，土沙关系变数重重。由于特朗普政府执意将美国大使馆从特拉维夫迁往耶路撒冷，直接引发巴以之间再次爆发流血冲突。美国悍然撕毁伊朗核协议，不仅令美伊关系急速恶化，也使得伊朗采取更为强硬的反美政策。12月3日，与沙特积怨甚深的卡塔尔宣布将于2019年1月退出欧佩克，成为首个退出欧佩克组织的中东国家，标志着全球最大的石油组织出现裂缝。12月19日，美国突然宣布计划“全面”并且“迅速”地从叙利亚撤军，投下又一枚“震撼弹”，导致中东地缘政治暗流涌动，更趋混乱复杂。

第六，欧洲安全乱局升级。本已高度紧张的俄乌关系因11月25

日爆发的刻赤海峡冲突而继续升级。俄罗斯在黑海和克里米亚地区举行大规模军事演习，并在乌克兰边境大规模集结军队，而乌克兰边防军则进入战备状态，连续进行导弹试射和军事演习，并威胁终结与俄罗斯的友好条约。双方在边界地区剑拔弩张，甚至不排除发生严重军事冲突的可能。而西方国家则齐声谴责俄罗斯。美国一方面派遣军舰进入黑海示威，同时威胁“不会坐视不管”，要让俄罗斯付出“痛苦和严重后果”，而北约则宣称将采取“集体行动”来回应俄罗斯的“侵略行为”。随着西方干预乌克兰问题的力度加强，俄乌冲突成为俄罗斯与西方对抗的主要战线，双方距离发生战争仅有一步之遥。

第七，民粹主义浪潮继续搅动国际政坛风云。受难民、就业、经济低迷、贫富差距拉大等问题的冲击，世界各地民粹主义运动风起云涌，使得很多国家内政陷入动荡，政治权力格局出现重组。例如 11 月 17 日，法国 10 余万民众为了抗议油价与燃油税上涨，身穿“黄背心”发起游行示威，并在 12 月 1 日的示威活动中引爆了巴黎 50 年以来最大骚乱，迫使政府宣布取消原定调涨燃油税的政策，总统马克龙遭受政治重创。一向以政治局面稳定、经济发展稳健而著称的德国，也因移民问题引发重大纷争，遭遇了多年不遇的组阁危机，总理默克尔被迫宣布不再寻求连任。12 月 18 日，比利时因移民政策问题爆发示威游行，导致内阁总辞职。英国脱欧协议激起国内强烈反弹，首相梅以放弃竞选连任为交换，才艰难挺过倒阁危机。在拉美地区，多位右翼甚至极右翼政客在大选中获胜，尤其是对特朗普仰慕不已，有“巴西特朗普”之称的博尔索纳罗以显著优势赢得选举，于 10 月 29 日当选新任巴西总统，标志着右翼势力在拉美的回潮，也给拉美政坛带来

了更多的变数。

## 谋变

面对美国特朗普政府一系列有悖常规、不合常理的政策措施，以及由此而引发并不断激化的国际政治乱局，世界各国在经过一段时间的观望和犹疑之后，开始意识到特朗普的“特立独行”绝非心血来潮之作，而是体现了美国目前当政者的普遍共识，并将罔顾其他国家的反对继续予以推进。为此，越来越多的国家开始思考如何应对一个“美国暴走”的世界和更多始料未及的变局。

例如，面对美国以贸易摩擦为抓手的全面施压，中国保持战略定力，秉持“斗而不破”的原则与美国展开博弈。中国在全球高举自由贸易的大旗，支持开放和自由贸易原则，坚定维护国际多边贸易体制。同时积极稳定周边，推行睦邻友好政策，显著改善了与日本、印度、韩国等国的关系，以对冲美国的战略压力。在欧洲方向，尽管部分欧洲国家依然在贸易和投资公平待遇、技术转让、知识产权保护等问题上与中国存有争议，但是中欧均明确反对美国的单边贸易措施，欧洲亦有意愿加强与中国的战略沟通和协作，以抑制世界经济贸易体系中日益增强的不稳定性 and 不确定性因素。

美国特朗普政府的所作所为，也使得包括欧盟和日本在内的诸多盟国离心离德，谋求自保。例如在美国退出“跨太平洋战略经济伙伴协定”（TPP）之后，日本继续推动与其他 10 国达成不包含美国在内的“全面与进步跨太平洋伙伴关系协定”（CPTPP）。3 月 8 日，相关 11 国正式签署 CPTPP。6 月 29 日，日本国会正式批准相关法案，标志着日本迈出主导构筑地区多边贸易机制，牵制特朗普政府贸易保护



主义政策的重要一步。7月17日，日本和欧盟在东京签署“经济伙伴关系协定”（EPA），日本将取消94%欧盟产品的关税，包括奶酪和葡萄酒。欧盟则逐步取消99%日本产品的关税。12月8日和12日，日本国会和欧洲议会相继批准了经济伙伴关系协定，并将于2019年2月1日正式生效。协议双方占全球GDP近30%、贸易总额近40%，覆盖区超过6亿人口，是迄今为止全球最大的自贸区，借此双方明确地释放出共同反对贸易保护主义的信号。

就欧洲而言，在坚决抵制美国退出伊朗核协议，与日本达成自由贸易协定的同时，由于美国一意孤行退出《中导条约》，并一再逼迫北约盟国增加预算、分摊军费之际，欧洲各国开始思考组建独立的联合武装力量。在欧洲看来，美国退出《中导条约》将使欧洲暴露在俄罗斯的中程导弹威胁之下，直接危及欧洲的安全，从而严重削弱了欧洲对美国的战略信任。鉴于此，欧洲开始尝试“另起炉灶”，推动自主防务，不再将自身的安全完全寄于美国的安全承诺。11月初，法国总统马克龙提议建设一支“欧洲军队”，称欧洲需要加强自卫能力而不能只依赖于美国。虽然法国的提议遭到美国总统特朗普的强烈批评，但是却得到了德国总理默克尔的积极支持。

在中东地区，美国的盟国土耳其、沙特、以色列等国，以及地区大国伊朗面对乱局，也在不断调整其政策。例如在打击“伊斯兰国”过程中，得到美国支持的库尔德武装力量不断发展壮大，激起了土耳其的忧虑。12月14日，土耳其发出警告，要进军曼比季和幼发拉底河以东地区，被美国视为“不可接受的”单方面行动。面对美国的压力，土耳其则大幅缓和与俄罗斯的关系，甚至宣称要从俄罗斯购买先

进的 S-400 防空导弹，引发了美土之间新一轮紧张关系。伊朗则积极地展开合纵连横，与欧洲携手反对美国退出伊朗核协议，并且着力提升与俄罗斯和土耳其的安全合作。而对于美国从叙利亚撤军的决定，以色列内塔尼亚胡政府则表现出巨大“失望”，同时强调将在叙利亚“继续采取积极行动”，以防止伊朗势力的做大。如此种种，势必导致地区内各国争夺地区领导权的斗争不断加剧，中东地区充满不确定性的新一轮地缘政治较量即将上演。

## 前瞻

日趋“自私自利”且凭借自身霸权优势横冲直撞，无视国际机制与规则的特朗普政府，不仅导致国际体系出现越来越多的“真空”和愈演愈烈的乱局，也迫使各国开始苦思应对和破解之道。

首先，联手反对单边主义和贸易保护主义，维护国际自由贸易体系。美国发动的全球贸易战逆历史潮流而动，已然给全球经济增长蒙上阴霾，并有可能冲击各国在全球供应链系统原有的角色与功能，造成全球产业链断裂，贸易结构严重失序，令世界经贸体系陷入混乱，甚至引发系统性危机。在此严峻变局下，世界各国不能不积极因应，调整产经对策，以求自保。

其次，由于美国将大国竞争置于其对外关系议程的首位，不断对中国、俄罗斯、伊朗等国施加日益强大的压力，使得大国地缘政治博弈日趋加剧。同时，特朗普政府又采取了“修正主义路线”，对以联合国、WTO、IMF、世界银行等为代表的国际机制采取“合则用，不合则弃”的功利主义态度，试图重塑以美国为主导和核心的国际秩序。

这都使得国际政治的不确定性因素急剧上升，且未来很有可能会进一步恶化，引爆更多的地区安全危机和军事冲突。

第三，美欧日之间一向稳固的跨太平洋与跨大西洋的合作关系呈现出倒退现象，加之利益的不一致性日趋凸显，使得自冷战结束以来各国已习以为常的既有安全、政治、外交、经贸体系遭到撼动。包括盟国在内的许多国家开始有意拉开与美国的距离，并且在新的全球格局中重新寻找和调整自身的战略定位。

放眼 2019 年的国际政治舞台，特朗普政府所带来的巨大冲击和破坏性仍将持续存在，并且随着美国国内大选的临近以及在国内政治中来自民主党的严重掣肘，力争连任的特朗普很可能在外交领域不断“发力”，使得国际政治乱局进一步恶化。而其他遭受打压的国家则会继续与美国进行强力周旋，并谋求建立“议题性联盟”和加强战略协调，更多地采取“抱团取暖”或是“两面下注”的方法，以应对日益不可预测的美国，以及一个更加纷乱复杂、更富不确定性的世界，从而推动国际政治格局出现新一轮的调整乃至重组。

## 2. 世界经济形势：从不确定到更不确定

宋国友 复旦大学经济外交研究中心主任

世界经济有其自身发展的逻辑，其形势发展也不断塑造着国际总体格局。对世界经济形势的分析有不同视角。从增长看，2018 年的世界经济增长较为令人满意。但从经济治理和经济秩序的角度，世界经济则蕴含着严重的不确定性。在某种意义上，以爆发中美贸易战为标志，2018 年世界经济正式进入了秩序重塑的关键阶段。原有国际经济秩序和规则越来越难以适应新的形势，大国经济互动也进入到新的调整时代。

### 中美两国引领世界经济增长

中美两国在世界经济中的位置进一步凸显。2018 年中美两国都实现了大致令人满意的经济增长，对世界经济的贡献有目共睹。美国经济因为去年年底的减税效应以及股市财富增长效应的拉动，今年经济持续强劲增长，预计全年 GDP 增速将达到 3%左右，为金融危机以来最佳年份之一。在 3%增速的推动下，美国 GDP 有望超过 20 万亿美元大关，成为全球首个突破这一规模的国家。中国的经济增长同样令人瞩目。尽管面临内外一系列不利因素，中国 GDP 增速依然保持在 6.7%左右，就 GDP 绝对增加值而言，位列全球第一。中美两大引擎的共同发力，2018 年世界经济可谓强劲增长，全年增速有望超过 3.5%，成为最近几年表现最好的年份。

中美两国虽然给全球经济增长注入强劲动力，但是两国之间出现

的贸易摩擦也严重影响了世界经济稳定的稳定性。特别是 2018 年下半年两国贸易战的陡然升级，迅速成为全球经济发展的最大不确定性因素之一。市场信心受挫，股市巨幅震荡，大宗商品价格波动增加，负面效果不断显现。

总体上，全球经济格局朝向结构性变化的趋势未改。一是中美各自经济的高速发展，使得这两国巩固了前两大经济体的位置，持续拉大了与其他经济体的差距，中国和美国这两大经济体占世界经济比重上升至 40%左右。是 21 世纪以来全球经济占比最高的年份。日本和欧盟各国与中美两国的差距在 2018 年进一步扩大。二是中美之间的 GDP 差距进一步减少。综合购买力平价和汇率计算，中国与美国的 GDP 差距继续变小。中国经济总量在未来十五年左右追赶乃至超越美国的大趋势未变。如果按购买力平价计算，中国经济总量实际上扩大了对美国的优势。三是发展中国家和新兴经济体的经济增速继续高于发达经济体，在世界经济中的比重不断提升。

### 全球经济理念出现重大变化

在 2018 年，全球经济理念出现显著变化。自由贸易、开放市场等华盛顿共识遭遇严重挑战，甚至华盛顿共识的提出者美国都不遵从华盛顿共识的基本理念。在美国的带动之下，全球经济理念出现了三大转向。

一是从市场经济到国家主义的转向。在国家利益导向以及大国间战略竞争加剧的推动下，主要经济体对于本国市场的干预日益明显。各国政府频繁制定各项政策，不断加强对市场的介入，力图塑造市场

方向，以便赢得对其他国家的竞争，争取本国经济利益最大化和绝对化。政府在国内经济和国际经济中的地位凸显，在一定程度上甚至要超过金融危机期间各国政府所发挥的作用。特朗普打破国内传统，公开指责美联储的加息步伐，试图阻止美联储的货币政策决定，是其中最为典型的表现。

二是从自由主义到保护主义的转向。以美国对外推动本国利益优先为标志，全球保护主义总体上更加明显，全球自由贸易相对式微。一些经济体为了保护自身行业和企业利益，在贸易、投资和技术领域保护政策均较为明显。在贸易领域，动辄威胁或者实施惩罚性关税，引发了连锁反应和相应反制，导致全球平均关税水平一度升高。在投资领域，过度使用甚至是滥用“国家安全”以限制外来投资的现象日益突出，全球对外直接投资急剧缩减。在技术跨国转移方面，技术保护主义更为明显，美国、欧盟等发达国家出台更具保护性的投资保护措施，压制技术合理转移。

三是从虚拟经济到实体经济的转向。与服务业等虚拟经济相比，当前各国对于实体经济的重视程度明显上升。各主要经济体都在争取“制造业回流”或者“制造业留下”，把制造业看成是至关重要的产业部门。同时，还争先采取各种形式的政策，以期为制造业发展创造较好的环境。一些经济体还有针对性地制定产业政策，扶植具有战略重要性的若干高端制造业。

## **区域经济合作有所加强**

虽然全球经济增速在 2018 年有所提高，但是由于美国政府对全

全球化的利益分配存在巨大不满，其对外发动的大规模贸易战也严重破坏了全球治理的合作基础，加之全球经济理念开始转向，导致 2018 年全球经济治理面临较大障碍。一是对于经济全球化的认知差异阻碍了全球经济治理向前推进。全球经济治理本质上是全球化的发展结果，缺乏全球化的共识就难以形成有效的全球经济治理。奉行零和博弈显然不是推进全球化应有的思维。二是国际治理多边机制的弱势导致全球经济治理缺乏机制条件。美国政府无视国际机制的严肃性和重要性，不断退群，冲击多边机制的固有原则，试图把多边机制调整为更好服务本国利益的平台，多边机制的约束力大为削弱。IMF、WTO 等主要国际经济机构在协调主要经济体的经济政策方面遭遇困境。在困境当中，国际经济治理体制只能以通过进一步改革完善的方式来加以调整和适应。尤其需要指出，作为前两大经济体，中美之间 2018 年全方位竞争明显加剧，美国把中国界定为“战略竞争对手”，中美经贸摩擦不仅限于贸易和投资，还逐渐蔓延至金融和货币领域，直接影响两国在全球经济治理中的合作难度。全球经济治理缺乏中美两个大国的一致性，不仅会丧失前进动力，而且可能成为大国战略博弈的新领域。

不过，在全球经济治理缺乏亮点的情况下，区域经济一体化发展还是取得了可喜进展。美国退出 TPP 之后，剩下的 11 个成员在原有 TPP 规则基础上，达成 CPTPP，表达了这些成员国继续推进区域经济一体化的强烈意志。除了 CPTPP 之外，欧盟和日本这两大经济体之间在今年达成了双边自贸协定，这一协定也是目前为止全球最大的自贸协定，覆盖全球 GDP 的 28%，贸易总额的 37%。中国坚定推进区域自贸协定谈判，力争和其他成员一道努力尽快达成区域全面经济伙伴

关系协定（RCEP）。RCEP16国成员达成协议的意愿显著增强，谈判也取得实质性进展，谈判完成度从2017年不到50%迅速提升到2018年的接近80%。RCEP如若达成，将覆盖全球近一半人口、全球贸易的40%、全球GDP的近1/3。这些双边和地区层面自贸协定谈判的最新进展表明，经济全球化和贸易自由化并未走向终结。无论是发达经济体，还是发展中经济体，仍有较大动力推动经济全球化的深入发展。在全球层面无法推进多边经济治理取得重大突破的情况下，在地区层面的诸多积极实践将有力驱散对于去全球化的担忧，也会有助于反击美国单边挑起的贸易保护主义。

### 走向更不确定的2019

2019年的世界经济形势更为扑朔迷离。其中最大的三个不确定性决定了明年的世界经济走势到底如何，也决定了未来一段时间国际经济格局演变的可能走向。一是美国经济增长前景。从周期律以及结构性两个要素判断，美国经济2019年的衰退风险加大。如果美国经济走向衰退，那么世界经济将会遭遇严重挑战。世界经济面临的风险和压力将急剧增长。二是中美贸易战走向。中美两国元首年底在阿根廷达成了“休战”的意向，相关工作部门也正在为达成两国都能接受的协议而努力。不过，中美贸易战在2019年仍然会有反复，不排除在特定时段会有严重对抗性的政策爆发。届时，对于国际贸易和全球经济的发展都将产生严重的负面影响。三是欧洲经济的发展。一方面，英国脱欧的结局仍有较大不确定性，无协议脱欧的可能性仍然存在。如果英国真的以这种方式脱欧，将会给英国和欧盟经济短期内带来冲



击。另一方面，法国黄马甲运动所揭示的欧盟内部社会和机制层面的深层矛盾也在积累中爆发，2019 年欧洲国家不排除继续出现类似黄马甲运动的政治事件。这也会导致欧洲经济走弱。

### 3. 中国外交：稳周边、促开放

林民旺 复旦大学国际问题研究院院长助理、青年研究员

2018 年的中国外交，确立了习近平外交思想的指导地位。在沉着应对来自中美经贸摩擦的同时，抓住有利时机，推动中国与周边国家关系的全面改善。特别是，实现了中印关系与中日关系的“重启”，推动朝鲜半岛形势的全面缓和。与此同时，中国在斡旋周边热点问题、推动周边区域合作方面，推动中国自身对外开放方面，也做出了积极努力，成为周边区域合作的引领者和地区和平发展的守望者。

#### 稳定中国周边战略环境

2018 年美国特朗普不断破坏既有国际规则，并且单方面要求修改美国同主要贸易伙伴的协定与规则。在此压力与背景下，中国改善了同印度、日本的关系，2018 年实现了双边关系的“重启”。

首先是中印关系顺利实现了洞朗对峙后的“重启”。2018 年 2 月以来，中印双方都开始释放积极信号，为武汉非正式会晤进行预热。中国“两会”结束当日，莫迪总理即致电习近平主席，为举行非正式会晤预热。2018 年 4 月 27 日至 28 日，中印领导人会晤在武汉东湖举行。两位领导人在友好气氛中，就国际格局和双边关系中的全局性、长期性、战略性问题以及各自国家发展愿景和内外政策深入交换意见，达成广泛共识。随后，两国领导人在 6 月青岛上合峰会、7 月约翰内斯堡金砖峰会、11 月阿根廷 20 国集体峰会中继续保持会晤，持续改善两国战略互信。

其次则是中日关系的大幅改善，最终实现中日政府首脑年内互访。2018年5月8日至11日，李克强总理正式访问日本并出席第七次中日韩领导人会议，这是中国总理时隔8年正式访日，实现了自2012年所谓“购岛问题”产生以来两国关系的转圜。两国还一致同意设立“一带一路”官民协议会，以促进两国在第三国合作推进更多经济产业项目。安全保障领域，两国一致同意启动“海空联络机制”。随后，10月25日至27日，日本首相安倍晋三对中国进行了正式访问，这是日本首相时隔7年后访华，预示着中日关系进入了“协调合作”的新阶段。两国在货币金融和开拓第三方市场上都取得了突破，重启了规模达2000亿元的双边本币互换协议，并携手在第三方市场上推进“一带一路”建设。日本政府随后将“印太战略”修改为“印太构想”，减弱了这一战略的地缘政治内涵。

其三，积极推动周边热点降温，斡旋周边争议问题。在朝鲜核问题上，中国发挥了建设性作用。朝鲜劳动党委员长、国务委员会委员长金正恩三个月内三次访华。6月他与美国总统特朗普在新加坡最终顺利实现会晤，9月同韩国总统文在寅在平壤会晤，随后双方发表《9月平壤共同宣言》，实现了南北关系改善，朝鲜半岛形势缓和。中方在此过程中发挥了积极作用，推动南北关系改善，支持朝美对话，支持各方为缓和半岛军事紧张、推进半岛无核化进程做出了重要贡献。

中国还努力推动南海问题的降温。2018年，中国与东盟国家已就“南海行为准则”单一磋商文本草案达成一致，这是磋商进程取得的重大进展。在11月14日的中国—东盟领导人会上，中国与东盟的11国领导人一致同意2019年内完成对“准则”单一磋商文本草案第

一轮审读。中国总理李克强在会上正式提出三年内完成“准则”磋商的愿景，这充分体现出中国愿同东盟国家共同维护南海和平稳定的诚意、决心和信心。与此同时，10月22日，中国-东盟“海上联演-2018”演习（ASEAN-CHINA MARITIME EXERCISE-2018）在广东湛江举行，这是中国和东盟十国海军首次举行海上联合演习，也是东盟与对话伙伴首次举行海上联合演练，体现了中国与东盟共同维护地区和平稳定、提升战略安全互信的意愿与决心。

此外，在缅孟之间的罗兴亚人危机上，中国扮演重要角色。2018年9月27日，在纽约联合国总部举行了中缅孟三方非正式会晤，达成三点重要共识，年内启动遣返若开邦避难民众工作的条件已经基本具备。另一个则是积极调解阿富汗与巴基斯坦关系。继2017年12月在北京举行了首次中阿巴三国外长会晤机制后，2018年12月举行了第二次中阿巴三国外长会，中阿巴三方务实合作对话会也相应建立，三国在民生建设和基础设施领域都达成了重要共识。中国以实际行动成为本地区和平发展的重要推动者。

### **推进周边区域合作与经济开放**

在全球经贸合作环境发生重大变化的形势下，中国加大了对地区经济合作的引领。首先是更加积极地推动亚太地区的经贸合作。中日韩峰会时隔近3年时间后再次重启，为中日韩经贸合作注入了新的发展动力。随着日本主导的“全面与进步跨太平洋伙伴关系协定”（CPTPP）通过，中国也在更加力推“区域全面经济伙伴关系协定”（RCEP）的达成。2018年11月14日，李克强总理表示，RCEP谈判必须要有紧

迫感，争取在 2019 年完成 RCEP 谈判。并且宣布，中国与东盟各国最终完成了自由贸易协定“升级版”的所有国内程序。中国—东盟自贸协定“升级版”正式全面生效，这将进一步提升中国和东盟的经贸关系，向国际社会释放中国和东盟国家坚定维护多边主义和自由贸易的积极信号。

与此同时，随着东北亚政治安全形式的变化，东北亚的经济合作迎来了春天。2018 年 9 月 11—12 日，习近平主席出席俄罗斯第四届东方经济论坛，着力推动中国东北地区和俄罗斯远东地区合作。中俄两国签署《远东地区 2018-2024 年经贸投资发展规划及谅解备忘录》《建立俄罗斯远东和贝加尔地区及中国东北地区商业委员会谅解备忘录》等意向性文件。

在全球层面，中国依然是全球化的坚定支持者。2018 年 11 月 5 日习近平主席在首届中国国际进口博览会开幕式上的主旨演讲以及 11 月 17 日习近平主席在巴布亚新几内亚的 APEC 工商领导人峰会上发表题为《同舟共济创造美好未来》的主旨演讲，都强调了世界自由贸易体系的坚定支持者。这一诉求，同样体现在 2018 年 6 月的青岛上合组织峰会和 9 月举行的中非合作论坛上。

12 月 18 日，在庆祝改革开放 40 周年大会上，中国进一步表明了坚持以发展为第一要务、坚定不移深化改革扩大开放的决心。在引领周边区域开放合作中，“一带一路”倡议是中国的重要抓手。2018 年中国同周边国家的“一带一路”合作取得重要进展，完成了不少重大项目。8 月 30 日，由中国援助的中马友谊大桥举行开通仪式，这是中国同马尔代夫共建“一带一路”的重要成果。在中巴经济走廊框

架下，目前共有 22 个合作项目，其中 9 个业已完工，13 个在建。2018 年 6 月 19 日至 24 日，尼泊尔总理奥利对中国的正式访问取得圆满成功，双方承诺加强“一带一路”倡议下合作，加强口岸、公路、铁路、航空、通信领域的联通，打造跨喜马拉雅立体互联互通网络。9 月 7 日中国与尼泊尔在加德满都签署运输协议，允许尼泊尔使用中国 4 个海港和 3 个陆港与其他国家进行贸易。

不少“一带一路”建设的重点国家，在内政变化后实现了顺利过渡，没有对共建“一带一路”造成重大影响。2018 年 7 月巴基斯坦举行国民议会选举，正义运动党主席伊姆兰·汗成为新一任巴基斯坦总理。2018 年 11 月 2 日至 5 日，伊姆兰·汗对中国进行首次正式访问，并在首届中国国际进口博览会做主旨发言，签署《中巴关于加强中巴全天候战略合作伙伴关系、打造新时代更紧密中巴命运共同体的联合声明》，打消了国际社会对中巴关系的疑虑，双方在中巴经济走廊建设上达成了新的共识。2018 年 8 月马来西亚总理马哈蒂尔的成功访华，也实现了中马在“一带一路”建设上的顺利过渡。

简言之，2018 年的中国外交取得了重要进展，尤其体现在中国的周边外交上。展望 2019 年，我们有理由期待，中国的周边外交将继续沿着构建周边命运共同体的路径前进。美国特朗普政府的“任性外交”，无疑给中国同周边国家的关系改善发展提供了重要的外部刺激。随着 2019 年第二届“一带一路”国际合作高峰论坛的举办，中国在塑造地区和平稳定和经济发展上，将扮演更加重要的角色。

## 4. 美国：特朗普乱局

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进入执政的第二年，特朗普在外交上采取了更多的非常规举措，以实施其“美国优先”的理念，给世界政治和经济格局带来一系列严重的负面影响，中美关系也面临极为严峻的局面。

### 搅乱世界经济政治格局

一是退群对多边主义和国际机制的冲击。当今国际政治、经济和安全机制大多是二次世界大战后美国主导建立的，其制度和规则设计在很大程度上反映了美国的利益和价值偏好，是美国霸权的重要支柱。然而特朗普政府对现存国际制度越来越反感，觉得它在经济上对美国不公平，令其他国家占美国的便宜；在安全上让美国承担太多的义务，而盟友却长期免费搭车；在政治上对美国约束太多，损害了美国的主权。透过“美国优先”棱镜，国际机制越来越被认为是在侵蚀而非促进美国的国家利益。在去年退出《巴黎气候变化协议》、《跨太平洋伙伴关系协定》、联合国教科文组织之后，今年特朗普政府又决定退出《伊朗核协议》、联合国人权理事会、万国邮政联盟，并威胁要退出1987年与苏联签订的《中导条约》。毫无忌惮的退群行为，反映了特朗普政府对多边主义的蔑视和唯我独尊的心态。它不仅严重破坏了国际社会在应对气候变化、维护中东和平等重大问题上的合作努力，更挑战了全球化时代多边主义和国际合作的崇高价值。

二是保护主义对全球经济格局的冲击。特朗普试图通过加征关税等手段重塑与主要贸易伙伴的经贸关系。对于墨西哥、加拿大、欧盟和日本，特朗普通过施压迫使对方坐到谈判桌前，接受美国的要求。对于中国，则发起前所未有的贸易战，限制中国企业对美投资，竭力防止中国获取美国先进技术。正在进行的中美贸易战是历史上规模最大的一场贸易战，也是世界第一和第二大经济体之间的一次激烈较量。美国单方面改变现有经贸格局的鲁莽行为，正在扰乱市场、冲击全球供应链、破坏多边经贸规则和世界经贸秩序，其对世界经济的影响将是重大和长期的。据世贸组织统计，G20 国家在今年 5 月至 10 月采取了 40 项新的贸易限制措施，涉及贸易额约 4810 亿美元，覆盖的贸易规模是之前一个时期的 6 倍，是 WTO 在 2012 年开始监测 G20 贸易以来的最高水平。在新采取的贸易限制措施中，3/4 是提高关税，其中很多是对美国 3 月实施的钢铝关税进行报复。2018 年上半年与 2017 年下半年相比，世界贸易增长下降了两个百分点。美国还通过与墨西哥和加拿大达成新的高标准贸易协定，以及阻挠世贸组织上诉机构新成员任命、导致争端解决机制无法正常运转的极端方式，倒逼世界贸易组织改革，国际经济规则正酝酿深刻调整。美国采取保护主义、单边主义和构建新型经贸规则“三箭齐发”的政策组合，推动国际经贸规则同时出现保守化、碎片化和高标准化等三大趋势。

三是重新定义美欧关系对同盟关系的冲击。特朗普“美国优先”政策导致美欧在贸易、伊核协议、气候变化等问题上产生严重分歧。特朗普在 7 月的欧洲之行中甚至将欧盟称之为“敌人”，引起了欧盟国家的震惊。法国总统马克龙提出要建立欧洲军队，遭到特朗普的痛



批。欧盟与美国在安全、经贸、价值观和国际秩序等方面的矛盾与分歧全面凸显，欧美关系面临二战以后的最大挑战。

### 应对特朗普冲击波

面对特朗普冲击波，世界被迫做出各种反应。

一是周旋。加拿大、墨西哥、日本、欧盟，被迫坐上谈判桌，与美国讨价还价，做出妥协，重新分配利益。

二是联合自强。日本牵头拯救跨太平洋伙伴关系协定，达成了没有美国参加的“全面与进步跨太平洋伙伴关系协定”。日本和欧盟也分别批准了双边自贸协定，这一当今世界规模最大的自贸协定将于2019年年初生效。欧盟谋求防务独立。2017年12月，欧盟25个成员国签署了“永久结构性合作”协议，将共同发展防务能力、投资防务项目以及增强军事实力，从而使欧盟在防务上更加灵活，更独立于美国。2018年，这些成员国在该协议框架下批准了17个军事合作项目。法国总统马克龙和德国总理默克尔分别呼吁建立欧洲军队，推进欧洲独立防务，此举得到了欧盟委员会和西班牙等国的支持。

三是减少对美国的金融依赖。俄罗斯已经建立了一个俄罗斯国家货币转移系统，可以保护其银行免受（美国）SWIFT转账服务的潜在切断。欧盟则在研究建立欧洲独立结算体系，以增强欧洲在贸易、经济和金融政策领域的自主权。欧盟还正式发出行动倡议，建议在经济战略部门积极使用欧元。中国启动了以人民币计价的原油期货交易，不仅要竞争能源贸易定价权，也是要助推人民币国际化。

四是建立志愿者同盟。面对特朗普政府单边主义和保护主义的冲

动，中、日、欧等国有意联手，以维护多边主义和自由贸易体系，国际政治出现了重新划线的趋势。

### 中美关系转型阵痛

今年以来，特朗普政府视中国为“竞争者”、“对手”和“修正主义国家”，推动美国对华政策作出一系列重大调整，给中美关系带来重大冲击。

首先是展开全面竞争。政治上，既要阻止中国挑战美国主导的国际和地区秩序，又要提防中国对美国社会的“渗透”。经济上，既要解决贸易不平衡问题和中国市场开放问题，又要阻止中国在科技领域的进步，还要改变中国的产业政策。安全上，既要应对中国军事力量的上升，又要抑制中国在地缘战略上的拓展。

其次是脱钩。为防止美国的高科技流向中国，要推动中美在技术上脱钩，为此要采取一系列措施，如迫使中国改变对外资的相关政策，限制中国对美投资，禁止中国学生学者赴美学习敏感技术专业和在美从事科研活动。为减少美国国防工业对华依赖所带来的风险，推动中美在产业链上部分脱钩，让美国国防承包商将其在华生产基地迁出中国。

第三是限制。随着美国对华政策基调从接触向竞争转换，美国将对中国施加越来越多的限制，或者为了防范所谓中国的政治渗透而限制中国媒体、文化机构（孔子学院、基金会）在美国的活动，或者为了报复中国的相关政策措施而限制中国公民获得美国签证、限制中国外交官在美行动等。

第四是施压。针对所谓中国企业或个人侵犯美国知识产权、从事网络商业间谍活动、违反美国相关政策（如对伊朗、朝鲜的制裁令）的行为，或采取司法行动，或进行制裁，或直接向中国政府施压。

在此背景下，当前中美关系出现了空前严峻的形势。

首先是中美结构性矛盾突出，这里既有力量对比的矛盾（美国要保持老大地位，防止被中国赶上和超越）和利益分配的矛盾（美方认为中国在现有国际经济体系中获得了巨大的好处，这对美国不公平），又有政治经济体制的矛盾，还有意识形态和价值观的矛盾。

其次是两国关系模式转型。中美关系从合作与竞争并存模式转换到竞争主导型模式。奥巴马时期两国关系中的合作、竞争都在上升，现在则是合作面在缩小、合作的动力在下降，而竞争领域扩大、竞争力度大幅上升。

第三是双边关系缩水。今年以来，随着贸易战硝烟弥漫，中美外交互动、经贸往来、人文交流都呈现下降趋势。特朗普执政后双方启动的四大对话机制今年仅举行了外交与安全对话，全面经济对话、执法与网络安全对话、社会和人文对话三个机制停摆，许多其它双边磋商机制也无法运作。由于美方加大政策限制，中国对美投资大幅下跌，降至 2010 年来的最低点。人文交流美方在踩刹车，甚至开倒车，一些与中方的合作项目被终止，美国的高等教育机构正在有选择地对中中国学生学者关上大门。长期以来，经贸关系和人文交流被认为是两国关系的重要基础，虽然两国政治关系起起伏伏，但经贸和人文纽带仍在不断扩展，而当下特朗普政府的政策正在严重削弱这两大支柱。

12 月初在阿根廷举行的习特会上，中美同意贸易战暂时休兵，

并致力于在此后的 90 天内谈判达成解决经贸纠纷的谅解。然而，即使中美贸易战能够告一段落，美国也不会放弃在科技及相关领域的对华限制，在台湾、南海等问题上势将继续对华挑衅，在涉疆、涉藏问题上也会不断给中国制造麻烦。2019 年对中美关系来说仍将是形势严峻的一年。在中美关系的重要转型期，摩擦、颠簸和冲突越来越成为常态，有效的风险和危机管控对双方都将是紧迫的挑战。

## 5. 俄罗斯：重回实用主义

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俄罗斯中亚研究中心主任

2018年，是第一次世界大战结束百年，也是2008年国际金融危机十周年。尽管世人都在反思过往的浩劫与混乱，但现实世界并未变得更加有序和安宁。世界范围的大变动、大分化、大改组、大调整仍在持续。

2018年5月，普京重回克里姆林宫，开启了其第四个总统任期并将执政到2024年，其执政思路也基本实现了“实用主义回归”。事实上，在21世纪初普京执政的最初几年，实用主义曾是其治国理政的主基调。但随着国际油价攀升推动经济快速增长和国力相对恢复，俄罗斯内政外交进入了一个较为“激进”的时期。特别是2008年前后，“美国已经衰落”、“多极化已成现实”、“俄罗斯可以有所作为”等判断一度主导了俄罗斯的国际战略观。2007年普京“慕尼黑讲话”、2008年俄格战争、2014年克里米亚危机成为俄罗斯“强势外交”的集中体现。

但随之而来的西方制裁以及国际油价断崖式跳水使俄经济发展严重受阻、国际环境迅速恶化。在严峻的现实面前，俄罗斯不得不重新审视国际环境、调整国际战略和内外政策，逐渐回归理性务实的实用主义。

**稳定内政重于外交**

大变局下，家家有本难念的经，内政与经济的重要性较之于外交进一步凸显。尽管普京在 2018 年 3 月进行的总统大选中以 76% 的高票成功实现连任，但其连任后推行的延迟退休、增税等举措在社会上引起了比较激烈的反弹。俄罗斯几十个城市中出现了游行示威，民众对普京的工作满意度大幅回落，从今年最高时的 82%，下降到低点时的 60%。对其信任度也从年初的 58.9% 跌到 11 月初的 36.5%。在今年秋季进行的俄罗斯地方选举中，执政党——统一俄罗斯党遭受重挫，反对派趁势扩大了在一些地方的影响力。

乱局之下，普京也意识到内部稳定比外部扩展更为重要，因此把更多资源和精力放在改善国内治理、保持经济稳定和维持民生需求，而非扩张国际影响上。12 月 9 日，普京在统一俄罗斯党代表大会上表示，“整个世界处于转型期，一个变化剧烈而且相当迅速的转型阶段。如果我们不能及时找到方向，不能及时搞清楚该做什么和怎么做——那我们将永远落后。”他强调，统一俄罗斯党不仅要有能力做出负责任的决定，还要“解释这些决定，然后参加选举并使选民相信此前所做的决定是正确的。”当前，俄罗斯政府经济工作的一个核心任务就是维持通胀的相对稳定，避免民众本已微薄的工资和退休金遭受通货膨胀的蚕食鲸吞从而引发社会动荡。2018 年，俄通货膨胀水平温和，基本控制在 3.5% 以下。新增就业同比增加 1.6%，失业率保持在 4.7% 的较低水平。尽管延迟退休改革引来了民众的广泛不满，但普京亲自出面、干预微调，再次调动了俄罗斯民众“好沙皇、坏大臣”的传统政治心理，保持了国内政局的总体稳定。

尽管从去年开始，俄罗斯经济摆脱衰退，进入增长区间。但由于

诸多结构性因素制约，增长乏力。不久前，普京签署俄罗斯联邦 2019 年到 2021 年三年期预算，设定未来三年 GDP 年增长率分别为 1.3%、2%、3.1%。尽管这是克里米亚危机以来俄第一个财政盈余预算，但不能不看到，俄经济增速仍低于世界经济平均增速，这意味着普京竞选时所作“到 2024 年俄罗斯进入世界经济前五强”的承诺无法兑现。更为重要的是，在世界新能源革命、新工业革命蓬勃发展的背景下，俄罗斯经济主要还是依靠油气、军火和粮食出口支撑，经济结构短期无法改变。

在这种情况下，俄罗斯政府也只能迫于现实，在世界经济体系中尽全力为本国谋取最大利益。可以看到，俄罗斯利用一切可能机会，甚至通过助推地缘政治紧张来维持和抬高油价。尽管俄罗斯与沙特在叙利亚问题上势不两立，但两国仍可以在“欧佩克+”的框架下就限产保价开展合作；而俄罗斯同伊朗在叙利亚的合作、俄在“伊核问题”上对伊朗的支持不仅仅是出于政治理念与国际道义，更有借美伊对抗甚至美国禁止伊朗出口原油从而推升油价的考虑。与此同时，俄罗斯还在借助日益紧张的国际局势和地区冲突积极推销军火，2018 年对外军售额达到 450 亿美元，赚得盆满钵满。此外，俄还在加紧利用自身优势，在世界各地推销核电站和粮食。

在俄罗斯的综合国力构成中，军事实力依然占据了最大的比重。尽管如今俄罗斯军费开支与美国不可同日而语，已无力和美进行全方位军备竞赛，但俄仍在竭力加强自身军力建设，试图保持对美国的关键性遏制，与美保持“不对称平衡”。当前，虽然俄罗斯经济非常困难，但俄还是加大了军事建设的力度，维持了较高比例的军费开支，

推进了一系列新式武器的研发和部署，例如“萨尔马特”洲际战略导弹、苏-57 战斗机、超高音速导弹等。

### 力争熬过“外交寒冬”

在“强势外交”受阻后，普京已清楚地认识到，俄美之间的实力差距是巨大的，俄无力与美全面争锋。因此，俄罗斯在对美关系上逐渐回归理性务实，在做最坏打算的同时谋求缓和。不论美国对俄如何加大制裁，但俄始终没有放弃改善对美关系的渴望，某种程度上甚至可以说，改善对美关系、缓解西方制裁和围堵是俄外交的第一要务。俄罗斯官方人士包括外交部发言人在每一次批驳美欧对俄制裁的时候，最后都会强调，“我们愿意改善对美关系，改善对美关系的大门始终是敞开的。”普京总统也多次强调，“俄罗斯无意与美国为敌，希望与美国恢复相互尊重的关系”。与此同时，俄罗斯也明白，俄美结构性矛盾无法迅速消除，并为此做了最坏打算。近来，俄罗斯在加快抛售美国国债的同时增持黄金，俄一些油气公司也要求外国客户修改合同并以欧元取代美元结算油气交易。这一切，都是为了防止在美国把俄踢出 SWIFT 的情况下，俄罗斯会遭受致命打击。

在不指望俄美关系迅速好转的同时，普京也在竭尽全力修复俄美关系，以尽可能争取“喘息”机会，以静待变、“熬过寒冬”。因此，在乌克兰问题上，俄放低身段，在不归还克里米亚的前提下，在“乌东冲突”问题上加强与明斯克小组的配合，试图通过与德、法的合作缓解西方对俄压力；在叙利亚问题上，俄在主导阿斯塔纳进程、索契进程的同时，也搭建了法、德参加的叙利亚问题解决框架。更重要的



是，普京利用一切机会，谋求恢复与美国的直接对话，防止俄美关系不受控制的呈现“自由落体”状态。除 2018 年 7 月与特朗普的赫尔辛基会晤外，他还想方设法利用纪念一战结束 100 周年、G20 等多边场合与特朗普交流。虽未如愿，但热情不减。此外，俄美两国也在积极筹备 2019 年春天普京的访美事宜。

当然，俄罗斯在对西方关系方面并未一味退让。在谋求缓和与西方关系的同时，俄也在软硬兼施，试图利用“北流-2”天然气管道项目、美国退出“伊核协议”问题、俄日北方四岛谈判、美欧矛盾以及西方国家内部政治及社会问题，分化美欧、分化北约、分化欧洲、分化美日、分化西方社会。俄罗斯的“组合拳”一定程度上确实使欧盟与美国在伊朗石油禁运、使德国与美国在“北流-2”天然气管道建设问题上出现一些间隙，使日本并未实质参与西方对俄制裁，也使一些西方国家的保守主义势力如法国的勒庞、匈牙利的欧尔班、奥地利的库尔茨等与俄惺惺相惜。

在力争与西方关系不出现“急剧降温”的同时，俄罗斯也在加大“向东转”力度，积极强化同中国、日本、印度等国合作。对日方面，俄利用北方领土问题调动日本，一面打破西方围堵，一面获取经济实惠；对印方面，双方加强了政治、经济与外交全方位合作，俄对印出售 S-400 采用了卢布结算的避险方式；在多边层面，俄罗斯也比以往更积极地参与东亚的一系列多边机制，包括东亚峰会、APEC 峰会等，积极推介普京提出的“大欧亚伙伴关系”倡议。俄罗斯—东盟峰会召开，双方关系从对话伙伴升格为战略伙伴，俄同新加坡、越南等东盟国家关系取得了进一步深化。

当然，在东方外交方面，俄罗斯收获最大的还是来自中国：政治领域，两国互动频繁，俄借此在大国关系中避免了过度的“孤独感”；在经济领域，两国贸易额迅速恢复，2018年1到10月中俄贸易额872.5亿美元，同比增长28.2%，全年有望突破1000亿美元；在能源领域，俄连续两年成为中国第一大石油供应国。2018年1到9月，中国自俄进口原油5056万吨，同比增长12.4%，金额265亿美元，增长53%，占进口总额比重的63%。中俄东线天然气管道加紧建设、西线天然气管道加紧谈判。中国企业参与的亚马尔LNG项目一至三期运营投产。首船亚马尔LNG已于今年运抵中国，双方还在商谈北极LNG二号项目。在国际能源市场转向“买方市场”之际，俄获得了一个庞大而稳定的销售市场；在投资领域，截至2017年底，中国对俄投资存量达到281.2亿美元，2018年1-10月投资流量为2.8亿美元。在西方对俄制裁背景下，中国投资成为俄重要的资金来源。

展望2019年，俄罗斯仍将延续实用主义内外政策。国内事务中，在努力实现盈余预算的基础上，避免社会改革政策严重冲击民众生活，确保社会政治稳定；外交上，在重点强化“后苏联空间”外交、防止俄乌关系恶化可能带来的“雪崩效应”的同时，着力巩固在中东的地缘政治成果，同时谋求借普京拟议中的美国之行改善俄美关系。

## 6. 欧洲：已破未立，艰难探索

丁纯 复旦大学欧洲问题研究中心主任

回顾 2018 年，对欧盟来说可谓是：内忧外患，已破未立，虽勤勉有加，但差强人意。

### 内忧外患

首先，经济复苏迟缓，下行风险加剧。尽管今年欧洲经济持续复苏，但较去年明显减速，预计欧盟经济今年增长仅 1.8%。失业率尽管持续下降，但仍在高位。通胀攀上 1.8%，倒是符合欧央行的期许，故决定年底 QE 正式退出。随着外部环境恶化，出口也显疲弱。此前一直一枝独秀的德国经济今年却明显减速，法国也不复去年的增速，增长预计均低于 2%。

其次，贫富差距扩大，中产规模缩水，社会不满集聚，助长民粹猖獗。欧债危机放大了经济全球化的负面影响，加剧了贫富分化，数据显示，目前全欧贫困人口已达 7850 万；同时，中产阶级规模下降，2018 与 2010 年相比，全欧中产占人口比例从 58.4% 下降到 55.2%；包括中产阶级在内的社会大众的失落感加剧，仇富、反精英和民粹情绪持续骤升。全欧抽样调查显示，对本国政府不信任率平均高达 61%。此次发端于法国、后蔓延至荷、比、奥、德等国的“黄马甲”运动，提出了从取消燃油税上调到改变政府决策方式等具体到抽象，包罗万象的各种诉求，堪称是欧洲社会中下层各种不满情绪的总爆发。

再次，传统主流政党式微，极端政党崛起，政治光谱右移，政坛

呈现碎片化。

欧洲政坛出现了令人担忧的新变化。在德国，极右翼另类选择党借难民问题异军突起，极大挤压了传统大党联盟党和社民党的空间，不仅挺进议会而且成为最大反对党，令德国政府组阁遭创纪录的半年难产之痛。难民处置问题使德国朝野纷争频仍，传统大党在州选举中接连失利，因拥抱难民政策而倍受诘难，默克尔黯然辞去党主席，结束其 18 年党首生涯，也“开启新时代”；在匈牙利，以反移民、提高退休金为口号的欧尔班政府连续第三次高票连任；在意大利，大选中极左反移民的五星运动和极右疑欧的北方联盟党，于 6 月组成了欧盟国家家中首个小党上位组建的民粹政府；在瑞典，反欧盟的极右翼瑞典民主党几乎复制了德国选择党的一跃成为第三大党，使传统的瑞典社民党陷入组阁困境。

另外，欧盟内部治理上，挑战不断，领导力缺失，内部凝聚力明显下降。难民问题成为考验欧盟内部治理能力和成员国关系试金石，摊派计划因频频遭受中东欧、南欧国家阻击而落空，欧盟权威尽失；法、德、英三大国均自顾不暇，渐失引领和轴心作用：德国面临领导层代际交替，且一贯秉持量力而行的准则，法国心有余而力不足，自身改革遭遇空前阻力，巩固法德轴心再出发的呼声高于实际进展，英国则深陷脱欧泥潭；最令欧盟难忍的就是匈、波等国通过修宪，管控媒体等，背离“自由主义”的欧盟主流价值观的倾向日浓，招致欧洲议会以实施《里斯本条约》第 7 款实行“家法”相威胁和制裁。

最后，特朗普“美国优先”政策侵蚀和改写了美欧联盟关系，让欧洲被逼自强。过去一年，欧洲深受特朗普“美国优先”政策的接连

痛击：政治上，指责欧盟是德国傀儡，赞扬英国脱欧，怒怼法国建设欧洲军队的倡议，支持欧洲民粹政党和人士；经济上，从加征钢铝关税到威胁对欧产汽车下手大打贸易战；防务上，从威胁取消保护承诺，逼交北约防务费到怒怼“欧洲军队”；国际治理上，推行单边主义，退出欧盟视为重大外交成就的伊朗核协议；气变上，退出巴黎协定；价值观上，甚至质疑欧洲最为珍视的自由精神、多边主义、民主等主流价值观，使默克尔等发出“欧洲完全依赖别人的时代过去了”的感叹。对其认识也基本经历了德国外长马斯般的心路历程：从大洋彼岸的偶尔“民主事故”到承认现实，呼吁以欧洲更加紧密联合来对付美国优先。

## 已破未立

其一，欧洲改革遭遇强大梗阻，而新生代领导还需磨砺。

面对困局，欧盟和各成员国领导人均力图改革图存，但遭遇强大改革梗阻，陷入改革-抗议-妥协的怪圈，举步维艰。最为典型的是法国改革遭遇的声势浩大的“黄马甲”抗议运动。去年号称非左非右、无传统大党支持、高人气上位的法国总统马克龙，无疑是新时代欧洲领导人的代表。他与其“青年近卫军”锐意进取，意气风发地提出了一系列对内深化改革、克服沉疴、重振法国经济，对外强化法德轴心和推进欧洲一体化的改革举措。包括取消富人税，以及旨在为劳动力市场松绑、赋予企业更多用工灵活性和自主权的劳动法改革、给企业减税以及为达标欧盟财赤上限而实施的财政紧缩举措如缩减住房补贴、冻结公务员工资上涨及对退休人员开征社保费等。一方面，使法

国经济初有起色：去年经济增长 6 年来首次接近 2%，公共财赤 10 年来首次低于 3%。另一方面，包括此次上调燃油税等一系列举措，动了法国社会、尤其是中下层的奶酪、增加了负担，酿成了持续月余的“黄马甲”抗议运动乃至骚乱，欲速则不达，被迫两次让步，不仅暂停征税，而且提高最低标准，实施紧急状态，推高明年预算赤字，其支持率也降至迄今最低点，不仅损毁其声誉，也使改革计划近乎夭折。加上此前因改革而下台的德国总理施罗德、意大利总理蒙蒂、伦齐等先例，昭示了当今欧洲社会“谁改革谁下台”的魔咒和互联网时代改革之难。也反映了新一代欧洲政治家领导在政策设计出台前欠缺仔细研究，执政思路过分精英化，脱离中下层民众。执政技巧还欠火候，仍需历练打磨。

其二，英国脱欧进程一波三折，“硬脱欧”风险空前增大。

英国与欧盟间有关脱欧谈判的进程堪称一路坎坷，一波三折。经过反复的讨价还价和安抚来自国内党内外的一系列挑战后，英国首相特丽莎梅终于和欧盟在 11 月拿出了“英国脱欧协议草案”，但旋即在英国国内引起了朝野各方的反对。不仅有来自反对党工党的指责，而且更多则来自于保守党内部的脱欧和留欧派的夹击，显然当今英国社会就此已严重分裂。特蕾莎·梅本身也遭遇了对其的不信任投票，尽管涉险过关，但其跛脚的地位也昭然若揭。目前，主张留欧的英国民众还呼吁再次就脱欧进行二次公投，而预期明年 1 月举行的英国议会有关协议的投票表决结果能否通过，从而导致实质性的“硬脱欧”，尚难预料。

## 艰难奋进

面对这一系列内忧外患，一体化路上，欧盟和成员国仍在孜孜以求，奋力前行。

其一，欧盟层面，政治上，坚持一体化，强硬回应来自民粹政党、政府在难民、预算等领域的各种挑战；经济上，强化欧元区救助机制，同意欧洲稳定机制(ESM)为银行业单一清算机制提供贷款支持。还拟制定计划，增加在能源、大宗商品等战略领域欧元的使用结算便利，抬欧元抑美元；防务上，继去年签署军事领域“永久结构性合作”协议后，今年6月欧盟9国签署“欧洲干预倡议书”，承诺组建欧洲联合干预部队；在全球治理上，明确反对贸易保护主义，坚持多边主义和自由贸易，提出了以规则为基础的、多边主义框架下的WTO改革方案。同时，积极推进自贸协定谈判并取得重大进展，和日本谈成了具有标志意义的欧日自贸协定；推出了被誉为欧版的“一带一路”计划的亚欧互联互通战略，并明确指出，要和中国合作对接；顶住美国压力，坚持遵守伊核协议。

其二，成员国层面，法国马克龙政府上任后提出了一系列雄心勃勃的欧盟改革、推进一体化的计划。诸如建立共同预算和欧盟财长、建立欧洲货币基金、加强共同防务、夯实法德轴心等举措，今年受到了开启第四个任期的“跛脚”总理默克尔的量力而行的回音，达成了不少缩减版的协议。

其三，迟缓但持续复苏的经济、来自昔日盟友美国的挑衅、中国等新兴经济体的挑战压力以及成为“反面教材”的英国混乱脱欧的现状，使各国民粹政党不再敢动辄以退欧脱欧造势，欧洲民众抱团取暖需求上升，对欧洲一体化的信心有所回复。欧洲晴雨表数据显示：2017

年秋以来,民众对欧盟的信任度上升了一个百分点,达到 42%;同时,对欧盟前景的乐观度已经达到了 58%,为 2015 年春季以来的最高。目前欧洲民众和各种势力均在期盼和角逐明年欧盟机构的换届,迷茫中求变。



## 7. 中日关系：峰回路转、蹉跎前行

胡令远 复旦大学日本研究中心主任

2018 年的中日关系，迎来冷战后的第二个重大调整期。

冷战结束，恰值日本泡沫经济崩溃和“55 年政治体制”解体，日本陷入“失去的十年”乃至二十年，国家一片迷茫；与此同时，中国的发展进入快车道。一方是江河日下，一方是一日千里，巨大的落差以及未来的发展趋势，使战后以来相对平稳的中日关系，面临历史性挑战。遗憾的是以小泉纯一郎前首相为代表的日本精英阶层，选择的是联美制华的基本方略。其 5 年任期内 6 次悍然参拜靖国神社，即为明显的表征。这是战后的中日关系史上所没有的现象，中日关系进入冷战后的第一个重大调整期。其间待到 2010 年中国的 GDP 超越日本并迅速拉大距离，随着综合国力的消长，在非老牌保守政党自民党执政时期，发生了以“购岛闹剧”为标志的中日间领土与海洋权益矛盾激化、连带国民感情急转直下、两国关系陷入战后以来最低谷的状况。安倍首相 2012 年梅开二度重新执政后，通过“俯瞰地球仪外交”、解禁集体自卫权等，进一步力图全面制衡中国。尤其是以其保守的政治理念推行所谓“价值观外交”，使两国在政治、安保领域中日关系紧张加剧的同时，在意识形态、价值理念等形而上领域，也使两国处于裂痕加深的境地。

然而事有固理，物极必反。自去年始，安倍首相通过各种方式，明显开始调整中日关系。本来对日本一直奉行睦邻友好理念与政策的

中国，对此也积极予以回应。在双方的共同努力下，今年5月李克强总理利用赴日出席中日韩三国首脑会议之机，作为中国总理时隔8年正式访问日本，取得了包括加强两国政府及民间各层级联系、进一步扩大经贸关系、启动中日海空紧急联络机制一系列成果；李总理还远赴北海道访问，希望进一步推动两国地方间的合作。在此基础上，今年10月，安倍首相正式访问中国。两国正式确认：中日关系重回正常轨道；安倍首相强调：日中关系已从竞争走向协调。标志着中日关系在冷战后迎来了第二次重大调整期。

### 安倍首相访华成果评估

首先，通过这次访问，双方在增强政治互信方面取得了诸多共识。主要表现在：一是再次确认四个政治文件作为中日关系政治基础的作用，特别是《中日和平友好条约》具有约束力的法律地位。二是特别重申和强调了“互为合作伙伴，互不构成威胁”的政治共识。这一共识对当下的中日关系而言，不仅具有“形而下”即现实层面的重要价值，也具有“形而上”的观念性意义。也即，“互不构成威胁”，实际上首先是一个观念性问题。一方面虽然“国强必霸”并不适用于秉持和平发展理念的中国，但“中国威胁论”在日本依然有较大市场；另一方面，中国对日本近年强化与美国军事同盟关系的种种举措，毋庸讳言也充满疑虑。因此，强调“互不构成威胁”的政治共识，不言而喻是增强政治互信的前提。“互为合作伙伴”，狭义上主要指经贸领域彼此合作、力避恶性竞争，广义上应指在所有可以合作的领域彼此都应视对方为伙伴。这一政治共识，无疑是增强两国政治互信的抓手

与平台。三是安倍首相借此次正式访华之机，以强调“将日中关系由竞争转向协调并推向新时代”的方式，正式表示将此前制衡中国的战略转向与中国进行协调的国策的意愿。果真如此，则为中日之间重建政治互信，提供了基础性前提。四是就敏感领域如何建构政治互信，达成重要共识并有相应举措。如就旨在避免日本自卫队与中国军队偶发性冲突的相互通报机制“海空联络机制”尽快开通热线达成一致。双方还签署了《海上搜寻救助合作协定》（SAR）等。

第二，在经贸合作的重要理念、新合作平台的打造等方面，取得重要共识和重大成果。习近平主席、李克强总理在与安倍首相的会谈中，双方表明，在当前国际情势下，作为世界第二、第三经济体，中日两国有责任也有义务共同坚持自由贸易原则，反对单边主义。同时确认了在进一步强化传统的经贸合作领域之外，同时以“第三方市场合作”为新平台和试验田。在访问期间举办的“第一届中日第三方市场合作论坛”，吸引了500多位日本企业界代表和中方代表1000余人，共签署了多达52项的“第三方市场合作”协议，金额超过180亿美元，同时还签署了十余项政府间合作协议。为适应第四次工业革命的时代需求，双方还共同确认和强调了进一步推动旨在便利开展高科技领域合作的“创新对话机制”，使其成为未来两国合作提质升级的重要平台。此外，双方还签订了升级版的货币互换协议，规模为2000亿元人民币（约300亿美元），为2002年版的10倍，这也是日本迄今为止与外国签订的同一性质协议中的最大一笔。

第三，官民并举，深化交流，改善国民感情。国之交在于民相亲，只有有了坚实的民意基础，中日关系才能真正健康发展，行稳致远。

特别是在信息时代，双方国民对两国关系的参与度非常高、非常深入。习主席在同安倍首相的会谈中强调指出，“要开展更加广泛的人文交流，增进相互理解，鼓励两国各界特别是年轻一代踊跃投身中日友好事业”。安倍首相在“第一届中日第三方市场合作”论坛的致辞中，特别强调了两国悠久的文化交流历史，意在说明中日之间存在着深厚的文化基因。两国政府共同决定明年为“中日青少年交流促进年”，安倍首相还特地赶赴北京大学进行交流。这次访问，必将成为促进和深化两国交流的助推剂。

### 中日关系重大调整的原因与前景

首先，制衡的无效性与所付出的代价之间存在巨大落差。自小泉时代起、特别是安倍执政前5年起，事实证明日本联美制华的基本方略了无成效，徒然失败，并为此付出惨痛代价。中国政治稳定、经济繁荣，国际威望日升，GDP已经是日本的2.5倍。

其次，美国特朗普政府的所作所为，使日美畸形关系的固有矛盾深化与激化。即美国在双边贸易协定方面，一味按照自己的偏好打压日本，损害了日本的现实利益；同时更为严重的是因为日本作为资源匮乏的岛国，贸易立国一直以来关乎日本的生存之道，美国特朗普政府的贸易保护主义理念与举措，从根本上损害了日本战略利益乃至带来生存危机感，这是日本难以接受的。与此同时，也使日本对日美军事同盟架构中，一方面美国不断加大对日本的要价，另一方面对现在这样一个美国的可靠性难免不产生疑虑。针对发生重大变化的美国，改变对其过于倚重的一边倒政策，其与及时调整对华关系，正是一枚

硬币的两面。

第三，长期与近邻大国中国处于持续紧张状态，对于任何一个日本的政治家来说，都不谪无法承受之重。战后初期的吉田茂另当别论，安倍的叔祖佐藤荣作长期执政而一贯敌视新中国。但 1972 年中日关系实现正常化，对于长期阻碍这一进程的佐藤来说，则以凄惨的境况结束其政治生涯，并成为其人生的败笔。前述小泉纯一郎 6 次拜鬼，对中日关系造成巨大冲击，连当时几乎所有的“首相经历者”，都共同联名指责其不负责任的行为。截至去年，安倍已经执政 5 年有余，其对华战略事实上的失败，使其在国内面临越来越大的压力，适时进行调整，不过验证了东亚地缘政治的一个典型命题而已。

在以上背景下进行的这次调整，是低层次的，即所谓从低谷“回归正常轨道”而已。中日之间包括历史问题等在内的旧有的结构性矛盾并没有真正解决，而更直面的课题与挑战，则在于海洋问题，特别是海上通道问题这一新的结构性矛盾。所以我们看到，日本近年处心积虑解禁集体自卫权、推动修改和平宪法、热衷 2+2 模式；同时连年增加军费、解禁武器出口三原则、购买新锐武器、搞变形航母等等，其目的不外为将来在不依靠美国的前提下，为实现近海与远洋的军事目标进行法律与军事力量的准备。而中国出于自身发展的自然需要，近年海上军事力量有所拓展。地缘政治中的系统效应，使两国由此形成一种“安全困境”。未来中日关系能否顺利发展，不言而喻，这是一个棘手的、难以回避的重大要素。

因此，要使中日关系行稳致远，首先必须要高屋建瓴，将中日关系的定位置于新时代的背景下进行擘画。安倍首相今年的正式访华，

后续效应上也可以说为习近平主席明年利用出席大阪 G20 会议时正式访问日本创造了一定条件。如能实现，届时就新时代中日关系的相关理念、发展方向等进行讨论，待时机成熟时，进一步使其规范化、机制化乃至法律化，由此深化两国的政治互信。其次，要强化军事交流，最大限度了解对方战略意图，减少误判，舒缓安全困境。

2018 年是战后中日关系史上的重要一年，其中最重要的，从形而上高度来看，就是日本首相时隔 7 年的这次正式访问。此访在一定程度上标志着日本高层在对华认知方面的转变，是理性应对中国和平发展的一个标志性开端。正如日本前首相福田康夫所指出的，这次中日关系的改善并非权宜之计。

另一方面，中日关系虽然峰回路转，但要达到行稳致远之途，还会经历蹉跎蹒跚的荆棘。对此，中国需要有清醒的认识，也更需要高度的政治智慧。

## 8. 印度：从火中取栗到平衡求存

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2018 年，印度经济、政治和外交形态总体良好，但不确定性也在上升。经济增长虽快但有新的不确定性因素；政治基本稳定，但由于印人党在五邦选举中的失败，2019 年 5 月大选的不确定性上升；外交上继续在大国间左右逢源，但是在美国优先导致不确定性上升的情况下，印度的谋利空间被大大压缩。在此情况下，印度对外政策进行了策略性调整，重新发现平衡外交的价值。

### 印度国内政治经济不确定性上升

2018 年，印度经济总体运行良好。由于私人消费和投资增长，印度经济在 2018 年度将增长 7% 以上，在主要经济体中是表现最好的，经济总量分别排第 6 位（名义汇率）和第 3 位（PPP）。但是，印度经济面临一些不确定性因素，包括油价波动、贸易保护主义和财政下滑等，将在未来影响印度经济增长。印度经济“有增长无发展”的面貌没有根本改变，“有增长无充分就业”的局面也依然存在。莫迪政府受困于国内政治、宗教等因素，在很多经济改革问题上难有进一步举动，国际社会对印度经济看法的积极面有所下降。

印度社会矛盾呈上升趋势。印度过去几年中的经济改革措施，包括废钞和税制（GST）改革等，虽然从长期来看是必要的、有益的，但是在短期内伤害到高度依赖现金和非正式经济活动的农民和中小

商人利益。另外，印度教民族主义情绪上升，宗教矛盾与冲突形势更加严峻。很多民众发现，印人党执政的地方政府似乎只关心宗教，对民生和发展并不真正感兴趣。

印度政治不确定性上升。莫迪总理上台 4 年多来，其国内改革措施有得有失。上次大选时普遍支持莫迪的知识精英和城市居民，开始因宗教等问题而反对莫迪。印人党在地方邦选举面临压力。在 12 月初结束的五邦选举中，印人党全部失败，失去三个执政邦，其中两个还是印人党已连任三次的邦。印人党在政治根据地的失败，导致 2019 年 5 月印度大选形势的不确定性上升。这一方面将导致印人党内矛盾激化，对莫迪总理的不满情绪上升；另一方面，反对党将更加自信，会更有力地联合起来对抗印人党。印人党赢得下次大选的可能性仍然很大，但已不再是“不可战胜的”。

### 印度与大国的关系面临调整压力

印美防务合作关系继续走强。2017 年 12 月美国发表《国家安全战略报告》，把印度定义为美国的“主要防务伙伴”。2018 年 8 月 3 日，美国把印度升级为“战略贸易授权 1 类”（Strategic Trade Authorization-1, STA-1）。印度成为亚洲仅有的三个获得这一地位的国家之一。2018 年 9 月 6 日，印美举行首次外交部长与国防部长参加的 2+2 对话。双方讨论了两国在印度-太平洋战略架构下的合作，并就武器采购、技术转让、经贸、移民等问题交换意见，并签署了“通信兼容与安全协议”（COMCASA）。目前，美印两国还在磋商“基本交流与合作协议”（BEC）的签署问题。这些都使印度与美国的防务关



系，有大幅度强化。

印美战略伙伴关系面临压力。印美关系在继续走强的同时，也面临一些新的挑战与压力。在奥巴马时期，美国基于长远战略需求，将印度定义为平等战略伙伴，在很多问题上考虑印度的情感和利益。但是特朗普上台以来，在美国优先的旗号下，对印度的定位与战略合作伙伴，转变为战略棋手。美国在很多问题上不考虑印度的利益，只要求印度的服从与配合。尤其是在伊朗核问题及相关的石油出口制裁问题上，美国漠视印度的核心利益，伤害到印度卢比的汇率和经济增长速度。

印度对美政策设计面临挑战。印度本来对美国印太战略持模糊但积极参与的姿态，试图通过印度最终会完全走向美国战略轨道的信号，来换取美国在技术、经济和战略上的支持。但最终印度发现：印度虽然与美国在军事、情报等方面进行更加密切的合作，但是在印度最关心的经济发展问题上，美国并不关切印度的核心利益。美国不仅自己不愿意向印度提供民用技术方面的转让，甚至还阻碍以色列等国家与印度的相关合作。

印度与美国之间的战略差异有所突显。印度与美国在印太战略的范围和目标上，既有相似性，都要平衡中国的战略压力；也有分歧，美国要打印度牌，借助印度反华需求来巩固自己的霸权。所以，美国把印太的范围，向西只划到印度西海岸。而印度则要借美国的支持，寻求在南亚和印度洋地区的主导地位甚至是霸权地位，所以把印太的范围划到非洲东海岸，要借美国的力量来强化印度在中东和非洲的影响。最近，美国声明要恢复与巴基斯坦之间的同盟关系，这又让印度

感觉到伤害和背叛。

印度与中国和俄罗斯的关系面临新考验。中国在洞朗非法入侵问题上的对印度采取的强硬态度，深刻影响了印度的对华认知，看到了中印关系恶化的风险，也为自己在中国和美国之间的政策，重新明确了一个底线，即不能挑战中国的核心利益。因为中国的战略反击是确定的，而来自美国的战略支持，则是不确定的。俄罗斯也以发展与巴基斯坦关系的方式，对印度进行了战略警告。

因此，虽然从长期来看，印度倒向美国难以避免；但是在短期内，印度完全倒向美国，不仅没有获得期待中的收益，反而增加了战略风险。印度外交面临策略性调整的巨大压力。

### 从“火中取栗”转向“平衡求存”

在日益紧张的大国关系之中，印度曾试图以战略平衡者的身份以便“火中取栗”，但到 2018 年明显失望并逐渐向“平衡求存”的方向发展。

印度本想在大国关系的紧张状态中左右逢源、火中取栗。一方面，印度想借自己平衡中国的战略价值，来从美国谋取更大现实利益；另一方面，印度想借中国和俄罗斯担心印度完全倒向美国的心态，迫使两国对印度做出更大的让步。为显示其战略重要性，印度不惜冒与中国发生武装冲突的风险，于 2017 年非法侵入中国洞朗地区。这既是为保护印度的战略薄弱地带，也是为向美国等国家展示印度的力量 and 对抗中国的决心。在军事方面，印度确实部分实现了目标。无论是美国的印太战略，还是日本加强与印度的军事合作，都表明印度战略重

要性的提升。但是从经济和外交的角度来看，印度并没有完全实现自己的目标。美国不关心印度的经济发展需求，也不关心印度的切身利益：美国虽然愿意与印度分享部分的军用科技，但不愿意与印度分享关键的民用科技以帮助印度经济发展；美国强调美国优先，在工作签证等问题损害了印度在美国侨民的利益；美国忽视伊朗石油对印度经济的重要性，甚至不惜以损害印度经济增长和金融稳定为代价；美国漠视印度正常安全利益，尤其是与俄罗斯之间的传统军事关系，一味地要求印度与俄罗斯切割；美国只愿意借印度来牵制中国，但对印度可能面临的战略风险不关注。

另外，美国特朗普总统的非常规外交风格也让印度非常不适应，导致印度对美国的战略信任度下降，对美国外交热情也有所降低。这样以来，印度不太愿意在当前情况下继续深化与美国的战略关系。把特朗普当局应付过去、以等待后来者，成为印度一个比较稳妥的外交选择。

“平衡求存”成为印度的新策略。在美国不确定性上升和中俄等国的战略压力下，印度从去年底开始就进行了策略性调整，向传统多边平衡战略的方向转移。

一是，印度公开表达与美国之间的战略差异。2018年6月，印度总理莫迪在新加坡香格里拉峰会上公开称：印度的印太地区愿景是积极的，不针对任何国家，将包容性地与该地区国家进行接触；印度洋-太平洋不是个战略概念，而是一个地区概念，“包括地理意义上的所有该地区国家”，以及其他在该地区有利益的国家。这与美国试图通过印太战略、把这一地区分裂成一个对抗性海上集团与陆地集团的

战略规划之间有很大的差距。

二是，印度努力恢复、缓和与俄罗斯和中国的关系。一方面，印度试图缓和与中国的关系。2018年4月，印度总理莫迪专程赶往武汉，与中国国家主席习近平举行中印关系史上的首次非正式峰会。两国领导人决心稳定被去年洞朗非法入侵事件所恶化的中印关系，印度以此减轻了来自中国的战略压力。另一方面，印度努力恢复、巩固与俄罗斯的传统关系。在美国的战略压力之下，印度曾一度疏离俄罗斯。但现在，为了平衡美国的压力、提高在美国面前的博弈地位，印度努力恢复与俄罗斯的传统关系，尤其是军事关系。为此，印度不惜冒美国的制裁风险，从俄罗斯购买S400防空导弹。

三是印度努力发展与美国以外西方国家之间的关系。近年来，印度加强了与日本的合作关系，以抵消美国的战略不确定性。2018年，印度与日本达成了一项军事基地共享协定，日本将允许印度海军使用日本在吉布提的基地，印度则允许日本海上自卫队使用印度在安达曼—尼科巴群岛上的军事设施。印日军事合作既是为了平衡中国的战略影响，也是为了减少对美国的军事依赖。

在国际大乱局与大变局之中，印度调整了自己的对外关系策略，重新发现了大国间平衡外交的重要性。但是，这并不能改变印度对美国的经济和战略依赖，也不会中断印度继续向美国方向靠拢的趋势。印度借美制华、大国平衡的基本战略，也不会发生变化。

## 9. 朝鲜半岛：新形势与新机遇

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2018年，朝鲜半岛出现了转折性变化，各当事方之间的互动形成了朝鲜半岛变化的大合力，核心相关方朝、韩、美、中等都发挥着重要作用。

### 朝鲜半岛局势转圜的核心动力

第一，朝鲜是近期朝鲜半岛局势转圜的最主要推动力量，是局势转变的最显著的“引擎”。朝鲜完成核武力建设之后，安全忧虑得到部分解决，敢于与美国协商，加之出于内部经济发展稳定以及对军事行动的担忧，朝鲜决意从“核经并进”转向“全力发展经济+实现朝鲜半岛完全无核化”的新并进路线。

第二，韩国的“导向”作用是重要动力。文在寅坚持对朝和解政策，反对战乱，也反对过去韩国保守政府颠覆朝鲜政权的核心思路，与朝鲜有“同理心”，得到了朝鲜的合作。文在寅政府谋求改变被动局面，发挥引导、主导作用，将绝不允许战争列为第一目标，通过情报机构打前站，建立起朝韩高层沟通渠道，用民族情义打动朝鲜。韩国也深知中美、美俄的战略对峙与矛盾，最大程度地趋利避害，主动引导局势，积极居间协调朝鲜与美、中、日、俄的关系，一定程度上改变了朝鲜半岛大国支配小国的惯性。“合”、“和”就成为韩国说服大国的最有力筹码。

第三，美国的战略转向发挥了引导作用。美国是朝鲜半岛问题的

“天花板”。特朗普急需朝鲜半岛问题出现松动以获得政治资本，以转移“通俄门”、性丑闻等舆论焦点，为中期选举等造势，进而颠覆性改变了美国的对朝策略，采取了“非典型对朝政策”，及时抓住了朝鲜有可能弃核这一机会，启用蓬佩奥与博尔顿等“对朝强硬人士”担纲对朝实质谈判，最终突破性地举行了朝美会谈，成功深度介入并转变了朝鲜半岛局势。

第四，中国的“稳定器”作用是重要推动力。中国在朝鲜半岛上的力量、利益与作用不容忽视。中国通过赞成并参加对朝制裁惩罚朝鲜挑战与无视国际规则的行为，也对朝鲜正常合理的安全关切与民生提出了操作性强的解决方案，即“双暂停”、“双轨并行”的解决路径。在各方互动深入遇到互不信任的难题时，中国通过如邀请金正恩访华、在国际场合传话等措施，鼓励各方继续保持和解势头，在局势转圜中发挥了动力源和稳定器作用，让朝韩首脑会谈的成果更可落实，也让朝美首脑会谈成果更为清晰，更可期待，为引导朝鲜半岛局势走向解决的“深水区”发挥了独特作用。

### **当事方之间的频繁互动**

朝鲜半岛局势转圜的过程中，各方互动出现了新面貌，不断上升成为朝鲜半岛局势转暖的加速器。中美朝韩等四个核心相关方出现了一系列政策调整，穿梭外交、领导人沟通或其他形式的交往频繁，朝鲜半岛的战争危机转向良性互动。

第一，中朝关系摆脱谷底徘徊，走向良性循环。朝鲜在无核化立场上出现松动，客观上消除了中朝关系 2014 年以来的最大障碍。金

正恩于 2018 年 3 月 25~28 日非正式访华后又两次访华，并与习近平主席会晤，中朝长期僵冷的外交关系也得以破冰。随后，中国外交部长王毅应朝鲜外相李勇浩邀请于 2018 年 5 月初访问了平壤，朝鲜国务委员会副委员长率党政代表团访华，中朝之间的互动在加速。

第二，朝韩关系大幅逆转，由冷漠对立转向热络互动。2017 年 5 月上台的文在寅政府一定程度上继承了金大中、卢武铉政府的对朝政策，朝韩关系转圜有了政治基础，朝韩也恢复了中断已久的秘密接触。朝鲜国务委员会委员长金正恩在 2018 年新年贺词中宣布完成“核武力”建设，平昌冬奥期间“破格”派遣名义元首金永南、金正恩胞妹金与正为特使突访韩国。朝韩随后形成良性互动，达成无核化、朝韩首脑会谈的基本共识，最终实现三次首脑会谈。朝韩实务层顺利实现了军事力量撤出非军事区、共同挖掘朝鲜战争遗骸、铁路勘查工作等成果，文化与体育交流成果也十分丰厚，双方政治认知不断改善。

第三，朝美关系先抑后扬，由对峙走向接触。2017 年内，朝鲜强行突破核导门槛，形成对美威慑。而美国以“炮火”、“怒火”回击，并要各国选边站队，调兵遣将推动“流鼻血”作战震慑朝鲜。美国还在联合国层面推动多项涉朝决议，采取“最严厉制裁”。韩、美、日以及欧洲等诸多国家也都采取了单独的对朝外交、经济与军事制裁措施。朝韩互动与穿梭外交之后，韩国居中穿针引线调解朝美关系，特朗普总统力排众议，决定举行朝美首脑会谈。韩美朝三方互动扭转了朝鲜半岛上的战争风险。韩朝美三边一轨半互动转向政府间接触，形成了“最高领袖-最高机构负责人-情报首长”的“自上而下”式互动模式，朝韩美三边的最高层、决策层与实务层形成了快速沟通模式，

并迅速达成了诸多共识。

第四，为稳定来之不易的朝鲜半岛局势，文在寅政府在国防、外交与对朝问题上都做了转向性的调整。国防政策上，美韩同盟关系是文在寅政府处理的重中之重，也是韩国无法突破的政策天花板。文在寅政府通过防长与外长的“2+2 会谈”迎合特朗普要求重新商谈战时作战指挥权移交、驻韩美军费用分担等问题，并在印太战略、萨德问题、韩美 FTA 谈判等问题上迁就、讨好特朗普。在对朝态度上，韩军修改作战方针，删除将朝鲜视为“主敌”的调门。韩朝两军响应板门店宣言、平壤宣言，在非军事区撤出了武装人员，永久性爆破了多个哨所，就挖掘朝鲜战争遗骸问题开展合作，举行多次军事会谈重建军事互信，在部分区域实现了“终战”，革命性地缓和了朝鲜半岛的军事对峙局面。

### **韩国的独特作用**

客观来讲，为稳定住朝鲜半岛局势，文在寅政府在方式创新与国际合作上发挥了独特作用。

第一，对机遇积极把握。在朝鲜半岛局势的稳定方面，文在寅政府抓住了平昌冬奥会的机会之窗，迅速通过“自上而下”式的穿梭外交，联通了中美两个对朝鲜半岛最有影响力的大国，并建立起了以首脑外交为主的外交网络。在稳定住中美两个大国关系的基础上，中朝、朝韩、朝美都实现了首脑会见，大大缓和了朝鲜半岛局势。同样，为避免中美对于朝鲜半岛未来变化的顾虑，韩国还建立起了与中美的高层联络渠道，尤其是不断强调美韩同盟“不变”、不过多提及驻韩美



军地位等，并为此在终战宣言、和平协定的问题上不断迎合美国的立场，有意稳定住美韩关系。

第二，对结果追求实用主义。文在寅政府认为，朝鲜半岛和平的钥匙系于朝鲜的无核化进程，如果国际社会同心戮力，朝鲜实现完全无核化也并非遥不可及。然而，朝鲜的无核化不仅仅是朝韩的事情，中美日俄以及国际社会都是“当事方”之一。“核是朝鲜确保政权生存的手段”，令朝鲜无核化也必然付出相应的代价。而向朝鲜提供安全保障只有国际社会才能胜任，只能基于韩美同盟加强与美日中俄等周边国家的合作，才能确保执行力与说服力。

第三，对大国“分而治之”。为稳定来之不易的朝鲜半岛局面，文在寅政府非常重视对中美等国的大国外交，也是最为无奈的部分。对于美国，韩国无法根本性地改变韩美关系，只能在美国的“施舍”下发挥外交技能。因此，在联合军演等涉及朝鲜半岛和平的根本性问题上，韩国不敢越过美国的红线，只能说服特朗普等，不得不求助于、忍耐、顺从美国的决定。对于中国，文在寅政府则采取沟通求助和“求谅解”策略，避免复杂的中美关系影响到朝鲜半岛局势，在终战宣言、和平协定的参与方问题上反复无常。

第四，朝韩尝试联手主导半岛局势。文在寅将南北关系的有利一面发挥到了极致。韩国认为，朝鲜半岛的两个直接当事方，应有巩固互信。文在寅政府上台后，先后与朝鲜进行了重启开城工业园区、平昌冬奥、体育对话等会谈，积累起了信任，实现了三次首脑会谈，在军事领域达成了 919 军事协议，强行推动了朝鲜半岛的部分“终战”。韩国政府还创造性地利用朝鲜的决策特点，开创了“最高领导人+情

报机构”的新模式，启用韩（青瓦台安保室与国家情报院）、朝（金与正+秘书室+统战部）、美（蓬佩奥+中情局韩国任务中心）的高层接触渠道，并通过穿梭外交，架起了朝美沟通的桥梁。

朝韩第一次尝试在大国竞争的间隙中合作或配合处理朝鲜半岛问题，而非受制于大国。但受韩美关系所限，这种合作存在局限，朝韩的交流不可能过多地触及军事领域中韩美合作的部分，韩朝互信的建立更多通过政治、经济、文化等多方面、多领域的合作，诸如文化、体育、离散家属等问题都取得了突破性的进展，而在高级政治层面，如军事、外交上仍然受到韩美同盟及联合国安理会制裁决议所限。

### **朝鲜半岛新的不确定性**

朝鲜半岛核问题进入操作深水期，但同时朝鲜半岛的形势也面临着巨大的不确定性。但正是这些不确定性的叠加，多方推动了朝鲜半岛问题的转圜与进展。

第一，无核化的前景与延续性。暂时来看，朝鲜愿意通过弃核进程换取发展机遇，朝鲜半岛迎来“金正恩机遇”。如何将金正恩弃核换发展、发展保安全代替拥核保安全的想法转化为现实，是决定朝鲜半岛走向的最重要因素。中美等大国竞争虽然会影响朝鲜半岛走向，但中美在朝鲜半岛无核化问题上大方向目前仍然一致，确保了朝鲜半岛局势稳定发展的动力。

第二，美朝韩领袖异变的个人品质导致国内政治与外交的严重剥离。事实上，朝美韩三国内部反对本国领袖立场者远远多于赞成者，但各国领袖强力推动。美韩总统更是不顾国会与其它部门的反对，坚

持与朝鲜进行会晤并推动实施。而美朝韩的领导人也恰逢非典型领袖当政。对于美韩而言，保证本党的执政或领袖的再选成功，也使得对朝鲜核问题出现高度期待。朝鲜虽然对特朗普不满意，但与其它人相比，特朗普更愿意同朝鲜交易。

第三，朝鲜半岛思维逻辑的新常态。传统观念与处置方式不适合于当前形势，地缘政治、大国政治的传统视角部分失效。六方会谈被抛弃，而非常规方式，如多轮首脑会晤、朝美直接接触、灵活的对话与“极限”手段的使用发挥更多作用；传统工作层接触、高层战略判断的方式被颠覆，而“自上而下”式的最高决策层直接参与扫清了诸多工作层面的障碍。以往将朝核问题、导弹问题、人权问题并联式的处置方式被抛弃，特朗普更着重于某个单一问题的解决。

从 2018 年全年的走势看，朝鲜半岛无核化还存在不少困难。首先是过分倚重“自上而下”的方式，在解决方向性问题上确实发挥了必要作用，但在解决具体细节问题上遇到了困境和瓶颈。其次，各方过分集中于无核化概念的不同之处，而忽视了共同点，相关概念过度集中于朝鲜单方面的无核化和付出，而未考虑到美国的义务与朝鲜的需求。再次，无核化的重点过分集中于美国与朝鲜，相对忽视了韩国、中国等当事方的作用，造成了朝鲜盯死美国、美国盯死弃核的死结，忽视了灵活性和实质进展。

当然，从 2018 年末各方的举措来看，各方仍然珍惜来之不易的无核化机遇与谈判窗口，并有意松动手中筹码。在可预见的未来，朝鲜半岛无核化进程逐渐步入深水区，需要实现的任务与目标也会有艰难的进展。

## 10. 朝鲜：走向“新并进”路线

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2018 年朝鲜半岛局势的转折性变化，当然是朝、韩、美、中等各放合力、互动的结果，半岛局势转圜的最主要推动力量还是来自朝鲜本身的转变，尤其是最高领导人金正恩的转变。

### 内部大变化

内因是朝鲜对外政策发生变化的最大动因。

第一，金正恩树立了稳固的权威，确立了自上而下的决策机制。一是金正恩调整、理顺了党政军的定位与相互关系，弱化国家行为的军事化色彩，展现出“正常”国家行为，军方与其他元老擎肘的局面得到改善，避免对抗、全力发展经济的战略得以执行。二是“完成”核武力建设，掌握了对美谈判的主动与主导权。朝鲜认为对美核威慑“足够、真实、有效”，“核地位”已经成为事实。三是转换发展路线，由“核与经济并进”战略转向全力发展经济。金正恩早已承诺改善民生，但不断的核导试验招致严厉制裁，而朝鲜上下已经无法承受再次的“苦难行军”。早在 2014 年的“5·30”讲话中，金正恩就指出，“对苦难行军时期到今天都未能解决国家的经济文化、人民生活的现实，包括经济管理人员在内的所有人员，都应该进行深刻的自我反省”。社会与经济缺乏活力的状态，不仅核武本应有的遏制力与外交筹码消耗殆尽，金正恩的权威也将荡然无存。朝鲜有着改善内外环境的刚性需求。

第二，社会发展接近临界点，经济提升成为必由之路。朝鲜内部市场经济因素的萌芽与扩散导致了社会阶层的分化。朝鲜境内有 380 多万部手机、600 余个自由市场，以及更多的自发集市，也有数十万人次的在外劳务人员，和频繁的贸易往来。市场因素的泛滥与信息流通改变了朝鲜人的日常生活方式，也造就了不少诸如“钱主”的富有阶层，更是改变了朝鲜居民对内外政治的看法。“无法想象重回苦难行军时代”已经成为社会共识，且这一趋势已经无法逆转。根据经济基础决定上层建筑的基本原理，经济层级的变化最终必然会反映在政治结构中。

第三，新思维与旧思想激烈对撞，政治发展面临瓶颈。朝鲜的社会环境出现了诸多新的挑战与现实。年青一代有着敏锐的新思维和逻辑行动方式，其提出的诸多新方案相对符合国际社会的要求。但由于受到客观条件的限制，对于诸多新的思想与路径，大部分民众的接受度实际较低，对于接受过 70 年朝鲜式教育的大部分朝鲜居民而言，仍然处于传统思路的惯性之中，无法理解，而即使得到理解、但由于客观条件限制无法具体实施的情况更多。这也是金正恩委员长不断斥骂手下及部分企业、单位领导人的原因。

没有对前辈政治、尤其是某些做法上的突破，就不可能有变革式的发展机遇。但是，朝鲜式权威体制的延续，加之以苏东剧变的教训以及叙利亚、利比亚的惨痛现实，又使得朝鲜对政治上的变化顾虑重重。守旧传统的惯性与新锐思想的融合，以及处于制裁条件下的朝鲜社会客观上又无法推行改革开放，如何从政治上突破某些做法以给予社会经济发展以新的动力，而又能保持统治的合法性，是朝鲜面临的

另一重要课题。

朝鲜内部正在步入各个层面的操作深水期，但这种风险也是朝鲜面临的最大机遇。

### **对外有调整**

朝鲜对外部视角的调整是其发生转变的另一重要动因。

第一，战争风险促使朝鲜改变了对抗的想法。朝鲜连续的核导试验促使美韩认真备战，连续的军事备战行动极大地震慑了朝鲜。朝鲜意在“以战逼和”，而非真正“决战”；本意是“拥核保安全”，但拥核后“却失去了全世界”。在高度的战争风险面前，金正恩认识到过去要靠武器获取的东西，现在必须靠发展经济实力来获取和保持，只能“以和逼和”。

第二，朝鲜担忧经济崩盘。联合国安理会通过多项涉朝制裁决议，甚至将诸多涉及民生的项目列入制裁对象，美韩日澳欧盟等宣布了多项单独制裁措施，并驱逐朝鲜涉外机构与人员，“群殴”式向朝施压。在制裁与围堵之下，朝鲜的“朋友圈”严重萎缩，国内社会经济遭受严重打击，各领域陷入瘫痪危机，朝鲜经济的崩盘“指日可待”。

第三，朝鲜改变了对韩国看法。过去韩国保守政府解决问题的核心思路是颠覆朝鲜政权，自然导致朝韩关系的断崖式跌落。而文在寅则坚持对朝和解政策，反对战乱，与朝鲜有“同理心”。朝鲜认为文在寅对朝鲜半岛和平与稳定有着“真诚愿望”。

第四，朝鲜调整了对华认识。过去朝鲜与美韩的对抗游刃有余，概因思忖中俄撑腰，但一连串过激行为使朝鲜首次面临失去“大后方”

的困境，拥核带来了更大的不安全和风险。金正恩通过宣布有意弃核，扭转对华关系，从而产生了更大的信心。

## 走向“新并进”

从截止目前的情况看，朝鲜的治国理政方式确实不同于以往，这也是朝鲜历史与现实融合的结果。但朝鲜是否走向更进一步的调整与转型，尚需缜密观察。

第一，朝鲜并非固步自封，不能开放是外部环境所致。朝鲜认为，自己始终有着开放心态，并非朝鲜不愿意改革开放，而是美国等国家的封锁，导致了朝鲜不能开放。经过多年“试错”和摸索，朝鲜认为，与国际社会对抗没有好结果，尤其是与中国搞对抗的后果更为严重。因而正转变方式，尝试以合作、改革、开放与国际社会打交道，并确定了未来的生存之道只能是走向世界，而非固步自封。

第二，核问题的进展是朝鲜能否走向改革开放的关键。无论朝鲜确定走何种道路，其最初出发点都系于朝鲜半岛核问题的解决，而现阶段的关键则是在弃核问题上如何与美国博弈，并获得美国的认可。然而，这一博弈过程正在进行之中，并将持续较长时间。如何将朝美关系改善转换为朝鲜改革开放的充分条件，而非必要前提，正是朝鲜目前的难题之一。经过多年与美国的交手，加之对国际形势的精准把握，朝鲜自认能产生影响并相信特朗普会与朝做交易，朝鲜也愿意通过核问题的解决来换取政治与安全利益。

第三，朝鲜积累了相应建设发展的经验与教训。从朝鲜社会的发展来看，经过近6年的折腾和“运动式”搞经济，通过“50天战斗”、

“70天战斗”、“100天战斗”等方式强征民力民财，朝鲜的经济发展有了一定起色。但多数的发展成就都投入到了未来科学家大街、黎明大街、元山市政、三池渊地区、马息岭滑雪场等“纪念碑”式的建设上，消耗甚巨。而从2016年起，不断进行核导试验，导致国际制裁一再加码，对朝鲜社会经济造成了严重打击，甚至对民生基础形成严重威胁。在2018年1月1日的新年贺词中，金正恩提出“全力发展经济”方针后，受到国内的普遍欢迎。而这一方针在4月的劳动党七届三中全会得到追认后，更成为朝鲜的国策路线。目前，朝鲜全力发展经济与社会向“钱”看蔚然成风，成为朝鲜社会发展的风向标。

第四，国内政治稳固，不存在政治替代方案。自2012年接掌朝鲜政权以来，朝鲜领导人先后对党、政、军等要害部门进行了大换血、大手术，牢固掌握了核心权力，尤其是对部队的掌握。同时，领导人在干部的任命中，更多地起用了“白头山二代”、“三代”年轻人士，党政军中高层干部与金正恩委员长形成了“利益共同体”、“命运共同体”。同样，朝鲜民众将金正恩与金日成等同化，经济也有好转，金正恩不存在合法性危机。

从内外环境来看，朝鲜的未来走向仍可期待。

第一，从外部看，中朝关系正在修复并重拾升势，与美国的关系也在不断修正之中，与韩国的关系则完全在朝鲜掌握之中。

保持与大国关系的稳定，打好中美两个大国牌，使朝鲜有了相对稳定的外部环境，处理其它关系则相对轻松。核问题的博弈，“斗而不破”将成为朝美关系的基调，朝鲜能够稳定住对美关系。同样，朝鲜了解美国，尤其是视特朗普总统为不可多得的“机会之窗”，因此



会有节奏地满足特朗普以换取利益。朝鲜非常清楚，只有中国式发展道路与政治模式才能实现其保政体、要安全、求发展的多重目标。美国是其多年宿敌，转变只是权宜之计，最终目标仍然是要消灭朝鲜政体。韩国提出的“H”形经济合作方案，包括其许多做法和目的，对朝鲜式政体有极大危害。

第二，从内部看，朝鲜有需求、有资源、有愿望、有潜力。朝鲜重、轻工业、化学工业、能源电力工业水平低，重建工业链条的发展需求巨大，与中国“去产能”所要转移的产能恰恰符合。朝鲜矿产、渔业、农业等战略性产业也不愿为外力所控制。同时，朝鲜适龄劳动力非常丰富，而且绝大部分受过高等教育，素质高、价格低。尤其是其庞大的军队保有量，更是朝鲜巨大的劳动力财富。朝鲜的军队正在改变任务方向，在保安全的同时，也积极地参与建设了诸多重大工程，展示出了巨大的建设能力与爆发力。朝鲜脆弱的金融业也需要大力扶持。朝鲜正在逐渐改变其金融体系中外国货币，如美元、人民币、欧元的占比，加强本币地位，摆脱金融控制。

朝鲜认识到，在急需发展机遇的情况下，形势逆转与倒退的代价将十分高昂，不但政治外交上的优势地位丧失殆尽，经济发展急迫需要的各类环境也将不复存在。朝鲜必须在履行好朝鲜半岛完全无核化这一承诺的同时，为融入国际社会、对接国际理念获得必要的发展条件。因此，朝鲜大胆扭转了金正日时代“先军政治”、“建设强盛大国”的战略发展方向，突破了通过对抗与极力跨越核门槛“核经并进”政策的禁锢，转型成为以全力发展经济为目标、以“无核化”与“贯彻七届三中全会方略”为手段的“新并进”路线。

当然，金正恩也有相当大的苦恼。对于朝鲜社会而言，最迫切的课题是证明“无核化”与“全力发展经济”之间的正相关关系。无核化的选择有利于全力发展经济，而全力发展经济则能够用社会安全替代核武器保安全，从而最终证明无核化有利于国家安全与经济发展。同样，朝鲜也需要从国际社会得到证明，朝鲜是有着正常安全需求与发展需求、受到国际社会欢迎的国家。更重要的是，金正恩还需要执政合法性的保证。当前朝鲜社会的现实已不允许遵循老式政治掌控权力，而只能通过社会发展与经济腾飞来显示新时代完全不同于父辈的政治合法性。

融入国际社会与完全无核化、社会经济发展、政治合法性形成了金正恩执政下朝鲜的完整逻辑链条，也形成了独特的朝鲜半岛转机。一定程度上讲，朝鲜弃核换取发展利益的想法能否实现，取决于朝鲜半岛上的博弈结果，尤其是周边大国能否将其弃核意愿引导向弃核现实、将坚定的弃核意志转化为稳定的弃核事实。

## 11. 中东：对抗、僵持与失衡

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对抗、僵持、失衡，构成了 2018 年的中东地区形势的典型特征。对抗突出表现为美国及其盟友沙特、以色列与伊朗的严重对抗，伊朗问题甚至有可能超越巴以问题成为中东的核心问题；僵持具体表现为叙利亚问题、巴以问题、也门问题等热点问题出现政治解决希望，但在总体上仍处于僵持状态；失序主要表现为受美国中东政策负面效应，以及地区大国博弈的影响，中东国际关系的分化组合更趋复杂，地区格局持续失衡。

### 美国及其盟友与伊朗的对抗全面加剧

根据特朗普政府 2017 年的《国家安全战略报告》，反恐、遏制伊朗、能源安全成为美国在中东的主要战略利益。由于“伊斯兰国”实体在 2017 年被消灭，能源安全并无迫在眉睫的威胁，遏制伊朗便成为 2018 年美国中东政策的主轴。总体而言，否定并退出伊核协议、重启制裁、组织地区盟友对抗伊朗成为特朗普政府伊朗政策主要内容。

2018 年 5 月 8 日，美国宣布退出伊核协议，并恢复对伊朗的制裁。与此同时，美国国务卿蓬佩奥提出了对伊朗“极限施压”的 12 条苛刻要求，其内容主要包括伊朗停止所有铀浓缩行为、无条件接受国际原子能机构核查、停止导弹研发和扩散、停止支持中东“恐怖组织”、停止对伊拉克、也门和叙利亚的干预等。此后，美国相继在 8 月和 11 月两次启动了对伊朗的大规模制裁。美国制裁伊朗的基本目

标是通过“极限施压”迫使伊朗就范，重新签署美国主导的伊核协议，同时通过强化与沙特、以色列的关系重塑中东的力量平衡。

特朗普中东政策的核心是在继续进行战略收缩、减少投入的情况下，通过遏制伊朗整合在奥巴马时期日渐疏远的盟友关系，重点强化美国与沙特和以色列的盟友关系，使其在遏制伊朗、反恐等领域承担更多任务和成本，进而增强美国对中东事务的主导权。首先，为强化与以色列的盟友关系，在巴以问题上采取明显偏袒以色列的政策，并企图强推解决巴以问题的所谓“世纪协议”。其次，组建以沙特为中心的反伊朗联盟即“阿拉伯版北约”，并大力支持沙特的内外政策，尤其在“卡舒吉事件”中极力维护美沙同盟关系。

美国遏制伊朗的政策面临着以下严峻挑战和困境。首先，美国企图通过制裁迫使伊朗主动改变和内部生变的可能都微乎其微，也很难改变其在地区热点问题上的政策。其次，美国的伊朗政策尽管得到沙特、以色列等中东地区盟国的配合，但沙特的政治发展，尤其是沙特能否成为防范国际能源市场稳定的“防洪堤”，都存在不确定性。最后，全面制裁伊朗导致的不确定性可能冲击美国金融霸权，这是美国深层次的隐忧。如果在国际能源市场出现欧盟正在探讨的独立于美元之外的交易系统，这无疑意味着美国金融霸权的松动。

总之，遏制伊朗构成了 2018 年特朗普政府中东政策的主线。由于特朗普的中东政策在本质上是以较小投入获取最大收益、以“离岸平衡”取代直接干预、以单边主义取代多边主义的功利主义和实用主义，美国在中东的作用更多呈现破多立少的消极影响。美国遏制伊朗的政策构成了中东地区尤其是海湾地区形势急剧紧张的根源所在。

## 热点问题持续僵持，政治解决进程艰难

在 2018 年的中东热点问题中，巴以问题的跌宕起伏和僵持难解最为引人瞩目。5 月 14 日，美国选择以色列“国庆日”亦即巴勒斯坦的“受难日”，在耶路撒冷高调举行美国驻以色列大使馆开馆仪式，诱发了 2014 年以来巴以最血腥的暴力冲突，造成 58 名巴勒斯坦人丧生，2800 多人受伤。

特朗普还力图强推巴以和平方案即所谓的中东和平“世纪协议”。2018 年 6 月，特朗普会见约旦国王阿卜杜拉，希望“世纪协议”能得到同盟国家的支持。据报道，“世纪协议”可能包括在约旦河西岸边界、加沙地带与埃及边界、戈兰高地主权等方面偏袒以色列，为未来巴勒斯坦国“首都”选址，推进巴以经济一体化等内容。该协议不仅严重侵害巴勒斯坦和叙利亚的领土主权，甚至也将对埃及对西奈半岛的主权构成侵蚀。但由于美国把更多精力投入于遏制伊朗，以及巴以问题的复杂敏感，所谓的“世纪协议”仍处在酝酿之中。在 2018 年底，巴以冲突再度升级，以色列和巴勒斯坦 Hamas 组织发生严重冲突，但由于以色列受到各种因素限制，才未对 Hamas 大打出手，避免了冲突升级。

此外，美国还施压沙特、约旦等阿拉伯国家在巴以问题上让步。这既使沙特等阿拉伯国家面临阿拉伯民众和舆论的压力，也有导致巴以冲突再度升级的风险，同时也给伊朗利用巴以问题进行反以、反美的政治动员提供了口实。

叙利亚问题同样僵持难解。在 2018 年，巴沙尔政权在俄罗斯支

持下继续扩大和巩固其控制的区域，并把反对派挤压至伊德利卜，但却因各方压力一直处于围而不攻的僵持状态。与此同时，美国、土耳其、以色列都曾对叙利亚目标发动军事打击，土耳其甚至对阿夫林地区发动了长达 3 个月的军事行动。因此，目前的叙利亚事实上处于俄罗斯支持下的巴沙尔政权控制主要领土、美国支持的库尔德人和土耳其各自控制小部分领土的复杂状态。在政治和解方面，西方和俄罗斯主导的各种机制并行发展，尽管对停止暴力、缓解冲突等方面发挥了一定的作用，但却难以就叙战后安排达成一致，也充分体现了域内外大国围绕叙利亚危机的复杂博弈。

也门冲突同样处在僵持之中。自 2018 年 5 月以来，胡塞武装与沙特领导的阿拉伯联军、也门政府军围绕西部港口城市荷台达市展开激烈冲突，造成了巨大的人道主义灾难。随着沙特陷入“卡舒吉事件”的危机之中，美国取消对沙特情报和后勤支持，导致沙特对也门的空袭受阻。在此背景下，也门交战双方于 12 月初同意在联合国协调下在瑞典举行和谈，但其前景仍难容乐观。

### **地区格局持续失衡，地区秩序更趋混乱**

从影响中东地区格局的外部因素看，尽管特朗普政府加大了对中东事务的投入，但其政策主线仍是战略收缩，同时也缺乏系统的中东战略。美国在中东不断减少投入、不愿直接介入的做法，使其主导中东事务的能力相对下降。此外，尽管俄罗斯重返中东的步伐加快，但除了维护自身现实利益外，并无主导中东地区格局和构建地区秩序的能力；欧洲对中东的影响力仍在持续下降；印度、日本对中东战略投

入加大，但影响力仍然有限。

总之，美俄主导能力和意愿的不足和其他域外大国能力有限的态势，导致外部大国长期主导中东地区格局的局面渐趋弱化。这是影响地区国家尤其是沙特、伊朗、土耳其和以色列等地区强国为寻求自身安全，不断扩张地区影响力的重要原因所在。在不断变动的中东地区格局中，除沙特与伊朗的对抗继续加剧外，2018年地区力量的分化组合有以下几点值得注意。

首先，沙特与土耳其的矛盾与摩擦加剧。近年来，土耳其与沙特围绕埃及穆斯林兄弟会问题、卡塔尔断交危机等热点问题多有不睦，其实质是双方争夺中东地区主导权、伊斯兰世界尤其是逊尼派主导权、发展模式之争等一系列矛盾的体现。2018年10月以来，双方围绕卡舒吉遇害事件的外交争端不断发酵，不仅使双方的矛盾更趋表面化，而且对美沙、美土关系都产生了不小的冲击。在卡舒吉事件中，沙特最大的诉求是“止损”，即避免卡舒吉事件对沙特的国际形象尤其是穆罕默德·萨勒曼的王储地位构成威胁，因此其底线是希望土耳其的调查结果不要把穆罕默德·萨勒曼牵涉其中，进而能够使穆罕默德·萨勒曼王储地位不致因此发生严重动摇。土耳其的诉求在于其在卡塔尔、叙利亚问题尤其是库尔德问题上的现实利益，但其核心关切是希望通过沙特撬动美国，使美国减轻对土耳其的政治、经济和外交压力，以改善其近年来不断恶化的内外环境。美国已宣布该事件不会影响美沙同盟关系，但迄今为止土耳其依然对沙特不依不饶，该事件如何收场仍是2019年中东局势的看点之一。

其次，阿拉伯世界的分化尤其是海合会的分裂进一步加剧。沙特

与卡塔尔断交危机仍处在僵持之中，卡塔尔在 2018 年底宣布退出欧佩克组织、国家元首缺席海合会峰会等做法，表明双方的矛盾仍未得到解决。在海合会内部，沙特、阿联酋和巴林成为反对卡塔尔的坚定力量，阿曼和科威特相对超然，卡塔尔陷入孤立，进而使海合会 6 国形成了“3+2+1”的碎化结构。

最后，美国推动构建对抗伊朗的“以色列—务实逊尼派轴心”，使以色列与部分阿拉伯国家关系走近。在 2018 年，以色列与沙特、约旦、阿曼、科威特等阿拉伯国家的关系不断升温，其根源仍在于在美国的伊朗政策和巴以政策，即推动以色列与阿拉伯国家和解，争取阿拉伯国家配合美国的巴以政策，同时通过构建“以色列—务实逊尼派轴心”共同对抗伊朗。这种局面使长期存在的阿以矛盾趋于缓和，而阿拉伯逊尼派国家与伊朗的矛盾进一步上升，有可能使海湾地区成为继“新月地带”之后中东地缘政治的又一漩涡。



## 12. 东南亚：大国博弈下的外交新调整

祁怀高 复旦大学国际问题研究院副院长

2018 年东南亚地区形势总体稳定，但中美日印等大国在该地区的博弈日趋激烈，成为影响东南亚国家外部环境的最大挑战因素。其中，中美在东南亚地区的博弈尤为激烈，中美两国都在试图扩大在该地区的影响力。2018 年，中美在东南亚的博弈呈现“中进美退”态势。中国与柬埔寨关系的日益密切、与菲律宾关系的大幅改善、与缅甸关系的迅速靠近，都体现了中美在东南亚影响力的“此涨彼消”。不过，当前中美在东南亚的博弈并非零和游戏，目前仍处在一种“竞争性共存”阶段。在 2018 年大国博弈日趋激烈的背景下，东南亚国家的外交新调整呈现出新特征：一是东南亚国家提出东盟版的印太愿景，试图维持东盟“中心地位”；二是东南亚国家在大国战略博弈中采用议题性选边策略，以谋取利益最大化；三是东南亚国家对中美两国的外交政策调整速度加快，在实际外交政策操作上对中美分别采取了拉近或拉远的做法。

### 地区形势总体稳定

大多数东南亚国家经济增速较快，已成为世界上最具发展活力和潜力的地区之一。根据世界银行 2018 年 10 月版的“世界经济展望数据库”的预测数据，大部分东南亚国家 2018 年度经济增速较快。2018 年的 GDP 增长率（预测）数据表现抢眼的东南亚国家包括：柬埔寨（6.95%）、老挝（6.79%）、越南（6.6%）、菲律宾（6.52%）、缅甸（6.40%）、

印度尼西亚（5.14%）。新东盟四国（柬老缅越）的增长潜力与活力比老东盟六国要更强一些。根据世界银行的预测，2019年柬埔寨、老挝、越南、菲律宾、缅甸五国的GDP增速将超过中国。当前，东盟10国和6个对话伙伴国（澳大利亚、中国、印度、日本、韩国和新西兰）之间的区域全面经济伙伴关系协定（RCEP）谈判已取得实质性进展。RCEP谈判各方表达了在2019年达成协议的决心。尽快完成RCEP谈判对维护地区贸易自由化和便利化，支持全球自由贸易，具有重要意义。

2018年东南亚国家政治发展总体稳定，但稳中有忧。2018年，东南亚地区国家中除马来西亚、柬埔寨进行大选外，其他国家均未举行全国性的选举换届活动。各国执政当局加强执政党或执政联盟建设，维稳图治，基本维护了国内政局稳定。2018年5月，马来西亚举行了第十四届大选，马哈蒂尔领导的希望联盟获胜，马哈蒂尔担任马来西亚第七任总理。2018年9月，马来西亚前总理纳吉布被捕，因牵涉“一马基金”贪污案面临起诉。2018年7月，柬埔寨举行了大选，洪森领导的执政党人民党获胜。柬2018大选之前，唯一能与人民党竞争的反对党救国党在2017年11月被解散。洪森虽然保持着对柬政局的控局，但隐忧仍存。柬执政党和反对党需要努力寻求政治和解，逐步建立稳固成熟的多党民主制。2019年2月，泰国将举行大选；2019年4月，印度尼西亚将举行总统选举。2019年泰国和印尼的大选的及选后政局走向值得关注。

2018年东南亚区域内的安全热点问题有所降温，但民族宗教冲突仍存。经过中国与东盟国家的共同努力，南海局势降温趋缓。2018

年 8 月，东盟国家与中国达成“南海行为准则”单一磋商文本草案，这是“准则”磋商所取得的一项明显进展。2018 年 11 月，中国表达了愿同东盟国家争取未来 3 年内完成“准则”磋商的希望。2018 年 11 月，文莱和菲律宾分别与中国探讨了油气开发合作，表明相关南海沿岸国正在积极推进油气领域的务实合作。但南海问题“树欲静而风不止”，海面下“暗流涌动”。“南海仲裁案”仲裁结果对中国南海维权的不利影响具有长期性和复杂性，有关国家绝不会放弃利用所谓仲裁裁决做文章。2018 年，菲律宾反政府武装仍在南部棉兰老岛等地活动并且发展。菲政府仍然需要采取坚实措施，以根除南部地区的恐怖分子和反政府武装分子。2017 年 11 月，缅甸与孟加拉国签署“若开邦流离失所者”(“罗兴亚人”)遣返安排，但难从根本上解决问题。2018 年，缅甸政府军与民族地方武装之间的冲突不时发生，缅甸民族和解与和平进程任重道远。

### 大国在东南亚的博弈日趋激烈

2018 年，中美日印等大国在东南亚地区展开了激烈的博弈。中国将东南亚视为其周边外交的关键地区，积极推进“一带一路”倡议。美国特朗普政府的“印太战略”逐渐明晰，而东南亚被美国视为联通印太的关键地区。日本安倍政府积极强化其与东盟及东南亚国家的“特殊关系”，2018 年 10 月日本与湄公河国家签署《东京战略 2018》，加强在基建、教育、气候变化等方面的合作。莫迪上台后推出针对东南亚的印度“新东进政策”，未来印度在东南亚地区的存在和影响力会日益增加。其中，中美博弈对东南亚国家外部环境的影响最大。

在中美战略博弈不断加剧的背景下，中美两国都在试图扩大在东南亚地区的影响力。美国 2017 年 12 月《国家安全战略》报告将东盟国家划分为盟友和伙伴两类。菲律宾和泰国是美国的重要盟友和市场；越南、印度尼西亚、马来西亚和新加坡是美国在安全上和经济上日益重要的伙伴。2018 年 7 月，在谈及“美国的印太经济愿景”时，美国国务卿蓬佩奥强调，位于印太地区中心的东盟在印太愿景中扮演着核心角色。蓬佩奥提出的“印太区域投资计划”指出，美国将在数字、能源和基础设施领域投资 1.13 亿美元，以提升美国在印度洋—太平洋地区的作用。在中国—东盟建立战略伙伴关系 15 周年之际，中国表示始终把东盟作为周边外交优先方向，坚定发展同东盟的友好合作。中国愿与东盟做共同发展、共建和平、开放共赢、开拓创新、包容互鉴的“五大伙伴”，愿与东盟建设更为紧密的命运共同体。2018 年 11 月，中国和东盟达成“中国—东盟战略伙伴关系 2030 年愿景”。

2018 年，中美在东南亚的博弈呈现“中进美退”态势。中国与柬埔寨关系的日益密切、与菲律宾关系的大幅改善、与缅甸关系的迅速靠近，都体现了中美在东南亚影响力的“此涨彼消”。在 2018 年 7 月柬埔寨大选前后，美国及欧洲施压洪森政府。中国继续加大对柬投资和援助，支持柬埔寨走符合本国国情的发展道路，支持柬埔寨维护稳定、加快发展、改善民生。自杜特尔特 2016 年 6 月就任菲律宾总统以来中菲关系大幅改善。2018 年 11 月，中国国家主席习近平访问菲律宾期间，中菲建立全面战略合作关系，两国签署了 29 项合作文件。其中的《共同推进“一带一路”建设的谅解备忘录》和《油气开发合作的谅解备忘录》尤为值得关注。缅甸因“罗兴亚人”问题备受

美国等西方国家指责和批评；中国认为“单方面指责或施压无助于问题的解决”。2017年11月，中国提出分三个阶段解决缅甸若开邦问题设想。2018年9月，中缅签署了政府间《关于共建中缅经济走廊的谅解备忘录》。2018年12月，缅甸宣布成立实施“一带一路”指导委员会，委员会由国务资政昂山素季任主席。当前的“中进美退”态势在未来仍面临难以预期的变数。2018年5月马来西亚大选后马哈蒂尔政府对华政策的变化就证明了这一点。美国对柬埔寨、菲律宾、缅甸的影响力仍然很大，这三个东南亚国家中仍有很强的亲美势力存在。对中美两国而言，当务之急是采取措施避免让日趋激烈的博弈演变成零和游戏。

中美在东南亚影响力“此涨彼消”的原因有三。一是，美国在东南亚投资的减少和贸易份额的下降。失去强有力的经济支撑，美国在东南亚的政治军事影响力就不会持久。二是，中国与东南亚的贸易投资日益增加，中国倡导的“一带一路”正在东南亚深入推进。2017年中国对东盟国家的投资流量为141.19亿美元，截至2017年底中国对东盟国家的投资存量已经达到890.14亿美元。中国在东南亚经济力量的增长必然会带来政治影响力的拓展。三是，美国的“人权外交”与东南亚国家的现实需求差距太大。菲、缅、泰等曾经倾向于美国价值观的国家都因在国内人权问题上受到美国压力而转向中国；而中国则照顾到了东南亚国家内部治理中的现实困难，没有就人权和治理问题向东南亚国家政府单方面施压。

## 东南亚国家的外交新调整

面对中美等大国在东南亚地区的激烈博弈，东南亚国家采取“大国平衡外交”、强调东盟“中心地位”、弘扬团结精神。东南亚国家除了印尼有着大国潜质外，其他国家都是中小国家。中小国家一般都希望在大国之间保持“等距离外交”，并在大国博弈中采取“左右逢源”的外交政策选择。东南亚国家不希望任何一个区域外国家主导该地区的事务，更不希望中美博弈迫使区域内国家“选边站”。在 2018 年大国博弈日趋激烈的背景下，东南亚国家的外交新调整呈现出以下特征：

特征之一是东南亚国家提出东盟版的印太愿景，试图维持东盟“中心地位”。作为横跨太平洋和印度洋的群岛国家，印尼在东盟版印太愿景中扮演着主要推动者角色。2018 年 1 月，印尼外长蕾特诺提出印太地区架构设想，强调开放、透明、包容原则，坚持对话和合作的大方向。印尼的这一举动表明其对美国等提出的“自由开放的印太”感到不安，印尼试图提出另一种以东盟为中心的印太愿景。在 2018 年 8 月的东亚峰会外长会上，印尼第一次完整地阐述了其印太前景和印太合作原则。原则包括，支持东盟的中心地位，构建开放、透明、包容和尊重法治的印度—太平洋合作，将东亚峰会机制作为主要平台等。印尼倡议的东盟版印太前景，意图强化已有的东盟主导的机制从而为东盟“中心地位”提供新的动力。

特征之二是东南亚国家在大国战略博弈中采用议题性选边策略，以谋取利益最大化。东南亚国家根据政治、经济、安全等不同的议题，采取不同的对美和对华政策。如越南与中国在经贸、投资、基础设施建设等领域开展合作；但与此同时，越南与美国在安全领域的合作关系升温。清华大学国际关系研究院中外关系定量预测组傅聪聪的文章

认为，当前东南亚国家的这种议题性选边策略不同于冷战时期东南亚国家在美苏之间的选边战略。冷战时期，东南亚国家的政权生存依赖美国或苏联，必须进行全方位的选边，即在政治、经济、安全等领域都与自己的政权保护国保持一致。当前东南亚国家的自主性很强，其政权基础的主要支柱已不再是外部势力，与超级大国的关系并不影响政权的生存与否。因此，当前东南亚国家已经具备在大国战略博弈中采用议题性选边策略的条件，这更有利于扩大它们的国家利益。

特征之三是东南亚国家对中美两国的外交政策调整速度加快。东南亚国家都奉行“大国平衡术”，但同时也在实际外交政策操作上对中美分别采取了拉近或拉远的做法。柬埔寨、菲律宾、缅甸、泰国四国对美保持一定距离甚至拉远与美距离，提升对华关系。印度尼西亚、文莱、老挝三国与中美均无矛盾和冲突，与中美均保持友好关系。越南和新加坡是长期主张纳入美国制衡中国的国家，这两个国家在2018年对中美均提升了双边关系。2018年5月大选后的马来西亚新政府改变了原政府对华较为紧密的关系，拉远了与中国的距离，同时积极与美国及其亚太盟友展开互动。

### 13. 印太战略：能走多远？

韦宗友 复旦大学国际问题研究院教授

自 2017 年底正式提出“自由开放的印太”战略构想以来，特朗普政府 2018 年采取了一系列新动作，积极推动落实。不仅象征性地将美国的亚太司令部更名为印太司令部，还首次提出了配合印太战略实施的印太经济战略，甚至复活了十年前的美日印澳四国安全磋商机制，摆开了与中国在印太地区进行战略竞争的态势。不过，尽管来势汹汹，特朗普政府在实施印太战略方面能够及愿意动用的资源似乎十分有限，日印澳等国与特朗普政府也远非“同心同德”。印太战略到底能走多远，还需要进一步观察。

#### 来者不善

2017 年 12 月，特朗普政府在颁布的首份国家安全战略报告里，不仅将中国界定为美国的战略竞争对手，还在地区战略部分，首次正式提出了“自由开放的印太”战略构想，其亚洲战略初具形态。根据美国国务院官员及副总统彭斯在不同场合的阐释，这一战略构想，大致包括三方面内容。

第一，将中国视为美国在印太地区的主要战略挑战，将美国与中国的战略竞争渲染为“自由”与“压迫”的斗争。特朗普政府认为，中国正在利用自身日益增长的政治、经济乃至军事力量在印太地区构建自己的“势力范围”，挑战甚至试图取代美国在该地区的霸权地位。中美在印太地区战略竞争不仅仅是地缘经济或地缘战略竞争，还是两



种不同发展模式、不同地区秩序理念的竞争，美国必须坚定维护自身的理念与模式，捍卫印太地区的“自由与开放”。

第二，经济与安全是重点关注。特朗普政府认为，中国正在大力推进的一带一路倡议，是中国建立地区霸权的重要组成部分，旨在建立一个中国主导的地区经济秩序。如果这一蓝图得以成功实现，那么整个欧亚腹地乃至印太沿海地区都会匍匐在中国国家主导的经济发展模式之下，对美国乃至西方主导的自由经济发展模式构成严重挑战。为此，特朗普政府提出了美国版地区经济倡议——“印太经济构想”，并加强与日本、印度及澳大利亚的经济协调与合作，共同推进印太地区经济、能源及基础设施建设，与中国同台竞争。

安全上，特朗普政府认为，中国大力推进海军现代化建设，积极维护海洋权益，特别是在南海争端及岛礁建设上的“奋发有为”及“军事化”举措，对美国在西太平洋地区的海上霸权构成严峻挑战。为此，特朗普政府不仅显著增加了国防军费开支，还强化与日本、澳大利亚等印太盟友的军事安全关系，提升与印度的安全伙伴关系，并积极撮合美日印澳四国安全合作机制，共同应对中国挑战。

第三，双边军事同盟及美日印澳四国协调是实施印太战略的主要手段。作为精明的商人和处处以“美国第一”为行动指南的特朗普，在推进印太战略构想时，除了依靠美国自身经济与军事实力外，还把借助盟友和伙伴的资源作为实施印太战略的重要依托。其中位于印太两端的日本与印度以及重新复活的美日印澳四国安全合作机制，被特朗普政府寄予厚望。

## 投入落差

任何战略，都要讲究目标与手段的匹配，其中可用资源是关键。说一千道一万，没米下锅都白搭。对印太战略来说，特朗普政府有多少资源、愿意投入多少资源，很大程度上决定了其实施效果及未来走向。

目前来看，特朗普政府实际投入的资源并不多。7月31日，国务卿蓬佩奥在印太商业论坛上高调抛出“印太经济构想”。尽管说得天花乱坠，但特朗普政府实际投入仅为1.13亿美元。希望这点资金能够推进“从西太平洋到西印度洋”广袤地区的数字经济、能源及基础设施建设，弥补印太地区高达20多万亿美元的基础设施投资缺口，只能说想象力太丰富。即便是美国政府大肆渲染的600亿美元对外发展金融资金，仔细研究，也只能说“看上去很美”。根据特朗普签署的法案，任何受资助的项目必须确保促进美国的经济利益与外交政策目标；优先考虑美国私人企业发起或参与的项目；超过1千万美元的项目必须向美国国会相关委员会提交论证报告，且单个项目的贷款不得超过30亿美元；贷款对象必须在劳工权益、环境及社会影响评估、妇女经济地位、促进私营企业等方面完全满足美方的严苛要求；一旦项目亏损合作方必须至少承担20%的损失。考虑到印太地区很多国家的实际情况，能满足条件的项目可谓凤毛麟角。

相对于经济上的吝啬，特朗普政府在安全上似乎慷慨得多。在2019年财年的国防授权法案中，特朗普政府大幅提升了军费开支，高达7160亿美元。同时，特朗普政府也继续加强对印太国家海上能力建设的支持。在2019财年国防授权法案中，将东南亚海上安全倡

议延长五年，更名为印太海上安全倡议，将孟加拉和斯里兰卡纳入援助和训练受援国，同时将印度纳入进来，提升这些国家的海上能力建设。此外，特朗普政府还大力推进在南海地区的“航行自由行动”，自 2017 年 5 月以来，已经在南海地区进行了 9 次“航行自由行动”，另外还有 9 次飞越及航母游弋活动。

### 同床异梦

在特朗普政府高调推出印太战略构想的前后，日本、印度及澳大利亚三国也不同程度地表达了本国的“印太梦”。日本安倍政府早在 2016 年就提出了后来被特朗普政府一字不动地套用的“自由开放的印太战略”，印度莫迪政府则提出要把“东向政策”升级为“东向行动政策”，澳大利亚政府也在官方外交政策文件中，提出了澳大利亚的印太秩序构想。

三国的印太战略蓝图，与特朗普政府的印太战略构想，有重合之处，基本上都把经济与安全放在突出地位。经济上，三国高度重视印太地区的基础设施建设。日本、印度都提出了本国的地区基础设施建设倡议，并加强双方在印太基础设施建设领域的协调与合作。安全上，都强调维护印太海域安全及海洋秩序的重要性，并在不同程度上表达了对南海航行自由及和平解决海洋争端的关注。

尽管在推进印太地区基础设施建设、维护海洋安全方面，日印澳三国与美国存在利益重合，但在如何看待中国及如何与中国打交道等问题上，三国与美国的看法并非一致。面对印太及国际秩序变局，三国也在未雨绸缪、左顾右盼，绝非美国鞍前马后的走卒。作为特朗普

印太战略重要支柱之一的日本，在对华关系上今年取得了一定突破。两国领导人不仅实现了互访，更为重要的是安倍访华期间宣布，两国将开展第三方市场合作，并强调中日关系已经开启由“竞争”到“协调”的新时代。

有着浓郁“大国情结”及长期“不结盟”外交传统的印度，自然也不愿意成为美国的爪牙。在发展与美国关系的同时，印度也在积极发展与中国、日本乃至俄罗斯的关系，在地区大国之间维持某种微妙的平衡。莫迪今年4月在武汉与中国领导人进行了成功会晤，两国领导人一致认为，“中印是邻居、朋友和伙伴，中印要不断增进互信，发扬共同倡导的和平共处五项原则的优良传统，走出一条符合时代要求的两个伟大联邦友好合作的大道。”让特朗普政府尤为难堪的是，莫迪政府不顾特朗普政府的警告，在普京访印期间与俄罗斯签署了高达52亿美元的军购大单，其中就包括被美国视为眼中钉的S400防空导弹系统，给特朗普政府出了一道难题，也给美印关系的未来发展蒙上一层阴影。

一个值得注意的动向是，今年年初西方媒体热炒的美日印澳四国可能共同加强在印太地区基础设施建设方面的协调与合作，实际上并没有下文。取而代之的是美日澳三国于7月30日宣布成立印太地区基础设施投资三边伙伴关系，在11月亚太经济合作组织领导人非正式会议召开期间，三国正式签署了谅解备忘录，加强三国在印太地区的基础设施投资合作。考虑到印度一度十分积极且雄心勃勃的印太能源及基础设施构想，印度缺席这一印太基础设施建设伙伴关系，耐人寻味。

另一个更值得关注的动向是，被特朗普政府寄予厚望的美日印澳四国安全合作机制（美国媒体一度将其热炒为“四国联盟”），虽然在11月东盟峰会期间举行了第二次安全合作磋商会，但是，此次四国安全磋商并没有实现外界所期待的级别提升，依然只是司局级安全磋商，且会后也未能发表联合声明，只是四国各自发表了会谈声明。显然，在中美竞争加剧背景下，印日等国不愿与美国走的更近，不愿意过分“刺激”中国。

### 能走多远

特朗普政府的印太战略到底能走多远，目前还难以预料。未来如何发展，将取决于如下因素的互动与发展。

第一，中美关系的演进。当前中美关系面临诸多挑战，处于十字路口，但也并非到了覆水难收地步。如果中美两国都有强烈战略意愿避免关系滑坡，避免对抗与恶性竞争，并采取切实措施展现战略善意与诚意，两国关系并非不能企稳回升。中美两国领导人在阿根廷的成功会晤及达成的贸易“休兵”，就是朝着关系缓和迈出的重要一步。

第二，美国愿意投入多少资源。特朗普的印太战略覆盖印太两洋，突出经济与安全维度，摆开与中国全面竞争态势。这些都需要美国巨额经济与军事投入。但目前来看，特朗普政府并不愿意投入更多资源，特别是经济资源。未来，一个民主党控制钱袋子的国会，将会在资源投入方面给特朗普政府施加更多限制，这必然进一步影响其印太战略的实施。

第三，“美国第一”与盟友利益如何调和。特朗普的印太战略显

然需要印日澳等印太盟友及安全伙伴的支持与配合。但是凡事从“美国第一”角度看问题，并在经贸等问题上不断敲打印度和日本的特朗普政府，如何调和这一内在矛盾，安抚盟友，是个不小的挑战。

第四，印度乃至日本都是不确定因素。印度和日本是特朗普印太战略的东西之锚，被特朗普政府寄予厚望。但是，这两国自身的利益及对中国的看法，与特朗普政府并非完全同步。今年以来，印度和日本两国已经在静悄悄改善对华关系，两面下注或多面下注，不愿意成为特朗普政府印太战略的马前卒。如果今后中日、中印关系进一步发展，特朗普政府的“印太之锚”必然会发生更大飘移。

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# **1. International Political Landscape: Seeking Changes in Turmoil**

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The international political arena of 2018 featured turbulence and turmoil. Through the promotion of the so-called "America First" policy, the Trump administration of the United States has constantly stirred up the international political landscape and became the primary source of chaos on the international stage. In the face of such turbulence triggered by, and intensified through, the actions of the Trump administration, countries around the world, after undergoing a 'wait-and-see' period, have stepped up efforts to cope with the situation, by adjusting existing policies and embarking on new strategic moves.

## **Turmoil**

One important factor leading to the chaotic international political environment is the 'America First' policy put forward by the Trump administration, which in turn led to an increase in the uncertainty of the international political system. Consequently, conflicts among major powers surged and turbulences were widely spotted on the global and regional level.

Firstly, chaos has been witnessed in the international political order. As the world's only super power in terms of comprehensive strength and influence, the US, under the Trump administration, has ironically become the primary source disrupting the current international political order. Following a series of withdrawals from international agreements and organizations like the Trans-Pacific Partnership in January 2017, the Paris Agreement in June and the UNESCO in October, Washington continued this momentum of disengagements in the year 2018. These include a string of exits from, or cancelations of, the following agreements: Iran's nuclear agreement in May; the UN Human Rights Council in June; the Optional Protocol concerning the Compulsory Settlement of Disputes to the Vienna Convention on Diplomatic Relations, the Treaty of Amity between US and Iran signed in 1955, the Universal Postal Union, all of which took place in October, as well as the latest backdown from Intermediate-Range Nuclear Forces Treaty between the US and Russia. If the disruptions can be likened to a 'black swan event', then the Trump administration's behaviors resembled more like a rampant 'black rhinoceros' that is to say, the administration has been a substantial trouble maker on the world stage.



Secondly, this chaos has been witnessed in the international economic and trade order. Ignoring widespread opposition from countries across the globe, the Trump administration insisted on launching an unprecedented 'global trade war' and triggered a slew of trade disputes. Take the most eye-catching China-US trade friction for example. On February 27th, the US Department of Commerce announced the decision to levy significant amount of import tax on shipments of aluminum foil from China in the name of so-called anti-dumping and anti-subsidy measures. It also imposed tariffs totaling \$250 billion on Chinese products in three rounds that kicked off on July 6, August 23 and September 24, respectively. Trade disputes initiated by the US have seriously overshadowed bilateral trade relations, with the two parties embroiled in an unprecedented period of friction. Meanwhile, the US has also threatened to levy more taxes on other major economic powers such as India, the European Union, Japan, Canada, Mexico and Korea, by leveraging Washington's economic might and rectifying or even reshaping international trade mechanism. These combined actions are poised to deal a heavy blow to the existing international economic and trade order.

Thirdly, US-Russia relations continue to deteriorate. In light of a series of alleged incidents such as the poisoning of a Russian ex-spy, Russia's alleged interference in the US election, and the Russia-Ukraine dispute, the US has imposed multiple rounds of sanctions against Russia, including deporting Russian diplomats, adopting sanction measures to 272 individuals and entities related to Russia and freezing Russian assets in the US, all of which further soured bilateral ties. Regardless of Moscow's strong opposition, Washington decided to pull back from the Intermediate-Range Nuclear Forces Treaty. Turning away from nuclear non-proliferation, the US has endeavored to upgrade its nuclear arsenal on an all-rounded front and lower the threshold for using nuclear weapons. In a tit-for-tat fashion, Russia exhibited the tendency to adopt every measure to 'ensure security', by enhancing its nuclear arsenal and the 'second strike' ability. All these measures have further eroded the two countries' strategic trust that is already considered fragile.

Fourth, China-US strategic competition has increased in intensity. Against trade frictions, the US has exerted pressure on China on many fronts, including security, military, science and technology, as well as humanities and people-to-people exchanges. They were exemplified by the following measures taken by Washington to suppress China's development: painting China as a 'revisionist country' and 'strategic competitor'; promoting the so-called 'Indo-Pacific' strategy by aligning with Japan,

Australia and India to isolate China; continuing to advocate the 'Freedom of Navigation' in South China Sea; limiting the enrollment of Chinese students to study high-tech related subjects in the US; imposing sanctions on Chinese high-level military officials in the guise of restrictions on Russia's arms procurement; strict inspections and restrictions on Chinese investment in the US; blaming China for the so-called 'cyber-attacks', etc. Such strings of efforts have contributed to the expansion and intensification of China-US rivalry.

On the fifth point, the mess in the Middle East remained unsettled. A number of soothing signals in the region were witnessed, with vast lost lands reconquered by Syria's government troops, the Assad regime strengthening its hold over the country, the extremist organization ISIS neutered through force. This has also raised the hopes of a peaceful settlement of the Syria problem through diplomatic measures. Nevertheless, the muscle-flexing game among the US, Russia and other major powers in the Middle East has yet to wane. The arrest of American pastor Brunson prompted the US to impose sanctions against Turkey, causing the sudden devaluation of the Turkish Lira and straining US-Turkey relations. The bilateral ties were further damaged in light of the divergence over the death of Saudi journalist Jamal Khashoggi. The incident also caused the simmering Saudi-Turkish conflict to resurface and uncertainties remained. Trump administration's decision to move the US embassy from Tel Aviv to Jerusalem has sparked bloody conflict between Israel and Palestine. Washington's betrayal of the Iranian nuclear protocol has rapidly deteriorated US-Iranian relations and prompted Iran to adopt even tougher anti-US policies. On Dec 3, Qatar, which has deep grievances with Saudi Arabia, announced it would withdraw from the OPEC in Jan 2019, becoming the first Middle East nation to exist from the world's largest oil organization, showing early signs of fraction. On Dec 19, the US announced 'comprehensive' and 'swift' withdrawal of troops from Syria in a sudden fashion, a striking move that further complicates the already delicate geopolitical situation in the Middle East.

On the Sixth point, the security chaos in Europe has escalated. The already strained Russia-Ukraine relationship became tenser following the Kerch Strait conflict that broke out on Nov 25. Russia conducted large-scale military exercises in the Black Sea and the Crimea region, and assembled large-scale troops on the Ukrainian border. Meanwhile, the Ukrainian border guards were put on alert, conducting missile tests and military exercises, and threatening to end the Friendship Treaty with Russia. The two sides were on the verge of confrontation on the border areas and did not rule out the possibility of serious military conflict. Meanwhile, Western countries condemned

Russia in tandem. On the one hand, the US dispatched warships to the Black Sea, threatening that it will not choose to ‘sit idle’ but vowed to let Russia bear ‘painful and serious consequences’ in the event of further action. NATO claimed it will also take ‘collective action’ in response to Russia’s ‘act of aggression’. With this deepened level of intervention in the Ukrainian issue from Western countries, Russia-Ukraine conflict has become a potential flashpoint of confrontation between Russia and the West.

Onto the seventh and last point, populist sentiments continued to stir up the international political landscape. Affected by issues such as refugees, unemployment, economic downturn and the widening gap between the rich and the poor, populist movements around the world are on the rise, leaving many countries embroiled in internal instability and, consequently, this has reshaped the world’s political structure. For example, on Nov 17, more than 100,000 people in France wore yellow vests to protest price hikes in oil and fuel taxes. The following riot on Dec 1, biggest of its kind in Paris in 50 years, has forced the government to cancel original policies and severely eroded the political root and support of the Macron administration. Germany, which is long known as an economic powerhouse with stable political setup, has also witnessed major disputes aroused by immigration issues. The internal factions have barred the smooth formation of the cabinet and forced Chancellor Merkel to abandon the ambition for re-election. Belgian Prime Minister Charles Michel offered his resignation on Dec 18, a victim of political infighting over migrant policies. British Prime Minister Theresa May confirmed she would not lead the Conservatives into the next general election as she strived to rescue her Brexit deal and keep her cabinet intact. In Latin America, several Right Wing and even Far Right politicians won elections in their respective countries. The most notable case is Jair Bolsonaro, who is dubbed ‘the Brazilian Donald Trump’ became president in a landslide win on Oct 29. This marked a ‘right-wing’ turn across Latin America that could bring more uncertainties to the region.

### **Seeking Changes**

In the face of a series of unconventional and unreasonable policies adopted by the Trump administration, as well as the consequent international political chaos, many countries have begun to realize that such eccentricities do not come by impromptu. Instead they are reflections of the general consensus held by presiding US politicians who will continue to advance such policies despite the opposition of other countries. In light of this context, more and more countries have started to contemplate measures

to respond to a world with a reckless US and with unexpected changes that could come along.

For example, facing US' overall pressure that originated from trade frictions, China maintained its strategic focus and competed with the US in a cautious manner. As an avid supporter of global free trade, China firmly upholds the international multilateral trade system. Meanwhile, by carrying out friendly policies with neighboring countries, Beijing has sought to improve bilateral ties with Japan, India and Korea in a bid to hedge strategic pressure from the US. While certain European nations still have disputes with China in the realms of fair treatment in trade and investment, technology transfer and intellectual property rights protection, the two sides both opposed Washington's unilateral trade measures. The EU has also expressed the intention to enhance strategic communication and coordination with China to counter the growing uncertainties in the world economic and trade system.

The actions of the Trump administration have also alienated key allies and prompted economies such as the European Union and Japan to seek self-protection. For example, after the US withdrew from the Trans-Pacific Partnership (TPP), Japan took the lead in pushing forward a separate 'Comprehensive and Progressive Trans-Pacific Partnership Agreement'(CPTPP) together with 10 other countries. On March 8, a total of 11 relevant countries officially signed the CPTPP. On June 29, the Japanese Parliament officially approved bills to champion multilateral trade in the region - an important step to build a multilateral trade order in the region and contain the spread of the Trump administration's trade protectionism. On July 17, Japan and the EU signed the Economic Partnership Agreement (EPA) in Tokyo, under which 94 percent of the tariffs on European exports to Japan would be lifted, including categories like cheese and wine. Meanwhile, the EU also pledged to gradually eliminate tariffs on 99 percent of Japanese products. On Dec 8 and 12, the Japanese parliament and the European Parliament successively approved the EPA, which is scheduled to enter into force on Feb 1, 2019. The two economies contributed to nearly 30 percent of global GDP, occupy 40 percent of global trade volume, and are home to 600 million people. The creation of the world's largest free trade zone thus far marks a clear sign of joint opposition to trade protectionism.

Apart from opposing the US' withdrawal from the Iranian nuclear agreement and signing free trade agreement with Japan, European countries are mulling to form an independent joint arms force. This is due to Washington's arbitrary exit from the Intermediate-Range Nuclear Forces Treaty and forcing NATO allies to increase their

share of military spending. From the EU's perspective, the US pullout of the treaty will expose the entire Europe to Russia's intermediate-range missiles, posing a direct threat to the security of the EU and consequently severely weakened EU's strategic trust in the US. Hence, Europe has taken on a separate approach by building up defense capabilities and no longer pins hope on Washington's wavering security promises. In early November, French president Macron called for the building of a 'real European army', claiming that Europe needs to strengthen its own defense capabilities and lessen its reliance on the US. While being slammed by US president Donald Trump, the proposal won support from German chancellor Angela Merkel.

In the Middle East, in light of the ongoing chaos, US' allies such as Turkey, Saudi Arabia and Israel, as well as regional powers like Iran have been adjusting their respective foreign policies. For example, the expansion of the Peshmerga, the Kurdish armed fighters backed by the US to fight against ISI, has become a source of concern for Turkey. On Dec 14, Turkey warned that it was determined to cross Syria's northern city of Manbij and the East of Euphrates, a move deemed by the US as 'unacceptably unilateral'. In light of the pressure from the US, Turkey chose to soothe ties with Russia, even claiming to procure the advanced S-400 air defense system from Moscow. This has sparked a new round of tension between the two countries. Iran, adept at playing the checks and balances game, joined hands with the EU in objecting to US' retreat from the Iranian nuclear protocol and strived to enhance security cooperation with Russia and Turkey. The Netanyahu administration of Israel has expressed huge 'disappointment' in US' military retreat from Syria. It reiterated the stance of taking proactive measures in Syria to contain the expansion of Iranian influences. All these will inevitably lead to escalating rivalries for regional leadership. A new round of geopolitical struggle, filled with uncertainties, is likely to resurface in the Middle East.

## **Prospect**

The Trump administration's increasingly 'self-interested' behaviors, together with its arrogance towards international mechanism and rules, have resulted in more geopolitical 'vacuum' and intensifying turmoil in the international system. The ongoing chaos is also forcing countries to contemplate ways to respond and counterbalance.

First, concerted efforts are needed to oppose unilateralism and trade protectionism, and maintain the international free trade system. The global trade war, which was

launched by the US and went against the historical tide, has cast a shadow over global economic growth, and is likely to deal heavy blows to different countries' roles and functions in the global supply chain, thus rupturing the existing system. This will severely disrupt trade structure, send world economic and trade system into potential recession, and even trigger systemic crisis. Such severe conditions are forcing countries to take proactive actions by adjusting industrial policies for the sake of self-protection.

As such, geopolitical tension is set to be intensified, given the fact that the US has prioritized 'major power competition' on top of its foreign relations agenda, by exerting constant and ever-increasing pressure on countries like China, Russia and Iran. Meanwhile, the Trump administration has adopted a 'revisionist' approach, embracing the likes of the United Nations, WTO, IMF and the World Bank only when they serve US interests and abandoning them when they fail its narrow mandate. Such unilateralism stances towards international mechanisms exemplify Trump's intention to reshape the international order that is centered around the US. All these have contributed to the precarious rise in uncertainties in international politics. The situation is likely to be further exacerbated and thus it is expected that further regional security crises and military conflict will result.

Third, a retreat was witnessed in the long-standing Trans-Pacific and Trans-Atlantic relations between the US and Japan, as well as the US and the EU. The rising divergence in interests have further shaken the security, political, diplomatic, economic and trade systems that these countries are long accustomed to. Many nations, including the US' traditional allies, have consciously kept a distance with Washington and are repositioning themselves through strategic adjustment in the new global structure.

Looking into international political arena of 2019: The massive impact and destructiveness of the Trump will endure, as the upcoming mid-term election and the foreseeable hurdles from the Democratic Party are likely to prompt Trump to take further provocative actions in the realm of foreign affairs, which could only exacerbate international political environment. Meanwhile, other countries marginalized by the US will continue to deal with, and fight against it, by seeking to form issue-specific alliances and enhance strategic coordination. Countries are likely to make joint efforts or hedge their bets on policies in response to an increasingly unpredictable US, as well as an ever complex and uncertain world. These will lead to a new round of adjustment and even restructuring of the international political landscape.

## **2. The World Economy: Escalating Uncertainties?**

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The world economy has its own logic of development, and its growth constantly shapes the overall global pattern. The analysis of the world economic situation features different perspectives. From the perspective of growth, the world economic growth in 2018 was relatively good. But from the perspective of economic governance and economic order, the world economy faced huge uncertainties. In a certain sense, with the outbreak of Sino-US trade war, the world economy officially entered a critical stage of reshaping its order in 2018. It is increasingly difficult for the original international economic order and rules to adapt to the new scenarios, and the economic interaction between big countries has also entered a new era of adjustment.

### **China and the United States Leading the World Economic Growth**

China and the US played increasingly prominent roles in the world economy. Both China and the US achieved roughly sound economic growth in 2018, and made obvious contributions to the world economy. Due to the tax reduction at the end of 2017 and the wealth growth from a robust stock market, the US economy continued to grow strongly in 2018. The annual GDP growth in the US was expected to reach around 3% to mark one of the best years since the financial crisis. Driven by the 3% growth rate, the US GDP was set to exceed the US\$20 trillion mark, making it the first country in the world to break this threshold. China's economic growth was equally impressive. Despite a raft of unfavorable internal and external factors, China's GDP growth remained at around 6.7%, and was the world's No.1 in terms of absolute GDP growth. As global growth engines, both China and the US posted strong performance, resulting in a robust growth in the world economy in 2018. The global annual growth rate was expected to exceed 3.5%, marking the best performance in recent years.

Although China and the US injected strong momentum into global economic growth, trade frictions between the two nations seriously hurt the stability of the world economy. In particular, sudden escalation of the trade war between the two countries in the second half of 2018 quickly became one of the biggest uncertainties in global economic development. Market confidence was weakened, stock markets fluctuated sharply, and commodity price volatility increased, with negative effects continuing to

emerge.

In general, the global economic landscape is still on track to embrace structural changes. Firstly, the rapid development of China and the US has enabled the two nations to consolidate their positions as the two leading economies, as they continuously extended their edges over other economies. As two major economies, China and the US increased their share of the world economy to around 40%, which was the highest proportion in any single year since the beginning of the 21st century. Compared with China and the US, Japan and EU lagged further behind in 2018. Secondly, the GDP gap between the US and China further shrank. Based on purchasing power parity (PPP) with adjusted exchange rates, the GDP gap between the US and China continued to diminish. It's still a general trend that China's economic aggregate is expected to catch up with or even surpass that of the US in the next 15 years. If calculated based on PPP, China has actually expanded its advantages over the US in terms of economic aggregate. Thirdly, economic growth of developing countries and emerging economies continued to be faster than that of developed economies, and their proportion in the world economy continued to rise.

### **Significant Changes in the Global Economic Philosophy**

In 2018, global economic philosophy changed dramatically. The Washington Consensus, which advocates free trade and open markets, has encountered serious challenges. Even the US, the proponent of the Washington Consensus, did not follow the basic ideas of the consensus. Driven by the US, global economic philosophy has seen three major shifts.

The first was a shift from a market-based economy to nationalism. Driven by national interests and intensified strategic competition among major powers, major economies took apparent measures to intervene in their domestic markets. Governments frequently formulated a variety of policies, continuously stepped up intervention in the markets, and attempted to shape market direction in order to win competition over other nations while striving to maximize absolute economic interests for their countries. Governments played a more prominent role domestically and globally, and, to a certain extent, their roles were even bigger than what were seen during the Financial Crisis. As one of the most typical cases, US President Donald Trump broke with tradition to publicly accuse the Fed of raising interest rates, in a bid to block the Fed's monetary policies.



The second shift was from liberalism to protectionism. As the US became a key example of prioritizing its own interests, global protectionism generally intensified, while global free trade turned relatively weak. In order to protect the interests of domestic industries and enterprises, some economies adopted obvious protectionist policies in the fields of trade, investment and technology. In the trade field, frequent threats or punitive tariffs triggered a chain reaction and corresponding counter-measures, temporarily resulting in an increase in the average tariff level globally. In the investment field, overuse and even abuse of “national security” to restrict foreign investment became prominent, and global foreign direct investment plunged. In terms of technology transfer, technology protectionism became more obvious. The US, EU and other developed nations have introduced more protective measures to suppress the rational transfer of technology.

The third was a shift from a virtual economy to a real economy. Compared with the virtual economy like the service industry, much more emphasis has been placed on the real economy. All major economies tried to lure back or retain manufacturing, making it a vital industrial sector. Meanwhile, they also took the initiative to adopt various forms of supporting policies in order to create a better environment for the development of the manufacturing industry. Some economies also worked out targeted industry policies to foster a number of high-end manufacturing sectors of strategic importance.

### **Regional Economic Cooperation Has Been Strengthened**

Although global economic growth improved in 2018, due to the US government’s huge dissatisfaction with distribution of benefits amid globalization, the large-scale trade wars it launched have seriously undermined the cooperation foundation of global governance. Also as global economic philosophy began to change course, it has led to major obstacles for global economic governance in 2018. Firstly, cognitive differences in economic globalization have hindered the advancement of global economic governance. Global economic governance is essentially the result of the development of globalization. Without a global consensus, it is difficult to form effective global economic governance. Pursuing a zero-sum game is obviously not the thinking that could advance globalization. Secondly, weakness of the multilateral mechanism for global governance has led to a lack of institutional conditions for global economic governance. The US government ignored the seriousness and importance of international mechanisms by continuously withdrawing from global organizations, while attacking inherent principles of the multilateral mechanism, and

trying to adjust the multilateral mechanism into a platform to better serve its own interests. The binding force of the multilateral mechanism has been greatly weakened. Major international economic institutions such as the IMF and the WTO faced difficulties in coordinating economic policies among major economies. In the midst of difficulties, the international economic governance system can only be adjusted and adapted through further reform and improvement. In particular, as the top two major economies, the US and China had intensified competition in all aspects in 2018. The US has defined China as a “strategic competitor.” Sino-US frictions were not limited to trade and investment, but also gradually spread to finance and currency sectors, which directly increased the difficulty of cooperation between the two countries in global economic governance. The lack of consistency in the two major powers in global economic governance will not only make it lose momentum, but also create a new field for strategic games between the two big countries.

However, in the absence of positive highlights in global economic governance, regional economic integration has made gratifying progress. After the US withdrew from the Trans-Pacific Partnership (TPP), the remaining 11 members signed the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) based on the original TPP rules, expressing strong will to continue to promote regional economic integration. In addition to the CPTPP, two major economies, the EU and Japan, reached a bilateral free trade agreement this year. This agreement is by far the world’s largest free trade agreement, covering 28% of global GDP and 37% of total trade. China firmly pressed ahead with negotiations of regional free trade agreements in a bid to work with other members to reach the Regional Comprehensive Economic Partnership (RCEP) as early as possible. The willingness of the 16 members in the RCEP to reach an agreement has increased significantly, and negotiations have also made substantial progress. Nearly 80% of all negotiations had been completed as of 2018, up from less than 50% in 2017. If the RCEP is reached, it will cover nearly half of the world’s population, 40% of global trade, and nearly one-third of global GDP. Recent developments in these bilateral and regional-level FTA negotiations indicated that economic globalization and trade liberalization have not come to an end. Both developed and developing economies still have much momentum to promote the in-depth development of economic globalization. In the absence of a major breakthrough in multilateral economic governance at the global level, many positive practices at the regional level will effectively dispel concerns about de-globalization and help counter the trade protectionism provoked by the US.

## **Uncertainty to Escalate in 2019**

The world's economic situation in 2019 is even more confusing. The three biggest uncertainties determine the world's economic trend in the coming year, and they also determine the possible direction of the shift in the international economic structure in the future. The first is the prospect for US economic growth. Judging from the economic cycle and structural factors, the risk of recession in the US economy will increase in 2019. If the US economy goes into recession, then the world economy will face serious challenges. The risks and pressures facing the world economy will rise dramatically. The second is the trend of Sino-US trade war. At the end of 2018, the heads of state of China and the US reached an intent of "truce" in Argentina, and the relevant working groups are striving to reach an agreement that is acceptable to both countries. However, the Sino-US trade war will still face an uncertain future in 2019, and a serious outbreak of confrontational policies cannot be ruled out at certain periods. By then, there will be a serious negative impact on international trade and the development of the global economy. The third is the development of the European economy. On the one hand, there is still a lot of uncertainty in the outcome of Brexit, and the possibility of a no-deal exit still exists. If Britain really leaves the EU in this way, it will bring shocks to the UK and EU economies in the short term. On the other hand, the deep social and institutional contradictions within the EU, which have been revealed by the Yellow Vest Movement in France, are also breaking out. In 2019, it cannot be ruled out that European countries may face political events similar to the Yellow Vest Movement. This will also lead to a weakening of the European economy.

### **3. Chinese Diplomacy:**

#### **Stabilizing Neighboring Relations and Promoting Opening-up**

**LIN Minwang**

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China has established President Xi Jinping's thoughts on diplomatic as guidelines for China's diplomacy for the new era in 2018. While coping with China-United States trade dispute in a calm manner, Beijing has seized the opportunity to comprehensively ameliorate relations with neighboring countries, which is notably reflected in the 're-set' of China-India and China-Japan relations, as well as the alleviation of tension in the Korean peninsula. At the same time, China has made active efforts in mediating in neighboring hot issues, promoting regional cooperation and pushing forward its own opening-up. All these have made China a leader in regional cooperation and a guard of regional peace and development.

#### **Stabilizing China's Neighboring Environment**

In 2018, US President Donald Trump constantly undermined existing international rules and unilaterally proposed changes in agreements and rules with US' major trading partners. Under such pressure and background, China has managed to improve relations with India and Japan by 're-set' respective bilateral ties in 2018. Firstly, China-India relations experienced a remarkable turnaround after the Donglang(Doklam) standoff. Since February 2018, both parties have been sending positive signals to explore improve of ties with the first informal summit in Wuhan. Indian premier Modi made a phone call to Chinese president Xi Jinping on the day when China's national two sessions (the annual meetings of the National People's Congress, and the Chinese People's Political Consultative Conference) concluded, paving the way for the Wuhan informal summit. The two leaders held a meeting in Donghu, center of the Wuhan city from April 27 to 28. The pair reached broad consensus after having a candid and in-depth exchange of views on the overall, long-term and strategic issues in international environment and bilateral relations, as well as their respective national development visions and internal and external policies. Subsequently, the two leaders continued to meet during the Shanghai Cooperation Organization Summit in Qingdao in June, the Johannesburg BRICS Summit in July and the G20 Argentina Summit in November, all of which served to improve strategic mutual trust between the two countries.

Secondly, Sino-Japan relations was greatly improved, with the leaders of two states

paying reciprocal visits in 2018. From May 8 to May 11 2018, Premier Li Keqiang paid an official visit to Japan and attended the Seventh Summit Meeting among the People's Republic of China, Japan and the Republic of Korea. This is the very first official visit of a Chinese Prime Minister to Japan in 8 years after the two countries embroiled in a dispute revolving around the 'island purchase' issue in 2012. The two sides have unanimously agreed to establish a Sino-Japanese public-private sector committee on 'The Belt and Road Initiative in a bid to advance cooperation in economic and industrial projects in a third country. On the security front, both sides have agreed to launch a defense communications mechanism. From Oct 25 to Oct 27, Japanese Prime Minister Shinzo Abe was in Beijing for the first formal bilateral visit by a Japanese leader to China in nearly seven years, a sign of apparent thaw in China-Japan relations, which has entered a new stage featuring 'coordination and cooperation'. The two countries have made breakthroughs in financial cooperation and joint development of third-party markets, by re-jumpstarting bilateral local currency swap agreement with a scale of 200 billion yuan, and promoting the Belt and Road initiative in third-party countries (outside of China and Japan). Subsequently, the Japanese government revised "Indo-Pacific Strategy" to "Indo-Pacific vision", reducing its geopolitical connotation.

Third, China helped to cool regional hot spot issue by actively mediating in a variety of procedures to solve the conflict . China has played a constructive role in the North Korean nuclear issue. Kim Jong-un, chairman of the Workers' Party of Korea and chairman of its State Council, paid three visits to China in three months. In June, Kim and US President Donald Trump finally touched down for the historical meeting in Singapore. In September, Kim and Korean President Moon Jae-in met in Pyongyang and issued the "Pyongyang Joint Declaration of September 2018", a clear sign of improving ties between North and South Korea and the appeasement of tension in the Korean peninsula. China has played an active part in this process, by promoting the improvement of bilateral ties, supporting Pyongyang-Washington dialogue and bolstering all efforts from relevant parties to promote the denuclearization of the peninsula.

China also worked hard to cool down tensions in the South China Sea. China has reached consensus with ASEAN nations on a draft code of conduct regarding the South China Sea called "Single Draft COC Negotiating Text", marking a major step forward. During the China-ASEAN summit on Nov 14, leaders from China and 10 ASEAN countries agreed to complete an initial review of the draft negotiating text in 2019. Chinese Premier Li Keqiang put forward the vision of wrapping up the

negotiation in three years, which reflected China's sincerity, determination and confidence in maintaining the peace and stability of the South China Sea together with ASEAN countries. Meanwhile, on Oct 22, China and ASEAN kicked off the first maritime exercise, the ASEAN-China Maritime Exercise 2018, which was the first-ever organized exercise between ASEAN and China, as well as the bloc with any other dialogue partners. This holds wider significance to China and ASEAN's collective willingness and determination to maintain regional peace and stability, as well as enhance mutual trust in strategic security.

In addition, China also played an important role in handling the Rohingya crisis between Myanmar and Bangladesh. On Sept 27, 2018, an informal three-party meeting between China, Myanmar and Bangladesh was held at the United Nations in New York. Three important consensuses were reached during the meeting that paved the way for repatriating refugees in Rakhine State. Another conflict mediation was related to conflicts between Afghanistan and Pakistan. Following the first meeting of the Foreign Ministers of China Afghanistan and Pakistan in December 2017, the second such meeting was held in December 2018, which led to the establishment of a pragmatic cooperation dialogue mechanism among the trio. Significant consensuses were reached in the areas of people's livelihood and infrastructure building. Through its tangible actions, China has materialized its role as an important promoter of regional peace and development.

### **Promoting Regional Cooperation and Economic Opening-up**

In light of major changes in global economic and trade cooperation, China has stepped up efforts to lead regional economic cooperation. First, it actively promoted collaboration in the Asia-Pacific region. The 7<sup>th</sup> China-Japan-Korea Summit revived after a pause of nearly three years, which has injected new impetus to the trilateral economic and trade ties. Following the adoption of the Japan-led CPTPP, China is also pushing ahead with the materialization of the RCEP. On Nov 14, 2018, Premier Li Keqiang urged all parties to have a sense of urgency in the negotiation and strive to reach an agreement in 2019. He also announced that China and ASEAN nations have finally gone through all domestic procedures for the upgraded FTA. The materialization of the upgraded FTA will further enhance China-ASEAN economic and trade relations, signaling China and ASEAN countries' firm will to uphold multilateralism and free trade.

Meanwhile, with the changing political and security environment in Northeast Asia,

the region's economic cooperation has gained refreshing momentum. From Sept 11 to 12, 2018, President Xi Jinping attended the Fourth Eastern Economic Forum in Russia and strived to promote cooperation between China's northeast region and Russia's Far East area. The two countries signed a number of documents of intent including "Far East Economic and Trade Investment Development Plan and Memorandum of Understanding for 2018-2024" and "Memorandum of Understanding on the Establishment of Business Council of the Russian Far East and Baikal Region and Northeast China".

On the global level, China remains an unwavering supporter of globalization. The spirits were emphasized in keynote speeches delivered by President Xi Jinping on the opening ceremony of the China International Import Expo on Nov 5 and the APEC CEO Summit on Nov 17 titled " Harnessing Opportunities of Our Times To Jointly Pursue Prosperity in the Asia-Pacific". Such propositions were also reflected in the Shanghai Cooperation Organization Summit in Qingdao in June and the China-Africa Cooperation Forum in September.

During the celebration of the 40th anniversary of reform and opening up on Dec 18, China further demonstrated its determination to adhere to 'development' as its top priority and unswervingly deepen reform and opening-up. The Belt and Road Initiative is an important starting point for China to usher in cooperation in the surrounding regions. In 2018, China has made remarkable progress in implementing the initiative with neighboring countries and completed quite a few major projects. On Aug 30, the China-Maldives Friendship Bridge, the first cross-sea bridge in the Maldives, opened to traffic, marking an important milestone in carrying out the Belt and Road Initiative by the two countries. A total of 22 cooperation projects were in the pipeline under the auspices of the China-Pakistan Economic Corridor, of which nine were accomplished and 13 were under construction. Nepali Prime Minister K. P. Sharma Oli wrapped up a successful official visit to China from June 19 to 24, 2018, during which the two countries promised to strengthen bilateral cooperation under the framework of the Belt and Road Initiative. The two sides have agreed to enhance connectivity in ports, highways, railways, aviation and telecommunications and build a so-called "Cross-Himalayan Three-Dimensional Interconnectivity Network". On Sept 7, China and Nepal signed a transportation agreement in Kathmandu, allowing Nepal to use four Chinese seaports and three land ports to trade with other countries.

Many key countries related to the Belt and Road Initiative have experienced smooth domestic power transition and the potential impact on co-creation of BRI-related

projects remained limited. On July 2018, Imran Khan, chairman of Pakistan Tehreek-e-Insaf (PTI), was elected the country's new prime minister. From Nov 2 to Nov 5, 2018, Khan paid his inaugural official visit to China and made a keynote speech during the first China International Import Expo. Concerns over China-Pakistan relations were dispelled by the signing of the "Joint Statement between the People's Republic of China and the Islamic Republic of Pakistan on Strengthening China-Pakistan All-Weather Strategic Cooperative Partnership and Building Closer China-Pakistan Community of Shared Future in the New Era", through which the two sides have reached new consensus on the building of China-Pakistan Economic Corridor. In August 2018, Malaysian Prime Minister Mahathir Mohamad's successful visit to China also symbolized the smooth transition in the construction of Belt and Road Initiative-related projects.

In short, China has made important progress in diplomacy, especially in dealing with neighboring countries. Looking forward to 2019, we have solid reasons to believe that China's neighbouring diplomacy will continue along the path of building a community of shared future. Trump's self-willed diplomatic moves have undoubtedly acted as an important external stimulus to prod China to improve relations with neighboring countries. With the second "Belt and Road International Cooperation Summit" on course to be held in 2019, China is set to play an even more important role in shaping regional peace and stability, and promoting economic development.



## **4. U.S.: The ‘Trump’ Turmoil**

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Entering into the second year of his presidency, President Trump has taken more unconventional measures in diplomacy to implement his “America First” policy, which has had a series of negative impacts on world political and economic landscapes and left the Sino-US relations in a rather severe situation.

### **Disrupting World Economic and Political Landscapes**

Firstly, US withdrawal from various international arrangements has been a severe blow to multilateralism and international institutions. Most of current international political, economic and security mechanisms were established by the United States after World War II. The design of the rules has largely reflected US interests and value preferences and has served as an important pillar of the American hegemony. However, the Trump administration has grown increasingly discontent against the existing international system. The arrangements are deemed to be economically unfair to the US and give other countries more competitive edges. On the security front, the US has to bear too many obligations, but its allies stand to enjoy long-term free rides. Excessive political constraints have also undermined US sovereignty. With the “America First” perspective, the administration is increasingly seeing international mechanisms as ‘eroding’ rather than ‘promoting’ US national interests.

After leaving the Paris Agreement, the Trans-Pacific Partnership Agreement and the UNESCO in the previous year, the Trump administration also pulled out of the Iran Nuclear Deal, the UN Human Rights Council, the Universal Postal Union, and even threatened to withdraw from the 1987 Intermediate-range Nuclear Forces Treaty with the Soviet Union. The reckless retreat indicated the Trump administration’s scorn for multilateralism and its overweening disposition. It has not only seriously undermined the international community’s cooperative efforts on major issues such as tackling climate change and peacekeeping operations in the Middle East but also challenged the universal values of multilateralism and international cooperation in the era of globalization.

The second great impact on the global economic landscape can be ascribed to the US protectionism. The Trump administration has tried to reshape economic and trade

relations with trading partners through measures like imposing additional tariffs. Trump has forced economies like Mexico, Canada, the EU, and Japan back to the negotiating table and accept Washington's requests. The US has launched an unprecedented trade war against China by restricting Chinese companies' investment in the US and preventing China from acquiring advanced US technologies. The ongoing Sino-US trade war has been the largest trade war in history and a fierce contest between the world's first and second largest economies. US' reckless behaviors to unilaterally manipulate the existing economic and trade rules have led to violent swings to the world market, disrupted the global supply chain, and undermined the international economic order. The impact will be significant and long-term. According to WTO statistics, the G20 countries have adopted 40 new trade restriction measures from May to October in 2018, covering a trading volume of about \$481 billion. The volume was six times higher than the previous period and marked the highest one since WTO started tracking G20 trade data in 2012. Three-quarters of the measures pointed to tariff rise, many of which were retaliation against US tariffs on the steel and aluminum imports starting from March. World trade growth in the first half of 2018 was down 2% from the second half of 2017.

The US also forced the reform of the WTO through extreme measures like reaching high-standard trade agreements with Mexico and Canada, as well as blocking the appointment of members of the WTO's Appellate Body which crippled the WTO's dispute settlement mechanism. International economic rules have been undergoing profound adjustment. The US has adopted a policy mixed of protectionism, unilateralism and the establishment of new economic and trade regulations to simultaneously promote the "conservatism, fragmentation and high-standardization" tendencies in the international economic and trade system.

Finally, the redefinition of US-EU relations also has an impact on US ties with its alliance. Trump's "America First" policy has caused deep divergences between the US and the EU on issues like trade, the Iran Nuclear Deal, and climate change. The EU countries were greatly shocked when Trump called the EU a 'foe' during his trip to Europe in July. He also harshly criticized French President Macron's proposal for a European army. The contradictions and differences between the US and the EU on security, economy, trade, value, and international order have grown prominent, posing the greatest challenge to US-EU relations since the end of World War II.

### **Responding to the "Trump Shockwave"**

The world has to find ways to respond to the "Trump shockwave."

One is through negotiations. Canada, Mexico, Japan, and the EU were forced to sit on the negotiating table and redistribute interests through bargaining and compromises.

The second is to unite and seek self-improvement. Japan took the lead to rescue the faltering Trans-Pacific Partnership Agreement, and 11 Asia-Pacific countries finally signed the Comprehensive and Progressive Agreement for Trans-Pacific Partnership without the participation of the US. Japan and the EU have ratified the EU-Japan Economic Partnership Agreement respectively. Once fully fledged in early 2019, it will be the largest free trade agreement in the world. The EU is also in pursuit of defense independence. In December 2017, the European Council adopted a decision to establish Permanent Structured Cooperation, and 25 member states agreed to participate. This permanent framework allows member states to develop defense capabilities, invest in shared projects, and enhance military strength so as to forge a more flexible EU defense system that is more independent of the US. In 2018, member states approved 17 military cooperation projects under this framework. French President Macron and German Chancellor Merkel have respectively called for the establishment of a ‘real European army’ to promote independent European defense. Their proposals won support from the European Commission, Spain, and other EU countries.

The third is to reduce financial dependence on the US. Russia has developed its own system for financial transfers that would protect its banks from a potential shutout of the SWIFT global transfer system in case of harsher U.S. sanctions. The EU is working on an independent European settlement system to enhance its autonomy in trade, economic and financial policies. The EU has also officially issued an initiative to recommend wider use of the euro in economic and strategic sectors. China has launched yuan-denominated crude oil futures to compete for pricing power in energy trade and to promote RMB internationalization.

The fourth is to establish “Coalitions of Willing.” Facing the Trump administration’s unilateralism and protectionism, China, Japan, the EU, and other countries have joined forces to maintain multilateralism and the free trade system, which may cause a reorganization of international political alliances.

### **The Hardship during the Transition of Sino-US Relations**

The Trump administration has regarded China as a ‘strategic competitor,’ a ‘foe,’ and a ‘revisionist power’ since 2017. Washington’s series of major adjustments to foreign

policy with Beijing have jeopardized Sino-US relations.

First, the two countries have been competing across the board. Politically, the US aimed to not only prevent China from challenging the US-led global and regional order but also limit China's 'infiltration' into American society. Economically, the Trump administration attempted to address issues on trade imbalance and market access restrictions with China, deter China's science and technology advancements, and intervene China's industrial policies. In terms of security, Washington has to cope with the rise of China's military strengths and curb China's geostrategic expansion.

The second is the de-linkage. In order to prevent China from acquiring US's high-tech, Washington has deemed it necessary to cut the two countries exchange mechanisms on technologies. To this end, a series of measures have been taken, such as forcing China to change related policies towards foreign enterprises, limiting Chinese investment in the US, prohibiting Chinese students and scholars from studying and conducting scientific researches on sensitive subjects in the US. Moreover, the Trump administration has required US defense contractors to move their production bases out of China to promote the partial decoupling from China on the industrial chain, thus reducing the risks caused by the dependence of US defense industry on China.

The third approach is to impose restrictions. As US policy toward China has shifted from engagement to confrontation, the Trump administration has placed a growing number of restrictions on China. For example, the US has set a limit to the activities of Chinese media and cultural institutions (such as Confucius Institutes and Chinese Foundations) in the United States to prevent the so-called 'political penetration.' The US government has also been restricting visas for Chinese citizens or limiting activities of Chinese diplomats in the United States to retaliate against China's relevant policies and measures.

The fourth measure is to exert pressure. The US has taken judicial actions, impose sanctions, or directly exerted pressure on the Chinese government in response to the Chinese companies' or individuals' alleged infringement of US intellectual property rights, their engagement in cyber espionage, and other activities in violation of related US policies (such as sanctions on Iran and North Korea).

Under such backgrounds, the current Sino-US relations have faced an unprecedentedly grim situation.

First of all, the structural contradiction between China and the US have been growing prominent. The contradiction comes from a shift in the balance of power (i.e., the US wants to maintain its status as the world's sole superpower and prevent being caught up and overtaken by China). It is a result of the so-called unfair distribution of interests (i.e., the US believes that China has reaped huge benefits from the current international economic system, which is unfair to the US). The two also have deep conflicts in the political and economic systems, as well as ideology and values.

Second, the relationship model between the two countries has transformed. Sino-US relations have shifted from one that features 'co-existence of cooperation and competition' to one that is primarily competition-oriented. During the Obama administration, both cooperation and competition were on the rise. However, the two countries' competition is expanding in scale and depth under the Trump administration, while the range of cooperation is shrinking and its momentum is declining.

The third is an overall setback in bilateral relations. With a sharp escalation in the trade war, the two countries' diplomatic interaction, economic and trade cooperation, and cultural exchanges have all exhibited a downward trend after Trump took office. Only one of the four Sino-US high-level dialogue mechanisms, the Diplomatic and Security Dialogue, was held in 2018. The rest of the three channels, including the Comprehensive Economic Dialogue, the Law Enforcement and Cyber Security Dialogue, and the Social and Cultural Issues Dialogue, were suspended. Many other bilateral consultation mechanisms are also dysfunctional. As Washington has imposed more severe restrictions, Chinese investment in the US has plummeted to its lowest level since 2010. Cultural exchanges have been halted and even moved backward. Some long-term cooperation projects have been terminated, and American universities have been selectively closing their doors to Chinese students and scholars. For a long time, economic and trade relations, as well as cultural exchanges have been regarded as the cornerstones for bilateral relations, because they remain thriving even as political ties have gone through ups and downs from time to time. However, the current policies of the Trump administration are severely eroding the two critical pillars.

During President Xi and Trump's meeting in Argentina in early December, China and the US agreed to halt, at least temporarily, an escalating tit-for-tat trade war. They pledged to reach consensus on settling economic and trade disputes through negotiation within 90 days. However, even if the trade war can be put to an end, the

US will by no means give up its restrictive policies on technology and other related fields. Washington will continue provoking Beijing on the issues of Taiwan, the South China Sea, Xinjiang, and Tibet. The year 2019 remains to be a tough year for China-US relations. During the important transition period of Sino-US relations, frictions, turbulence, and conflicts will become more frequent. Therefore, an effective risk and crisis management mechanism is a pressing challenge for both sides.

## **5. Russia: Back to Pragmatism**

**FENG Yujun**

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The year 2018 marks the centenary of the end of the first World War and the 10th anniversary of the 2008 international financial crisis. While people keep reflecting on the havoc and chaos of the past, the real world has not become more orderly or peaceful. Major changes, divisions, restructuring and adjustments are still going on around the world.

In May 2018, Vladimir Putin returned to the Kremlin, kicking off his fourth term as the country's president till 2024. His governing ideas have made 'a return to pragmatism'. In fact, in the early years of Putin's presidency in the early 2000s, pragmatism was once his overriding governing idea. However, with Russia's rapid economic growth and the relative recovery of national strength fueled by the rising international oil price, the guiding principle of the country's internal and foreign affairs have entered into a relatively "radical" stage. Especially around 2008, sentiments such as "the United States has declined", "multi-polarization has become a reality", "Russia can make a difference" once prevailed and dominated Russia's basic stance towards international strategy. The Munich speech of Vladimir Putin in 2007, the Russia-Georgia war in 2008, the Crimea crisis in 2014 all marked the epitomes of Russia's 'aggressive diplomacy'.

However, the ensuing western sanctions and the plunge in international oil prices have seriously hindered Russia's economic development and rapidly deteriorated the international environment. In the face of such harsh reality, Russia has to re-examine the international environment, adjust international strategy and internal and external policies, and gradually return to rational pragmatism.

### **Domestic Stability More Important than Diplomacy**

Under major changes, each family has its own difficulties (as the Chinese saying goes). The importance of domestic affairs and economy is more prominent than that of diplomacy. Although Putin won re-election with 76% of the vote in the presidential election in March 2018, the measures he implemented after his re-election, such as delaying retirement age and raising taxes, have incurred fierce social backlash. Demonstrations have taken place in dozens of Russian cities, and public satisfaction

with Putin has fallen sharply from the highest reading at 82% this year to just 60%. Russian's trust in him also fell from 58.9% at the start of the year to 36.5% in early November. In Russia's regional elections this autumn, the ruling Party-the United Russia-experienced a major setback, giving opportunities for opposition parties to gain influence in certain regions.

Under the turmoil, Putin also realized that internal stability carries more weight than external expansion. Therefore he has diverted more resources and energy in improving domestic governance, keeping economic stability and maintaining people's livelihood, rather than expanding international influence. Addressing the United Russia's Party Congress on Dec 9, Putin said: "The world is undergoing a transformation, a very powerful and dynamically evolving transformation, and if we do not get our bearings, if we do not understand what we need to do and how, we may fall behind for good." He stressed that the United Russia Party must not only make responsible decisions, but "explain these decisions to the people and then take part in elections and convince voters that the earlier decisions were right while the path we have chartered is the only correct one". At present, one of the core tasks of the Russian government's economic work is to maintain the relative stability of inflation, in a bid to avoid social unrest triggered by the shrinking of people's already-meager wages and pensions, which might be eroded by rising inflation.

In 2018, Russia's inflation level was moderate controlled under 3.5%. Newly-created jobs increased 1.6 percent year-on-year, while unemployment rate was kept at the relatively low level at below 4.7 percent. While retirement delay reform has triggered widespread dissatisfaction among the public, Putin's approach to personally intervened in and fine-tuned the reform has again mobilized the traditional political psychology among the Russian public, which can be characterized as "good tsar, bad minister". This has helped maintain the overall stability of Russia's domestic politics.

Although since last year, Russia has walked out of the recession shadow and moved into growth trajectory. Nevertheless, due to many structural factors, growth remains weak. Not long ago, Putin signed the Russian Federation's three-year budget from 2019 and 2021, setting the annual GDP growth rate at 1.3 percent, 2 percent and 3.1 percent respectively. While this marks Russia's first budget surplus since the Crimea crisis, it is unneglectable that Russia's economic growth rate remained lower than the average growth rate of the world economy. It also means that Putin cannot live up to his promise made during his presidential election to "make Russia among the world's top five economies by 2024". What's more important, even against the vigorous



development of the new energy and the burgeoning new industrial revolution, Russia's economy is still mainly bolstered by oil and gas, arms and food exports, and such economic structure cannot be changed in the short term.

Under such circumstances, the Russian government has to face up to the reality and try every means to pursue the biggest interests for the country. It is noticeable that Russia has been using every possible opportunity to maintain and raise oil prices, even by stoking geopolitical tensions. Although Russia and Saudi Arabia are at loggerheads over Syria, the two countries can still cooperate on oil output curbs and price maintenance under the framework of "OPEC +". However, the cooperation between Russia and Iran in Syria, as well as Russia's support of Iran on the "Iran nuclear issue" are not only motivated by political ideas and international morality. The moves also come out of the consideration of pushing up oil prices through the US-Iran confrontation or even the US' ban on Iran's export of crude oil. At the same time, Russia has been aggressively selling its arms amid rising international tensions and regional conflicts, raking in \$45 billion in foreign arms sales in 2018. Russia is also stepping up efforts to promote nuclear power plants and food around the world.

Military strength still occupies the largest proportion in the composition of Russia's comprehensive national strength. Although the country's military expenditure is not comparable to that of the US and it is no longer capable of conducting an all-round arms race with Washington, Moscow is still striving to strengthen its military construction, by maintaining critical containment of the US and achieving an 'asymmetrical balance'. Despite its current economic difficulties, Russia has still enhanced its military construction, maintained a relatively high proportion of the military expenditure, and promoted the development and deployment of a series of new weapons, such as Salmat intercontinental ballistic missile, Sukhoi Su-57 fifth-generation fighter jet, and hypersonic missile, among others.

### **Striving to Survive "Diplomatic Winter"**

As his "aggressive diplomacy" faced obstruction, Putin has clearly realized the huge national strength gap between Russia and US and that Russia is unable to compete with the US on a full scale. As a result, Russia has gradually returned to a rational and pragmatic approach when dealing with the US, seeking detente while preparing for the worst. No matter how the US imposed more sanctions on Russia, Moscow has never given up its desire to improve relations with Washington. To some extent, it is not exaggerating to say that ameliorating ties with the US and appeasing sanctions

and containment from Western countries are the top priorities of Russia's diplomacy. Russian officials, including foreign ministry spokespersons, always emphasized the stance that "We are willing to improve our relations with the US and the door to improving ties is always open", even if they criticized and refuted sanctions from the US and European countries. President Putin has also repeatedly stressed that "Russia has no intention to be an enemy of the US and wants to restore a relationship featuring mutual respect." At the same time, Russia also understands that its structural problems with the US cannot be solved in short term and has prepared for the worst possible scenarios. Lately, Russia has accelerated its sale of US Treasury bonds while increasing its holdings in gold. Meanwhile, some Russian oil and gas companies have required foreign clients to modify their contracts and settle oil and gas-related transactions in euros instead of US dollars. All these are aimed to prevent Russia from suffering a fatal blow, should the US choose to disconnect Russia from SWIFT(the US-dominated international payments network).

While a quick upturn is not expected any time soon, Putin is still sparing no efforts in fixing relations with the US in order to win over time and space for 'breath' and 'survive the winter'. Therefore, on the Ukraine issue, Russia lowered its profile by strengthening cooperation with the Minsk Group without returning Crimea. It attempted to alleviate Western pressure on Russia through cooperation with Germany and France. In the case of Syria, while taking the lead in driving the Astana and Sochi peace processes, Russia has also set up a framework for the resolution of the Syrian issue with the participation of France and Germany. More importantly, Putin has used every opportunity to seek the resumption of direct talks with US in a bid to prevent a free-fall in bilateral relations. In addition to his meeting with Trump in Helsinki in July 2018, Putin also sought to use multilateral occasions such as the centenary of the end of the First World War and the G20 to communicate with Trump. While such wishes have fallen through, the enthusiasm to fix ties remains. In addition, Russia and the US are also actively preparing for Putin's visit to the US in the spring of 2019.

Russia, of course, is not simply backing down in its relationship with the West. While seeking to ease ties, Russia has also taken 'the carrot and stick' approach, leveraging a series of issues to divide the EU and the US (alliance), the NATO, Europe, the US and Japan (alliance), as well as the entire Western society. These include the Nord Stream 2 natural gas pipeline project, the US withdrawal from the Iran nuclear deal, Russia-Japan negotiations on the disputed islands (which Russia calls the Kuril Islands and Japan calls the Northern Territories), the contradictions between the US and the EU and a number of internal political and social problems inside Western

countries. Russia's slate of measures did drive a wedge between EU and the US on the oil embargo on Iran, divert Germany and the US in the construction of the Nord Stream 2 gas pipeline project, exclude Japan from the de facto Western-led sanctions on Russia, and draw in conservative political forces in Western countries, represented by Le Pen of France and Kurz of Austria, to have empathy for Moscow.

Striving to avoid a sharp deterioration in its relations with the West, Russia is also stepping efforts to 'turn East' and actively enhancing cooperation with countries like China, Japan and India. Regarding Japan, Russia has used the northern territory issue to mobilize Japan, breaking the siege of Western countries while reaping substantial economic gains. As for India, the two countries have strengthened all-rounded cooperation on politics, economy and diplomacy. Russia's sales of the S400 anti-aircraft missile system to India was also settled in rouble to avoid financial risks. On multilateral level, Russia has been more active in participating in a series of multilateral mechanisms in East Asia, including the East Asia Summit and the APEC Summit, and promoting the "Greater Eurasian Partnership" initiative put forward by Putin. Following the ASEAN-Russia summit, bilateral relations have been upgraded from dialogue partners to strategic partners, and Russia's relationship with ASEAN countries like Singapore and Vietnam has been further deepened.

Of course, with regard to its diplomacy with the East, Russia gains the most from China: On the political front, the two countries interacted frequently so that Russia managed in avoiding the excessive "loneliness" in its relationship with major powers; Economically, bilateral trade volume restored quickly, with trade readings jumped 28.2 percent year-on-year to hit \$87.25 billion from January to October 2018. In the energy sector, Russia has been China's largest oil supplier for two consecutive years. From January to September 2018, China imported 50.56 million tons of crude oil from Russia, up 12.4 percent year-on-year. Trade volume leapt 53 percent from same time a year ago to \$26.5 billion, which accounted for 63 percent of the total import. China and Russia have stepped up the construction of the "Eastern Route" of the natural gas pipeline and quickened the pace on the negotiations of the "Western Route". The first to the third phase of the Yamal LNG project involving Chinese enterprises have been put into operation. The first shipment of the Yamal LNG has arrived in China this year and the two sides are still discussing the Arctic LNG 2 project. As the global energy sector shifts to a 'buyer's market', Russia has obtained a huge and stable sales market. In terms of investment, China's investment to Russia has accumulated to \$28.12 billion, whereas investment flow from January to October 2018 reached \$280 million. Chinese investment has become an important source of

capital for Russia against the backdrop of Western sanctions .

Looking ahead into 2019, Russia will continue its pragmatic internal and external policies. In domestic affairs, on the basis of achieving a surplus budget, Moscow should strive to avoid any serious impact of social reform policies on people's lives so as to ensure social and political stability. In terms of diplomacy, while strengthening the "post-Soviet" diplomacy and preventing the "avalanche effect" that may be caused by the deterioration of Russia-Ukraine relations, Russia should make great efforts to consolidate its geopolitical achievements in the Middle East and seek to improve Moscow-Washington ties through Putin's proposed visit to the US.

## **6. The European Malaise: Old Rules Falling Apart, New Ones on the Way**

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Looking back at 2018, the European Union has faced challenges at home and abroad. The continent has seen old rules falling apart while new ones not yet well established. While the EU has been putting its efforts to the ground, effects remain lackluster and limited.

### **Challenges at Home and Abroad**

First, the economic recovery has been sluggish and downside risks have intensified. Despite a sustained rebound this year, the EU's economy is expected to grow just 1.8 percent this year, following a marked slowdown from last year. Unemployment rate, though falling continuously, remains rather high. Inflation rate climbed to 1.8 percent, which was in line with the European Central Bank's expectation, prompting the authorities to formally cease the quantitative easing policies at the end of the year. Exports have also shown signs of fatigue as external conditions deteriorate. Economic performance of Germany which was previously seen as a standout performer, has slowed down sharply this year. No longer being able to sustain last year's momentum, France is also expected to secure just below 2 percent of economic growth rate.

Second, expanding level of inequality, shrinking middle class and the ever-surging social discontent are rampantly fuelling populism. The European debt crisis has magnified the negative impacts of economic globalization and aggravated the polarization between the rich and the poor. Meanwhile, the scale of the middle class has shrunk. Compared with 2010, the proportion of the middle class in the European population has decreased from 58.4 percent to 55.2 percent in 2018. The sense of loss among the general public, including the middle class, has intensified, with anti-wealth, anti-elite and other populist sentiments on the sharp rise. A Europe-wide poll showed that an average of 61 percent of respondents distrusted their respective governments. The "yellow vest" movement, which started in France and spread to the Netherlands, Belgium, Austria, Germany and other countries, has put forward a variety of concrete and abstract demands, from cancelling the increase of fuel tax to changing the ways the governments make decisions at large. The chaotic situations can be regarded as the general explosion of dissatisfaction among the lower and middle classes of the European society.

Third, the political landscape in Europe features the decline of traditional mainstream parties, the rise of extreme parties, the “right-leaning” of political spectrum and the fragmentation of politics.

There have been worrying new changes in European politics. In Germany, the far-right party, known as the Alternative for Germany (AfD), has been taking advantage of the refugee crisis to marginalize the traditional big players like CDU/CSU (unofficially known as the Union parties) and the Social Democratic Party (SPD). AfD has not only successfully secured seats in the parliament but also become the largest opposition party, which has resulted in six months of stalemate in forming a functioning cabinet. The refugee problem has caused frequent disputes between the government and their opposition parties. The traditional big parties lost successively in their state elections. Criticized for being a supporter of the refugee policy, Merkel resigned as the chairman of the party, dejectedly ending her 18-year tenure as party chief, which also "ushered in a new era". In Hungary, the government led by Viktor Orban won a third consecutive term in a row thanks to his anti-immigrant and pension-boosting policies. In Italy, the far-left Five Star Movement, an anti-immigrant supporter, and the far-right European-skeptic party, the Northern League, formed the first populist government in the EU that is comprised of all small parties. In Sweden, the far-right, anti-EU Sweden Democratic Party almost duplicated the success story of Germany's AfD to become the nation's third largest party, leaving the traditional guru-the Swedish Social Democratic Party-in a difficult situation in forming an effective government.

In addition, the EU faces constant challenges in terms of internal governance, which features the lack of leadership and a notable decline in internal cohesion. The refugee issue has essentially become a “litmus test” of EU's capacity for internal governance and its relations with other member states. The plan to distribute and relocate refugees fell through as it was frequently thwarted by middle, eastern and southern European countries. France, Germany and the United Kingdom have all been overwhelmed by their own problems and are gradually losing their guiding and the ‘axis’ role in the organization. Germany is faced with a generational change of leadership and always adheres to the principle of acting based on one's ability. France's capabilities are somewhat incompatible with its willingness, and the country's own reform has encountered unprecedented resistance. Calls for the reigniting the France-Germany axis in the EU seemed more significant than its actual progress, while the UK is mired in the Brexit dilemma. What makes the EU suffer the most is that countries like

Hungary and Poland have deviated from EU's mainstream liberalist values through measures like amending the constitution and controlling the media. This has prodded the European Parliament to implement Article 7 of the Treaty of Lisbon to deter and impose sanctions on relevant member states.

Finally, Trump's "America First" policy has eroded and rewritten the basis for the US-EU alliance, which has, in turn, forced Europe to stand up for itself.

Over the past year, Europe has been pummeled by Trump's "America First" policy: politically, the US accused the EU of acting as Germany's puppet, touted the UK for leaving the Union, lambasted France's initiative to build a European army, and supported populist parties and politicians in Europe. Economically, Washington imposed tariffs on steel and aluminum to threaten to launch a trade war on Europe-manufactured automobiles. On the defense front, US threatened to withdraw its commitment to ensure Europe's security, forced EU countries to pay 'protection fees' for NATO's protection, and severely criticized EU's proposal of building an independent European army. With regards to international governance, the US has taken the unilateral approach, pulling back from the Iran nuclear deal that was deemed by the EU as a 'major diplomatic achievement' and exiting from the Paris Agreement on climate change. In terms of value propositions, the US even questioned the most-cherished mainstream values in Europe, such as the spirit of freedom, multilateralism and democracy, making German Chancellor Merkel and others sigh, "the era when Europe is totally dependent on others has become something of the past". The general impression on Washington's policies has largely gone through the journey as what German Minister for Foreign Affairs Heiko Maas has described: "from regarding the US' behaviors as occasional 'democratic accidents' on the other side of the Atlantic, to admitting the harsh reality". He also called on the EU to unite more closely to tackle with the 'America First' policy.

### **Old Rules Falling Apart, New Rules Not Yet Established**

First, European reform has encountered huge obstacles, and the new generation of country leaders needs to gain more experience.

When facing the difficulties, the EU and leaders of its member states have tried hard to keep the reform momentum. But little substantial progress has been made as the reform itself has encountered strong obstacles and slipped into a 'reform-protest-compromise' vicious cycle. The most typical case is the massive

'yellow vest' protest in France to oppose the country's reform. Popular candidate Emmanuel Macron was elected French president last year without the support from traditional big parties, who has not exhibited a clear political standpoint that leans towards the left or right. Such a figure is undoubtedly a representative of the new era of European leaders. He and his colleagues forged ahead and proposed a series of measures to deepen reform at home in order to overcome longstanding problems, revitalize the French economy, strengthen the France-Germany axis (in the EU) and promote European integration. These include the abolition of taxes on the rich, carrying out labor law reforms that are aimed at liberalizing labor markets and giving companies more flexibility and autonomy, as well as cutting down on taxes for companies. They also include austerity measures to meet EU's deficit ceiling, such as cutting housing subsidies, freezing pay rise in the civil service sector and levying social insurance expenses on retirees.

On the one hand, the French economy begins to pick up: last year, the economy surged close to 2 percent for the first time in six years, and the public deficit was kept below 3 percent for the first time in a decade.

On the other hand, the series of measures including the price hike in fuel taxes has touched the core interests of, and added burden on notably the country's lower to middle class. These have given rise to the month-long "yellow vest" protests, which even turned into riots. Haste makes waste. The reform plan was forced to make two concessions: the tax levy was put on a pause and the minimum tax threshold was raised. The country entered into a state of emergency and next year's budget deficit level was consequently pushed higher. Macron's approval rating dropped to historical low point. His reputation was severely damaged and so was his reform plan. Macron's case, together with previous examples of German Chancellor Gerhard Schroder, Italian Prime Minister Mario Monti and Matteo Renzi, who were forced out of office due to their reform plans, have demonstrated the curse of "whoever carries out reform has to step down" and reflected the compounding difficulties of reforms in the internet era. It also reflected that the new generation of European politicians and leaders still lack careful and thorough researches before the introduction of the policy design. Their governance ideas are excessively elitist and thus separated from the middle and lower classes. Their governing skills are still immature and need to be further developed and sharpened.

Second, the Brexit process has experienced twists and turns, and the risks of a "hard-landing Brexit" scenario have increased unprecedentedly.



The Brexit negotiation between the UK and the EU has been a bumpy one. After repeated bargaining on, and appeasement of, a series of challenges from both inside and outside the party, British Prime Minister Theresa May and the EU finally put forward the "draft withdrawal agreement" in November, but it immediately aroused oppositions from various parties at home. These criticisms not only came from the opposition Labor Party, but also from different branches within the conservative party, whose stances on whether the UK should remain in the EU varied. These are obvious signs that the British society has been deeply divided. Ms. May herself also faced a serious trust crisis. Though she finally survived the no-confidence vote, it was apparent that her political status was no longer as stable. At present, the British people who advocate staying in the EU are calling for a second referendum on the issue. It is still difficult to predict whether the British parliament will pass the draft agreement and subsequently lead to a substantial hard-landing of the Brexit.

### **Forging Ahead among Difficulties**

Faced with such a series of internal and external concerns, the EU and its member states are still making unremitting efforts to forge ahead on the road of integration.

First, on the EU level: Politically, the bloc adheres to integration and strongly responds to various challenges from populist parties and governments in areas such as refugees and budgets. Economically, the euro zone rescue mechanism was strengthened and the European Stability Mechanism (ESM) was given green light to provide loan support for the single clearing mechanism of the banking sector. It proposed plans to facilitate the use and settlement of the euro in strategic areas such as energy and commodities, thus boosting the role of the euro and weakening that of the US dollar. On the defense front, following the signing of the agreement on "Permanent Structured Cooperation" in the military field last year, the nine EU countries inked the "European Intervention Initiative" in June this year, pledging to form a joint European intervention military force. In terms of global governance, the EU has made clear its opposition to trade protectionism, adhered to multilateralism and free trade, and has put forward a WTO reform plan under the rules-based and multilateral framework. At the same time, the EU has actively promoted negotiations on free trade agreements and has made significant progress. It struck a deal with Japan on the landmark EU-Japan Economic Partnership Agreement. It also unveiled a Euro-Asian connectivity strategy which is dubbed the European version of the Belt and Road Initiative. It also pointed out that it needed to work with China to achieve

this goal. The EU has also withstood pressure from the US and insisted on abiding by the Iran nuclear deal.

Second, on the level of member states: The French government under Macron's presidency has rolled out a string of ambitious plans to push forward EU reform and promote integration. Moves include the establishment of the common budget mechanism, the creation of the role of EU's finance minister, the European monetary fund, and the strengthening of a common defense system and the France-Germany axis. These efforts have received cautious echoes from German chancellor Merkel and a number of deals (albeit being scaled-down versions) were reached.

Third, the confidence in EU integration bounced back thanks to a slew of factors, including the slow yet continued recovery of the economy, provocations from old-day ally-the United States, mounting competition pressure from China and other emerging economies and the turbulent situation of the UK due to its Brexit decision as a negative example. These have also prevented populist parties from instigating the 'EU disintegration' sentiment and led to resurging confidence among EU residents. A barometer tracking EU confidence showed that confidence level in the EU has risen by one percentage point since the autumn of 2017 to 42 percent. The level of optimism on EU's prospects, meanwhile, has reached 58 percent, the highest reading since the spring of 2015. At present, European people and all kinds of forces are looking forward to, and competing for, the next year's elections across EU's institutions, hoping to seek changes in confusion.

## **7. China-Japan relations: Turnaround and Progress with Twists**

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In 2018, China-Japan relations went into the second major adjustment period after the Cold War.

The end of the Cold War coincided with the collapse of Japan's economic bubble and the disintegration of the 1955 System. Japan then stepped into a "lost decade" or even two decades, while China's growth entered a fast lane. One side was on a downward trend, while the other side expanded rapidly. The huge gap and growth prospects posed a historic challenge to the relatively stable post-war China-Japan relations. It was a pity that Japanese elite, represented by the former Prime Minister Junichiro Koizumi, chose the basic strategy to ally with the United States to counterbalance China. It was clearly manifested by his six visits to the Yasukuni Shrine during the five-year term. This was a phenomenon that had not existed in the history of post-war China-Japan relations, marking that the relations entered the first major adjustment period after the Cold War. In the meantime, China's GDP surpassed Japan in 2010 and the gap quickly widened. With the shift in overall national strength, in the period not reigned by the conservative Liberal Democratic Party, the conflicts over Sino-Japanese territorial and maritime rights and interests, represented by "Japan's purchase of disputed isles," intensified, national sentiment plummeted, and relations between the two nations fell to the lowest since the war ended. After Prime Minister Shinzo Abe took office again in 2012, he further tried to counterbalance China through "Diplomacy of Panoramic Views" and lifting the ban on collective self-defense. In particular, the so-called "values diplomacy" under his conservative political philosophy has intensified the tensions between China and Japan in the political and security fields, while, with regard to ideology and values, it further expanded the gap between the two nations.

However, things have inherent reasons, and will develop in the opposite direction when they become extreme. Since last year, Prime Minister Abe has clearly begun to adjust China-Japanese relations in various ways. China, which always pursues good-neighborly relationship with Japan, has responded positively to it. With joint efforts of both sides, in May 2018, Chinese Premier Li Keqiang leveraged the opportunity to attend the China-Japan-ROK summit to make his first official visit to Japan in eight years as the Chinese premier. The visit resulted in a series of achievements, such as boosting ties between the two governments and various private

entities, expanding economic and trade relations, and launching the China-Japan maritime and air liaison mechanism. Premier Li also visited Hokkaido and hoped to further promote cooperation between the two countries at local levels. On this basis, in October 2018, Prime Minister Abe officially visited China. The two countries formally confirmed that China-Japan relations have returned to normal track. Prime Minister Abe stressed that Japan-China relations have moved from competition to coordination. It marked that Sino-Japan relations ushered in a second major adjustment period after the Cold War.

### **Evaluation of the Results of Prime Minister Abe's Visit to China**

First of all, through this visit, the two sides have reached a lot of consensus on enhancing political mutual trust. They were mainly manifested in the following aspects. Firstly, both sides reconfirmed the four political documents as the political basis of China-Japan relations, especially the legally binding China-Japan Treaty of Peace and Friendship. Secondly, both sides reaffirmed and emphasized the political consensus that they “are each other’s cooperative partner, and not threats to each other.” This consensus had important values in both practical and conceptual levels for the China-Japan relations. That is to say, “not threats to each other” is actually a conceptual issue first. On the one hand, although the philosophy that “a great power will surely seek hegemony” does not apply to China that upholds the philosophy of peaceful development, many people in Japan still buy in the “China threat theory.” On the other hand, China is still full of doubts about Japan’s various initiatives to boost its military alliance with the US in recent years. Therefore, it is self-evident that the political consensus on “not threats to each other” is a prerequisite for enhancing political mutual trust. Being “each other’s cooperative partner,” in a narrow sense, mainly refers to cooperation in the economic and trade field and avoid vicious competition. In a broad sense, it should refer to regarding each other as a partner in all areas where they can cooperate. This political consensus is undoubtedly the starting point and platform for enhancing political mutual trust between the two nations. Thirdly, Prime Minister Abe’s official visit to China, with the emphasis on “from competition to co-existence, Japan and China bilateral relations have entered a new phase,” officially expressed his willingness to shift the government strategy of counterbalancing China to coordinating with China. If this is the case, it will provide a basic premise for rebuilding political mutual trust between China and Japan. Fourthly, the two sides reached an important consensus on how to build political mutual trust in sensitive areas with corresponding measures. For example, both sides agreed to launch a hotline as soon as possible under the China-Japan maritime and air liaison

mechanism, a mutual notification mechanism aimed at avoiding occasional conflicts between the Japanese Self-Defense Force and Chinese military forces. The two sides also signed China-Japan Maritime Search and Rescue Agreement (SAR).

Second, China and Japan have achieved important consensus and major achievements in key philosophies and new platforms in terms of economic and trade cooperation. In Prime Minister Abe's meetings with President Xi Jinping and Premier Li Keqiang, the two sides agreed that under the current international scenario, as the world's second- and third-largest economies, China and Japan have the responsibility and obligation to adhere to the principle of free trade and oppose unilateralism. Meanwhile, both sides confirmed that beyond further strengthening traditional economic and trade cooperation, the "third-party market cooperation" is also a new platform and experimental field. The first China-Japan Forum on Third-party Market Cooperation, which was held during Prime Minister Abe's visit, lured 500-plus representatives from Japanese business circles and 1,000-plus Chinese representatives, and 52 "third-party market cooperation" agreements worth over US\$18 billion were signed. Both sides also signed over 10 intergovernmental cooperation agreements. In order to cater to the fourth industrial revolution, the two sides confirmed and emphasized the "innovation dialogue mechanism" to further promote cooperation in the high-tech field, making it a vital platform for upgrading cooperation between the two nations in the future. The two sides also signed an upgraded currency swap agreement valued at 200 billion yuan (about US\$30 billion), 10 times that of the 2002 version. It is the largest of its kind signed by Japan with foreign countries so far.

Third, apart from government-level interaction, civil society exchanges were also boosted to improve the feelings of the people. Amity between people holds the key to the sound relations between states. Only with a solid foundation of public opinions can China-Japan relations develop in a healthy and stable manner. Especially in the information age, people in the two nations are highly engaged in the bilateral relations. In his talks with Prime Minister Abe, President Xi emphasized that "it is necessary to carry out extensive humanities exchanges, enhance mutual understanding, and encourage people from all walks of life, especially the younger generation, to actively participate in the construction of Sino-Japanese friendship." In his speech delivered at the first China-Japan Forum on Third-party Market Cooperation, Prime Minister Abe particularly emphasized the long history of cultural exchanges between the two nations with an aim to illustrate the existence of a profound cultural gene between China and Japan. The two governments jointly decided to make the year 2019 "China-Japan Youth Exchange Promotion Year," and Prime Minister Abe also made a

special visit to Peking University to interact with students. This visit will surely become a booster for promoting and deepening exchanges between the two countries.

### **Reasons and Prospects for Major Adjustments in China-Japan Relations**

First, there is a huge gap between the inefficiency of counterbalancing and the price paid. Since the Koizumi era, especially in the first five years under the Abe administration, it has proved that Japan's basic strategy of leveraging the US to counterbalance China was ineffective and in vain. China's political stability, economic prosperity, and international prestige have risen, and GDP is already 2.5 times that of Japan.

Second, what the Trump administration did has deepened and intensified the inherent contradictions in the deformed relations between Japan and the US. In terms of bilateral trade agreement, the US has suppressed Japan based on its own preferences, which has hurt Japan's real interests. What makes it even worse is that Japan is a resource-poor island country with trade playing a key role in supporting its survival. The Trump administration's philosophy and measures on trade protectionism have fundamentally damaged Japan's strategic interests and even brought a sense of survival crisis, which is unacceptable to Japan. Meanwhile, with regard to the US-Japan military alliance, the US continuously raised the prices for Japan, which becomes doubtful about the reliability of the US. In response to the major changes in the US, Japan is altering its previous policy that relied too much on the US while adjusting the relations with China in a timely manner. It just shows the two sides of a coin.

Third, for any Japanese politician, long-term, constant tensions with close neighbor China is something unbearable. In early post-war days, Shigeru Yoshida was an exception, while Eisaku Sato, Abe's granduncle, was hostile to the New China when he was in power. However, in 1972, China-Japan relations were normalized. Sato, who had long hindered this normalization process, ended his political career in a miserable situation, making it a failure in his life. The aforementioned Junichiro Koizumi's six visits to the Yasukuni Shrine had a huge impact on China-Japan relations. Even almost all the former prime ministers in Japan have jointly accused him for this irresponsible behavior. As of last year, Abe had been in power for over five years. His de facto failure in the strategy for China has put him under increasing pressure at home. His timely adjustment has just proved a typical proposition of geopolitics in East Asia.

Under the above-mentioned scenario, the adjustment was still at a low level, which means “returning to normal track” from the bottom. The old structural conflicts, including historical issues between China and Japan, have not been truly resolved. The more straightforward issues and challenges lie in the new structural contradictions in maritime issues, especially maritime access. Therefore, we’ve seen that, in recent years, Japan has deliberately lifted the ban on collective self-defense, promoted the revision of the peace constitution, and was keen on the “2+2” model. Meanwhile, it has increased its military spending, relaxed the Three Principles on Arms Exports, purchased new weapons, and unveiled an “aircraft carrier in disguise.” The aim to get it prepared on the legislation and military aspects for offshore and maritime military objectives under the premise of not relying on the US. Due to the natural needs of its own development, China has expanded its maritime forces over recent years. The systemic effects of geopolitics have led to a “security dilemma” between the two nations. It is a difficult and intractable factor that has to be addressed for smooth development of China-Japan relations in the future.

Therefore, in order to make China-Japan relations stable and far-reaching, a top-level positioning is needed in the context of the new era. Prime Minister Abe’s official visit to China in 2018, to some extent, creates the condition for President Xi Jinping’s official visit to Japan at the G20 Osaka summit in 2019. If it can be realized, the two sides can discuss relevant concepts and directions of China-Japan relations in the new era. When time is ripe, both sides can further standardize, institutionalize and even legislate them to deepen the political mutual trust between the two nations. Second, the two sides must boost military exchanges, maximize the understanding of each other’s strategic intentions, reduce misjudgments, and ease security dilemmas.

The year 2018 was an important year in the history of post-war China-Japan relations. From the conceptual perspective, the most important thing was the first official visit of Japanese Prime Minister to China in seven years. To a certain extent, this visit marked transformation in Japanese top leaders’ cognition of China and was a landmark beginning for Japan to rationally respond to China’s peaceful development. As former Japanese Prime Minister Yasuo Fukuda said, the improvement of China-Japan relations is not a matter of expediency.

On the other hand, although the China-Japan relations have turned around, they may have to experience difficult twists and turns in order to reach a stable and far-reaching path. In this regard, China needs to have a clear understanding and a higher degree of

political wisdom.



## **8. India: From ‘Pulling Chestnuts out of the Fire’ to ‘Balancing for Survival’**

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In 2018, India’s economic, political and diplomatic landscapes remained generally good, but uncertainties escalated. Although economic growth was fast, new uncertainties emerged. The politic scenario was basically stable, but due to the BharatiyaJanataParty (BJP)’s loss in the five-state assembly election in the end of 2018, uncertainty around the general election in 2019 has been rising. India continued to boost its ties with major powers, but amid rising uncertainties from the “America First” policy, India’s room to seek benefits has been greatly squeezed. Under this circumstance, India’s foreign policy has been tactically adjusted, and it has rediscovered the value of balanced diplomacy.

### **India’s Internal Political and Economic Uncertainties Escalate**

In 2018, India’s economy generally performed well. Thanks to growth in private consumption and investment, the Indian economy grew by more than 7% in 2018, the best performer among major economies, with its economic aggregate ranked the sixth (nominal exchange rate) and third (purchasing power parity) respectively in the world. However, India also faced some economic uncertainties, including oil price volatility, trade protectionism and declining fiscal revenue, which will affect India’s economic growth in the future. The basic scenario that India’s economy “has growth but no development” has not fundamentally changed, while the situation of “economic growth without full employment” still exists. The Modi government was trapped in internal politics and religion issues, making it hard to take further steps on lots of economic reform issues. The international community had a less positive view on the Indian economy.

India’s social conflicts were on the rise. Over the past few years, India’s economic reform measures, including demonetisation and goods and services tax (GST) reform, have been deemed as necessary and beneficial in the long run, but, in the short term, they hurt the interests of farmers and smaller merchants who were highly dependent on cash and informal economic activities. In addition, Hindu nationalism has been on the rise, with escalating religious contradictions and conflicts. Many people found that

the local governments led by the BJP seemed to care only about religious interests and were not really interested in promoting people's livelihood and development.

India's political uncertainty has been rising. Over more than four years since Prime Minister Modi came to power, domestic reform measures have resulted in both gains and losses. In the last general election, Modi's key supporters were intellectual elites and urban residents, who now oppose Modi's policies over religious issues. The BJP was under pressure in local state elections. In the five-state election that ended in early December, the BJP lost in three states, two of which were where the party had been re-elected three times. The loss in the strongholds led to an increasing uncertainty around India's general election in 2019. On the one hand, it would worsen internal contradictions within the BJP, with rising dissatisfaction with Prime Minister Modi. On the other hand, the opposition party would be more confident and unite in a more forceful manner against the BJP. It's still very likely that the BJP will win the next general election, but it is no longer "invincible."

### **India's Relations with Major Powers Face Pressure for Adjustment**

The India-US defense relationship continued to strengthen. In December 2017, the US published the National Security Strategy Report, which depicted India as the "Major Defense Partner" of the US. On August 3, 2018, the US upgraded India to the Strategic Trade Authorization (STA-1) category of trading partners. India has thus become one of the only three countries (other two are Japan and South Korea) in Asia to obtain this status. On September 6, 2018, India and the US held the "2+2" dialogue between their foreign and defense ministers. The two sides discussed cooperation under the Indo-Pacific Strategy and exchanged views on military procurement, technology transfer, trade, and immigration. The two countries also signed the "Communication Compatibility and Security Agreement" (COMCASA). At present, the US and India are also negotiating the signing of the "Basic Exchange and Cooperation Agreement" (BEC). All of these have greatly enhanced the defense relationship between India and the US.

The India-US strategic partnership was under pressure. While India-US relations continued to strengthen, they also faced some new challenges and pressure. Under the Obama administration, based on its long-term strategic needs, the US treated India as a strategic partner of equal status, while taking India's feelings and interests into consideration on many issues. However, since Donald Trump took office, under the "America First" policy, the US shifted its positioning of India from a strategic partner

to a strategic player. The US didn't consider India's interests on many issues, and only required India's obedience and cooperation. Especially on the Iranian nuclear issue and related oil export sanctions, the US ignored India's core interests, which hurt the Indian Rupee's exchange rate and India's economic growth rate.

India faced pressure in designing its policy towards the US. India originally took a vague stance towards the US Indo-Pacific Strategy, but was actively engaged with an aim to use the signal that India would eventually move completely onto the US strategic track in exchange for technology, economic and strategic support from the US. But India ultimately found that although it had closer ties with the US in military and intelligence aspects, the US was not concerned about India's core interests, like its economic growth. The US was unwilling to transfer civilian technologies to India, and even hindered India's cooperation with Israel and other countries.

The strategic differences between India and the US have been highlighted. As for the scope and objectives under the Indo-Pacific Strategy, India and the US had similarities, which were to balance strategic pressure from China. Both they also had differences. The US hoped to leverage India's anti-China sentiment to consolidate its own hegemony. To this purpose, the US has mapped the west end of the Indo-Pacific region at the west coast of India. India, on the other hand, hoped to take advantage of the US support to seek a dominant or even hegemonic position in South Asia and the Indian Ocean. Therefore, India has defined the Indo-Pacific to include the east coast of Africa, with an aim to leverage the power of the US to strengthen India's influence in the Middle East and Africa. Recently, the US declared that it would resume its alliance with Pakistan, which in turn made India feel hurt and betrayed.

India's relationships with China and Russia faced new challenges. China's tough stance towards India on the illegal intrusion of the Donglang area has profoundly changed India's perception of China. India has seen the risks of deteriorating Sino-Indian relations, and redefined its policy between China and the US by setting a bottom line that it mustn't challenge China's core interests. It's because that China's strategic counterattack was certain, but strategic support from the US was uncertain. Russia has also issued a strategic warning to India via developing its relationship with Pakistan.

Therefore, although, in the long run, it's inevitable that India will move closer to the US. But, in the short term, if India rushes to stand on the same line with the US, it won't bring any expected benefits, while also increasing strategic risks. India's

diplomacy is under tremendous pressure for strategic adjustments.

### **From ‘Pulling Chestnuts Out of the Fire’ to ‘Balancing for Survival’**

In increasingly tense relationships between major powers, India originally attempted to take the role as a strategic balancer in order to “pull chestnuts out of the fire.” But in 2018, India became obviously disappointed and gradually developed towards “balancing for survival.”

Previously, India had wished to take advantage of the tensions between major powers. On the one hand, India wanted to leverage itself to balance China’s strategic value in a bid to seek greater real interests from the US. On the other hand, India hoped to make use of China and Russia’s worry that India might fully side with the US to force these two countries to make greater concessions to India. In order to demonstrate its strategic importance, India ran the risk of armed conflicts with China by illegally intruding into China’s Donglang area in 2017. It was aimed at protecting India’s strategically weak area, while showing to the US that India had the power and determination to confront China. On the military side, India has indeed partially achieved its goals. Whether it was the US Indo-Pacific Strategy or Japan’s improved military ties with India, it showed India’s increasing strategic importance. But from an economic and diplomatic perspective, India has not fully achieved its goals. The US didn’t care about India’s economic growth needs, nor did it care about India’s core interests: Although the US was willing to share some military technologies with India, it is unwilling to share key civilian technologies to aid India’s economic development. The US emphasized the America First policy, with its work-visa policy harming the interests of Indian expatriates in the US. The US ignored the importance of Iranian oil on India’s economy, and tackled the issue even at the expense of India’s economic growth and financial stability. The US ignored India’s normal security interests, especially its traditional military ties with Russia, by requiring India to part with Russia. The US was only willing to leverage India to contain China, but it didn’t pay attention to the strategic risks that India may face.

In addition, the unconventional diplomatic style of US President Donald Trump has also made India feel very uncomfortable, resulting in a decline in India’s strategic trust in the US with eased enthusiasm in developing diplomatic ties with the US. Under such a scenario, India was not willing to continue to deepen its strategic relationship with the US. Dealing with the Trump administration and waiting for the next US President would become a more sensible diplomatic option for India.

“Balancing for survival” becomes a new strategy for India. Under the strategic pressure of rising US uncertainty, as well as China and Russia, India has started to make strategic adjustments since the end of 2017 and shifted to a traditional balanced multilateral strategy.

Firstly, India has publicly expressed its strategic differences with the US. In June 2018, Prime Minister Modi stated at the Shangri-La Dialogue in Singapore that India’s vision about the Indo-Pacific region was positive, it didn’t target any country, and it would be inclusively in contact with regional countries. Modi pointed out that Indo-Pacific was not a strategic concept, but a regional concept, which should “include all countries in the region in the geographical sense,” as well as other countries that have interests in the region. This was in sharp contrast to the US attempt to leverage the Indo-Pacific Strategy to separate the region into the confrontational maritime group and land group.

Secondly, India has been striving to restore and ease its relationships with Russia and China. On the one hand, India was trying to ease its relations with China. In April 2018, Modi made a special trip to Wuhan to hold the first-ever informal summit with Chinese President Xi Jinping in the history of Sino-Indian relations. The leaders of the two countries vowed to stabilize Sino-Indian relations that were aggravated by the Donglang intrusion incident. India thus reduced the strategic pressure from China. On the other hand, India was striving to restore and consolidate its traditional ties with Russia. Under the strategic pressure of the US, India once moved away from Russia. But now, in order to balance US pressure and boost its bargain power, India took actions to restore its traditional relationship with Russia, especially the military relations. To this end, India didn’t hesitate to run the risks of US sanctions by purchasing S400 anti-aircraft missiles from Russia.

Thirdly, India has stepped up efforts to develop relationships with Western countries beyond the US. In recent years, India has strengthened its cooperative relationship with Japan to offset the strategic uncertainty from the US. In 2018, India and Japan reached a military base sharing agreement, under which Japan would allow the Indian Navy access to a Japanese base in Djibouti, while India would permit the Japan Maritime Self Defense Force to use India’s military facilities on the Andaman and Nicobar Islands. The military cooperation between India and Japan is not only aimed to balance China’s strategic influence, but also to reduce military dependence on the US.

In the international scenario featuring chaos and great changes, India has adjusted its foreign relations strategy by rediscovering the importance of balanced diplomacy among major powers. However, this does not change India's economic and strategic dependence on the US, nor will it prevent India from moving closer towards the US. India's basic strategy of leveraging the US to contain China and seeking balance among major powers will not change.

## **9. The Korean Peninsula: New Situations and New opportunities**

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The year 2018 marked a turning point for the Korean Peninsula, with all related parties including North Korea, South Korea, the United States and China pulling in concerted efforts to push forward changes on the peninsula.

### **The Core Driving Force of the Turnaround in the Korean Peninsula**

First, the Democratic People's Republic of Korea (DPRK) is the most critical driving force for the recent turnaround on the Korean peninsula and the most significant "engine" for the transformation of the situation. After the completion of its nuclear force construction, Pyongyang has addressed some of its security concerns and therefore has the guts to negotiate with Washington. In addition, to ensure internal economic development and stability as well as avoid devastating consequences aroused by military actions, the DPRK was determined to shift from the duo track of "developing both nuclear weapons and economic development" to a new course focusing on "comprehensive economic development and the complete denuclearization of the Korean Peninsula".

Second, the guiding role of the Republic of Korea (ROK) acts as another driving force. South Korean President Moon Jae-in adheres to the policy of reconciliation with the DPRK, opposes war and refutes the core positions held by the previous conservative administrations to overthrow the DPRK regime. Such empathy has won Seoul the opportunity to cooperate with Pyongyang. The Moon Jae-in-led government seeks to change the passive situation and play a leading role. Not allowing an inter-Korean war to happen, the Moon administration established a high-level communication channel between the two countries with the aid of intelligence agencies and tried to arouse the nationalistic sentiments of the DPRK. Fully aware of the strategic confrontation between China and the US, as well as the US and Russia, South Korea played a guiding and active role in coordinating relations between DPRK and the US, China, Japan and Russia, by maximizing common interests and avoiding potential conflicts. With "cooperation" and "peace" being the most powerful bargaining chips to persuade major powers, ROK has to a certain extent altered the altered pattern of the peninsula where major powers tend to dominate smaller countries.

Third, the strategic shift of the US has played a guiding role. The US has long been

the 'ceiling' of the Korean Peninsula issue. Trump was in dire need of leveraging any progress made on the peninsula to gain political capital, which could help offset impacts and divert focus away from incidents like 'Russia's interference in the US 2016 presidential election' and sex scandals, as well as pave the way for the midterm election. Out of these considerations, Trump has subversively changed policies towards the North Korea through an 'atypical' approach, by appointing hardliners like Mike Pompeo and John Bolton to lead substantial negotiations with the DPRK. These efforts have finally led to the ground-breaking summit between DPRK and US' top leaders, which successfully helped the US get deeply involved in and transform the situation of the Korean peninsula.

Fourth, China's role as a "stabilizer" is an important driving force. China's influence, interests and role on the Korean peninsula cannot be ignored. While endorsing and participating in sanctions against the DPRK for its behavior of challenging and ignoring international rules, China has also put forward actionable solutions, known as the "dual suspension" and the "dual track " plans, to address DPRK's normal and reasonable security concerns and ensure people's livelihood. When mistrust surfaced in the process of deepened interaction, China encouraged all parties to keep the momentum of reconciliation through efforts like inviting Kim Jong-un to visit China and help deliver messages in many international occasions. China's role as a source of power and stabilizer has fostered more implementable and clearer results during the DPRK-ROK Summit that are worth anticipating. Beijing has played a unique role in guiding all parties closer to the substantial resolution of the Korean peninsula.

### **Frequent Interactions among All Related Parties**

As the situation on the Korean peninsula continued to evolve, interactions among all parties have also taken on a new look, which are shaping up to be the accelerator for the further warming of the peninsula. Four core players, namely China, the US, North Korea and South Korea, have respectively made a series of policy adjustments, via frequent interactions like shuttle diplomacy and leadership communication. These contributed to the shift on the peninsula from the crisis of war to benign interaction.

First, China-DKRRK relations have walked out of the nadir and moved towards a virtuous circle. The easing of the DPRK's stance on denuclearization has removed the biggest obstacle since 2014 in bilateral ties. After his informal visit to China from March 25 to 28, 2018, Kim Jong-un paid another two visits to China and met with President Xi Jinping. The pair reached a number of consensus and broke the ice in the



diplomatic relations that were embroiled in a stalemate. Subsequently, Chinese Foreign Minister Wang Yi paid a visit to Pyongyang in early May of 2018 at the invitation of DPRK Foreign Minister Ri Yong-ho. This, together with the visit of a Party and government delegation led by DPRK's vice-chairman of the State Affairs Commission to China, has quickened the interaction pace between the two countries.

Second, inter-Korean relations have undergone a sharp reversal, from one featuring cold confrontation to warm interaction. The government of Moon Jae-in, who took office in May 2017, has to a certain extent inherited the policy legacies of predecessors like the Kim Dae-jung and Roh Moo-hyun administrations towards the DPRK. This serves as the political foundation for the turnaround of inter-Korean relations and helped resumed the long-stalled secret contacts between the two nations. In his 2018 New Year message, Kim Jong-un, chairman of the State Affairs Commission of the DPRK, announced the completion of the building of the country's nuclear power. In an unconventional manner, he also dispatched nominal head of state, Kim Yong-nam, as well as Kim Jong-un's younger sister Kim Yeo-jong as special envoys for a sudden visit to the ROK during the Pyeongchang Winter Olympics.

The two Koreas have since kicked off positive interactions, reaching the basic consensus on denuclearization and agreeing to hold inter-Korean summit talks. Three such talks finally materialized. On the practical level, DPRK and ROK have successfully achieved the withdrawal of military forces from the DMZ, conducted joint excavation of Korean war relics and examination work on railways, as well as carried out fruitful cultural and sports exchanges. Both sides have constantly deepened political understanding towards each other.

Third, the DPRK-US relations first experienced an ebb and then made a rebound, moving from confrontation to contact. In 2017, North Korea forcibly broke the threshold of nuclear missile, forming a deterrence against the US. Responding with 'gunfire' and 'anger', Washington urged other countries to take sides and deployed troops for effective preemptive strikes in a bid to deter Pyongyang. The US also pushed forward multiple resolutions regarding North Korea at the UN level to impose 'the toughest sanctions'. A number of nations, including South Korea, the US, Japan and many European countries have also imposed separate diplomatic, economic and military sanctions against the DPRK.

Following the restoration of inter-Korean interactions and shuttle diplomacy, ROK played a mediation role between DPRK and the US. President Trump made the

decision to hold the US-DPRK summit despite widespread opposition. Interactions among the three parties have reversed the risk of war on the Korean peninsula. The quasi-official trilateral communications among ROK, DPRK and the US have shifted to intergovernmental contacts, forming a top-down model featuring interactions among “head of state, head of highest organ of state power, and head of the intelligence department”. Such model allows for state leaders, highest-level decision-makers and practitioners of the three countries to reach multiple consensus through a fast-track communication channel.

Fourth, in order to stabilize the hard-won appeasement on the Korean peninsula, the government of Moon Jae-in has made adjustments in national defense, diplomacy and issues concerning the DPRK. In terms of defense policy, the US-ROK alliance is the top priority of the Moon administration, which also remains to be the policy ceiling that South Korea cannot afford to break through. Through the "2+2" talks between the defense minister and the foreign minister, Moon Jae-in's government met Trump's request to renegotiate issues such as the transfer of wartime operational command and the cost-sharing of US forces in South Korea. It also accommodated and pleased Trump by agreeing to make concessions on issues like the Indo-Pacific strategy, the deployment of THAAD in ROK, and the bilateral FTA negotiations. In terms of attitude towards the DPRK, the ROK army revised its operational policy and discarded the tone of regarding the DPRK as the "main enemy". In response to the declaration of Panmunjom and the Pyongyang Declaration, the two armies pulled out militants, permanently blew up multiple guard posts, initiated cooperation on the evacuation of Korean war relics, and hosted multiple rounds of military meetings to restore military mutual trust. The genuine "end to the war" has been realized in some areas, which revolutionarily eased the military confrontation within the Korean peninsula.

### **The Unique Role of ROK**

In a bid to stabilize the situation of the Korean peninsula, the Moon Jae-in government has played a unique role in fostering innovative communication methods and promoting international cooperation.

First, the Moon administration has actively grasped opportunities. In terms of the stability of the situation on the Korean peninsula, the Moon Jae-in government has seized the window of opportunity of the Pyeongchang Winter Olympics to effectively connect China and the US, the two most influential powers to the Korean peninsula

through top-down shuttle diplomacy, and established a diplomatic network featuring summit diplomacy. On the basis of stabilizing the relations between China and the US, bilateral top-leader meetings were held between China and DPRK, DPRK and ROK, and DPRK and the US, which greatly eased the tension on the peninsula. Meanwhile, in order to avoid concerns from China and the US over the potential changes on the peninsula, South Korea has established a high-level communications channel with both countries, and emphasized the continuity and consistency of the US-ROK alliance without elaborating too much on the status of the US Forces Korea. It constantly catered to US's positions on the "End of War Declaration" and the "Peace Treaty" in a bid to stabilize ROK-US relations.

Second, the Moon government pursued pragmatic results. The administration believes that the key to peace on the Korean peninsula lies in the denuclearization process of the DPRK, and complete denuclearization of the DPRK is not beyond reach if the international community pulls in concerted efforts. However, the denuclearization of the DPRK is not simply an inter-Korean matter. China, the US, Japan, Russia and the entire international community are all parties concerned. "Nuclear weapons are the means to ensure the survival of the regime of North Korea", and the denuclearization of DPRK inevitably carries corresponding price. It is only the international community that stands in a good position to provide security guarantee to the DPRK, and it is only through the strengthened ROK-US alliance and the deepened cooperation with related and neighboring countries like the US, Japan, China and Russia, can such execution and persuasion be ensured.

Third, the Moon administration adopts different approaches towards different major powers. To stabilize the hard-won situation on the Korean peninsula, the Moon administration attaches great importance to major country diplomacy with the likes of China, the US, which, meanwhile, also places ROK in an awkward and helpless situation. South Korea cannot fundamentally change its relationship with the US and can only demonstrate diplomatic skills at the mercy of the US. Therefore, ROK dares not cross the policy 'redline' of the US on fundamental issues concerning the peace of the Korean peninsula, including joint military exercises. The only path it can take is to try to persuade Trump and has to resort to, tolerate and comply by Washington's decisions. As for China, the Moon administration has adopted a strategy of seeking communications, help and 'understanding' to avoid the complex Sino-US relationship to affect the situation of the Korean peninsula. It has therefore acted in a quite capricious manner on determining the participants involved in the "End of War Declaration" and "Peace Treaty".

Fourth, the DPRK and the ROK are attempting to jointly dominate the situation on the peninsula. Mr. Moon has brought out the best he can in North-South relations. The ROK believes that the two parties directly related to the peninsula should consolidate mutual trust. Since taking office, Moon Jae-in and his administration have held talks with the DPRK on the resumption of the Kaesong Industrial Complex, the Pyeongchang Winter Olympic Games, and sports-related dialogue, etc., all of which are conducive to the accumulation of trust. As a result, three summit meetings were held and the Sept 19- military agreement was reached, which forcibly promoted the "end of war" on certain parts of the Korean peninsula. The Korean government has also created a new communications model featuring "top leader + intelligence agencies", jumpstarting a trilateral top-tier official communications channel comprised of ROK's Cheong Wa Dae's (Blue House) security department + National Intelligence Service, DPRK's Kim Yeo-jong + The Secretariat + The Unification department, as well as US' Mike Pompeo + CIA Korea Mission Team. Shuttle diplomacy has helped build a bridge between DPRK and the US.

For the first time, instead of being subject to big countries, the two Koreas have attempted to cooperate or coordinate with each other on the Korean peninsula issue amid competitions of major powers. But constrained by ROK's relationship with the US, such cooperation has its limitations. The inter-Korea communication is unlikely to touch upon military issues where ROK and US has deep collaboration. Trust-building is primarily achieved through political, economic and cultural cooperation, such as making tangible breakthroughs on culture, sports and the reunion of separated families. In the realm of high politics, ROK-DPRK relations on military and diplomacy are largely constrained by the ROK-US alliance and sanctions imposed by the UN security council.

### **New Uncertainties of the Korean Peninsula**

The operational work to address the nuclear issue on the Korean peninsula has entered a substantial stage. But at the same time the situation on the peninsula also faces huge uncertainty. However, it is the accumulation of these uncertainties that has promoted the turn-around and progress of the Korean peninsula issue.

First, the prospects and continuity of denuclearization. For the time being, the DPRK is willing to exchange its nuclear disarmament process for development opportunities, and the peninsula faces the "Kim Jong-un opportunities". The most important factor

determining the direction of the Korean peninsula is how to turn Kim's idea of "nuclear disarmament in exchange for development and development for security" into reality. Although competition between China and the US and other major powers will affect the direction of the Korean peninsula, Beijing and Washington are largely in the same position on the denuclearization of the Korean peninsula, which ensures its stable momentum.

Second, the changing personal traits of leaders in the US, DPRK and ROK have all resulted in a severe deviation between domestic politics and diplomacy. In fact, the countries' leaderships respectively face far more domestic opposition than support, but they insisted on moving forward their diplomatic endeavors. The presidents of both US and ROK even ignored opposition from their congresses and other government departments, insisted on the idea of meeting with DPRK leaders and spared no efforts to make it happen. The three countries' presidents all happened to have atypical leadership profiles. For both the US and ROK, to ensure the Party to remain in the ruling seat or the reelection of its leaders also raised high expectations for the North Korea nuclear issue to be solved. While DPRK is discontent with Trump, it has to acknowledge the fact that Trump is more willing to make deals with DPRK than anyone else.

Third, the new normal of logic on the Korean peninsula has emerged. Traditional ideas and solutions are not suitable for handling the current situation, with traditional perspectives like geopolitics and major power politics becoming partially invalid. The six-party talks have been abandoned, whereas unconventional means, such as multiple rounds of summit meetings, direct engagement between the DPRK and the US, flexible dialogue mechanisms and the use of "extreme" means are playing more eminent roles. The traditional way of maintaining working-level contact and making strategic judgement from higher-end was overturned, while the 'top-down' approach has helped clear many obstacles on working level thanks to the direct participation of the highest-decision makers. Instead of dealing with the nuclear, missile and human rights issue in a concerted fashion, Trump tended to deal with one issue at a time.

Judging from the entire 2018, there are still many difficulties in the denuclearization of the Korean peninsula. First, over-reliance on the "top-down" approach. While such an approach has indeed played an essential role in solving fundamental problems, it has encountered difficulties and bottlenecks in addressing details. Second, the parties have focused too much on the differences in the concept of denuclearization but ignored the common ground. Relevant concepts centered too much on the DPRK's

efforts on denuclearization, while obligations of the US and the needs of DPRK were not fully taken into account. Third, too much attention is paid to efforts made by the US and DPRK, relatively ignoring the roles of other concerned parties like ROK and China. Neglecting the importance of flexibility and substantial progress, this has led to a deadlock where Pyongyang gauged Washington's changing attitude as a prerequisite to embark on denuclearization, whereas Washington evaluated Pyongyang's denuclearization actions as a premise for changing its stance towards Pyongyang.

Of course, from the measures taken by all parties at the end of 2018, it's clear that all concerned players still cherish the hard-won opportunity of denuclearization and the window of opportunity for negotiations, and are willing to loose hold of their bargaining chips. In the foreseeable future, the denuclearization process on the Korean peninsula will step into the "deep water" zone, and there will be perceived difficulties in making progresses in achieving tasks and goals.

## **10. DPRK: Towards a 'New Concerted' Path**

**ZHENG Jiyong**

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The transformational changes on the Korean peninsula in 2018 is of course the result of concerted efforts and interactions among the two Koreans, the United States and China. But the most important driving force changing the peninsula's situation still originates from the transformation of North Korea itself, especially due to changes from its top leader Kim Jong-un.

### **Major Internal Changes**

Internal factors are the biggest drivers of the changes in North Korea's foreign policy.

To begin with, Kim Jong-un has maintained his firm authority at home and established a top-down decision-making mechanism. First, Kim Jong-un adjusted and straightened out the positioning and mutual relations between the Party, the government and the military, weakening the country's 'militarized impression' and presented "normal" state behavior. Tensions between the military and other senior statesmen were ameliorated, giving green light to the strategy of "avoiding confrontation and developing the economy" on a full scale. Second, DPRK has "completed" the building of nuclear force and can take the initiative in negotiations with the US. Pyongyang believed that its nuclear deterrence against the US is "sufficient, real and effective", and that its 'nuclear status' has become a status quo. Third, DPRK has shifted the development path from a strategy of "nuclear and economic development" to one featuring 'all-out economic development'. Kim Jong-un has long promised to improve people's livelihood, but the country's repeated nuclear and missile tests have led to severe sanctions and it clearly cannot afford another "march of hardship". As early as the May 30 speech in 2014, Kim has pointed out that "all personnel, including those in charge of economic affairs, should have a deep self-reflection on the country's unaddressed difficulties in economic and cultural development as well as people's livelihoods, which could date back to 'the march of hardship' period." The lack of social and economic vitality will not only exhaust the nuclear deterrent and diplomatic leverage it should have, it will also undermine Kim Jong-un's authority. Therefore North Korea has a rigid demand to improve its internal and external environment.

First, the Democratic People's Republic of Korea (DPRK) is the most critical driving force for the recent turnaround on the Korean peninsula and the most significant "engine" for the transformation of the situation. After the completion of its nuclear force construction, Pyongyang has addressed some of its security concerns and therefore has the guts to negotiate with Washington. In addition, to ensure internal economic development and stability as well as avoid devastating consequences aroused by military actions, the DPRK was determined to shift from the duo track of "developing both nuclear weapons and economic development" to a new course focusing on "comprehensive economic development and the complete denuclearization of the Korean Peninsula".

Second, social development has approached a tipping point where economic upgrade has become the only way forward. The germination and diffusion of market economy inside North Korea have led to the segmentations of social classes. There are more than 3.8 million mobile phones, over 600 free markets and a growing number of self-organized marketplaces, as well as hundreds and thousands of migrant workers in North Korea where frequent trade activities take place. The flourishing market factors and the flow of information have changed the daily lives of North Koreans, created several wealthy classes such as the 'money lenders', and even changed residents' views on domestic and foreign politics. The standpoint of "returning to the march of hardship is unthinkable" has become a social consensus, and there is no turning back. According to the basic principle that the economic base determines the superstructure, changes in the economic hierarchy will inevitably be reflected in the political structure.

Third, the new thinking and the old ideas collide fiercely, and the political development faces the bottleneck. North Korea's social environment has presented many new challenges and realities. The younger generation has exhibited a keen sense of new thinking and logic of action, and many of their new proposals are relatively in line with the requirements of the international community. But due to limitations from objective conditions, the majority of the population can hardly accept such new thinking and new path. Especially to those who have received the Korean-style education in the 1970s, they are still in the inertia of traditional thinking. Even if some of the new thoughts are understood, not much can be done to have them fully implemented due to reality constraints. This is also why chairman Kim Jong-un has constantly scolded his subordinates and representatives of certain enterprises and organizations.



Without making breakthroughs in the politics of the previous generations, and notably changing certain practices, there will be no opportunity of transformational development. But the continuation of North Korea's authoritarian system, the lessons of the social upheaval of the former Soviet Union and certain East European countries, together with the bitter realities of Syria and Libya have made Pyongyang highly wary of and concerned about political changes. It is another important task for the DPRK to inject new impetus to social economic development while maintain the regime's legitimacy, by integrating the political traditions with new ideas and making breakthroughs on certain political practices under the circumstances when reform and opening-up cannot be implemented due to sanctions. DPRK has entered into the 'deep water' zone on the many operational levels, where such risks can also spell the biggest opportunities for the country.

### **Adjustment to the Outside World**

The adjustment of North Korea's external perspective is another important driver for its transformation.

First, the risks of war prompted North Korea to change its mindset about confrontation. North Korea's continuous nuclear and missile tests have prodded the US and South Korea to make serious preparations on a potential warfare, and a string of military drills and preparatory actions have greatly deterred North Korea. Pyongyang's intention was to 'leverage a potential war in exchange for peace' rather than 'launch a real war'. The purpose of having nuclear weapons was to ensure its security instead of "losing the entire world". In the face of high risks from the war, Kim Jong-un realized that what used to be obtained by weapons must now be acquired and maintained by developing economic strength. Therefore the pursuit of peace can only resort to peaceful development.

Second, North Korea fears a collapse in its economy. The United Nations Security Council has adopted a number of resolutions concerning sanctions against the DPRK, and that even included many items regarding people's livelihood. The US, South Korea, Japan, Australia and the European Union also exerted a concerted pressure on North Korea, by announcing a slate of separate sanction measures and expelling DPRK institutions and personnel involved in foreign affairs. Under such sanctions and containment, DPRK's 'friends circle' severely shrank, its social and economic activities were seriously hit, and the country's all functions were paralyzed. North Korea's economy is on the verge of collapse.

Third, North Korea has changed its view on South Korea. In the past, the governing idea of South Korea's conservative government was to overthrow the North Korean regime, which naturally led to the free-fall deterioration of inter-Korean relations. Moon Jae-in, on the other hand, has adhered to the policy of reconciliation with the DPRK, opposed war and showed "empathy" for the DPRK. North Korea believes Moon Jae-in has a "sincere desire" for peace and stability on the Korean peninsula.

Fourth, North Korea has adjusted its perception of China. In the past, North Korea was able to deal with the US and South Korea with ease and flexibility, largely due to the support from China and Russia. However, a series of extreme actions has caused North Korea to face the dilemma of losing its "backup force" for the first time. Kim Jong-un has gained greater confidence by announcing his intention to abandon nuclear weapons and reverse relations with China.

### **Towards a 'New Concerted' Path**

Judging from the current situation, North Korea's governance model is indeed different from the past. This is the result of the integration of history and reality of the DPRK. But whether North Korea is heading towards further adjustment and transformation remains to be closely watched.

First, North Korea is not refusing to make any progress. Its failure to open up is the result of (constraints from) external circumstances.

North Korea believes that it has always had an open mind. The reason why it has failed to open up its market is not due to its unwillingness but the interference and blockade from the US and other countries. After years of 'trial of error' and exploration, it has come to the conclusion that confrontation with the international community, especially with China, can yield no good result. Therefore the country has stepped up changing its behavior pattern by attempting to engage the international community through cooperation, reform and opening-up. It has also reaffirmed its future path of survival relies on embracing the world rather than standing still.

Second, progress on the nuclear issue holds key to whether North Korea can move towards reform and opening-up. No matter what path the DPRK has decided to take, its starting point is the resolution of the Korean peninsula nuclear issue. And the key at the present stage is how to negotiate with the US on the nuclear disarmament issue

and win recognition from Washington. However, this gaming process is ongoing and will last for a long time. How to turn the improvement of DPRK-US relations into a sufficient condition, rather than a necessary prerequisite, for the reform and opening up of the DPRK has become one of the thorniest issues facing the DPRK.

After years of confrontation with the US and accurate apprehension of the international situation, North Korea believes it can exert influence on Trump and that Trump is willing to make a deal with it. Pyongyang is also willing to use the resolution of the nuclear issue in exchange for its political and security interests.

Third, the DPRK has accumulated relevant experience and lessons in construction and development. From the perspective of the social development of the DPRK, after nearly six years of struggling exploration and a movement-like campaign to develop the economy, the country has expropriated labor force and people's wealth by launching a series of campaigns like "50 day-battle" "70-day battle" and "100-day battle". As a result, North Korea's economy has taken on some new look. But the majority of the achievements have been invested in the costly construction of 'landmark' or "monumental" sites, such as the Future Scientists Street, the Ryomyong Street, the Wonsan city, the Samjiyeon County as well as the Masikryong Ski Resort. Since 2016, the ongoing nuclear and missile tests have led to increased international sanctions, which have dealt a severe blow to the social economic development of the DPRK and even posed a serious threat to people's livelihood. Kim Jong-un received widespread domestic support after he proposed a policy of "all-out economic development" in his New year's message delivered on Jan 1, 2018. The policy was later adopted during the third plenum of the seventh Congress of the Workers' Party of Korea in April and has become an overriding national strategy. Presently, the pursuit of 'money' has become a new trend guiding the country's social and economic development.

Fourth, domestic politics remains stable and there is no Plan B for political arrangement. Since taking over the DPRK regime in 2012, the top leadership has carried out major reshuffling and adjustments in key departments sweeping across the Party, the government and the military, and have firmly grasped all core power, especially in armed forces. At the same time, Kim has appointed a growing number of younger generation born in the family of DPRK's founding fathers so that a community of shared interests and future is effectively forged between Kim and the mid-to-high level leadership across the Party, the government and the military. Meanwhile, the north Korean people have put Kim Jong-un on a pedestal and treated him equally with Kim Il-sung, and the economy has showed signs of improvement.

There is no legitimacy crisis for Kim Jong-un.

From the perspective of internal and external environment, the future of North Korea is worth expecting.

First, externally, Beijing-Pyongyang ties are being patched and bilateral relations are re-picking up momentum. Relations with the US are also in the process of constant revision, while relationship with South Korea is completely under the control of the DPRK.

Maintaining the stability of relations with major countries and properly maintain relations with China and the US have provided a relatively stable external environment for the DPRK to handle other relations with relative ease. "Fighting without breaking" will become the defining tone in the DPRK-US relations on the nuclear issue game, so that the DPRK can stabilize its relations with the US. Similarly, based on a thorough understanding of the US, the DPRK regarded President Trump as a rare "window of opportunity" so that it will meet Trump's requirements in a contemplated and measured fashion in exchange for benefits. North Korea is clearly aware that only a Chinese-style development path and political model can help the country achieve its multiple goals of preserving political regime, ensuring security and seeking development. As its longtime enemy, the US has not altered its ultimate goal of eradicating the DPRK regime and the current changes are merely expedient. The "H-shaped belt" economic cooperation plan proposed by South Korea, including many of its practices and purposes, is extremely harmful to the preservation of the North Korean regime.

Second, internally, North Korea has needs, resources, aspirations and the potential. The development level of DPRK's heavy and light industries, the chemical sector as well as the energy and power sector, remains rather low, but it has a huge demand in the reconstruction of the industrial chain. This accords exactly with China's 'de-capacity' strategy and is complementary to the surplus capacities it needs to get rid of. North Korea is also determined to have full control over strategic industries such as mining, fishing and agriculture. At the same time, North Korea has a very rich working population, the vast majority of whom have received high education and are relatively cost effective. A big military force represent a particularly massive source of labor. The North Korean military is changing its mission: while maintaining security, it has also been actively involved in many major projects, demonstrating its huge construction capacity and power. North Korea's fragile financial sector also needs

strong support. It is gradually changing the proportion of foreign currencies in its financial system, such as the US dollar, RMB and the euro, by strengthening the status of its own currency in a bid to get rid of financial control.

North Korea has recognized that, in the face of an urgent need for development opportunities, the cost of reversing or even bucking the current trend can be too high to bear. Not only will it exhaust the country's political and diplomatic advantages, it will risk losing all kinds of environments that favor the imminent needs for its economic development. While fulfilling its commitment to complete denuclearization of the Korean peninsula, the DPRK must obtain the necessary conditions for its development to integrate into the international community and align itself with international ideas. As a result, North Korea has boldly reversed previous strategies like the "*Songun Policy*" (Or Army-First Policy", "Building Gangseong Daeguk", (or Powerful and Prosperous Nation) put forward by Kim Jong-il. By breaking through the policy constraints of "developing economy and nuclear weapons at the same time", the DPRK has transformed to take on a concerted new path that upholds developing economy as the overriding goal and uses denuclearization and 'the implementation of the strategies in the third plenary session of the Seventh WPK Congress' as the new means.

Kim Jong-un, of course, is also in considerable distress. The most pressing task for North Korea is to prove the positive correlation between "denuclearization" and "all-out economic development". The choice of denuclearization is conducive to the full development of economy, and the full development of economy can substitute nuclear weapons as the new method to ensure social security. This finally serves to prove that denuclearization is beneficial to the country's security and economic development. Similarly, the DPRK needs to be embraced by the international community that it is a country, which has normal security and development needs and aspires to be welcomed by the international community. More importantly, Kim Jong-un needs legitimacy of his regime. The current status quo of North Korean society will not allow for the old-fashioned politics to control power. The political legitimacy can only be manifested by the social development and quick economic takeoff that area far cry from that of the older-generation leaders.

Integration into the international community, complete denuclearization, social and economic development and the political legitimacy have formed the complete logic chain of the DPRK under the rule of Kim Jong-un. They also contributed to the unique turning point for the situations on the Korean peninsula. To a certain extent,

whether the DPRK can achieve its goal of abandoning nuclear weapons in exchange for development opportunities relies on the outcome of the game on the Korean peninsula. This is especially dependent on whether neighboring major countries can manage to guide Pyongyang's denuclearization willingness into reality, and turn its firm determination to abandon nuclear weapons into stable and substantial facts and actions.

## **11.Middle East: Confrontation, Stalemate and Imbalance**

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Confrontation, stalemate, and imbalance have formed the typical characteristics of the scenario in the Middle East in 2018. Confrontation was highlighted by serious clashes between the United States (together with its allies Saudi Arabia and Israel) and Iran. The Iranian issue may even surpass the Palestinian-Israeli conflict as the core in the Middle East. Stalemates were manifested in some hot issues such as Syria crisis, the Palestinian-Israeli conflict and Yemen civil war. These issues saw hopes of resolving, but were still in an overall stalemate. Imbalance was due to the negative effects of the Middle East policy by the US, as well as the rivalry among big powers in the region. International relations in the Middle East went more diversified and complicated, while the regional scenario continued to be unbalanced.

### **Intensified Confrontation between the US, Its Allies and Iran**

According to Trump administration's National Security Strategy in 2017, counter-terrorism, containing Iran, and energy security were the main strategic interests of the US in the Middle East. Since the "Islamic State" was eliminated in 2017, there was no imminent threat to energy security. Containing Iran then became the priority of US Middle East policy in 2018. In general, denying and withdrawing from the nuclear agreement with Iran, restarting sanctions, and instigating regional allies against Iran were the main part of Trump administration's Iran policy.

On May 8, 2018, the US announced its withdrawal from *Joint Comprehensive Plan of Action* (JCPOA), while resuming sanctions against Iran. Meanwhile, US Secretary of State Mike Pompeo proposed 12 tough demands to put "extreme pressure" on Iran, such as stopping all enrichment, providing the IAEA with unqualified access to all sites throughout the entire country, ending proliferation of ballistic missiles and halting further launching or development of missile systems, ending support to Middle East "terrorist" groups, and ending interventions in Iraq, Yemen and Syria. Since then, the US has launched large-scale sanctions against Iran twice in August and November in 2018. The basic goal of US sanctions against Iran was to force Iran to succumb to the US "extreme pressure," re-sign a US-led nuclear agreement, and reshape the balance of power in the Middle East by strengthening its relations with Saudi Arabia and Israel.

The core of Trump's Middle East policy is to consolidate relations with its allies, which became gradually alienated under the Obama administration, by containing Iran, while continuing to go ahead with strategic contraction and input reduction. The focus is to strengthen its alliance with Saudi Arabia and Israel, making them to take on more tasks and costs in containing Iran and anti-terrorism efforts, and thus enhancing the dominant role of the US in Middle East affairs. First of all, in order to strengthen the alliance with Israel, the US took policies clearly biased towards Israel on the Israeli-Palestinian issue, and attempted to push the so-called "Deal of Century" to resolve the Palestinian-Israeli issue. Secondly, the US attempted to set up a Saudi-led anti-Iranian alliance, or the "Arab version of NATO," and offered strong support for Saudi's internal and external policies, especially in the "Khashoggi incident," to maintain the US-Saudi alliance.

The US policy of containing Iran faced the following severe challenges and difficulties. Firstly, the US attempt, through sanctions, to force Iran to succumb to the US or to change Iran's regime is unlikely to succeed, and it is also hard to change Iran's policy on regional hot issues. Secondly, although the US policy for Iran was supported by Saudi Arabia, Israel and other Middle East allies, Saudi's own political development, especially whether it can become a "floodwall" to ensure the stability of the international energy market, remained uncertain. Finally, the uncertainties caused by comprehensive sanctions against Iran may cast an impact on the US financial hegemony, which is a deep concern for the US. If there occurs a trading system independent of the US dollar in the international energy market, which the EU is discussing about, it will undoubtedly mean the loosening of the US financial hegemony.

In short, containing Iran constituted the main part of the Trump administration's Middle East policy in 2018. Trump's Middle East policy was essentially to leverage a small input to maximize profits, to replace direct intervention with "offshore balancing," and to replace utilitarianism and pragmatism with multilateralism with unilateralism. Therefore, the US role in the Middle East was more disruptive than positive. The US policy of containing Iran was the root cause behind the escalating tensions in the Middle East, especially in the Gulf.

### **Stalemates over Hot Issues Continue and the Political Settlement Proves Difficult**

Among the hot issues of the Middle East in 2018, the ups and downs of the Palestinian-Israeli stalemate were the most striking. On May 14, the US chose Israel's



national day, also Day of the Catastrophe in Palestine, to hold a high-profile opening ceremony of the US Embassy in Israel in Jerusalem, which triggered the most bloody violent clash between Palestine and Israel since 2014, resulting in 58 Palestinians getting killed and more than 2,800 injured.

Trump also attempted to push ahead with the Palestinian-Israeli peace plan, the so-called “Deal of Century” in the Middle East. In June 2018, Trump met with King Abdullah of Jordan and hoped that the “Deal of Century” would be supported by the allies. According to media reports, the “Deal of Century” may favor Israel in such aspects as the West Bank border, the Gaza Strip and the Egyptian border, as well as the sovereignty of the Golan Heights. It also aims to select the site of the “capital” for the future Palestinian state and promote economic integration of Palestine and Israel. The deal not only seriously violates the territorial sovereignty of Palestine and Syria, but also encroaches upon Egypt’s sovereignty over the Sinai Peninsula. However, as the US placed a majority of its focus on containing Iran, together with the complexity and sensitivity of the Palestinian-Israeli issue, the “Deal of Century” is still in the making. In late 2018, the Palestinian-Israeli conflict escalated again. There was a serious conflict between Israel and Hamas in Palestine. However, due to a variety of factors, Israel did not launch a massive attack against Hamas, thus avoiding the escalation of the conflict.

The US has also pressured Arab countries such as Saudi Arabia and Jordan to make concessions on the Palestinian-Israeli issue. It has made Arab countries like Saudi Arabia face pressure from Arab people and media, while also increasing the risks of a renewed escalation of the Israeli-Palestinian conflict. It also provides an excuse for Iran to launch anti-Israel and anti-US political campaigns by leveraging the Israeli-Palestinian issue.

The Syrian issue was also deadlocked. In 2018, the Bashar Assad regime continued to expand and consolidate its controlled areas with the support of Russia, and squeezed the opposition to Idlib. But the Assad regime didn’t launch an attack due to pressure from all sides. Meanwhile, the US, Turkey, and Israel have all launched military strikes against Syrian targets. Turkey even launched a three-month military operation against the Afrin region. Therefore, Syria is now in a complicated state under which Russia-backed Assad regime controls a majority part of the territory, while US-backed Kurds and Turkey each controls a small part of the territory. In terms of political reconciliation, the various mechanisms led by the West and Russia have developed in parallel. Although they have played a certain role in stopping violence and easing

conflicts, it is still hard to reach an agreement on post-war arrangements, and it also fully reflects the complex game among big powers in and out of the region in addressing the Syrian crisis.

The Yemen conflict was also in a stalemate. Since May 2018, the Houthi forces, Saudi-led coalition forces and Yemeni government forces have been engaged in a fierce clash around the western port city of Hodeida, causing a massive humanitarian disaster. As Saudi Arabia fell into the crisis after the “Khashoggi incident,” the US withdrew its intelligence and logistics support for Saudi, thus halting Saudi’s air strikes against Yemen. Under such a scenario, the two parties engaged in the Yemen conflict agreed in early December in 2018 to hold peace talks in Sweden under the coordination of the United Nations, but its prospects are still not optimistic.

### **Regional Pattern Remains Unbalanced with Increasing Regional Disorder**

As for the external factors that affect the pattern in the Middle East, although the Trump administration has stepped up its input in Middle East affairs, the core of its policy was still a strategic contraction, and it also lacked of a systematic Middle East strategy. As the US reduced inputs and became reluctant to directly intervene in the Middle East, this has led to a relative decline in its ability to dominate in Middle East affairs. Although Russia accelerated its attempt to return to the Middle East, beyond the purpose of safeguarding its own real interests, it still doesn’t have the dominant power in the Middle East region or the ability to build the regional order. Europe’s influence on the Middle East continued to wane. India and Japan have been increasing their strategic inputs in the Middle East, but their influence was still limited.

In short, as the US and Russia had weaker capacity and willingness to dominate in the Middle East, and other foreign powers had limited capability, the scenario, under which the Middle East had long been dominated by foreign powers, has been weakened. This is a key reason behind the fact that Saudi Arabia, Iran, Turkey, Israel and other regional countries strive to expand their regional influence for the purpose of their own security. In the ever-changing Middle East landscape, except for the fact that confrontation between Saudi Arabia and Iran continues to intensify, the following aspects in the reshaping of regional pattern in 2018 are worth noting.

First, conflicts and frictions between Saudi Arabia and Turkey have been worsened. Over recent years, Turkey and Saudi Arabia have clashed over several hot issues including the Egyptian Muslim Brotherhood and Qatar crisis. It actually reflected a

series of conflicts as the two sides revved up competing for dominance in the Middle East, the Islamic world (especially the Sunni world), and the development model. Since October 2018, diplomatic disputes between the two sides over the murder of Khashoggi have been escalating, which not only made their conflicts more apparent, but also had a great impact on the US-Saudi and US-Turkey relations. In the Khashoggi incident, Saudi Arabia's biggest appeal was to "stop loss," which means preventing the incident from posing a threat to Saudi's global image, especially the status of the Crown Prince Muhammad Bin Salman. So the bottom line is that Turkey's findings don't involve Muhammad Bin Salman, and thus the status of Crown Prince would not be seriously shaken. Turkey's appeal lies in its real interests in Qatar and Syria, especially on the Kurdish issue, but its core concern is that it can leverage Saudi Arabia to reduce the US political, economic and diplomatic pressure on Turkey, while improving its deteriorating internal and external environment. The US has announced that the incident would not affect the US-Saudi alliance, but so far Turkey still takes on Saudi Arabia over the incident. How the incident is resolved will be one of the highlights in the Middle East in 2019.

Second, the division of the Arab world, especially the Gulf Cooperation Council (GCC), has intensified. Saudi Arabia and Qatar are still in a stalemate of broken diplomatic relations. In late 2018, Qatar announced its withdrawal from the OPEC and its head of state was absent from the GCC summit, indicating that conflicts between the two sides have yet to be resolved. Within the GCC, Saudi Arabia, the United Arab Emirates and Bahrain form the key forces against Qatar. Oman and Kuwait are relatively neutral, while Qatar is isolated, which leads to a "3+2+1" fragmented structure.

Finally, the US promoted the construction of the Israel-Pragmatic Sunni Axis against Iran, bringing Israel closer to some Arabic countries. In 2018, Israel's relations with Saudi Arabia, Jordan, Oman, and Kuwait have continued to heat up. Its root causes still lie in the US policy for Iran and the Palestinian-Israeli issue. That is to promote reconciliation between Israel and Arab countries, seek support from Arab countries for the US policy on the Palestinian-Israeli issue, and, at the same time, build the Israel-Pragmatic Sunni Axis fighting against Iran. This scenario has helped ease the long-standing Arab-Israeli conflict. But clashes between Arab's Sunni-led countries and Iran have further intensified, which may make the Gulf region a new vortex in the Middle East after the "Fertile Crescent."

## **12. Southeast Asia: New Diplomatic Adjustment under the Sino-U.S. Competition**

**QI Huaigao**

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In 2018, the scenario in Southeast Asia (SEA) was generally stable, but the power competition among China, the United States (the U.S.), Japan, India and other major countries in the region became increasingly fierce, making it the biggest challenge that will likely affect the external environment of SEA countries. Among them, the Sino-U.S. Competition in SEA was particularly intense, as the two great powers were trying to expand their influence in the region. In 2018, the Sino-U.S. Competition in SEA showed a trend of “China advancing while the U.S. retreating.” However, the current Sino-U.S. Competition in SEA is not a zero-sum game, and it is still in a “competitive coexistence” stage.

China regards SEA as a key area for its neighboring diplomacy and actively promotes the Belt and Road Initiative (BRI). The Trump administration’s “Indo-Pacific Strategy” has gradually become clear, and SEA is regarded by the U.S. as a key link in the Indo-Pacific region. The Abe government has actively strengthened Japan’s “special relationship” with ASEAN and SEA countries. In October 2018, Japan and several southeast Asian countries, located along the Mekong River, signed the “Tokyo Strategy 2018 for Mekong-Japan Cooperation” to strengthen cooperation in infrastructure, education and climate change. After Modi took office, he launched India’s “Act East” policy for SEA, and India’s presence and influence in SEA will gradually increase in the future. Among all these, the Sino-U.S. Competition has the greatest impact on the external environment of SEA countries.

Under the background of the intensified strategic competition between China and the U.S., the two countries both attempted to expand their influence in SEA. The U.S. National Security Strategy report unveiled in December 2017 divided ASEAN countries into two categories: allies and partners. the Philippines and Thailand remain important allies and markets for the U.S. Vietnam, Indonesia, Malaysia, and Singapore are growing security and economic partners of the U.S.<sup>1</sup> In July 2018, when remarking on “America’s Indo-Pacific Economic Vision”, the U.S. Secretary of

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<sup>1</sup> The White House, *National Security Strategy of the United States of America*, December 2017, p. 46, <https://www.whitehouse.gov/wp-content/uploads/2017/12/NSS-Final-12-18-2017-0905.pdf>.

State Mike Pompeo emphasized that ASEAN, which is literally at the center of the Indo-Pacific, plays a central role in the Indo-Pacific vision that America is presenting. Under a new U.S. initiative announced by Pompeo, the U.S. will invest US\$113 million in digital economy, energy and infrastructure areas to enhance its role in the Indo-Pacific region.<sup>2</sup> On the occasion of the 15th anniversary of the establishment of China-ASEAN strategic partnership, in May 2018, China's Premier Li Keqiang stated that China has all along regarded the ASEAN as a priority in its neighboring diplomacy and unswervingly developed friendly cooperation with the ASEAN. Li Keqiang stressed that China is willing to be a partner of the ASEAN in five aspects, namely for common development, peace, openness and win-win progress, entrepreneurship and innovation, as well as in promoting inclusiveness and mutual learning.<sup>3</sup> In November 2018, China and the ASEAN agreed on the China-ASEAN Strategic Partnership Vision 2030.

In 2018, the competition between China and the U.S. in SEA showed a trend of "China advancing while the U.S. retreating." China's growing relationship with Cambodia, dramatically improved relationship with the Philippines, and fast-expanding relationship with Myanmar all reflected China's rising influence over the U.S. in SEA. Before and after Cambodia's general election in July 2018, the U.S. and Europe cast pressure on Hun Sen's government. China continuously boosted its investment and assistance to Cambodia, supported Cambodia's own development path in line with its national conditions, and helped Cambodia in maintaining stability, fostering development and improving people's livelihood. Sino-Philippine relations have improved significantly since Rodrigo Duterte became President of the Philippines in June 2016. In November 2018, during the visit of Chinese President Xi Jinping to the Philippines, China and the Philippines established a comprehensive strategic partnership and the two nations signed 29 cooperation documents. Among them, the Memorandum of Understanding on Cooperation on the Belt and Road Initiative and the Memorandum of Understanding on Cooperation on Oil and Gas Development were particularly worthy of attention. Myanmar has been challenged and criticized by the U.S. and other Western countries on the Rakhine issue, but China believed that "unilateral accusations or pressures would not help solve the problem." In November 2017, Chinese Foreign Minister Wang Yi proposed a three-stage solution to help settle the issue in Myanmar's Rakhine state.<sup>4</sup> In September 2018,

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<sup>2</sup> Michael R. Pompeo, "Remarks on 'America's Indo-Pacific Economic Vision'," the U.S. State Department, July 30, 2018, <https://www.state.gov/secretary/remarks/2018/07/284722.htm>.

<sup>3</sup> "Keynote Address by Premier Li Keqiang at ASEAN Secretariat Ministry of Foreign Affairs," ASEAN Secretariat, Jakarta, 7 May 2018, ENGLISH.GOV.CN, [http://english.gov.cn/premier/speeches/2018/05/09/content\\_281476140338650.htm](http://english.gov.cn/premier/speeches/2018/05/09/content_281476140338650.htm).

<sup>4</sup> "China Proposes Three-phase Solution to Rakhine Issue in Myanmar: FM," Xinhua, November

China and Myanmar signed a memorandum of understanding for establishing the China-Myanmar Economic Corridor. In December 2018, Myanmar announced the establishment of a steering committee, which is chaired by Myanmar's State Counselor Aung San Suu Kyi, for implementation of tasks relating to the BRI.

The current scenario under which "China advancing while the U.S. retreating" still faces uncertainties in the future. This is evidenced by the changes in the Mahathir government's policy towards China after Malaysia's general election in May 2018. The influence of the U.S. on Cambodia, the Philippines, and Myanmar is still very strong. There are still powerful pro-American forces in these SEA countries. For China and the U.S., it is imperative to take measures to prevent the increasingly fierce competition from turning into a zero-sum game.

There are three major reasons behind the influence shift between China and the U.S. in SEA.

Firstly, Trump's "America first" policy and withdrawal from the TPP in 2017 has left some SEA countries in utter disappointment. Without a strong economic linkage with SEA, the political and military influence of the U.S. in the region would not last long.

Secondly, trade and investment between China and SEA have been rising. The China-proposed BRI is being promoted in SEA. In 2017, China's investment in the ASEAN countries was US\$14.119 billion. By the end of 2017, China's outstanding investment in ASEAN countries had reached US\$89.014 billion.<sup>5</sup> The growth of China's economic power in SEA will inevitably lead to the expansion of its diplomatic influence.

Thirdly, the gap between the "human rights diplomacy" of the U.S. and the actual needs of SEA countries was too wide. The Philippines, Myanmar, Thailand and other countries that used to favor the U.S. values have turned to China because of the U.S. pressure on their domestic human rights issues. China has taken into consideration the real difficulties in the internal governance of SEA countries and has not unilaterally pressured SEA countries on human rights or governance issues.

ASEAN countries believe it "would be better if they could become part of the

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19, 2017, [http://www.xinhuanet.com/english/2017-11/20/c\\_136764392.htm](http://www.xinhuanet.com/english/2017-11/20/c_136764392.htm).

<sup>5</sup> Chinese Ministry of Commerce, National Bureau of Statistics, State Administration of Foreign Exchange, eds., *Statistical Bulletin of China's Outward Foreign Direct Investment Year: 2017*, Beijing: China Statistics Press, 2018, p. 31.

regional balance-of-power configuration rather than begging for security from great powers”.<sup>6</sup> They do not want the Sino-U.S. Competition to force the countries in the region to choose which power they side with. Amid the increasingly fierce Sino-U.S. Competition in 2018, the new diplomatic adjustments of SEA countries had the following characteristics.

Firstly, SEA countries have proposed the ASEAN version of the Indo-Pacific Vision in a bid to maintain ASEAN’s “central status.” As an archipelagic country across the Pacific Ocean and the Indian Ocean, Indonesia is a major promoter of the ASEAN version of the Indo-Pacific Vision. In January 2018, Indonesian Foreign Minister Retno Marsudi proposed the regional architecture of Indo-Pacific, emphasizing the cooperation of free, open, inclusive, comprehensive, and beneficial for the long-term interest of all countries in the region.<sup>7</sup> Indonesia’s move suggests that it is uncomfortable with existing Indo-Pacific visions proposed by regional powers and offers an alternative ASEAN-centric vision instead.<sup>8</sup> At the East Asia Summit (EAS) Foreign Ministers’ Meeting in August 2018, Indonesia for the first time fully explained its views over Indo-Pacific and principles for Indo-Pacific cooperation. The principles are to keep maintaining ASEAN’s central role and making the Indo-Pacific region as an open, transparent, inclusive and respectful to international law and cooperative area by using the EAS mechanism as the main platform.<sup>9</sup> The Indonesia-initiated ASEAN Indo-Pacific Vision is aimed to seek new momentum for ASEAN centrality by strengthening existing ASEAN-led mechanisms.”<sup>10</sup>

Secondly, SEA countries adopted bandwagoning policy with great powers based on different concerned issues with an aim to maximize benefits. SEA countries had different bandwagoning policies with the U.S. and China based on the concerned

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<sup>6</sup> Kai He, *Institutional Balancing in the Asia-Pacific: Economic Interdependence and China’s Rise*, London: Routledge, 2009, p. 115.

<sup>7</sup> Retno L. P. Marsudi, “2018 Annual Press Statement of the Minister for Foreign Affairs of the Republic of Indonesia,” Jakarta, 9 January 2018, <https://www.kemlu.go.id/id/pidato/menlu/Pages/PPTM2018%20MENLU%20RI%20ENG.pdf>.

<sup>8</sup> Evan A. Laksmana, “Buck-passing from Behind: Indonesia’s Foreign Policy and the Indo-Pacific,” November 27, 2018, <https://www.brookings.edu/blog/order-from-chaos/2018/11/27/buck-passing-from-behind-indonesia-foreign-policy-and-the-indo-pacific/>.

<sup>9</sup> Indonesian Ministry of Foreign Affairs, “Introducing the Indo-Pacific Concept, Indonesia Set the Tone at the East Asia Summit,” 6 August 2018, <https://www.kemlu.go.id/en/berita/Pages/Introducing-the-Indo-Pacific-Concept,-Indonesia-Set-the-Tone-at-the-East-Asia-Summit.aspx>

<sup>10</sup> Evan A. Laksmana, “Buck-passing from Behind: Indonesia’s Foreign Policy and the Indo-Pacific,” November 27, 2018, <https://www.brookings.edu/blog/order-from-chaos/2018/11/27/buck-passing-from-behind-indonesia-foreign-policy-and-the-indo-pacific/>.

issues, such as politics, economy and security. For example, Vietnam cooperate with and China in the fields of economy, trade, investment, and infrastructure construction. But at the same time, cooperation between Vietnam and the U.S. in the security field was heating up. Fu Congcong, a member of the quantitative forecasting group for Sino-foreign relations at Tsinghua University's Institute of International Relations, believes that the current bandwagoning policy of SEA countries was different from that in the Cold War period. During the Cold War, the regimes of SEA countries relied on the U.S. or the Soviet Union for survival, so that they had to choose which great power they wanted to fully side with, which means, in the political, economic, and security fields, SEA countries must be consistent with the great power that protected them. But nowadays, SEA countries are largely independent, so the main pillar of their political foundation is no longer an external force. The relationships with great powers no longer affect the survival of their regimes. Therefore, in the competition of great powers, SEA countries now can choose to bandwagon with any of great powers based on the concerned topics. Such a policy will help SEA countries expand their national issues.<sup>11</sup>

Thirdly, SEA countries speeded up adjusting their foreign policies towards China and the U.S today. SEA countries pursued “balance of power” with great powers, but they actually moved closer to or farther away from China and the U.S. in real operations. Cambodia, the Philippines, Myanmar and Thailand maintained a certain distance from the U.S. or even moved a bit farther away from the U.S. to enhance their relationships with China. Indonesia, Brunei and Laos had no contradictions and conflicts with either China or the US, so they maintained friendly relations with both China and the U.S. Vietnam and Singapore are long-term advocates to leverage the U.S. to balance the influence of China, and these two countries boosted bilateral relations with both China and the U.S. nowadays. After the general election in May 2018, the new Malaysian government changed the former government's strategy in seeking closer relationships with China by distancing itself from China, while actively interacting with the U.S. and Japan.

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<sup>11</sup> Fu Congcong, “Southeast Asian countries' Foreign Policies toward China and the United States are Tending to differentiation” (Dongnanya Guojia dui Zhongmei de Waijiao Zhengce quyue Fenhua), *Quarterly Journal of International Politics* (Guoji Zhengzhi Kexue), Vol.3, No. 3 (September 2018), pp. 142-145.



## **13.Indo-Pacific Strategy: How far Can It Go?**

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Since the Free and Open Indo-Pacific Strategy was officially unveiled at the end of 2017, the Trump administration has adopted a raft of new actions in 2018 to actively promote its execution. It has not only symbolically renamed the US Pacific Command to US Indo-Pacific Command, but also proposed the Indo-Pacific economic strategy for the first time as part of the implementation of the Indo-Pacific Strategy. The US even revived the Quadrilateral Security Dialogue (Quad) between the US, Japan, Australia and India originally established 10 years ago, in a bid to launch strategic competition with China in the Indo-Pacific region. However, despite the impetuosity, the resources the Trump administration can and will leverage in implementing the Indo-Pacific Strategy seem to be very limited. Japan, India, and Australia are far from being on the same boat with the Trump administration. It is still to be seen how far the Indo-Pacific Strategy can go.

### **No Good Intention**

In December 2017, the Trump administration's first National Security Strategy report defined China as a strategic competitor of the US, while officially proposing the Free and Open Indo-Pacific Strategy in the report's regional strategy section, showing its strategy for Asia has taken shape. According to the interpretation by officials from the US Department of State and Vice President Mike Pence on several occasions, this strategic concept generally includes three aspects.

Firstly, it regards China as the main strategic challenge of the US in the Indo-Pacific region, and renders strategic competition between the US and China as a rivalry between "freedom" and "oppression." The Trump administration believes that China is leveraging its growing political, economic, and even military power to build its own "sphere of influence" in the Indo-Pacific region, thus challenging and even attempting to replace the US hegemony in the region. The strategic competition between China and the US in Indo-Pacific is not only geo-economic or geo-strategic competition, but also competition between two different growth models and different concepts for regional order. The US must firmly uphold its own ideas and models to defend the "freedom and openness" in the Indo-Pacific region.

Secondly, economy and security are the main concerns. The Trump administration

believes that the Belt and Road Initiative, which China is actively promoting, is an important part of China's bid to create regional hegemony and to set up a China-dominated regional economic order. If this blueprint is successfully realized, the entire Eurasian hinterland and even the coastal areas in Indo-Pacific will be under a China-led economic growth model, which poses a serious challenge to the free economic growth model dominated by the US and the West. To this end, the Trump administration has proposed the US version of regional economic initiative - Indo-Pacific Economic Vision – while boosting economic coordination and cooperation with Japan, India and Australia to jointly foster economic, energy and infrastructure development in Indo-Pacific as it competes with China on the same stage.

In terms of security, the Trump administration believes that China is stepping up efforts to modernize its navy and protect its maritime rights and interests, especially with the “assertive” and “militarization” measures taken in the South China Sea disputes and the construction of islands and reefs, which poses a serious challenge to the US maritime hegemony in the Western Pacific. To this end, the Trump administration not only significantly increased defense and military spending, but also strengthened military and security relations with Indo-Pacific allies like Japan and Australia, enhanced security partnership with India, and actively coordinated the security cooperation mechanism between the US, Japan, India and Australia in a bid to jointly deal with the challenges from China.

Thirdly, the bilateral military alliance and coordination between the US, Japan, India and Australia are the main tools to implement the Indo-Pacific Strategy. As a savvy businessman and a firmer believer in “America First” Trump is making use of the resources of US allies and partners to complement its own economic and military strength in pressing ahead with the Indo-Pacific Strategy. The Trump administration places high hopes on Japan and India, which are located at the two sides of Indo-Pacific, as well as the revived Quad between the US, Japan, Australia and India.

### **Gap in Input**

A strategy must ensure that appropriate means are used to realize the goals, while the available resources are the key. All in all, one can't make bricks without straw. The effectiveness and future of the Indo-Pacific Strategy largely depends on how much resources the Trump administration has and is willing to invest.

It seems that the Trump administration has not invested many resources in the region. On July 31, the US Secretary of State Mike Pompeo unveiled the high-profile Indo-Pacific Economic Vision at the Indo-Pacific Business Forum. Despite the hype, the Trump administration has actually invested only US\$113 million. It's apparently impossible to leverage this amount of input to promote digital economy, energy and infrastructure development in the vast area from the Western Pacific to the Western Indian Ocean and to make up for the infrastructure investment gap of more than US\$20 trillion in the Indo-Pacific region. If you study it carefully, even the US\$60 billion US development finance funding only "looked beautiful." According to a bill signed by President Trump, any funded project must vow to promote US economic interests and foreign policy objectives. Projects initiated or participated by US private companies will be prioritized. Projects worth more than US\$10 million must submit feasibility reports to the relevant committee of the US Congress, and funding for a single project must not exceed US\$3 billion. The funded projects must fully meet the strict US requirements in terms of labor rights, environmental and social impact assessment, women's economic status, and promotion of private enterprises. If the projects post a loss, the partners should shoulder at least 20% of the loss. Considering the actual situations in many countries in the Indo-Pacific region, few projects can meet the requirements.

Compared with the stingy economic package, the Trump administration seemed to be much more generous in security spending. In the National Defense Authorization Act for Fiscal Year 2019, the Trump administration significantly increased its military spending to total US\$716 billion. At the same time, the Trump administration also continued to strengthen its support for maritime capacity building for Indo-Pacific countries. In the national defense authorization act for FY 2019, the Southeast Asia Maritime Security Initiative was extended for five years and renamed Indo-Pacific Maritime Security Initiative, which includes Bangladesh and Sri Lanka for aid and training, while also adding in India to help enhance its maritime capacity. The Trump administration has also revived up promoting the "Freedom of Navigation" in the South China Sea. Since May 2017, the US has carried out 12 "Freedom of Navigation" operations in the South China Sea region, together with 8 flyovers or aircraft carrier movements.

### **Strange Bed Fellows?**

Before and after the Trump administration unveiled its high-profile Indo-Pacific Strategy, Japan, India and Australia also expressed their "Indo-Pacific Dream" to

varying degrees. As early as 2016, the Abe government of Japan proposed the “Free and Open Indo-Pacific Strategy”, whose title was later borrowed by the Trump administration. The Modi government of India proposed to upgrade the “Look East” policy to “Act East” policy. The Australian government also proposed its own perspective of Indo-Pacific order in its official foreign policy document.

The Indo-Pacific strategic blueprints proposed by the three countries had similarities with the Trump administration’s Indo-Pacific Strategy, as they basically put economy and security in a prominent position. Economically, the three countries attach great importance to infrastructure construction in the Indo-Pacific region. Both Japan and India unveiled their own regional infrastructure construction initiatives, while improving mutual coordination and cooperation in the field of infrastructure construction in Indo-Pacific. In terms of security, they all emphasize the importance of maintaining maritime security and order in Indo-Pacific, while showing their concerns about freedom of navigation and peaceful resolution of maritime disputes in the South China Sea region.

Although Japan, India and Australia share similar interests with the US in promoting infrastructure construction and maintaining maritime security in the Indo-Pacific region, they are not in line with the US on how they view China and deal with China. Amid the changes in Indo-Pacific and global order, the three countries are also preparing for the rainy day and don’t want to be the pawns of the US. As one of the important pillars of Trump’s Indo-Pacific Strategy, Japan has made some breakthroughs in its relationship with China in 2018. The leaders of the two countries have not only visited each other’s country, but more importantly, during Abe’s visit to China, they announced that the two nations will carry out third-party market cooperation and stressed that Sino-Japanese relations have entered a new era from “competition” to “coordination.”

With a strong “great power complex” and long tradition of “non-aligned” diplomacy, India is naturally reluctant to become a henchman of the US. While developing relations with the US, India also actively boosted its ties with China, Japan and Russia, thus maintaining a delicate balance between regional powers. Modi had a successful meeting with the Chinese leader in Wuhan in April 2018, and the leaders of the two nations agreed that “China and India are neighbors, friends and partners. China and India must continuously enhance mutual trust, carry forward the five principles of peaceful coexistence they jointly advocate, and step onto a road of friendly cooperation between two great countries to meet the requirements of the era.” What

made the Trump administration feel particularly embarrassed was that the Modi government signed a US\$5.2 billion military purchase deal with Russia during Putin's visit to India in 2018 despite the Trump administration's warning, including the S400 anti-aircraft missile system, which is regarded by the US as a thorn in the eye. It presented a tough question to the Trump administration and cast a shadow over the future development of US-Indian relations.

A noteworthy trend was that the US, Japan, India and Australia were likely to strengthen coordination and cooperation in infrastructure construction in the Indo-Pacific region, which made the headlines in Western media at the beginning of 2018. In fact, there was no follow-up. Instead, the US, Japan and Australia announced a trilateral partnership for infrastructure investment in the Indo-Pacific region on July 30, 2018. During the informal meeting of APEC leaders in November, the three countries formally signed a memorandum of understanding to strengthen cooperation in infrastructure investment in Indo-Pacific. Considering that India was once active and ambitious in its perspective for energy and infrastructure in Indo-Pacific, India's absence from the Indo-Pacific infrastructure partnership is intriguing.

Another highlighted issue is the security cooperation mechanism between the US, Japan, India and Australia, which the Trump administration had high hopes on (US media once played it up as a "Quad alliance"). Although the four countries held the second meeting on security consultation during the ASEAN summit in November 2018, the level of the meeting was not upgraded as expected. It was still at the working level, and no joint statement was issued after the meeting. The four countries issued their own meeting statements respectively. Obviously, under the backdrop of intensified Sino-US competition, India and Japan were reluctant to move closer toward the US to avoid "irritate" China too much.

### **How Far Can It Go?**

How far the Trump administration's Indo-Pacific strategy can go is unpredictable. It will depend on the interaction and development of the following issues.

The first issue is the evolution of Sino-US relations. Sino-US relations now face many challenges and are at a crossroads, but they are not irreparable. If China and the US have strong strategic will to avoid a decline in their relationship, avoid confrontation and malicious competition, and take measures to demonstrate their strategic goodwill and sincerity, it's still possible for the two nations to stabilize and revive their

relations. The successful meeting between the leaders of China and the US in Argentina and a “truce” in trade war they agreed on was an important step toward easing relations.

The second issue is how much resource the US is willing to invest. Trump’s Indo-Pacific Strategy covers both the Indian Ocean and the Pacific Ocean, highlights the economic and security dimensions, and initiates an open strategic competition against China. These all require huge economic and military inputs from the US. But for now, the Trump administration is unwilling to invest more resources, especially economic resources. In the future, the Democratic-dominated Congress, which controls the budget, will impose more restrictions on the Trump administration in terms of resource input, which will inevitably further affect the implementation of its Indo-Pacific Strategy.

The third issue is coordination between the “America First” policy and the interests of its allies. Trump’s Indo-Pacific Strategy clearly needs support and cooperation from its Indo-Pacific allies and security partners like India, Japan and Australia. However, if the US highlights “America First” in everything, and continuously takes on India and Japan on economic and trade issues, it will be a big challenge for the Trump administration to reconcile this internal conflict and appease its allies.

Fourthly, India and Japan are uncertain factors. India and Japan are the East and West anchors in Trump’s Indo-Pacific Strategy, and the Trump administration has placed high hopes on the two nations. However, India and Japan are not entirely in the same page with the Trump administration concerning their attitudes towards China. Since the beginning of 2018, India and Japan have been quietly improving their ties with China, betting on two sides or multiple sides, and are unwilling to become the pawns of the Trump administration’s Indo-Pacific Strategy. If China-Japan and China-India relations are further developed in the future, the Trump administration’s “anchors of Indo-Pacific” will inevitably drift farther away.