

# 夜遊莫斯科

七月一日，遊輪Viking Cruise為我們安排的節目是"莫斯科之夜"。大巴先把我們載到莫斯科的紅場（Red Square），讓我們再逛一次白天已經花了幾小時走遍了的，匯集了俄國的政治，宗教，藝術和歷史的心臟地帶(紅場是由克里姆林宮，東正教大教堂，博物館和一家老式高檔百貨公司圍繞的廣場，位於克里姆林宮牆外中間還有列寧和其他領導人的陵墓)。

恰好，本來被認為是敬陪末座的"最差東道國隊"——俄國足球隊——居然晉級世界杯十六強，並且在當天下午打敗了勁旅西班牙，邁入八強。所以，年輕人，三五成群，湧向紅場，總共可能有一兩千人。有些人手中搖晃著俄國國旗，一面走，一面歡欣呼叫，過往的汽車也不停地按喇叭。廣大的廣場上人氣充沛，喜氣洋洋。我們在人群裡走了一陣子，吸收了他們的正能量，然後再次登車去碼頭，上船遊河。遊船在莫斯科河中緩緩前行，沿河可以看到裝飾了燈火的大廈和它們反映在水面上的倒影。雖然大廈的燈光絕對比不上廣州或者杭州的夜景，但仍然相當漂亮。遊船回到紅場的途中，河邊來往的一群群搖旗歡笑的青年向我們招手，而到了紅場附近，我們看到明亮多彩的，形狀似洋蔥大大小小的東正教教堂屋頂，難免驚嘆一聲：美！千年來，俄國人，雖然上兩世紀也沒少欺負中國人，其實也是受苦受難的民族，而七月一日，他們迎來了值得他們驕傲的一天。

如果你沒有去過俄國，而對俄國人的印象是來自美國電影或電視裡塑造的俄國黑手黨形象的話，那麼你會以為他們個個都是個子高大，冷酷無情，殺人不眨眼的惡魔。如果你是在上世紀九十年代去過，那麼你印象裡的俄國可能是貧窮落後，到處都是購物者排的長龍。戈巴喬夫和葉利欽，兩位主導前蘇聯轉型到"民主社會"的政治領袖，現在被一般俄國人視為歷史罪人。毫無疑問，在他們的引導下，前蘇聯的轉型應當算是極端失敗的。

令人一直困惑不解的是，中共的領袖處處參看蘇聯模式，以它作為擬定政策的借鑒，而戈葉兩人，儘管完全有時間參考鄧小平於1978年在中國發動的改革開放，可是他們似乎絲毫沒有仿效的念頭。他們迷信西方模式：戈巴喬夫急於政治轉型，疏忽了經濟發展，而經濟徹底失敗，轉而導致政治轉型失敗和葉利欽武裝奪權；葉利欽急於徹底毀掉計劃經濟，乃聽取美國專家的建議，想要一步到位，結果導致聯邦解體和十年經濟蕭條，人口縮減，年輕人不肯結婚，自殺率猛增和預期壽命縮短。試想，經濟實力遠比當時中國強大的蘇聯，如果學習中國，經濟實行雙軌制，有序轉型獲得成功，加上它豐富自然資源的底子，再去追求政治民主化，那麼今天的世界將是一副不同的景象。

## ◎水永和

自從普京於2000年1月1日從葉利欽手中接下了總統的棒子之後，嚴厲打擊國內的伊斯蘭分裂勢力，並得利於石油國際價格的飆升，俄國開始走向振興之路。當然，振興的過程也不是一帆風順，因為美國自克林頓以降，繼續在歐洲採取了擴張政策，一直把北約擴張到俄國邊境。石油價格也時高時低，似乎被美國的金融鉅子們用來打壓普京。俄國國內的貪腐情況也甚為嚴重。即便如此，如果你是在近幾年去俄國旅遊的話，那麼，正如現在湧往俄國的大批老中遊客一樣，我所看到的俄國已經從灰燼中逐漸尋回生命和活力了。

在聖彼得堡時，Viking Cruise讓我們欣賞了世界排名第二的芭蕾舞團表演的"天鵝湖"，那優美的舞姿，配合著柴可夫斯基的羅曼蒂克的旋律，令不懂得芭蕾舞的我，也為之神往。劇院門外停放的是整齊排列的大巴，音樂廳裡面是一團一團從大巴下來的遊客，顯示出，在當前的世界上，各地的傳統藝術的真正支撐者其實是外來的客人。本國人的興趣反而已經被西方大眾文化和手機文化給吸引過去了。

既然在聖彼得堡已經看到了一流的芭蕾舞表演，那麼到莫斯科的時候就沒有必要再去欣賞世界第一的芭蕾舞表演了，所以，Viking 把我們帶到一個社區級的小劇院，大概就那麼兩百多個座位，去聽一個小規模的發燒友型樂團的演奏。這個樂團的特點是用傳統俄國樂器來演奏傳統俄國音樂，包括俄國音樂大師的作品。意想不到的，它居然成為我們旅遊中的一個亮點。當這些樂團演奏"齊瓦戈醫生"（1965）的主題曲時，音樂裡不但流露出並且充滿了俄國人的感情，時而溫柔，時而淒涼，時而奔放而熱情。回想起電影裡戴著貂皮帽的拉娜（克莉絲蒂）站在雪地里的美麗形象，和她與哪一位齊瓦戈醫生之間的曲折愛情，聚少離多的坎坷人生！啊！沉醉了。（有趣的是，這個曲子並沒有俄國民間樂曲的根源）

毫無疑問，凡是去俄國的遊客絕對不能錯過聖彼得堡的艾爾米塔什博物館。原先是凱特琳娜大后（既然有彼得大帝"於先，那就應當有"大后"於後，因為他們兩位是俄國千年歷史中最偉大的兩位領袖，兩人為俄國帶來十八世紀的百年興盛）的冬宮和私人博物館。這位大后嚮往歐洲文化，所以收購無數歐洲的文藝珍品。雖然曾經被大火燒毀，損失巨大，可是重建後的金碧輝煌和收集珍品之多，更超過了過去，被評為世界四大博物館之一。它絕對屬於桶子清單裡"一生必看一次"的項目之一。

美國旅客到俄國旅遊，意識上有一個矛盾，那就是一方面欣賞俄國的歷史文物和風土人情，而另一方

面又知道美俄之間當前的緊張關係。這是遊輪僱用的俄國導遊設法緩解的。船上幾位出身於教師的導遊都擁有豐富的歷史知識，尤其是俄國宮廷史，所以她們的講解令人聽得津津有味。她們對列寧的批評不多，但是對史大林則沒有好話。如前述，對戈巴喬夫和葉利欽是批評多於讚許。對於普京，她們顯然是支持的。

普京兼併克里米亞，因此被美國帶頭的北約制裁，這個題目是她們特別想要對美國遊客解釋的。第一，克里米亞的俄語系居民佔多數；第二，經過國際監測的選舉，超過80%的選民以96%的高票支持克里米亞"回歸"俄國。言外之意就是，制裁其實沒有道理。為什麼是回歸呢？因為克里米亞本來屬於前蘇聯，是赫魯曉夫於1964年喝醉酒，慷慨過頭，輕易地將它送給了當時屬於蘇維埃聯邦的烏克蘭共和國。所以，實際上是物歸原主。

總之，我們船上的美國遊客沒有人對導遊的解說提出異議。

# 貿易戰：公知，黨內權鬥，海外反華總攻擊

## ◎彭文逸

的上半月看到國內傳來要向習大大奪權的信息。也就是說，貿易戰不但沒有帶來團結，反而帶來了黨內分化。這到底是什麼回事？

先說說公知吧。公知受到重視，因為他們佔據了兩個高地，一是道德高地，不受自私自利利益影響；二是知識高地，因為他們擁有專業知識。站在這兩塊高地上，他們的言論有份量。毫無疑問，有不少是忠黨愛國的公知，但也有一部分是"超然"的公知，他們超越國界，以世界公民自居，拿自己的標準批評時政。在大陸，這種批評的後果有時相當嚴重，所以這群公知最寶貴的地方是在他們的勇氣，值得我們欽佩，即使他們的言論有時令人無法認同。對於北京決定跟美國硬拼，國內有一部分公知表示反對，他們的理由是：一，中國在國際貿易方面的確有靠譜的地方，所以美國提出的許多批評是有道理的；第二，中國經濟的底子其實薄弱，貿易戰會導致經濟崩盤。也就是說，中國不但輸在理上，也會輸在實戰上。

由於篇幅有限，在此我就不舉個別的例子了，但是要提出一個重點。那就是，當特朗普啟動第301條款，用"國家安全"為理由，向對美國忠心耿耿的加拿大增收鋼和鋁的關稅時，我們就知道，對付流氓是沒有什麼"超然"的標準的。任何人再擺出站在道德高地的姿態，拿出什麼國際標準來批評中國的反制措施，那只不過是表示他的愚腐。

至於貿易戰的輸贏問題，雖然有些學者說的頭頭是道，把美國的強大擡的老高，覺得中國的經濟岌岌可危，因此斷言中國會輸。可是，必須了解，只要是戰爭，包括貿易戰在內，因素複雜之極，任誰都難以預知到底後果如何，因為它所涉的意外因素太多，執政者的眼光，

地在過著他們自己的日子，既不敵視也不特別對旅客友善。至於事態將如何發展，我們不得而知，僅僅憑兩週旅遊的直覺感受，可以說，俄國未必是美國媒體描述的邪惡王國。

智慧，決心，耐力，和整個社會的韌力等等，都會產生很大的影響。最重要的一點是，貿易戰必然是雙方都有損失，所以誰能撐到最後，誰就可能是慘勝的贏家。原先，我們總以為，美國不能打持久戰；可是，看到國內的黨內出現的內鬥，難免令人懷疑：中國能不能打這個持久戰？特朗普可能兩年後再見；可是，習近平難道能穩坐江山？

安倍預見中美的鬥爭可能會兩敗俱傷，所以匆匆忙忙地邀請了歐盟的商務代表，簽訂了歷史上最大規模的自由貿易協定。顯然，中美貿易戰才開打，他就想做漁翁了。

七月間，網上盛傳，共產黨內部有人也趁這個貿易戰的機會對習大大發動攻擊。至少，大肆渲染的事件包括：《人民日報》有一天，頭版上居然完全沒有習大大的名字。還有四天，習的名字也沒有出現在大標題內。另外，上海有一名女子用墨水塗抹習近平的肖像，其他各地也有人仿效，而各地官員迅速撤除習的照片。台灣東森電視台最能譁眾取寵的《關鍵時刻》節目，立馬報導，習近平一共經歷了十七次暗殺，有人要奪權了！他的位子不穩了！海外的一大批反華論壇，如美國之音中文台，明鏡，唐人，郭文貴以及其他一些自導自演的視頻等，都興奮起來，因為它們的收視率突然增加了，或許他們可以回國當官了！在他們眼中，共產黨政權就好像是紙做的，風一吹就會倒掉的樣子。

可是，習氏夫婦按時出國去，訪問中東和非洲多國，好像沒有大事發生一樣。

所以說，貿易戰本身沒有什麼可怕，倒是因為它而產生的意外情況才值得我們關注。

# Trading War Is Not A Tool or Solution for Trade Imbalance

## Mainstream and Organic Views Dr. Wordman

Trading is a human trait ever since humans formed societies from the Stone Age, through the agricultural eras then to the industrialization centuries. Human civilization advanced by creating and embracing technologies which ever more enhanced the necessities of trading. Trading is a bilateral act consummated by negotiation under a mutually agreed trading system involving transportation and distribution logistics and financing and payment mechanisms. When negotiation is abandoned, history showed us, trading war begins harming human societies to a pain level that a military war may occur. The two past world wars were clear evidence of that. Today, our world is witnessing a serious trading war launched by President Trump of the U.S. Why does a self proclaimed great negotiator want to abandon negotiation and initiate a trading war? This is a puzzling question we need to find an answer.

For the benefit of doubt, since the trading war is just launched, we may speculate that Trump's trading war is really a part of his negotiation tactics. Then why does Trump have to resort to trading war to adjust trading pattern and to correct trading results? Trump's tariff on aluminum and steel not only punishes China but also impacts Canada, India, Mexico, and Several EU countries. The 25% tariff on 34 billion Chinese goods has triggered China's retaliating reaction but Trump has added 10% tariff on \$200 billion Chinese goods which are still being tabulated by the commerce department. This type of rash behavior can hardly be imagined as the action of a rational government practicing a deliberated thought process to develop trade policies. Of course, no one has enough information nor any psychic power to read into President Trump's mind to know the answers to the why questions. As a citizen one has the right to analyze the trade issue at hand based on common sense and voice one's opinion whether the government's current trade policy hurts the U.S. or not.

President Trump seems to feel that the U.S. has been taken advantage of by the world for too long in trading ("allowed by the previous administrations") that it is difficult for the U.S.(for him as the President) to correct the ills without taking extreme measures; in his view, the extreme measure can include denying all previous trade agreements and starting from fresh using trade war as a tool to pressure the trading partners since the U.S. has a large market. However, trade agreements and trade practices were accepted

willingly by trading partners through negotiations. It is hard to believe that the American people involved in the past trading negotiations were all dummies who would give away the store for not getting anything in return. Looking back we see that the U.S. has always held a strong trading position with her abundant agricultural produce and energy resources, despite of an oil cartel and many countries desire to have self sufficiency in food supply. The U.S. conscientiously lets her low-tech labor intensive manufacturing industry to disappear and deliberately maintains her hi-tech capital intensive industries to flourish and lead the world. The U.S. also created and excelled in a sophisticated financial industry attracting capitals to the U.S. either for investing in our risky hi-tech development or for financing American debts.

There is nothing wrong with the above strategy except one must realize that every developing country in the world is trying to move up in the technology ladder to take advantage of productivity gain from technology rather than being satisfied with maintaining low-tech industries to produce cheap goods for the developed nations. The above U.S. strategy has been working for decades in favor of the U.S. so long as the advancement and innovations in her hi-tech industries can keep ahead of the competitive followers. When competitors caught up then the U.S. may lose. For example, the American auto-industry used to dominate the world until competitors crushed them. American airplane industry can export one plane worth more than million pairs of shoes or pants imported if no competitor is behind. With smart marketing and trademark protection, some vast amount of low-tech products imported into the US market is creating huge profits for American companies. For example, a pair of Adidas sneakers is typically sold at prices of multiple times than their import value making a huge profit for Adidas and its stock holders but no benefit for American workers who lost their Adidas jobs. The no brand imports, of course, do contribute to trade imbalance, but their low prices (say shoes and pants) actually benefit lower income Americans who can only afford the cheap imports.

The issue of trade imbalance between the U.S. and China, therefore, is not as simple as the import and export figures indicate nor as "American jobs stolen by China" as retorted by Trump in his campaign. Labor intensive industries face the challenge of labor cost

thus they migrate from developed countries to developing countries as a natural economic movement. Any government protection scheme including tariffs can only slow down their migration a bit but eventually fails. This phenomenon existed for many decades and the only sensible solution is to create new industries based on hi-technology components to maintain a competitive edge or gain higher productivity. However, hi-tech industries may create new jobs but they may also eliminate existing jobs especially labor jobs. Apparently, China has learned from others' experiences, she is launching a technology and innovation drive ("China Manufacturing 2025") to upgrade their industries to higher value chain but with a focus on achieving a net job increase not job loss. This is nothing new; Germany has her German Industry 4.0. In U.S., the government neglected the manufacturing industry for years in favor of financial industry resulting in today's dilemma: The U.S. highly depends on manufacturing imports and financial product exports. The imports are more physical necessity products and the exports depended more on a debt ridden society (like the U.S. highly depended on debt refinancing to get by).

So Trump's attempt to use trade war to stop China Manufacturing 2025 and force her to open up financial markets is not a logical policy; not only China will not accept it, it also does not necessarily help the U.S. The sensible solution is to accelerate technology innovation and sell (rather than restrict) high-tech sales to China. China recognizes the value of her market size able to attract technology companies to come and manufacture and sell products. Technologies are protected by patents but patents are just a piece of paper without markets to accept their applications. The U.S. should exploit the huge market in China to sell her technology products to make profit and sustain her technology development to maintain her leadership position. For example, GM makes 10 million cars; 4 million are manufactured and sold in China. The question is whether GM is plowing back its profit to develop advanced technology to maintain a technology lead or simply to distribute its profit as dividends. Tesla with its technology lead in electric vehicle is setting up manufacturing factory and research and development center in China. Obviously, Tesla is valuing China's market thus ignoring President Trump's plea to keep manufacturing in the U.S.

The above discussion is just common sense analysis not deep economic theory, but it is sufficient to tell us that Trump's trade war policy does not solve the US trade problem nor help her industry revitalization. The U.S. needs to understand China's market value and the scope of China's 2025 manufacturing industry upgrade to come up with her industry policy to leverage her lead in many technologies and to take advantage of China's market to accelerate technology products manufacturing, develop and sell products for Chinese markets and sustain her lead in technologies.