

論中壇美 US-CHINA FORUM

網址: http://www.us-chinaforum.org
http://www.us-chinaforum.com

投稿信箱: uschinaforum138@gmail.com

中美元壇社 主編

社務委員: 張紹遷 周友道 水秉和 張一飛 陳立家 陳惠忠
馬在莊 佟秉宇 高志雲 范湘濤 張文基 蔣社長

刊例設計 劉學武

每星期六出刊 第263期

推進中美相互瞭解合作 促成海峽兩岸和平統一 倡導和諧平等多元世界

貿易戰的非貿易因素

“挺到2020年”

◎水秉和

十一月六日，距今不到三個月的時間，美國將舉行一次可能是歷史性的中期選舉。目前，參議院一百席的三分之一，亦即34席，將輪換式地參選，加上一席遞補病重的麥肯恩，共35席。眾議院的435個席位全部要進行兩年一次的重選。參議院參選的席位中有26名屬民主黨，超過他們現在擁有的席位(49)的半數，所以維護已經不易，若想從共和黨的席位中再挖出兩個或更多的席位，以取得多數，那就更難。眾議院中，共和黨與民主黨的比數是248比192(包括華盛頓特區和波多黎各的代表)，如果民主黨想取得多數，它至少需要捍衛自己原有的席位，再奪取24個共和黨的席位。由於歷來擁有白宮的政黨在中期選舉中都會失去不少席位，所以，民主黨贏得眾議院多數和掌控它的概率比較高。

這是目前許多政治分析師的看法。由於特朗普在共和黨黨選民中的支持率一直高企(80%-90%)，甚至在他赫爾辛基跟普京會面時矮了半截尷尬局面也沒有使他失去支持率，所以儘管共和黨內許多議員對他不滿，可是為了選舉勝利，幾乎沒有一個敢明目張膽地跟他劃清界限。因此，對於特朗普的胡言亂語，到處欺負人的霸凌行為，以及對盟國和對手一律增加關稅的貿易戰，只可能由反對黨來制衡，而制衡的途徑就是在這次中期選舉中民主黨至少取得參眾兩院之一的多數。這是貿易戰的非貿易因素中非常重要的一個。

這並不是說，民主黨反對特朗普就是對北京有所偏向。當然不是。

民主黨在奧巴馬任內推動了一系列壓制中國的政策，包括挑起釣魚島糾紛，慫恿菲律賓在國際仲裁法庭挑戰中國的南海主權，以及組建排斥中國的TTP(泛太平洋貿易夥伴)等。而是說，特朗普減稅的主要對象是跨國公司和大富翁們，而貿易戰抬高關稅的受害者則是農民，勞工階層和一般消費者，因為中國銷美的大部分產品是他們的生活必需品。這些人本來屬於民主黨的票倉，不過被特朗普的“美國第一”的口號給忽悠和劫持了。今年十一月是他們回歸民主黨的機曾——如果民主黨能夠打醒一大批盲目的低收入者的白種選民的話。

第二個非貿易的重要因素當然就是特別檢察官穆勒對“通俄門”的調查了。對於這項調查是否能夠建立特朗普通俄國打擊對手的確鑿證據，我們不得而知。即使有了充分的證據，穆勒並沒有權力提出告訴，他必須提交眾議院審理。如果民主黨在中期選舉獲得眾議院的多數，並通過了彈劾總統的決定，那麼它將組建一個類似委員會的經理組，向參議院提出告訴。經過參議院審議，並且得到三分之二的多數，總統才會被彈劾。

所以說，即使民主黨在中期選舉中獲得眾議院的多數，能夠達成彈劾特朗普的決議，一旦提到參議院，不管它是否也贏得多數，它也得不到三分之二的席位，所以彈劾案必然會被擋住。基本上，穆勒的調查除了讓特朗普精神緊張，亂發推特之外，並不會改變他穩坐白宮四年的現實。

只不過，如果他先發制人，炒了穆勒的魷魚，造成憲法危機，或者

證據公開，暴露了他跟俄國打交道的可能醜聞，那麼，2020年時，無論共和黨選民再糊塗，大概也會把他拋棄了。

上面說的是兩個關鍵時刻，一是今年十一月的中期選舉，一是2020年的總統選舉。也就是說，不論貿易戰的談判進行的如何，有沒有解決，它會因為共和黨和特朗普在這兩次選舉中的失利而獲得解決。

其實，在2020年以前，更重要的因素可能是經濟。上一季度美國經濟的成長率高達4.1%，讓特朗普在群眾大會上得意非凡，自吹自擂。可是，這多半是無以為繼的。《紐約時報》在最近兩月的社論中曾公開預測，明年或者後年美國經濟將陷入不景氣。其他許多經濟分析師也有類似的看法。只要在2020年下半年的大選之前，經濟出了問題，特朗普的政治生命也多半完蛋。

這裡我難免要提到貿易戰了。增加關稅的意思就是抬高進口貨物的銷售價錢，對一般小民而言，那就是壓擠他們的荷包，降低他們的購買能力。物價上升會帶來通漲。為了對付通漲，美聯儲的辦法是加息，而它本來說好了就要加息。物價升高，利息升高，消費必然降低，經濟必須衰退。貿易戰只是在加速和加強這個趨勢。我幾乎可以在此跟大家打賭一塊錢：在2020年以前，美國經濟必然轉弱。

所以，特朗普想要坐四望八，那是沒有希望的了。

貿易戰屆時可能早已結束。如果還沒有結束，它也將自然結束了。所以，習近平需要做的是：無論如何要挺住，挺到2020年。

期待後特朗普時代的到來 多極元化的大趨勢將無可逆轉

土耳其的金融危機

下面是土耳其總統厄爾多安前不久在《紐約時報》論壇版文章裏一段廣被引用的話：

“在局勢無可挽回之前，華盛頓必須放棄一個錯誤的看法，以為我們之間可以存在不對等的關係，而需要面對一個現實，那就是土耳其是有選擇的。”

為什麼要發表這麼嚴肅的聲明呢？那是因為特朗普又在發橫了。他要求厄爾多安釋放一名居住在土耳其23年之久的牧師，而厄爾多安沒有答應，指該人曾參與兩年前失敗的政變，所以，特朗普就揮起制裁大棒，使土耳其陷入金融危機。

那麼，厄爾多安的選擇是什麼呢？難道是脫離北約？

土耳其是北約的成員，擁有北約第二多的軍隊，把守住歐洲南邊的大門，並且還有美國的空军基地，地理位置極端重要。脫北選擇的後果無比重大，其時機顯然不夠成熟。但是，受到制裁的打擊，土耳其的里拉迅速下滑，加上過去幾年的慢速下滑，它已經從最高時2里拉兌1美元曾一度狂跌到8兌1，也就是跌了70%以上。後來獲得卡塔爾150億美元的支援，危機暫解，里拉回升至6，但仍屬極低。這是因為，過去十年，它累積了天量的美元債務，一旦受到制裁，外國投資者和本國人立馬套取美元開溜。現在，土政府處於金融危機之中。它需要還債，也需要去美元。怎麼辦？有辦法！何不引進人民幣呢？

這顯然就是厄爾多安的一項選擇之一。他正在跟中國商談在中國發行熊貓債券。當人民幣跟里拉可以直接兌換，趁此里拉狂跌的機遇，中國企業和游客肯定會大批湧進土耳其。因此，有些論者認為，最大的受益者將是中國。過去，在某些發展中國家出現金融危機的時候，美國企業就會大規模湧入，賤價收購優質產業，也就是我們通常聽說的“剪羊毛”。當然，這次大規模湧進土耳其的將不是美元，而是人民幣。不過，中國不是“剪羊毛”，中國乃是拯救友邦於危難之中也(:-))。

里海(Caspian Sea)協議

里海雖然被稱為海，它其實是世界最大的鹹水湖。圍繞著它的是五個國家：俄國，伊朗，哈薩克斯坦，阿塞拜疆和土庫曼斯坦。由於

里海擁有極豐富的石油資源，因此這五國之間曾經發生相當尖銳的爭執。經過二十年的談判，最近它們終於簽訂了一項協議，規定每個沿岸國家的控制範圍和共同擁有的海域。這樣一來，本來是五國間衝突的來源，現在它卻變成推動五國互助合作的力量。

一位巴西籍的名記者Pepe Escobar，多年來追蹤一帶一路發展，對此協議在Asia Time 網報上發表了“里海向歐亞整合邁進”。他說，“祇有五個岸邊國家的武裝船隻容許在里海的水中航行。”也就是說，北約國家的軍艦休想進入。他指出，這五個自然資源大國的合作對中國發起的一帶一路產生了積極作用。

特朗普撕毀伊核協議之後

特朗普對伊朗施展出他慣用的伎倆，那就是先施以威脅，然後邀請對方談判。對朝鮮，這麼做似乎達到了他跟金正恩面談的目的，可是當他撕毀了在聯合國安理會的法律框架下達成的《伊核協議》之後，又說要跟伊朗談判的時候，他就喫了個閉門羹，伊朗的最高領袖霍梅尼明確表示，拒絕跟美國談判，伊朗外交部長則表示，在今年九月參加聯合國大會開幕時，也不會在場外跟特朗普或者龐貝奧談判。伊朗外交部長Zarif說，那是因為“美國不誠實。”這句話一針見血，直搗特朗普政府的核心弱點。我們中國人說，人無信不立。同理，國無信也不立，或者，國無信則衰。特朗普一而再地出爾反爾，以為沒有後果。後果絕對會有，並且經常是在人們意想不到的時候出現。

特朗普發出警告說，他對伊朗的制裁將於11月4號生效，屆時將對所有跟伊朗進行貿易的國家施以制裁。他自己違反了安理會決議，反而要制裁哪些遵守協議的國家，比他退出《巴黎協議》更可惡。此可忍孰不可忍？所以，連美國的盟友英德法都宣佈，將支持跟伊朗進行貿易的企業，商討如何改用歐元繼續跟伊朗貿易。中俄兩國也聲稱，將繼續維持跟伊朗之間的正常貿易關係。而就在這個時候，也就是在8月2號，東盟十國在新加坡舉行外長會議的時候，伊朗跟它們簽訂了

一項友好協議，促進雙方的經濟合作。連東盟都敢不買美國的帳了！

儘管如此，跟美國有巨額貿易量的一些歐洲大企業，如法國的Total石油公司和德國的西門子等，因擔心特朗普報復，仍然決定退出伊朗市場。據新聞報導，中石油將接手Total 退出的開發南帕爾斯油氣田。它被稱之為世界儲量最大的油氣田。

看樣子，為了支援友邦，中國又要乘人之危坐收漁利了。

南中國海

上面說到，伊朗跟東盟外長在新加坡開會期間簽訂了友好協議。外交部長王毅也參加了該盛會，並發言。他重點提到東盟與中國就南海的《行為準則》達成了所謂的“單一磋商文本草案”。似乎過去雙方是各說各話，各有各的立場，而現在已經有了共同語言，取得了共識，接下來就可以簽約了。這當然是重大發展，這有點像前面提到的里海協議，亦即某一個區域內的周邊國家取得了共識，準備共同管理一個海域。不同的地方在於里海是一個封閉的內陸水域，而南海是極為繁忙的海道。儘管如此，繼續演變下去，東盟和中國如果能夠共同管理南海，那麼，美國再企圖收買一國來藉機插手的機會當大為減少，它自己想要無端插手的時候也會受到區內所有國家的抵制。

不但如此，中國還第一次跟東盟舉行了軍事演習。這些都是良性發

展，雖然到最終解決南海問題還有一段路要走。

期待後特朗普時代

特朗普的任期還有兩年餘。我們幾乎可以肯定，當他離開白宮的時候，國際關係已經會發生相當深遠的變化，相信史學家們將會發明一個新詞，稱之為“後特朗普時代”。現在或許有人還存有幻想，以為那個時代會是美國“更偉大”的時代，但事實很可能恰好相反，美國的經濟力量會大不如前，它的國際影響力也會大為縮小。後來繼位者想要再恢復美國的獨霸地位，將沒有可能。

理由至少包括下列：

第一，氣候變化，或暖化，以及人類的行為它負的責任，是國際上從上世紀九零年代就追求解決的議題。由於它牽扯到極端複雜的經濟利益，一直拖到習近平和奧巴馬兩人負責兩個最大的空氣污染國時才獲得解決，達成了《巴黎協議》。這是關係到全人類未來共同命運的大事。特朗普上臺以後輕易地就將它撕毀。這不同於他作為一個流氓商人，連續破產賴賬的私人行為。他根本不懂得公益與私利的差別。他還撕毀了《伊核協議》，TTP，北美自貿協定等一系列經過長期談判達成的妥協。他根本不瞭解什麼是信用。這是特朗普政權最根本的問題。現在，連緊鄰加拿大和墨西哥，以及數十年的共患難的盟友都

不能信任他，也無法信任美國的政策。

第二，制裁其實是一把雙刃劍，當美國獨霸天下，受到制裁的國家別無選擇時，它的威力極大。可是，當對方有其他選擇時，它會隨著對方選擇範圍的擴大而逐漸減少或失去影響力。歐元和人民幣的興起，和它們的金融機構的擴大，直接影響了美國制裁能力。可是人民幣又與歐元不同。歐元過去一直跟著美元跑，所以不是選項。人民幣是當前唯一的選項。中國還設立了一個獨立於SWIFT之外的CIPS(跨境支付系統)，使國家間轉賬匯款不再受美國控制。特朗普的制裁雖然仍然會使得被制裁國的經濟受到打擊，但是也同時增加別的國家避免使用美元的意圖，和增加人民幣和歐元的影響力。現在明顯看到，俄國，伊朗，委內瑞拉，一批非洲國家，已經逐漸形成了一個人民幣集團。土耳其正在加入。

第三，貿易戰。如果繼續打下去，它絕對會壓抑消費，降低GDP。目前，不論在中國還是美國，受到貿易戰傷害的人和產業都屬少數，可是一年以後，後果將會非常明顯，不景氣的發生率將會擴大。

第四，後特朗普時代應當是國際多極化的大趨勢，而這個趨勢將無可逆轉。

Chinese Inventions

Jan Willem Nienhuys, Cheng Shan-Hwei

President Trump claims that China is stealing intellectual property from the United States, and Vice-President Pence even said that Chinese people lack creativity, in other words, China's progress today is based on stealing inventions. What does history tell us?

Everybody knows that silk and the cultivation of silkworms is a Chinese discovery. China is famous for porcelain and tea as well, and it took Western countries a long time before they managed to copy silk, porcelain and tea. In this sequel I will mention a few of the inventions where China was far ahead of the rest of the world. In many cases these Chinese inventions were imitated by other people.

The Chinese were already making cast iron in 300 BC, about 1700 years before Europe. They maintained the necessary high temperature with so-called double acting piston bellows. Whether you push or pull the handle, it will always blow into a combustion chamber. This machine is discussed in chapter five of the classic Dao De Jing.

One cast iron product was used to make salt. In Sichuan salt was produced by drilling a hole all the way into underground layers of salt. The drill bits were made of cast iron suspended from bamboo ropes. Brine was pumped up from these holes and evaporated in large cast iron pans, heated by natural gas from other boreholes. The whole salt, gas and iron industry was nationalized by Han Wudi in 119 BC. Today's drilling for oil can be traced directly back to this Chinese invention, for it started immediately after the missionary Laurent Imbert described the technique in detail in 1828.

China developed iron plows in East-Zhou. In the Western Han Dynasty (around 200 BC) there were already four different types of plow. Dutch sailors brought these plows back to Europe in the 17th century, probably after having seen them in Taiwan. These plows (called "Dutch plows") were twice as efficient and so one needed fewer animals and less meadows to feed them. This caused a revolution in European agriculture.

From the 2nd century AD on, Chinese ships had watertight compartments that divide the space inside a ship. If these are not connected to each other, the ship won't sink if a part of the hull is damaged. At the end of the 18th century Benjamin Franklin and others recommended that shipbuilders should learn from China to

build ships with watertight compartments.

Long ago European horse drawn carriages could not carry much weight. If the horse had to pull too hard, it could not breathe because of the belt around its neck. The Chinese used a horse collar, so the horse would pull with its chest. Another Chinese invention was stirrups (mass produced from cast iron!). With stirrups riders were much more stable on their horses. These inventions arrived in Europe in the 6th century AD and immediately became popular.

Paper is well known to be a Chinese invention. Invented already in the Han dynasty, the Arabs learnt the technique from the Chinese around the year 700, and managed to keep it a secret for about five centuries. Not many people know that toilet paper (unknown in the West before the 19th century) was already in use in China in the 6th century. Wallpaper, playing cards and paper umbrellas are other paper products directly copied from Chinese examples.

The British introduced the so-called civil service examination in the 17th century, and that was directly copied from China. There all officials had to pass an examination, and this practice had started in the Sui dynasty (about 600 AD).

The oldest known printed book is a copy of the Diamond Sutra, printed in 868. How the technique of printing arrived in Europe is unknown, but it suddenly appeared in Europe after the Mongolian army had reached the German borders.

In the Song dynasty China reached its peak in science and technology. Here are some examples.

1. Movable type. This was invented by Bi Sheng in 1045 AD. It did not become popular because Chinese has so many characters and it is sometimes more practical to use block printing. Gutenberg invented printing with movable type in 1448 AD. He may have been inspired by Arab bookmaking.

2. Paper money. Some Sichuan rich merchants issued bills of exchange, but their company was confiscated and their system was 'nationalized' in 1023 AD, so these bills later became official banknotes. 3. Magnetism. In the Han dynasty a kind of magnetic spoon was used for Fengshui, but this had evolved into a magnetic compass by the 10th century. A book of 1117 AD mentions a government regulation saying that sea-going ships should have a compass. That is just about the time that the compass suddenly appears in Europe together with another Chinese nautical invention, the stern post rudder.

4. Pound lock. The Grand Canal has sections of different level. It was difficult for ships to go from one section to another. In the Northern Song Dynasty, Qiao Weiyue built (in 984 AD) a so-called pound lock (two sluice gates close to each other). After the ship enters the lock through one gate, the gate is closed, the water level in the lock is changed and then the ship can leave through the other gate with a small loss of high level water. 400 years later this was copied in the Netherlands.

5. Gunpowder and firearms. Many people know that gunpowder is a Chinese invention, but they think the Chinese only used it for fireworks. Not so. After the invention of gunpowder (ca. 800 AD) it was immediately applied to warfare. An early use was incendiary rockets. So-called fire lances were long pipes filled with fast burning gunpowder. This weapon evolved into the cannon by the 13th century. After the Chinese mastered the art of making explosive gunpowder they developed all kinds of bombs. European firearm technology started suddenly, and when one sees a German 1450 woodcut showing a cannon that looks exactly like a Chinese cannon of 50 years earlier, then one understands why.

Western science expanded from the combination of Greek geometry and astronomy with practical applications and systematic experimentation. China had enough mathematics to serve as basis for science, not geometry but advanced numerical mathematics. Chinese mathematicians solved routinely higher degree equations by approximation and in about 1800 BC they were already calculating with negative numbers, that's about 1800 years before Europeans did so. Why then was there in China no spark between theory and practice that produced science?

The Ming Dynasty reversed the Mongolian discrimination against the Han people. It reinstated the examination system, but merely tested Confucianism by letting candidates write so-called eight-part essays. Personal opinions were not allowed. There is nothing wrong with Confucianism but you can't solve all problems with quotations from Confucius. In the Ming Dynasty all intellectual force was channeled into memorizing Confucianist writings and becoming an administrative bureaucrat. There were people in China who understood that this was no good. I mention Gu Yanwu (1612-1683) and Song Yingxing (1587-1666, writer of Tian Gong Kai Wu), but they were powerless. The Qing Dynasty (after 1644) was even worse. In 1793, the British sent Special Envoy Macartney to China. He gave a letter from King George to Emperor Qianlong to ask for more trade. He also brought various advanced instruments as gifts. However, Qianlong answered that China already had everything and did not need trade. This set the stage for the later humiliation of China.

Imitation of an advanced civilization is not surprising. The West has copied many inventions from China. Once the British accused Germany of imitation, and after the Second World War Western people laughed at Japanese imitations. Now they say that Chinese can't innovate. Of course, the past success of China doesn't prove that Chinese are naturally more talented. Different ethnic groups may look slightly different, but people's brains are in average the same, even if their skins are paler, their hair more like straw and their noses stick out more than those of others. However, the Chinese have a tradition of hard work and diligent study and this certainly contributes to the rapid development. And most important of all, they remember the lessons of history and are determined not to repeat their mistakes.