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Superpowers and AGI: How U.S.-China Competition Could Be Shaped by the Emergence of Artificial General Intelligence

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The Big Idea

Artificial intelligence (AI) systems continue to progress at a steady pace. This trend has fed forecasts that artificial general intelligence (AGI)—generally defined as AI systems that can achieve human levels of performance on a wide variety of tasks—could emerge in the near to medium term.

Amid much discussion and debate regarding the technology’s development trajectory and potential implications, how AGI would affect geopolitical competition between the United States and China has received comparatively less rigorous attention.

Superpowers and AGI: How U.S.-China Competition Could Be Shaped by the Emergence of Artificial General Intelligence, by Jacob Stokes, aims to fill that gap. Instead of making a technological judgment about whether or when AGI will emerge, the paper stipulates a world where AGI is imminent or already exists. The paper then employs informed speculation rooted in the current contexts and histories of U.S.-China strategic competition, international relations, and global security.

The report starts by defining AGI and assessing the ways it could emerge. Next, the paper explains China’s vision for AI generally and situates Beijing’s approach to AGI in that broader context. The paper uses a series of four lenses, or ways to interpret what is happening in the country, to examine whether and

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to what degree China is pursuing AGI. Taken together, China’s approach to AGI might be best understood as a messy and still-developing mix of all the lenses. AGI is moving up the priority list of Beijing’s AI policy. But AGI is not the North Star for the AI community in China the way it is in Silicon Valley—at least not yet—and it might never be.

Takeaways

Either the United States or China successfully building AGI would not automatically convert to geopolitical dominance. Rather, the state with AGI would have to apply it to translate technological capability into wealth, power, and influence. AGI would need to be capable of carrying out specific valuable tasks and do so in ways that are cost-effective relative to other options. Sometimes that AGI capabilities-to-power conversion could prove unworkable.

This report offers a novel framework to explain the ways Washington or Beijing might gain or lose geopolitical power as AGI develops. It proposes five potential mechanisms through which AGI could affect U.S.-China strategic competition and the global balance of power: (1) boosted economic growth and productive capacity, (2) consolidated influence over the global information environment, (3) new military capabilities, (4) large-scale misalignment or loss of control, and (5) downstream political effects. The explanation of these mechanisms shows they could all function in complicated ways. Discussions of each consider how they might play out while also theorizing limits so as to inject some realism into a debate that often veers into the fantastical.

Assuming technological progress continues at its current pace or accelerates, the push toward AGI will shape U.S.-China geopolitical competition over the coming years and decades. The specific choices and risks that Washington and Beijing must contend with will vary as each country gets closer to AGI. This report examines those choices across four phases: both states are pursuing AGI, one state is on the cusp of

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AGI, one state possesses AGI while the other does not, and both states have AGI. Those phases might blur together, though, if AGI's emergence ends up being neither discrete nor observable, which would affect policymakers' calculus.

Recommendations

The race toward AGI and the technology's potential emergence could have major implications for U.S.-China competition and increase the risk of military conflict or disaster in multiple ways.

Strategic rivalry and the need for some level of U.S.-China coordination will exist in a state of constant tension. But policymakers will have to manage that tension instead of trying to resolve it by picking either unmanaged competition or unrealistic cooperation.

Policymakers in the United States should:

- Balance near- and long-term AI bets.
- Ensure U.S. resources and technology do not aid China's AI development.
- Create diplomatic channels with allies and China focused on AI and ensure AGI's potential emergence is on the agenda.
- Develop a technically sophisticated way to track inputs to AGI as well as key performance thresholds for frontier AI systems.
- Conduct a scenario exercise to test when and how the United States might intervene to stop China from developing AGI.
- Prepare to reverse engineer or steal AGI technology if China gets it first.
- Limit and counter the reach of authoritarian digital infrastructure.
- Provide AGI alternatives that are compatible with democracy and avoid unnecessary constraints on other countries' sovereign choices.

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- Build programs to cushion AGI's effects on society to prevent the deterioration of societal cohesion at home and abroad.

For more information or to arrange an interview with Jacob Stokes, please contact Charles Horn at chorn@cnas.org.

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