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## The Tech High Ground

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What It Will Take to Gain  
the Advantage Over China

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## What It Will Take to Gain the Advantage Over China

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**T**he countries that prevail in great-power rivalries are those that adapt. Athens and Sparta and their allies constantly innovated so their navies could outperform one another. During the Cold War, the United States and the Soviet Union spent nearly two decades engaged in a space race. Now, technology is the central front in U.S.-Chinese competition and in the broader contest to shape the world, and the United States must adapt again. This rivalry is playing out across frontier sectors including semiconductors, artificial intelligence, biotechnology, and clean energy. To prevail, Washington needs a clear definition of success and a clear and consistent strategy for how to achieve it.

For decades, U.S. policy toward China rested on a quiet but powerful assumption: Beijing was essentially running the same race as the United States, just a few steps behind. China was seen as a copycat—

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adept at imitation, lagging on innovation, and ultimately dependent on access to Western technology. The American lead was assumed to be durable, perhaps even self-sustaining.

That assumption has not been borne out. China has moved beyond simply chasing American innovation. It is pursuing a different theory of power: one that places production, scale, and control of critical inputs at the center of its national strategy. As the United States has focused more narrowly on maintaining its lead in innovation break-

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throughs, confident that these would cascade naturally into economic, military, and soft power, China has focused on the cascade—aiming to translate technological advances into applied capabilities across its economy and national security enterprise. In other words, while the United States has been running one race, China has been running

another. Although this shift unfolded gradually, its consequences are now impossible to ignore. In sector after sector, China has built or is building dominant positions in many of the foundational layers that underpin the modern economy.

Americans tend to see the competition as a race to a finish line—a contest to see which country reaches the next exciting innovation first. But that framing is misleading and counterproductive. This contest has no end date. Success will not manifest as a single moment of triumph with one side declaring victory. Nor will it come from running fast in a single lane. Instead, this competition will extend indefinitely, across a wide variety of sectors. It is no longer enough to be the first to discover new advancements if others are faster at deploying them, or to lead in design if the inputs and capacity vital to production sit beyond the control of the United States or its allies. Washington’s goal must be to establish all these forms of advantage at once.

The point of this contest is not simply to “beat” China. If the United States pulls ahead of China on some relative metric but fails to deliver on making its people more secure or creating greater opportunity for them, then it will have failed—full stop. Success will require fostering a techno-industrial base that drives continuous innovation, rapidly adapting the U.S. military to deter major conflicts, and spreading American digital infrastructure and standards, all while

remaining open to cooperation with China over shared interests to prevent a race to the bottom that leaves the whole world worse off.

Securing these objectives must be the central task of American statecraft in the twenty-first century. Doing so will require changes in mindset that transcend partisan boundaries and persist across multiple administrations. But locking in those changes now is urgent, because technological power is translating directly and rapidly into geopolitical power to a degree the world hasn't seen in years. And for the first time in a long time, the United States is facing a genuine peer competitor.

#### I DID IT MY WAY

Becoming a leader in global technology has become a central organizing principle of Chinese state power. Beijing's industrial policy is shaped around this goal, and its strategy is designed for the long term. Chinese leaders are seeking to make the rest of the world dependent on China while making China independent from everyone else. And they have assessed that to achieve this, China does not need to lead in every frontier domain. Instead, it needs to control nodes of leverage—that is, the inputs and systems that advanced economies and militaries depend on to function. Beijing has already captured several of these nodes, including processed rare earths, precursor ingredients for pharmaceuticals, and batteries, and it is striving to capture others, such as robotics.

China has also gotten much better at technological breakthroughs. After capturing the battery supply chain, for example, it has been able to race ahead in battery innovation, now producing more than 70 percent of the world's lithium-ion batteries and controlling roughly three-quarters of global battery cell manufacturing capacity. It is now trying to repeat this pattern in the biotechnology industry.

China's execution of this sweeping strategy is made possible by its political system. Unlike Washington, Beijing has the centralized authority to direct vast national resources toward national objectives with speed and coordination. State banks, industrial policy, procurement, and regulation all move swiftly in concert. There is no meaningful separation between the military and civilian realms, so civilian technological breakthroughs flow directly into the national security enterprise. And the state is unencumbered by free-market constraints, which means it can mobilize inputs at a staggering scale

and subsidize intense competition, in which most recipient firms fail but a few champions emerge that can dominate a global industry. Short-term inefficiency and massive capital misallocation are tolerated in service of long-term gains; there are no voters asking their elected representatives whether their tax dollars could be put to better use.

The United States has long dismissed the Chinese system as too rigid for frontier innovation. And there's no question that the American system—democratic and capitalist, with a limited government, world-class universities, strong intellectual property protections, and a free-market system in which winners and losers emerge on their own—has produced a dazzling lineup of transformative breakthroughs. The United States cannot replicate China's approach, nor should it want to. But Americans must find their own way to compete on this broader playing field—not only innovating but also producing the advanced technology and controlling the vital inputs that will power their economy and defense industrial base.

#### SYSTEM UPDATE

An effective American technology strategy would aim to establish and protect four areas of high ground. A high ground provides an enduring structural advantage. It delivers concrete, measurable results that connect policy to the real lives of the American people. First, the United States must revitalize its techno-industrial base, not only to preserve its position at the cutting edge of innovation but also to generate enough production capacity to produce advanced technologies at scale, across diversified and resilient supply chains and in cooperation with allies and partners. The U.S. military, for its part, must focus on rapid innovation and adaptation, which will be critical for deterring aggression in multiple theaters and, in particular, for maintaining peace and stability across the Taiwan Strait. Washington must also build a democratic digital order that makes American technology the prevailing model, protected by high safety standards, financed transparently, and in respect of human rights and data privacy. Finally, this approach must establish a floor of stability in the U.S.-Chinese relationship and create meaningful cooperation between the two countries to prevent a race to the bottom that hurts everyone.

These high grounds are mutually reinforcing. A revitalized techno-industrial base would support military power and economic

resilience. Military innovation that deters a war over Taiwan would protect American industry and preserve a dynamic global economy. A global digital order that enshrines democratic values rather than authoritarian ones would create an economy in which people of all backgrounds and beliefs can participate freely. And so on.

Three families of technology will be essential to this strategy. The first is computing, which includes semiconductors, quantum information systems, and, especially important, artificial intelligence. The second is biotechnology and biomanufacturing, from drug discovery to the synthetic production of construction materials. The third is clean energy, especially the “electric stack” of batteries, motors, chips, and power electronics. Advancements in these three groups will underpin progress in the others: more computing power and clean energy will improve AI capabilities, and more advanced biotechnology and a more powerful electric stack will translate that progress into scientific and industrial gains.

If the United States succeeds in claiming and holding these areas of high ground, it can create durable leverage. But if it fails to do so, it will risk not only falling behind in innovation but also losing a critical degree of freedom. American economic dynamism and military deterrence will erode as the country’s industrial strength hollows out and pressure from adversaries weakens Washington’s ability to control supply chains for key military technologies. As fear of retaliation builds, the United States will find it more difficult to impose protective countermeasures against foreign coercion or unfair practices—by China or anyone else. And as the United States’ global influence diminishes, so will its ability to deliver opportunity and security to Americans.

#### TECH SUPPORT

In recent decades, an assumption took hold in the United States that technological design and research were inherent American strengths, while manufacturing was a cost center that could safely migrate offshore. But it has become increasingly clear that innovation cannot be severed from production, because when manufacturing leaves, process engineering know-how follows. Over time, that knowledge outflow erodes the feedback loops that sustain technological leadership. History has shown the value of investing in a diverse and resilient manufacturing base. The economists Daron Acemoglu and Simon

Johnson have chronicled how, during the Industrial Revolution, people with backgrounds in the trades became the innovative engineers who pushed inventions forward. A country whose people stop building and tinkering with technologies will lose its capacity to advance those technologies. And a country that allows its general industrial base to atrophy—surrendering institutional knowledge, control over supply chains, and an overall depth and diversity of production—will have a harder time building strength in specific crucial sectors. The United States cannot allow that to happen.

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To revitalize the United States' techno-industrial base, Washington must pursue a national strategy with a two-track approach: first, promoting innovation and advanced manufacturing, and second, protecting those advances from unfair competition and malign use. Promoting innovation demands that the United States better leverage its

human, financial, and strategic capital. That starts with immigration policies that make it easier for the best scientific and engineering talent to come to the United States—and then stay. A high concentration of engineers in key areas such as AI are from other countries, but it is clearly in the U.S. interest for those highly skilled workers to build their careers in the United States. The U.S. government should also supercharge federal funding for R & D, restoring the historic high levels of the 1960s; a major injection of basic research funding would provide a greater strategic return on investment than any other federal expenditure. And investing in clean energy projects would help provide the necessary foundation for plentiful electric power, which would support technologies such as AI without leading to an explosion in electricity prices and harmful environmental consequences.

Legislative milestones such as the 2022 CHIPS and Science Act and the 2022 Inflation Reduction Act, which focused on building capacity in the U.S. semiconductor and clean energy sectors, demonstrate how government action can promote manufacturing. But a more comprehensive and integrated industrial strategy is needed. One model is Operation Warp Speed, the government initiative launched by the first Trump administration during the COVID-19 pandemic to develop and deploy a vaccine as quickly as possible.

The operation's success demonstrates that the U.S. government can coordinate risk, demand, and supply quickly when the objective is clear and has political support. The United States should launch a similar mobilization to develop domestic production of frontier technologies such as advanced batteries and drones and to deploy more advanced robotics and AI in U.S. factories. This approach will especially help small and midsize manufacturers that lack the capital and in-house expertise to modernize and scale on their own. Any successful policy must also focus on helping workers move into high-skill roles rather than treating them as expendable.

In practice, this means deploying a coordinated toolkit to spur private investment in sectors that are strategically important but not yet attracting the capital they need to grow. Measures should include boosting targeted public investment, setting price floors, leveraging government purchasing power, and creating incentives for companies to sign long-term purchase contracts with domestic producers, as well as advancing reforms in the permitting process for production and construction, which can currently drag on for years, if not decades. The steps the second Trump administration has taken to invest more in domestic processing capacity for heavy rare earths and magnets, building on the Biden administration's initial moves in this direction, are good examples of putting this toolkit to work.

A successful industrial strategy also depends on a coherent answer to a simple question: Which industries are strategically important? This is a matter of judgment and discretion. The Biden administration viewed the auto industry as strategic because it has extensive industrial capacity that can be redirected in a crisis, such as during the push to build ventilators during the COVID-19 pandemic, and because it is a major customer for other industries, from steel and aluminum to glass and electronics, which means that when the auto industry is thriving, the ripple effects are felt across a number of industries. Other administrations might make different determinations as to what is on the list, but to ensure rigor and clarity, they should establish specific criteria that explain those choices. The scholar Chris Miller has proposed that these criteria include sectors that have a clear national security nexus, are prone to concentration and monopolization, cannot be readily reconstituted in a crisis, and have major positive effects on their industrial ecosystem.

Some argue that in at least one frontier sector—clean energy—the United States should pull back from competing and accept that China will become the world’s foundry for speeding the energy transition. According to this line of thought, if China wants to subsidize cheap solar panels, electric vehicles, and batteries for the rest of the world, the United States should let it happen; after all, Americans could then buy cheap products from China. But the world is only a fraction of the way through the clean energy transition. Saying “game over” now would be wildly premature. And ignoring clean energy now would lead to a new form of U.S. energy dependence just as the United States has shed its old one on foreign oil. Electric vehicles and the supply chains that allow for their production are examples of exactly the kind of clean energy industries that American workers should be building. At the same time, Washington has to apply industrial strategy to the biotech industry, to reverse the offshoring of contract research organizations (which help biotech companies run trials and conduct research) to China.

These investments must also be made with resilience in mind. China has already demonstrated its willingness to weaponize dependencies by cutting off processed rare earths and magnets in response to trade disputes. There are those who reasonably ask whether full supply chain resilience is actually possible; even as Washington addresses some vulnerabilities, others remain, and still others might emerge. It’s true that complete, permanent resilience in all critical goods is likely out of reach. But it’s still better to have fewer areas of vulnerability: in gambling terms, it reduces the number of high cards in an opponent’s hand, which can matter in a multistage game. To start, Washington should focus on high-priority inputs—those in which restrictions by China would have broad and immediate effects on the American economy and those in which remediation is operationally challenging and slow to materialize. This was the thinking that led the Biden administration in 2022 to use a broad set of authorities under the Defense Production Act to secure a reliable and sustainable supply of the materials necessary for large-capacity batteries: lithium, cobalt, graphite, nickel, and manganese.

The goal of this strategy should not be self-sufficiency—it should be diversification. This will require working with allies and partners. Kurt Campbell and Rush Doshi, who both served in the Biden administration, have written in these pages about the pursuit

of “allied scale”—an approach in which the United States and its partners would coordinate their industrial strategies so that investments made by one country would reinforce collective capacity. If the United States, Europe, and other partners aligned on “de-risking” from China and harmonized their technical standards in key industries, they could build a thriving production ecosystem that no single country could sustain alone. This was the Biden administration’s goal when it coordinated policies with the European Union, the G-7, and other key partners. Unfortunately, the Trump administration has undermined allied alignment. Future administrations must undertake a determined diplomatic effort, likely over many years, to regain credibility with allies.

Finally, efforts to promote innovation must focus not only on invention and production but also on diffusion—making sure those inventions are widely used. As the political scientist Jeffrey Ding has shown, increasing total factor productivity—that is, the amount of output produced from a set number of inputs—starts with building, but it doesn’t end there. Sustained success in technology competition requires that inventions be adopted across the economy and national security enterprise. During the Cold War, that is where the Soviet Union failed and the United States prevailed.

#### SMALL YARD, HIGH FENCE

Promoting innovation and manufacturing, although vital, is not sufficient to build a resilient techno-industrial base. A new U.S. strategy must also include active mechanisms to protect that base. Take the unfair trade practice known as “dumping.” Across many sectors, China is selling its excess production in global markets at below-market prices, forcing competing manufacturers out of business while Chinese firms remain dominant. To push back against such tactics, a modern industrial strategy must include tariffs that target Chinese goods in strategic sectors such as electric vehicles and semiconductors but not the broader Chinese economy. Many other countries—including some, such as Brazil, that are not always in step with U.S. interests—are concerned about Chinese overcapacity and are pursuing their own countermeasures.

The United States must also protect its most advanced technologies from potential misuse. At the heart of this agenda are advanced semiconductors, which are critical for expanding the computing

power needed for a sustainable lead in AI, which would, in turn, accelerate progress across virtually every other domain of science and military power. Full decoupling with China would be unwise; the flow of goods in nonsensitive areas such as agriculture and basic household products has benefited American families. But relaxing export controls on advanced computing amounts to voluntarily surrendering one of the most decisive advantages the United States and its allies possess today. Policymakers should not be deterred by those who suggest that existing U.S. export controls have backfired by driving China to build its own domestic semiconductor supply chain. Chinese leaders had already declared this to be a top national priority and poured a massive amount of attention and public resources into the country's domestic chip sector before those controls were contemplated.

The best approach is the one I have described as “small yard, high fence.” This means being selective in what the United States controls (a small yard), focusing only on the most sensitive technologies that will define national security and strategic competition, and then securing this small yard with tight restrictions (a high fence). This is how the Biden administration handled chip controls. Its export controls on exquisite biotechnology equipment and restrictions on U.S. investments in China's production of sensitive technologies, such as quantum computing, are further examples of how this approach works in practice.

Finally, any meaningful protection agenda must safeguard American citizens' and companies' sensitive data and critical infrastructure from infiltration by Chinese state-sponsored cyber-actors. This threat is real; such actors have previously pre-positioned malware on American IT networks. To better protect Americans from hostile intrusions, Washington must distinguish threat levels for different kinds of technologies—such as cranes, hobbyist drones, and household appliances—that rely on or are linked to Chinese technology in ways that make them vulnerable to foreign manipulation or surveillance.

#### LARGE LANGUAGE MILITARY

Another key dimension of an effective U.S. technology strategy would be to enhance military innovation aimed at deterring major conflict. A war over Taiwan would trigger a global economic shock of historic proportions. Washington's top military priority must be to deter such

a war, and its success will depend in large part on whether the U.S. military adopts new technologies and shares them with partners.

The old maxim that quantity has a quality of its own holds true for technological breakthroughs in software and hardware. Cheap and abundant aerial drones, uncrewed surface vehicles, and distributed sensors will be crucial to imposing prohibitive costs on an adversary, even as high-end capabilities, such as long-range precision strikes, and legacy systems, such as those for clearing mines, remain vital. So will new operational concepts and updated frameworks for command and control. The military cannot fight the wars of the future with battle plans from the past. The Biden administration's National Defense Strategy, for example, established "integrated deterrence" to encompass the many domains and platforms that these new technologies offer. This kind of diffusion will ensure that U.S. and partner forces retain the ability to sense, maneuver, and strike even under heavy missile attack or cyber-disruption.

Artificial intelligence is central to these shifts. AI-enabled systems already play a growing role in optimizing logistics, analyzing intelligence, detecting cyber-vulnerabilities, and identifying military targets. Over time, these AI systems will increasingly shape how militaries train, plan, and fight. China, for its part, is already integrating AI capabilities to bypass traditional U.S. advantages such as battlefield awareness and logistics optimization. Washington must up its game. Deploying AI across the U.S. national security enterprise will require cultural as well as organizational change, including new approaches to acquisition and procurement and protocols around joint human-machine teams.

It is vital that these policy frameworks prioritize the responsible adoption of AI by the U.S. national security community. The debate over the Pentagon's ability to use large language models to surveil U.S. citizens or to build lethal autonomous weapons has revealed that norms for the military use of AI have not caught up with its capabilities. The United States must hammer out a consensus grounded in law and values to ensure that AI is used both ethically and effectively. Doing so will make competing in military innovation more challenging, since rivals are unlikely to be bound by the same principles and guardrails as the United States. But it is nonetheless essential.

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**Competition is  
not inconsistent  
with cooperation.**

Effective military innovation cannot rest on U.S. capabilities alone. It must be built on networked defense, integrating advanced technologies across allied militaries in ways that multiply rather than merely aggregate power. Partnerships such as AUKUS, a security arrangement among Australia, the United Kingdom, and the United States, illustrate what is possible. AUKUS is generally perceived as a narrow deal involving nuclear submarines, but it is better understood as a technology accelerator—a mechanism for effective technology transfer and capability deployment in areas such as GPS-free quantum navigation and undersea warfare. NATO, for its part, has launched its own defense innovation accelerator.

#### BETTER SAFE THAN SORRY

After World War II, Washington developed an architecture for international commerce, law, and standards that fostered security and economic conditions for shared growth and prosperity. It succeeded precisely because the rest of the world chose to subscribe to and build on that architecture. Likewise, if the United States is to succeed in today's technology competition, it cannot only build the most advanced AI model. It must also get global buy-in for its digital infrastructure.

Beijing is already exporting a Chinese-made version of this digital infrastructure across much of the developing world, often bundling telecommunications hardware, cloud services, surveillance systems, payment platforms, and low-cost financing for those offerings. These exports are not neutral; they prioritize state control, censorship, and surveillance by default. In effect, Beijing is exporting an operating system for authoritarianism. The United States must offer a better alternative.

If the global digital economy ran on a U.S. tech stack—cloud architecture, chip designs, safety protocols, and technical standards—the United States could secure a future in which democratic values were baked into the code of the twenty-first century. If the United States were to cede this ground, authoritarian states could own the backbone of global commerce and communication, prioritizing state control over the well-being of citizens, with implications for backdoor surveillance, data extraction, propaganda, and coercion.

Winning this diffusion contest requires commercial diplomacy at scale. The U.S. government should partner with U.S. companies to lower barriers to access to American technology around the world.

Offering financing for U.S. technology, technical assistance, and partnerships with U.S. firms could help increase adoption, particularly in regions where China already offers subsidized and ready-to-use tech bundles.

In this contest, standards and governance matter just as much as hardware. Standards, although often obscure and underappreciated, are the grammar of global technology, determining how systems interact, data are governed, and risks are managed. They are written by a wide array of international bodies that exercise enormous influence over the future tech landscape, extending from the rules of the road for AI safety and data privacy to biotechnology and biomanufacturing. The United States needs to lead in these bodies rather than step away from them, as the current administration seems to be doing.

In particular, the United States should prioritize developing standard evaluations of AI systems—testing, before their release, what makes them work and whether and how they might fail in real-world use. Washington and like-minded partners should back safeguards for synthetic biology, too, given its increasing convergence with AI, including common screening protocols, redlines around particularly dangerous applications, and incident-reporting norms when experiments or systems fail in unexpected ways.

Those who argue that a focus on risk and safety holds the United States back in the tech competition with China have it backward. Ensuring security and trustworthiness will not slow the United States and its allies down. It will ultimately enable them to move faster. Uncertainty breeds caution: when policymakers and industry lack confidence about safety and reliability, they are more reluctant to adopt new capabilities. The United States should be stepping up, rather than stepping back, on coordinating and shaping global efforts toward AI security and safety.

#### EASY DOES IT

As it aims to fortify these other areas of high ground, American technology strategy must create space for stability and cooperation in the U.S.-Chinese relationship. This must be a core pillar of the approach, not an afterthought. Neither country is going anywhere, and each will have to learn to live alongside the other. The competition will end in catastrophe for everyone if the two great powers do not work together to avoid the worst risks or if they enter a destabilizing downward spiral.

There is no doubt that China and the United States will continue pushing the limits of AI, but competition without regard for risks could lead to dangerous proliferation or loss of control. This danger drove the Biden administration to secure Beijing's agreement, in a 2024 meeting between U.S. President Joe Biden and Chinese leader Xi Jinping, to maintain human control over the decision to use nuclear weapons.

Likewise, as the two countries seek to reduce dependencies for critical inputs, they must avoid tit-for-tat retaliation over trade restrictions, which could generate more harm than good. Competition in clean energy technologies and biotechnologies should not obscure cooperation in addressing the climate crisis or working toward medical advancements such as treatments for cancer and other diseases. And enhancing military capabilities could raise the likelihood of war if not accompanied by deep and sustained communication between Beijing and Washington, especially regarding the Taiwan Strait.

Competition is not inconsistent with cooperation. By increasing its technological capacity, the United States will have more leverage to secure agreements on risk management. But there is no mechanical formula or algorithm for how to find the right balance. Doing so will require some degree of trial and error and some amount of friction. Still, the renewal of the U.S.-China Science and Technology Cooperation Agreement in 2024, which promotes shared standards on issues such as intellectual property protections and reciprocal access to certain databases and scientific field sites, shows that ample room remains for the two countries to collaborate on scientific endeavors that benefit humanity even as they pursue competitive policies. What is essential is that American policymakers do not go too far in either direction, even if doing so seems at times to be the easier path.

#### IT'S A MARATHON, NOT A SPRINT

Once the United States has clearly defined its strategy, it must execute. Doing that well means facing the widening gap between the country's strategic ambitions and its ability to deliver. Closing that gap in technology and manufacturing means addressing the incentives that drive U.S. capital markets. Wall Street firms privilege investments in software, excited by the high returns its scalability promises. They devote far less attention and money to

capital-intensive, lower-margin industrial production. A strategy that relies on the invisible hand of the market to allocate capital to strategic hardware manufacturing will fail if that hand is only chasing the next software unicorn. The U.S. government must work with the private sector to overcome this misalignment, using public policy tools such as tax credits, loan guarantees, and risk insurance to make less attractive investments financially viable for private capital. It must also pair the deployment of advanced machinery with significant investments in training, mobility, and wage growth. This is critical not only for U.S. competitiveness but also for American workers, who understandably perceive AI, automation, and robotics more as threats to their jobs than as tools that could make those jobs safer, more interesting, and better paid.

The other half of the execution challenge is government bureaucracy. The United States has built a system that prioritizes process over outcomes, with permitting requirements that can delay new construction by a decade, procurement regulations that strangle innovative defense startups, and a funding gridlock that starves scientific agencies. Too many people possess the power to say no. Too few are empowered to say yes.

Statecraft means little if it does not serve the material well-being of the working and middle classes. A targeted, long-term strategy to compete with China that prioritizes techno-industrial sovereignty, deterrence through military innovation, and democratic digital standards while preventing a race to the bottom would create good jobs and turbocharge investment in the public interest. It would also harness military spending for preventing wars, not starting them; absorb the shock of the coming technological disruption; and manage the risks posed by great-power competition. And it would protect Americans' privacy, civil liberties, and way of life. There is no party or faction whose goals are not on this agenda.

This work will take decades, not years. The United States must seek more than the short-lived prize of being first to discover new breakthroughs. Instead, it must work to capture these areas of high ground by aligning capital with strategy, empowering its institutions to act decisively, and building with the urgency of the post-World War II era and the agility of the digital age. This is a defining national project of our time and one the American people are more than equipped to achieve. 🌐