# Analysing the US-China "AI Cold War" Narrative

***Yujia He & Richard Heeks***

***Abstract:*** *Discussions about artificial intelligence (AI) are gaining prominence in the recent revival of "cold war" narratives comparing US-China relations today to the historical rivalry between the US and the Soviet Union. Drawing on a review of existing academic and policy literature engaging with the "AI cold war" narrative, this paper examines how the narrative is justified, and numerous ways that it can be challenged. It finds that the framing is largely driven by the securitisation of AI, as state actors and policy pundits view AI innovations' dual-use capabilities as key to national security and ideological competition. However, critics posit that the narrative exaggerates China's AI capabilities, promotes commercial interests of tech firms and defence contractors, creates self-reinforced militarisation, and undermines the potential for international research and regulatory cooperation. Moreover, the cold war binary framing may misrepresent the global distribution of AI capabilities. To extend beyond the AI cold war narrative, future research may recognise the limitations of the binary framing and expand analysis on the AI development strategies of third-party players (including those from the Global South) drawing upon local and regional political economic dynamics and development contexts. This paper concludes by inviting scholars to rethink the affective power of narratives and contribute research and narrative analysis that allow for the articulation of perspectives from third countries.*

The contentious relationship between the US and China in the past decade has prompted debates about whether the world has entered a "new cold war". Since the Obama Administration's 2011 "Pivot to Asia", Washington's China policy has shifted from economic engagement alongside maintaining security interests (e.g. Taiwan and the South China Sea), towards balancing against a rising China and strengthening American hegemonic power.[1] US-China relations rapidly worsened under the first Trump Administration (2017-2021) which characterised China as a fully-fledged security threat.[2] Following the 2017 publication of the US National Security Strategy naming China as a "strategic competitor", "strategic competition" has become the ubiquitous bipartisan framing in Washington's China policy.[3] The Biden Administration (2021-2025), though differing in many ways from Trump's American First foreign policy, viewed China as a prevailing threat to American leadership and "the most serious long-term challenge to the international order".[4] The new Trump Administration, by reigniting a trade war, seems to continue the strategy of decoupling from China.

Among international relations observers, neorealist scholars tend to view this shift towards great power competition as the inevitable result of change in the balance of power in the international system. A prevailing view, based on the power transition theory, is Graham Allison's "Thucydides trap". Drawing from historical case studies, Allison argued that a war is likely to occur between a rising power and the hegemon, due to the severe structural stress caused when the former threatens to displace the latter. Therefore, "war between the United States and China in the decades ahead is not just possible, but much more likely than recognized at the moment."[5] Meanwhile, other scholars have challenged this view. For example, Chan (2020)[6] and Hanania (2023)[7] identified flaws in Allison's case selection and research strategy. He (2022)[8] and He & Feng (2025)[9] pointed to other variables like international institutions and institutional competition in possibly supporting a peaceful order transition. Chan (2020, 2021)[10] further pointed to the role of third countries in influencing conflicts occurrence and outcomes, and critiqued the ethnocentrism embedded in the "Thucydides trap" assumption of the rising power as a revisionist state.

Nonetheless, the "Thucydides trap" and broadly the power transition theory has garnered significant popularity in the policy community, evidenced by the endorsement of prominent politicians in Washington.[11] Coupled with the worsening bilateral relations, it has generated a revival in "cold war" narratives, including "new cold war"[12] and "Second Cold War."[13] At a general level, many see the resonant patterns of today's US-China tensions from the First Cold War between US and USSR, including "an ideological divide ... emerging coalitions ... growing competition for influence in the Global South."[14]

Notably, the centrality of competition in the technological sphere, especially in digital technology, has led to references to a "tech Cold War"[15] and "digital Cold War."[16] The concept has emerged as a buzzword invoked in discussions of policies and countermeasures across different issue areas, including cyber warfare and cyber attacks, export controls, sanctions, investment restrictions, and supply chain diversification.[17] Among the range of digital technologies, artificial intelligence (AI) is sometimes picked out as the chief "battleground" between the two superpowers,[18] leading to discussions surrounding an "AI cold war."[19]

In this paper, we wish to examine particularly the narrative around an "AI cold war", based on a review of key academic and policy literature. While not seeking to minimise the structural factors and the power-based view of interstate competition, this study adds to the literature by employing a narrative review approach, critically exploring and reflecting on the development and the implications of this narrative that often underpins discussions surrounding AI in international relations. What evidence is provided for the existence of an AI cold war? What critiques are offered? What are the implications of use of the term?

This study finds that the "AI cold war" narrative is largely shaped by the securitisation of AI, as state actors and policy pundits view AI innovations' dual-use capabilities as key to national security and ideological competition. However, the narrative overshadows other important perspectives concerning AI development. Critiques include that it

exaggerates threats from China's AI capabilities, serves the commercial interests of tech firms and defence contractors, reinforces militarisation and racialised sentiment, and undermines the potential for international research and regulatory cooperation. The binary framing also misrepresents the global distribution of AI capabilities. Recognising the limitations of the framing, future research may expand on the roles and the strategies of third-party players (including Global South players), drawing upon local and regional political economic dynamics and development contexts, and diversifying narratives beyond the "AI cold war".

This paper proceeds as follows. The next section outlines the narrative review methodology. The third section identifies the affirmatory views in the literature, which in some way accept the idea of an "AI cold war". The fourth section identifies the critique which questions the use of the term and its implications. The fifth section reflects on the narrative's analytical limitations and discusses possible areas of research inquiry. The concluding section summarises the findings and the implications for broader IR scholarship and for policymaking.

## The narrative review approach to interrogate a dominant analytical framing

The expansive international relations scholarship on AI has mainly covered four themes: the balance of power, disinformation, governance, and ethics.[20] According to Bode (2024), while most existing scholarship on these established themes "works with well-established IR conceptualisations", several possible research avenues may expand beyond established frameworks. Among them is "beyond the AI arms race", critically reflecting on the arms race as the dominant analytical framing about AI and IR.[21]

This paper therefore aims to contribute to the literature through a comprehensive narrative review of how academic and policy analysis engages with the term "AI cold war". The narrative literature review method allows researchers to "describe what is known on a topic while conducting a subjective examination and critique of an entire body of literature".[22] It is particularly useful for offering "an interpretation of the literature, note gaps, and critique research to date", thereby setting the stage for future research.[23] By focusing on narratives, this paper also follows the "narrative turn" in IR scholarship[24] that employs a critical and reflective approach to "explore how narratives are shaped, how they appeal to specific political audiences, and whose interests are served by dominant political narratives."[25]

The data source for this narrative review included two components. 1) Articles, books and reports from relevant databases of Google Scholar and Web of Science. The search strategy involved first using specific keywords of "AI cold war", then reviewing each article's headlines for its relevance to the research questions and reviewing the relevant article's content to confirm the inclusion in this review. The selection excluded literature that primarily used the term to describe AI with no reference to international relations (e.g. business management), or in the context of other power relations such as between Russia and the US or other western powers. This yielded a total of 62 publications published by 2024 that formed the basis of the review of the academic literature. 2)

Major policy publications that referenced the term "AI cold war". The quantity of documents from non-scholarly sources that referenced the term is massive, therefore a systematic query would be beyond the scope of the study. The authors therefore prioritised documents from key government agencies, congressional commissions, and think tanks as a proxy to understand the use of the term in the political discourse. They complement the review of the academic literature in making sense of how the narrative is substantiated, understood and interpreted. The references of the selected scholarly articles were reviewed to find relevant policy publications.

The authors then conducted the data extraction process of identifying and summarising key information from the selected publications. The synthesis of the extracted data followed these steps to embrace a holistic perspective in writing narrative reviews[26]: identifying common themes and patterns across the literature; assessing the strengths and the weaknesses of the different arguments for each theme; comparing findings across studies to highlight consistencies and discrepancies; integrating the findings to provide a comprehensive understanding of the current state of work.

## Affirmation of an "AI Cold War"

The AI cold war narrative appears to have emerged in tandem with broader security interests about AI in the political discourse. The term "AI cold war" can be originated to a Wired article in October 2018 entitled, "The AI Cold War That Threatens Us All"[27], with a growth in occurrences since then[28]. This source in turn traces use of the term back to a Henry Kissinger piece on the dangers of AI in The Atlantic[29] that led to a White House-organised AI Summit. According to Thompson & Bremmer (2018), "By midsummer (of 2018), talk of a "new cold war arms race" over artificial intelligence was pervasive in the US media."[30]

As the quote suggests, there is significant overlap in use of the term "AI cold war" with the term "AI arms race". While terms such as "AI race" or "AI competition" are also widely used in the political discourses, there are some crucial differences. The primary distinction is that the former terms introduce a securitisation of narrative[31]: framing relations as an issue of national security, and seeing the other state as an external threat of sufficient magnitude to require adoption of exceptional measures.[32] The "cold war" framing introduces a militarisation of narrative, which frames relations in terms of "military ideas, values and imagery."[33] Moreover, it introduces a resonance with, and invites parallels with the First Cold War.[34]

There is an argument that securitisation, even militarisation, of the AI debate could be justified. Some literature[35] has outlined several main rationales for the securitisation of AI. Firstly, most AI innovations are inherently dual-use, possessing both civilian and military use capabilities, and they can be used for both positive and harmful purposes. Therefore, AI poses national security risks that warrant mitigation. Secondly, unlike other dual-use technologies such as nuclear power, AI-powered digital applications are varied, and increasingly ubiquitous across industrial sectors and in people's daily lives, and AI's future uses are still unclear. Digital technologies are also more difficult to be "geographically contained" than material technologies like missile weapons systems.[36] So, AI poses unique and substantial security vulnerabilities. Thirdly, nation states and

defence contractors have invested significantly in AI, and "a race to militarize artificial intelligence is gearing up".[37] For example, Horowitz (2018) viewed China's and Russia's investment in AI as to "increase their relative military capabilities with an eye toward reshaping the balance of power."[38] Horowitz (2018) further argued that the risk for the US is "taking its military superiority for granted and ending up like Great Britain's Royal Navy with the aircraft carrier in the mid-20th century."[39]

Thus, a number of literature sources largely affirm the notion of an AI cold war, referencing growing investments by major countries in military applications of AI[40], and the emergence of adversarial elements in US-China relations.[41] Further analysis of the evidence presented for the affirmative use of the term shows that state actors and policy pundits view AI innovations as key to national security, which largely echoes the broader competitive balance-of-power framing.

On the US side, as noted earlier, the successive National Security Strategies of the Trump and Biden Administrations demonstrated a bipartisan consensus viewing China as the greatest challenge to US national security.[42] Concerning AI, the official policy discourse has called for maintaining US technology leadership and harnessing AI to fulfil national security objectives.[43] The US Federal Bureau of Investigation (FBI) has warned that the biggest security threat in the "new cold war" of AI usage comes from China and its AI-enabled capabilities in cyber-attacks and spying .[44] The US Department of Defense AI Adoption Strategy, published in 2023, seeks to accelerate advanced AI capabilities adoption to ensure "decisive superiority on the battlefield for years to come".[45] The "shift towards AI and 'data driven' warfare" has led the Pentagon to award "large multi-billion dollar contracts to Microsoft, Amazon, Google, and Oracle."[46]

In addition, the understanding that tech innovations are crucial to political influence and ideological prestige has led to AI being seen to have paramount influence in Washington's policy centred on great power competition. This is not new: US federal innovation policy during the First Cold War followed a mission-oriented approach, partly motivated by "national prestige and ideological competition" with the Soviet bloc.[47] Because of AI's perceived significant role in surveillance and domestic governance, views that AI capabilities may shape the competition between democracies and authoritarian regimes and the future of the world order have also sprung up, drawing comparisons to the historical Cold War.[48] Some pundits argue that the US likewise needs to maintain technological leadership in AI for ideological supremacy, in the coming "Cold War 2.0 against autocracies."[49]

On the Chinese side, some literature sources note that "China under Xi seeks to use AI for more military purposes,"[50] and so, "China's race to exploit and integrate Artificial Intelligence (AI) into their military is rising exponentially."[51] Under President Xi's call to enhance strategic capabilities in emerging areas, the People's Liberation Army (PLA) has been shifting toward "intelligentized warfare."[52] Chinese military lawmakers and experts recognise such capabilities as "a focal point in major power competition, a vantage point in high-end warfare", stressing the importance of enhancing AI-enabled combat capabilities.[53] Nonetheless, Beijing's official discourse has opposed the broader "new cold war" rhetoric as an "attack and smear" campaign pushed by "some political forces in the US…taking China-US relations hostage and pushing our two countries to the brink of a new Cold War."[54]

The securitisation of AI in narratives affirming the "cold war" has also risen in the economic realm. A number of literature sources note the increasing use of economic policies, such as export controls, investment screening, and industrial policies concerning AI development to serve the state's geostrategic interests. Besides major investments in domestic AI capabilities, Washington has deployed coercive policy instruments, such as export controls on advanced AI chips and manufacturing equipment to China, to counter the perceived threats from Chinese offensive cyber operations and military capabilities.[55] This has generated rising interest in how to navigate the "tech cold war" among the business community and among international business scholarship.[56] Meanwhile, Beijing has used the term "cold war mentality" to criticise US policies aiming to curb Chinese firms' access to technology, supply chains and investments, and vowed to retaliate and counter US "containment" efforts[57], which likely contributes to the narrative's popularity.

A smaller fraction of literature – what might be called critical-affirmatory – accepts not just the existence of an "AI cold war" as rhetoric but also, mostly from a US perspective, some legitimacy in the securitisation of narrative: "some of the claims of this narrative are based at least in part on genuine security concerns and important unknowns."[58] However, the conclusions drawn are critical of the narrative in some way, as discussed in the next section.

## Critique of an "AI Cold War"

Among those critical of the "AI cold war" narrative, three main threads of critique can be identified from the literature: exaggeration of threats; promotion of Big Tech interests; and various negative consequences from the narrative's mainstreaming.

### *Exaggeration of threats from Chinese capabilities*

The first thread of critique argues that the inequality in AI power between the US and China means that the threat from China has been exaggerated[59].[60] In making this argument, Zeng (2022) is specific about security: "existing analyses vastly exaggerate … the extent of China's AI advancement and its geopolitical threat."[61]

Other papers step outside the security arena and look generally at AI capabilities. Their critique is perhaps fitting to the notion of the AI arms race rather more than the AI cold war. Some talk about this in general terms, for example about the "large education and innovation gaps" that exist in AI between the US and China, but others bring concrete data[62]. Bryson & Malikova (2021) use data on market capitalisation (MC) of firms and intellectual property (IP) patents that encompass AI to demonstrate that China is "still dwarfed again by the United States, in terms of both MC and IP"[63]: for example, capitalisation of US$1.5bn in China vs. US$9.8bn in the US in 2020. Olson (2024) focuses on more specific outputs: "When it comes to producing machine learning models of note, the US is still far ahead with 61 … while China ranks second with just 15."[64] Such claims are supported by the latest 2024 Government AI Readiness Index which ranked the US first and China 23rd. China scored lower than the US on all three foundations for AI: government, technology sector, and data and infrastructure.[65]

Exaggeration of the capabilities of one's adversary (or conversely of one's own country's vulnerabilities) of course brings echoes from the past:

> *"Americans, however, have a history of overestimating the technological prowess of their competitors. During the Cold War, bloated estimates of Soviet capabilities led U.S. officials to make policy on the basis of a hypothesized "bomber gap" and then "missile gap," both of which were later proved to be fictional."*[66]

And this goes even further back: "The exaggeration of American vulnerability ... has been a recurring feature of debates over American foreign and defence policy for at least a hundred years."[67]

### *The militarising big tech's interests behind the push for "AI Cold War"*

The second thread of critique picks up this issue of exaggeration of security threats and seeks to explain why actors adopt the AI cold war rhetoric. Some authors in this thread of critique see that rhetoric as based in part on a genuine belief rather than being a deliberate exaggeration.[68] This critique overall centres on the actors pushing for the narrative and how it serves their interests.

On the US side, according to AI Now Institute, the notion of an "AI arms race", a close equivalent of AI cold war, "has evolved from a sporadic talking point to an increasingly institutionalised position, represented by collaborative initiatives between government, military, and tech-industry actors and reinforced by legislation and regulatory debates."[69] The main benefit said to be sought by those promoting the notion of an AI cold war is a minimisation of regulatory constraints or ethical concerns on AI innovation. As Bryson & Malikova (2021) wondered, "could at least some of the proposing or amplifying of claims postulating an AI cold war be intended to disrupt new regulation?"[70] Xue & Guo (2024) also posit that "They (the proponents of the narrative) argue ... that ethical inquiry is a distraction from this political reality (AI cold war)."[71]

The "they" in question is seen to be US Big Tech firms: "when US tech companies argue for more lax regulation lest China race ahead, they are likely exaggerating the threat for their own purposes."[72] For example, AI Now Institute's 2023 report presented a detailed timeline of how the AI arms race rhetoric has been institutionalised in US policy discourse and "leveraged by stakeholders to push back against regulatory intervention targeting Big Tech companies, such as on antitrust, data privacy, and algorithmic accountability."[73] The position of US Big Tech is often instantiated in the 2021 National Security Commission on Artificial Intelligence report[74] authored by a commission chaired by Eric Schmidt, the former CEO of Google[75].

Alongside constraints on AI regulation, Big Tech firms, in tandem with stakeholders within the defence and security arms of the US government, are also said to be using securitised, militarised rhetoric around AI to obtain greater state investment. Such rhetoric appeals to political audiences and justifies the deployment of "more resources and support to not only the American AI-enabled military sector but also the AI commercial industry."[76] The irony, according to some observers, is that some players like Mr. Schmidt pursue a two-track approach: employing the cold war narrative to warn

US policymakers about the threat from China and obtain US government funding, while using government resources to pursue personal connections and investment opportunities with the Chinese AI industry.[77]

### *Dangers of the framing*

Mutually reinforcing securitisation and militarisation

Whereas it is largely seen as commercial actors in the US who contribute to securitising AI discourse for commercial benefits, along with a constellation of national security and intelligence actors, in China it is said to be the Chinese state that does this for the purposes of stimulating other actors to focus on AI. For example, Zeng (2022) argues that: "AI is being securitized by the Chinese central government to mobilize local states, market actors, intellectuals and the general public"[78]. The derivation of the Chinese state's securitisation of AI and AI discourse is seen in part to derive from and be fed by AI securitisation and militarisation in the US: a mutual reinforcement that is potentially "setting both countries on a dangerous path."[79]

This, then, represents the third thread of critique: the dangers of AI cold war rhetoric. That the militarised element becomes a self-fulfilling prophecy, leading ultimately to a hot war is obviously the greatest danger.[80] Beyond this is the concern that a focus on militarisation of AI "diverts resources and attention from nearer existential threats, such as extreme weather events."[81] Observers also note that the "arms race" rhetoric has led to relatively less policy support for non-military applications of AI in US federal policy.[82]

Negative consequences for international research collaboration, Asian community, and AI governance

Some literature points to the danger of the "cold war" or "arms race" rhetoric in contributing to a difficult environment for international collaboration in AI research and development (R&D) and AI governance. On the one hand, China's Civil-Military Fusion strategy for developing military-technological innovation, including AI innovations, has intensified US concerns of security threats from international R&D collaboration with Chinese players, on top of concerns about industrial espionage. A 2019 Congressional hearing led by the US-China Economic and Security Review Commission concluded that "civilian academic collaboration and business partnerships between the United States and China could aid China's military development."[83]

Yet on the other hand, the cold war rhetoric is seen to create an increasingly hostile environment for researchers, who face already stringent regulations on research security in both the US and China.[84] The fracturing of cross-border R&D collaboration between the US and China is seen to slow the international flow of knowledge and talent, and thus decrease the research output for both countries and slow the pace of innovation on a global scale.[85] The controversial "China Initiative" led by the US FBI was accused of racial profiling and surveillance in its investigations targeting Chinese-American scientists, including AI researchers, creating "general feelings of fear and anxiety that lead them to consider leaving the United States and/or stop applying for federal grants."[86]

This leads to another critique of the AI arms race narrative (which often overlaps with the cold war narrative): it is built upon "racial structures of power" and "previous racialised configurations of anti-Asian sentiment."[87] The rhetoric "draws on older forms of techno-Orientalism and anti-Asian racism to portray China as a distinctly racialised and Othered civilizational threat to the US."[88] McInerney noted some parallels with the US characterization of threats from Japan's economic and technological power, and the rise of anti-Asian racial violence in the US in the 1980s.

The rhetoric is also seen to risk undermining safety and ethics in AI development and deployment, and the potential for much-needed international cooperation on AI governance.[89] This includes regulation of military applications with risk, from a US perspective, of "a permanent cleavage [that] ... will only give techno-authoritarianism more room to grow."[90]

Implications for third countries

The final danger is seen to be for third countries which "will be forced to "choose sides"[91], with the potential that aligning with one will harm relations with the other power. Thompson & Bremmer (2018) note that "it will all seem uncomfortably close to the arms and security pacts that defined the Cold War."[92] Relatedly, a critique of the AI cold war narrative is that it mischaracterises "an increasingly complex and multipolar world into a binary one". The rhetoric ignores the influence of other important players such as the EU[93] and their policy choices which do not neatly follow the logic of alignment. As will be discussed in the next section, this is a knowledge gap to which future research may contribute.

## Discussion: what to make of the narrative and the contestations for future research

As the AI cold war rhetoric becomes more popular (and also contested), it has prompted rising scholarly interest about the implications of the framing for research and possibilities of a future research agenda. Some literature the authors reviewed identified a broad compass for more research on national or global governance of AI, the domestic and global politics that shapes that governance,[94] and on business strategies of innovation for multinational enterprises and high-tech startups amidst rising "techno-nationalism."[95] Some pointed specifically to tracking and analysing the terminology and imagery within the narratives around Sino-US AI relations, including their sources and their implications. Those implications include not just relations between the two powers but also the strategies of third countries.[96] This section draws on the review's findings and broader scholarly analysis to discuss areas where scholars can contribute evidence-based insights towards a more inclusive research agenda.

### *Limitation of the AI cold war binary framing*

In looking to the future, one main point of discussion in the current AI literature (with more link to the notion of an AI arms race) is whether China will catch up with the US in terms of AI. Some see China having a set of advantages over the US which are likely to propel its catch-up and possibly even global leadership in AI. For example, a report co-authored by Graham Allison and Eric Schmidt viewed China having

advantages derived from its larger population that could benefit AI implementation, such as the greater scale and scope of data that can be made available for AI model training, the larger Chinese domestic market, and a large domestic talent pool offering less expensive labour.[97] They also include characteristics related to China's innovation system: for example, the relatively more centralised decision making of the Chinese state, and its willingness to employ industrial policy and government support such as public procurement for indigenous technology is seen as an advantage. Some argue that China's AI development may benefit from closer relations between the state and Chinese Big Tech than is the case in the US, and cite the greater level of Chinese investment being made in AI.[98] This advantage may however be debatable, as US Big Tech have become key players in defence contracts and sought closer alliances with the so-called "National Security State."[99]

Others are more circumspect in their analysis, expressing disagreement or scepticism about the possibility of China overtaking the US in both military AI or general AI capabilities. A review of Chinese-language articles written by military experts shows that most Chinese defence experts perceive various significant barriers to the development and deployment of AI in the PLA, and see the US maintaining leadership in military AI.[100] Some analysis cites a whole slew of constraints facing AI innovation in China: US AI-related export restrictions and China's relative lack of compute power, a deficit in top AI talent, inefficiencies in state funding, a relatively closed innovation system characterised by strong government control including censorship and by lack of inward flow of talent, and global domination of the English language in the text sources that are used for model training.[101] A central bone of contention in this literature is whether China's authoritarian state, with its absence of pluralism and weak civil society and lack of rights-based guarantees, represents a strength for future US AI innovation[102] or a strength for China's future AI innovation.[103] One may relate this to broader scholarly discussions about the link between democracy and science, and the role of state policy actions in science and technological advancement.[104]

The release of DeepSeek-R1, an open-source large language model (LLM) that performed on par with some leading LLMs by US AI companies in early 2025 has renewed discussions of US-China AI competition. DeepSeek was lauded by Beijing as an example of Chinese "innovative, open, sharing approach" to AI development,[105] and to many commentators it demonstrated the possibility of Chinese AI advancement potentially catching up with the US despite US export restrictions on high-end semiconductors.[106] Some viewed the fact that the team consisted mostly of Chinese-university-educated researchers as a testimony to successful domestic talent development.[107] While DeepSeek's purported cost reduction for model development has been debated, some saw it potentially changing AI business models that could benefit companies globally to catch up with US firms in building smaller models and AI applications.[108] Meanwhile, Washington sounded the alarm over DeepSeek as "a wake-up call" for America.[109] Policy analysts and tech CEOs vowed that America must win "the AI race/war" in media and congressional hearings.[110] Export control is still a hotspot for US policy, as Washington believes that DeepSeek's capabilities relied on work-around access to US high-end chips, including prior purchases, access through shell companies or remotely through data centres in non-restricted countries.[111]

Yet as the critical viewpoints presented above suggest, the binary framing focusing on the US and China as two AI superpowers and their relative strengths or vulnerabilities is analytically narrow, overlooking other important aspects of AI development. It also misrepresents the global distribution of AI capabilities.[112] Data from Bryson & Malikova (2021) shows that in terms of both firm patents and market capitalisation, the US exceeds China, the EU and the rest of the world combined.[113] Meanwhile, by the measure of firm patents, the EU is on par with China, so the EU is hardly an inconsequential player as the cold war framing might suggest. In terms of both patents and market capitalisation, the rest of the world (excluding US, China, EU) combined exceeds both the EU and China, again calling the binary framing into question.

### *AI development strategies of third-party economies*

The weakness of the binary framing embedded in the AI cold war narrative naturally leads to a new research area: the third-party countries' AI development strategies. Emergent analysis of third-party states' current strategies nonetheless often takes the binary US-China power competition framing as the pretext. Some analysis accepts the view of the "AI cold war", noting in general the difficulty of a "mix-and-match" alignment strategy that hedges between the two powers.[114] Some analysis specifically advises the alignment with one power against another: for example, Pathak & Jindal (2023)[115] and Mohanty & Singh (2024)[116] advise India to more closely collaborate with the US in AI, while also acknowledging divergences in India's and the US regulatory approaches.

In practice, security alliances, or overlapping interests in national security concerns, may not be the only factor influencing third country's strategies. For example, even for traditional security allies of the US such as Japan and South Korea, there seems to be reluctance in fully supporting Washington's call for coercive sanctions such as export control against Chinese players.[117] Notably, South Korea's newly appointed presidential chief AI advisor advocates for a "sovereign AI" strategy: securing capabilities across the entire AI industry value chain, and building AI systems that "deeply understand and align with the nation's own language, culture, laws, and social values."[118] He argues that South Korea possesses nearly all the components of the AI "full-stack", from semiconductors to cloud infrastructure, data and AI talents. The strategy is promoted as a unique proposal to "nations in the Middle East, Southeast Asia, and beyond that are wary of the technological hegemony of both superpowers, the U.S. and China."[119] Meanwhile, some industry players countered that the state-led push for a national large-language model may divert resources away from AI applications development and favour domestic tech giants, one of which the advisor hails from.[120] This suggests that for technologically advanced middle powers like South Korea, besides external security alliances often favoured by proponents of the "cold war" narrative, complex domestic political economic considerations may shape the national AI strategy and its implementation, necessitating further research and analysis.

In this vein, while not a single state but a supranational union, the European Union is seen by some as the third major player (alongside the US and China), with a quest for both strategic autonomy and global technological leadership.[121] This view echoes the data evidence from Bryson & Malikova (2021) noted earlier. Broadly speaking, as Danzman & Meunier (2024) argued, a confluence of factors (heightened geopolitical

tensions from US-China competition, the Covid-19 pandemic, the Russia-Ukraine conflict, and the unilateral protectionist turn in US policy) has led to the EU pivoting towards the securitisation of its economic policy.[122] The EU's various new trade, investment and innovation policy tools aim to advance its own security interests under the new doctrine of "open strategic autonomy". EU policy embraces "a global AI race logic" and emphasises the need for digital sovereignty and jurisdictional independence in AI.[123] The Council of Europe Framework Convention on Artificial Intelligence adopted in 2024 is the first-ever international legally binding treaty concerning AI, upholding human rights, democracy and the rule of law in AI development.[124]

Research on the EU often highlights the so-called "Brussels Effect", through which the EU leverages firms' desire to access its internal market to exert regulatory influence, resulting in the potential de jure or de facto harmonisation of regulatory standards globally.[125] Meanwhile, some argue that EU AI sovereignty is a myth: "given the absence of a leading AI industry and a coherent defence strategy, the EU has few tools to become a global leader in advancing standards of AI beyond its regulatory capacity."[126] In practice, the EU's regulatory power in AI governance appears to encounter some rising challenges. The EU AI Act, lauded as the world's first binding comprehensive regulation on AI,[127] currently faces uncertainty in the implementation of some key provisions.[128] Observers attribute it to a change in Brussels' focus from safety towards promoting innovation and simplifying laws, European firms' call for more regulatory clarity and less compliance burdens, and US Big Tech and Washington's push to pause the legislation.[129] Hence, while the EU's role may in effect counter the binary AI cold war logic, further research is needed to understand various internal and external factors that may influence the EU's evolving AI strategy, and how and to what extent the EU may assert its influence globally in AI development and regulations.

### *AI development strategies of the Global South amidst geopolitical tensions*

A notable gap that emerged from this narrative review is the limited analysis about how the AI cold war narrative is perceived by Global South[130] players, and more broadly, how and to what extent global geopolitics may influence their AI development strategies. Historians of cold war studies have noted the importance of adding "the North-South dimension to the analysis of the Cold War by focusing on the agency of Third World actors."[131] Historically, Global South countries employed "a myriad of different diplomatic strategies, international networks, and political actions" with "overlapping identities" under the proclaimed neutrality, to "escape the binary logic" of cold war rivalry.[132] Some observers of the current geopolitical tensions similarly argued that "Cold War 2.0 is ushering in Non Alignment 2.0."[133] International relations scholars studying developing regions have long argued for mitigating the American bias in scholarship, and in the context of present-day geopolitical tensions, "trying explicitly to move beyond U.S.- or PRC-centric assessment."[134] To avoid binary thinking, scholars call for highlighting "local narratives and regional perspectives about the opportunities and challenges posed by shifting power distributions and security dynamics."[135] This represents a new area where scholars may contribute evidence-based research.

While not focusing on AI, some current research from the Global South on the implications of geopolitical tensions for technology policy highlights local elites' perceptions of risks and benefits of international technology partnerships, and various possible political strategies to achieve their development goals. For example, Kuik (2024) found that Southeast Asian states' decisions concerning Chinese vendor Huawei in national 5G networks can be viewed as varied degrees of light or hard "hedging" (yet still not taking sides).[136] The variation can be attributed to local elites' perception and legitimisation of economy-security trade-offs concerning partnerships with Huawei and other domestic attributes. Qobo and Mzyece (2023) argued that African actors should diversify their critical technology infrastructure sources and "insist on acquiring and developing new technologies like 5G based on objective criteria that serve their development needs rather than those of the foreigners."[137] They also argued for retaining and exercising African "agency", including increasing African integration and enhancing resilience against external pressures through regionalisation efforts, negotiating with diversified international partners and via international forums,[138] and participating in international technology standard-setting processes.

An increasing number of middle- and low-income countries published their national AI development strategies in 2023 and 2024, with geographic diversity across Africa, Latin America, and Asia.[139] This is a dimension that the "AI cold war" narrative with its focus on the major powers may overlook. As the studies above suggest, researchers need to understand unique local and regional perspectives that may shape developing states' technology development strategies amidst global geopolitical tensions. This likely means a mixture of context-specific factors are at play, such as domestic politics, socioeconomic concerns, and technology development needs, which may interact with external security dynamics to influence a government's AI strategy.

In addition, regional AI-related initiatives are gaining momentum across the Global South, with examples such as:

1. The African Union Continental AI Strategy released in 2024 highlights "an Africa-centric, development-oriented and inclusive approach". The Strategy called for maximising AI benefits, building capabilities for AI (e.g. data, platforms, talent, digital literacy, research and innovation), minimising risks (in ethics, safety, and security), promoting public and private investment, and intra-African cooperation, cooperation with external partners and participation in global AI governance.[140]

2. The Association of Southeast Asian Nations (ASEAN) released its Responsible AI Roadmap (2025-2030), and a non-binding guide on AI Governance and Ethics for organisations in Southeast Asia.[141] The ASEAN AI Safety Network, announced in 2025, is seen to enable ASEAN states to "have a unified voice and participate in global AI safety and governance discourses which are more often than not the domain of Global North countries."[142] Notably, ASEAN seeks to advance AI governance and development cooperation with both China and the US, as shown in the leadership statements for Comprehensive Strategic Partnerships with both countries in 2024.[143]

3. Latin American states adopted the Montevideo Declaration building on cooperation

> with UNESCO and CAF, and a roadmap to strengthen regional technical and political dialogues on AI governance and development in 2024. Five priority areas were identified: governance and regulation, talent and future of work, protection of vulnerable groups, environment, sustainability and climate change, and infrastructure.[144]

Future research may therefore also explore the possibilities for Global South actors to advance their interests and agenda-setting in AI development through regionalisation efforts. They may include regional market integration, technology infrastructure coordination, negotiation as a bloc vis-à-vis foreign powers and possibly Big Tech firms, and participation in international institutions and multistakeholder AI governance dialogues. Of course, the scope of regional strategies and their effectiveness in implementation may vary from context to context. For example, as Gagliardone (2024) pointed out, the African Union Convention on Cyber Security and Personal Data Protection adopted in 2014 still lacks enough ratification from individual states to become active.[145] Developing states also face various barriers to meaningful participation in global AI governance initiatives.[146] Still, to decentre the focus from US-China binary cold war framing, future research may examine Global South actors' regional perspectives and strategies in AI development and governance.

### *Diversifying narratives beyond the "AI Cold War"*

Given the discussions concerning the "AI cold war" narrative outlined in this paper so far, scholars may also critically reflect on the affective power of the "cold war" framing itself and the possibilities of diversifying narratives. On the historic Cold War and the current New Cold War narratives, Tan (2023) cautions that "the start of a New Cold War" is "likely to continue spawning Cold War-style narratives that will repolarize the world, with either/or ways of thinking to mobilize for "us" and against "them", often through the demonization of "them" into an "enemy-other."[147] Bode et al. (2025) argue that the US side of the "tech war" should be understood as narrative practices by policymakers, analysts and academics entrenched in and supporting "the realist master narrative centred on great-power competition."[148] Chen et al. (2024) urge scholars to work "against the paranoid discursive climate that both US and Chinese governments impose" under the pervading "new cold war" framing, and recognise the power relations, positionality and materiality in academic knowledge production.[149] Specifically, they urge scholars to deliver methodological and theoretical insights involving "dynamic sociotechnical entwinements, across multiple scales, and via different positionalities" that challenge simplified understandings about China.[150] This subsection draws upon such discussions and offers some suggestions for diversifying narratives surrounding AI beyond the "cold war" framing.

Concerning AI, some observers see the future and its narrative as something to be shaped. Thompson & Bremmer (2018) argue for dropping the cold war rhetoric and replacing it with concrete Sino-US cooperation on AI rules and standards.[151] Bryson & Malikova (2021) look more at the AI policy-making process than its content, and advocate shifting from a rhetoric- and interests-led approach to an evidence-based approach:

> *"Given the urgent problems facing our planet as a whole, we invite all parties to reconsider the AI cold war rhetoric and to take a data-led approach to honing regulation to benefit resilient, diverse markets and societies globally"*[152]

Similarly, Su (2024) argues that the cold war rhetoric will lead to a future "further away from the globalised internet as it should be."[153] She proposes replacing it with a focus on "real solutions to underlying concerns" such as "a framework and global policy that oversees data transparency protecting it for all users regardless of what side of any potential digital cold war they come from."[154]

Marichal (2024) argues differently – that, rather than trying to move away from rhetoric and narratives, one should understand their power in politics and embrace them but ask "what other metaphors could we use?"[155] Drawing from Verity Harding's book, AI Needs You, he suggests using the metaphor of "the space race rather than the nuclear arms race", a domain in which "even if there was a competition over scientific advancement, there was also a great deal of collaboration" such as with the International Space Station.[156]

Recent moves by Beijing and Washington suggest some possibility of moving in this direction, even if only in a small, low-hanging fruit way. Two UN non-binding resolutions were adopted in 2024: one sponsored by the US with support of China on the need for global collaboration to ensure that AI is "safe, secure and trustworthy"; the other sponsored by China with the support of the US urging richer nations to close the widening gap with lower-income countries to ensure they benefit from AI.[157] The adoption of the UNESCO Recommendation on the Ethics of Artificial Intelligence in 2021 by 193 states, the first global normative framework for AI development and deployment, showed that multilateral negotiations accommodating different preferences to reach global agreements is possible.[158] Therefore, diversifying narratives beyond the "cold war" framing focus on great power competition may recognise some possible convergence of interests that could form the basis of US-China bilateral cooperation, and multilateral cooperation in AI governance.

As discussed earlier, since the cold war binary framing misrepresents the global distribution of AI capabilities, future research on third party players' AI development strategies drawing on local and regional perspectives is needed. In practice, this also means amplifying calls for the development of AI models and applications that suit diverse sociocultural contexts and development needs of the non-western world. While Big Tech firms have sought to improve their models by incorporating more languages in their training datasets, most major LLMs still underperform for non-English languages and cultural contexts, especially for low-resource languages, leading to the "LLM digital divide."[159] The crucial limitations include "a scarcity of labeled and unlabeled language data" and "poor quality data that is not sufficiently representative of the languages and their sociocultural contexts."[160] The data limitations are compounded by resource gaps such as limited Internet penetration, low digital literacy, lack of talent and computing resources in the Global South.[161]

While the hurdles are high, efforts by public and private sector players in Global South countries to develop local monolingual models and regional multilingual models are underway.[162] These models are often built upon various existing open-source models developed by US, Chinese or European companies like Meta, Google, Alibaba, and Mistral, and fine-tuned using data from local and regional languages. To overcome the data limitations, some teams have developed protocols to ethically collect data from native

speakers and redistribute revenue back for further development.[163] Some regional multilingual models, such as SEA-LION (Southeast Asian Languages In One Network) and AfriBERTa, benefit from technical collaboration with Global North firms and universities.[164] Diversifying narratives beyond the "cold war" framing may therefore recognise and promote the efforts of various Global South players to localise AI for their own linguistic and cultural nuances and development contexts.[165] In contrast to the prevailing cold war framing's singular focus on competition for technology leadership, diversified narratives may shift the focus from "scaling up" to "scaling right,"[166] emphasise the practical relevance and impact of AI for local communities, and promote South-South and North-South collaborations in co-developing AI solutions.[167]

Lastly, diversifying narratives beyond the "AI cold war" framing of great power competition may recognise the shared challenges and inequality associated with the global value chain of AI. For example, various forms of contestations surrounding labour in AI development have emerged across the US, China, and other Global South countries. Tech workers in both the US and Chinese AI industry have faced similar issues such as the precarious working conditions of those who perform "invisible labour" (e.g. data labelling, flagging content), omnipresent workplace surveillance enabled by AI, intense working culture with long hours requirements, and gender discrimination and sexual harassment.[168] New forms of grassroots resistance have also emerged. For example, in 2019 Chinese developers started a GitHub project named 996.ICU (meaning working long hours from 9AM to 9PM leads to ICU visits), to crowdsource and publicise information about companies' working conditions.[169] The project received support from developers outside of China. A group of US tech employees published an open letter urging GitHub and Microsoft (which owns GitHub) to make the project uncensored, arguing that "we have to come together across national boundaries to ensure just working conditions for everyone around the globe."[170] In Africa, AI annotators and content moderators have mobilised against US Big Tech contractors' exploitative labour practices, with support from local court ruling (in the case of Kenya) and international activist networks.[171] Diversifying narratives beyond the AI cold war can help draw our attention towards these forms of precarity and contestations in AI development that do not conform to the state-centric lens of power and prestige, and the emergent narratives and practices of international solidarity that may propel further efforts for harm reduction and ethical accountability.

## Conclusion

This narrative literature review critically explores the development and implications of the "AI cold war" narrative that feature prominently in discussions surrounding AI and international relations. It finds that the affirmative use of the AI cold war narrative in existing academic and policy literature is largely congruent with the securitisation of AI in political discourses, and broadly the balance of power perspective in understanding US-China relations resembling the neorealist power-based approach. The critique of the narrative in existing literature mostly focuses on the framing's characterisation of threat that may exaggerate Chinese capabilities, the vested interests of militarising Big Tech in pushing for the framing, and the negative consequences of reinforcing militarisation and racialised sentiments, impacts on research and ethics, international collaboration, and third countries' AI strategies. The binary focus on the US and China

as two AI superpowers vying for technology leadership also misrepresents the global distribution of AI capabilities, overlooking the roles of other major players such as the EU and AI developments in the rest of the world.

For future research, in addition to analysing the narratives and the implications for AI development, firm strategies, and relations between the US and China, scholars may examine AI strategies of major third-party economies like the EU and innovative middle powers like South Korea in the face of geopolitical tensions. While "technological sovereignty" is an often-used buzzword in third countries' AI policies, the reality is likely more complex, requiring in-depth research on how internal political economy and external security factors interact to influence technology policy development and implementation. As an increasing number of Global South countries are ramping up their AI development efforts, researchers may analyse unique local perspectives about security, economic and development interests and context-specific factors that may influence their national AI strategies and regionalisation efforts amidst shifting global geopolitics. Given the contestations and the limitations of the "cold war" framing outlined in this paper, researchers and practitioners may also reflect on the affective power of the narrative itself and explore other possible metaphors and narratives that can more fully capture the complexity of AI development beyond the state-centric binary power competition lens and the implications for international relations. These may include recognising the coexistence of technology competition and cooperation in AI governance, the efforts to localise AI development for non-western contexts and community interests, and the precarity and the contestations surrounding AI global value chains and emergent forms of international solidarity involving non-state actors.

For the broader debate in IR scholarship, this narrative review's findings echo the affirmations and the critiques surrounding the prevalent power-based neorealist framing of strategic competition and power transition.[172] Analytically, it heeds the call for a critical and reflective approach to explore narratives in IR scholarship.[173] The findings suggest that instead of accepting predominant framing and narratives like the "AI cold war" as is, scholars may probe and reflect upon how such narrative has been constructed, practised, and legitimised in policymaking and in scholarly knowledge production. This can provide the pathway for more grounded analytical work on the capabilities, strategies and influence of various state and non-state players in not just the US and China but also third-party economies. For practitioners, the findings also suggest the importance of diversifying narratives for emerging discussions on global AI governance.

For development scholars, this study's findings may also generate interests to contribute analysis of AI development needs, policies, and imaginaries that reorient our focus toward the Global South. Bareis & Katzenbach (2022)'s analysis of AI policy in the US, China, France and Germany, shows that "all establish AI as an inevitable and massively disrupting technological development by building on rhetorical devices such as a grand legacy and international competition", meanwhile their "respective AI imaginaries are remarkably different, reflecting the vast cultural, political, and economic differences of the countries."[174] As this review suggests, how Global South players' local and regional cultural, political and socioeconomic contexts influence the construction and the implementation of their local and regional AI strategies and imaginaries remain to be explored. As we reflect on the power of the narratives, we may also find new, potentially

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