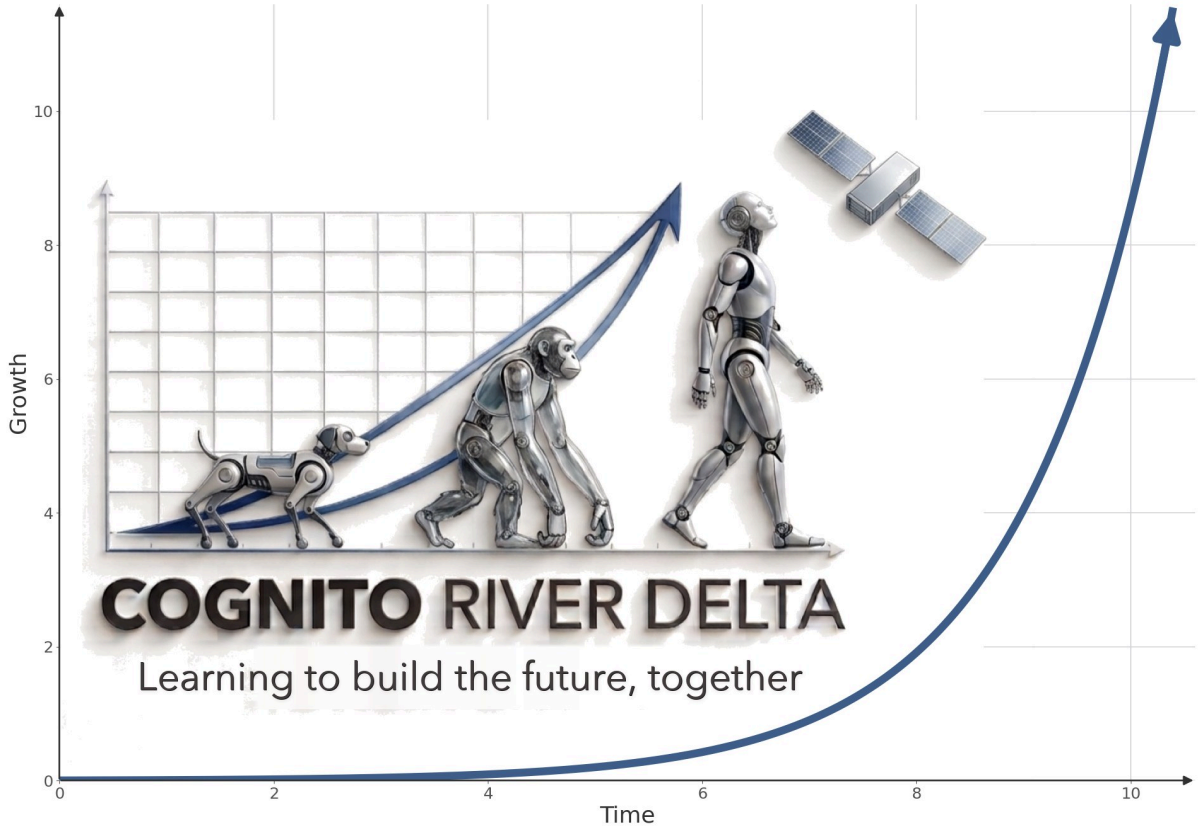


CATEGORY ROLLUP

Policy, geopolitics & China - 2026-W45

Week of November 2, 2026

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Week of November 2, 2026 · 18 min read

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Overview

The defining storyline of this week is the hardening of the "Silicon Curtain"—the transition of the U.S.-China technological rivalry from a series of diplomatic frictions and trade tariffs into a pervasive, high-stakes era of industrial subversion, massive infrastructure mobilization, and sophisticated espionage. We are witnessing the end of the era of "soft" decoupling. The week's developments suggest that the battle for AI supremacy is no longer merely about who writes the best algorithms, but about who controls the physical and legal architecture required to run them. As analysts like Alex Karp suggest, this has evolved into an existential "us or them" struggle where technological sovereignty is synonymous with national survival.

This shift is evidenced by three converging trends. First, the emergence of a high-stakes "cat-and-mouse" game in hardware flows, where Chinese firms like Moonshot AI attempt to bypass U.S. export curbs via European "neoclouds," and Nvidia allegedly explores aggressive product-tier pivoting—such as repurposing GB202 dies from consumer RTX 5090s into specialized, high-margin RTX Pro 5500 workstation cards—to satisfy massive Chinese demand while navigating regulatory minefields. Second, the scale of capital expenditure required to maintain leadership has reached a level of "sovereign-adjacent" spending, highlighted by Anthropic's unprecedented $895.4 billion compute commitment. Finally, the geopolitical struggle has entered the realm of active espionage, with reports that Chinese intelligence (MSS) utilized a "honeypot" scheme targeting Nvidia CEO Jensen Huang. Collectively, these threads indicate that the "us or them" dynamic is no longer a rhetorical

device but a functional reality shaping the global supply chain, energy policy, and national security protocols.

AI Policy

The landscape of AI policy this week was dominated by the collision of national security interests and the sheer complexity of global hardware supply chains. The most significant flashpoint was the report of a Chinese intelligence operation targeting Nvidia CEO Jensen Huang via a romantic "honeypot" scheme involving a Megaspeed executive suspected of spying for China. This incident has moved beyond a corporate security concern and into the halls of government; reports indicate that Congress has summoned Huang to brief lawmakers on the matter. This underscores a growing vulnerability: as AI hardware becomes the primary lever of geopolitical power, the individuals overseeing its production become high-value targets for state-sponsored espionage, turning corporate leadership into a frontline of national security.

The policy debate is also being shaped by the increasingly desperate attempts to circumvent U.S. export controls. Chinese lab Moonshot AI is reportedly utilizing European "neoclouds" to lease Nvidia Blackwell chips, a move that highlights a critical loophole in current policy: while the U.S. can control the shipment of physical chips, it has significantly less control over the remote access to compute power via third-party jurisdictions. This "compute-as-a-service" loophole allows Chinese entities to access cutting-edge silicon without a physical border crossing, creating a massive headache for regulators attempting to maintain a technological edge. This reality mirrors the warnings of Amy Webb, who notes that while the U.S. often views AI through a reactive, sometimes utopian or apocalyptic lens, China’s state-led strategy is focused on the practicalities of fast-following R&D and widespread adoption.

Simultaneously, we are seeing the emergence of protectionist measures in the robotics and automation sectors that signal a expansion of the "sensitive technology" definition. The Chinese government's decision to block SoftBank’s $5.4 billion acquisition of ABB Robotics is a textbook example of "data-centric" protectionism. Regulators cited concerns that robot data—the movement, environmental mapping, and sensory input of machines—could be leveraged to train AI models. This signals that the scope of technological warfare is expanding from the silicon itself to the massive datasets generated by the machines that the silicon powers.

Looking ahead, the policy environment remains highly volatile. Analysts suggest that a Democratic-led Congress in 2027 may wield significant subpoena power and consider

aggressive new regulatory tools, such as mandatory "AI pauses" or significant new tariffs ranging from 15% to 25%. The regulatory pendulum is swinging toward increased oversight, placing hardware and software providers in a precarious position between rapid innovation and intense government scrutiny.

Geopolitics

The geopolitics of this week can be summarized as the "Materialization of AI Power." The competition has moved from the digital realm into a physical struggle for energy, space, and localized manufacturing. A massive piece of this puzzle is Anthropic's commitment to spend $895.4 billion on compute through 2045, including major deals with Google and SpaceX. This figure, while requiring rigorous auditing, represents a shift in how major AI players operate; they are no longer just software companies, but massive infrastructure entities whose capital expenditures rival the GDP of mid-sized nations. This massive scale of spending creates a tension between the "safety-first" rhetoric of companies like Anthropic and the "dominance-first" moral imperative described by Palantir’s CEO, Alex Karp.

The race for "Sovereign AI"—infrastructure that allows a nation or a major entity to protect its own proprietary IP and operate independently of global volatility—is accelerating. This is being driven by the realization that current dependencies on Asian fabrication and global supply chains are strategic liabilities. Elon Musk’s pursuit of the "TerraFab" project in Texas and his interest in "orbital compute" represent attempts to create a completely autonomous, vertically integrated hardware-and-power ecosystem. This concept of orbital compute has stirred a significant scientific debate regarding the feasibility of space-based data centers. While some academics argue that the vacuum of space creates a "thermos trap" that would make cooling impossible, Farzad Mesbahi contends that the physics of radiative cooling (the Stefan-Boltzmann law) makes orbital compute a viable, if extreme, hedge against terrestrial power constraints and the $200/kg break-even launch cost requirement.

The geography of power is also being redefined by the energy bottleneck. The ability to scale AI is fundamentally a question of electrical capacity, and the divergence in electricity growth is becoming a critical geopolitical metric. While Elon Musk has claimed that electricity growth outside China is "basically flat," Farzad Mesbahi disputes this, noting a 17% growth rate in other regions and 6% in OECD countries. Regardless of the exact percentage, the core tension remains: the struggle to secure energy for data centers is becoming as central to national security as the struggle for semiconductors. The ability to maintain a high-growth electricity pipeline is increasingly seen as the decisive factor in winning the AI race.

China

China continues to demonstrate a dual-track strategy of domestic manufacturing dominance and aggressive technological circumvention. On the domestic front, China’s industrial strength in the "physical" side of AI—robotics and automotive—is stark. China currently accounts for 95% of the global supply of humanoid robots, a position of dominance that creates a significant barrier to entry for Western competitors and aligns with Dan Wang’s view that China’s engineering-led leadership provides a superior state capacity for material production. This is complemented by a rapid transition in heavy industry, with electric trucks now making up over 50.3% of China's heavy truck sales as of September.

In the automotive sector, the battleground has shifted from simple electrification to "AI-defined vehicles." As Chinese firms like BYD achieve record-breaking export growth (selling over 300,000 BEVs in October), Western companies like Tesla are being forced to pivot their value propositions. Tesla is increasingly relying on its FSD (Full Self-Driving) software and Grok integration to maintain competitiveness against the sheer volume of Chinese manufacturing. This suggests that the "EV war" is being subsumed into a larger "AI-intelligence war" in the transport sector.

However, China’s progress is not without significant internal friction. The company Zhipu AI, despite its massive $170 billion peak valuation earlier in the year, has had to pivot its business model to "Model as a Service" after failing to compete with consumer-facing platforms like ByteDance's Doubao. This illustrates the intense competitive pressure even within China's own AI ecosystem. Furthermore, the "Silicon Curtain" is forcing Chinese firms into increasingly complex workarounds to acquire high-end hardware. Reports that Nvidia may be diverting GB202 dies from consumer RTX 5090s to specialized, high-margin RTX Pro 5500 workstation cards—to serve massive orders from firms like ByteDance and Alibaba (estimated at 3 million units valued at $35 billion)—suggest that the demand for AI-capable hardware in China remains voracious. Despite these workarounds, the "friction" is real, evidenced by approximately 600,000 Nvidia H200s being stalled in Hong Kong due to import restrictions.

Cross-cutting themes

The most significant cross-cutting theme this week is the **Physicality of the AI Race**. For years, the narrative focused on "the algorithm," but this week's developments prove that the real contest is being fought over the physical requirements of compute: silicon, electricity,

data centers, and cooling. The "us or them" geopolitical rivalry is being mediated by the fundamental laws of physics and the physical constraints of the planet.

This manifests in three critical ways:

1. **Hardware as Geopolitical Leverage:** The tension between Nvidia's need to serve the massive Chinese market—through reported product-tier pivoting—and the U.S. government's desire to restrict that same hardware creates a direct conflict between corporate profitability and national security. This creates a "governance risk" where the hardware itself becomes a tool of subversion.
2. **The Energy-Compute Nexus:** The debate over electricity growth and the push toward orbital compute links the high-level geopolitical competition directly to the capacity of national power grids. The race is no longer just for chips, but for the ability to power them, making energy policy a core pillar of AI strategy.
3. **Robotics and the Data Loop:** The blocking of the SoftBank/ABB deal shows that physical machines (robotics) are now viewed as the primary sensors for the data that fuels AI models. This effectively merges the manufacturing and software sectors into a single, inseparable strategic pillar, where "data-centric protectionism" is used to guard the inputs of future AI training.

Where sources agree

- **The Existential Rivalry:** There is broad consensus among high-level analysts, including Palantir's CEO Alex Karp, that the U.S.-China competition for AI leadership is a fundamental "us or them" struggle with profound national security implications.
- **China's Robotics Dominance:** Sources agree that China holds a massive lead in the production of humanoid robots, controlling approximately 95% of the global supply chain.
- **The Shift to Sovereign AI:** There is a consensus that the global market is moving toward "Sovereign AI," where nations and major corporations prioritize domestic infrastructure to protect proprietary IP and reduce dependency on foreign-controlled hardware and Asian fabrication.
- **The Inadequacy of Current Export Controls:** Sources agree that U.S. export controls are not stopping Chinese progress but are instead driving them toward more complex, indirect methods of acquisition, such as leasing compute via European neoclouds or utilizing specialized workstation-grade silicon.

Where sources disagree

- **The Scale of Economic Impact:** There is a significant dispute regarding the extent to which AI and data centers drive U.S. economic growth. Jo Bhakdi claims AI/data centers drive 90% of growth, whereas *The Economist* attributes the recent manufacturing revival to a more traditional mix of tariffs, tax incentives, and supply chain shifts.
- **Electricity Growth Realities:** Elon Musk has claimed electricity growth outside China is "basically flat," but analyst Farzad Mesbahi disputes this, citing a 17% growth rate in other regions and 6% in OECD countries.
- **The Efficacy of Export Controls:** While regulators aim to stifle Chinese progress, the reports of Nvidia's product pivoting and Moonshot AI's use of neoclouds suggest a disagreement on whether these controls are actually effective or if they merely increase the cost and complexity of procurement for Chinese firms.
- **Tesla's Software Metrics:** There is a conflict regarding Tesla's FSD adoption; BestInTESLA reports a >75% take rate, while FutureAzA notes this figure includes free trials, potentially inflating the perceived commercial success.
- **The Feasibility of Orbital Compute:** A scientific divide exists between academics who argue that the "thermos trap" of space makes cooling impossible and proponents like Mesbahi, who argue that radiative cooling (Stefan-Boltzmann law) makes it a viable hedge against terrestrial constraints.

Numbers and claims to verify

- **Anthropic’s $895.4 billion compute commitment:** This is an unprecedented figure that requires auditing to determine if it represents a binding long-term capital commitment or a theoretical maximum projection.
- **Nvidia's "50% China Cap":** Reports that Nvidia is instructing partners and cloud clients to limit Chinese exposure to below 50% need official corporate verification.
- **The 3 million RTX Pro 5500 order:** The claim that Chinese firms have ordered 3 million of these specific workstation cards—a move valued at $35 billion—is an extraordinary volume that requires cross-referencing with official shipping or corporate data.
- **600,000 H200s stalled in Hong Kong:** The scale of these import stalls should be verified through trade data to understand the true impact of current export restrictions on hardware availability.

- **Tesla's Optimus production target:** The claim of 20,000 robots per week needs verification against current factory capacity and component availability.

Investment and strategic implications

- **Infrastructure as a Hedge:** The trend toward "Sovereign AI" and domestic chip fabrication (exemplified by the TerraFab project) suggests that long-term value may reside in companies providing the "foundational" physical infrastructure—chips, energy, and data centers—rather than just the software layers.
- **Revenue Risks for High-Exposure Firms:** Companies with significant reliance on Chinese markets (like Oracle and Nvidia) face acute regulatory and geopolitical volatility. The strategy of shifting hardware tiers to bypass controls is a high-risk maneuver that could lead to sudden, severe regulatory crackdowns.
- **The Energy Bottleneck:** As AI scales, the "limiting reagent" for growth is shifting from semiconductors to electricity. Investment in energy-efficient computing, grid stability, and potentially even novel cooling/power solutions (like orbital or advanced radiative cooling) becomes a critical strategic priority.
- **The "AI-Defined" Pivot in Automotive:** Valuation for automotive companies is likely to pivot away from pure EV metrics toward their ability to integrate and monetize AI-driven software and autonomous capabilities, as seen in Tesla's strategic response to BYD.
- **Governance and Espionage Risk:** The emergence of high-level espionage targeting CEOs introduces a new layer of leadership and regulatory volatility for major tech firms, potentially affecting stock stability and corporate governance.

What to watch next week

- **Congressional Testimony and Espionage Developments:** Any official statements or further developments regarding the summons of Nvidia's CEO following the reported MSS/honeypot espionage allegations.
- **Nvidia's Official Stance on China:** Watch for any corporate clarification regarding the reported limits on Chinese customer exposure or the alleged shift in GPU product tiers (GB202 to RTX Pro 5500).
- **China's Response to Robotics Blocks:** Any movement from Chinese regulators regarding the blocked SoftBank/ABB acquisition or similar foreign acquisitions in the

automation and robotics space.
- **Energy and Electricity Data:** Further clarity on the discrepancy between reported electricity growth in OECD countries versus China's capacity expansion, and how this affects the scaling of data centers.

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