

FOREIGN POLICY RESEARCH INSTITUTE

OBSCURITY BY DESIGN

COMPETING PRIORITIES FOR AMERICA'S CHINA POLICY

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March 2025

About the Author

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Tanner Greer is a Non-Resident Fellow with the FPRI Asia Program as well as the Deputy Director of the Open Source Observatory, a project of the Council on Foreign Relations that investigates Chinese politics by identifying, translating, and annotating Chinese documents and policy debates of strategic importance. Previous to directing the Observatory, Mr. Greer worked as a journalist and essayist. His columns on Chinese affairs, international relations, and world history have been published in outlets such as *The New York Times*, *Foreign Affairs*, and *Foreign Policy*, as well as on his personal blog, *The Scholar's Stage*. He earned a BA in history and politics from Brigham Young University-Hawaii in 2015.

Asia Program

The trajectory of Asia over the coming decades will likely determine the health, safety, and prosperity of the world. No region is more dynamic nor holds as much promise and potential as Asia. It is home to 48 countries and more than 4.5 billion people. Annual trade passing through the South China Sea accounts for more than 60 percent of global maritime trade and more than 21 percent of total global trade. Five of the top ten wealthiest economies are Asian countries. Over 90 percent of the world's most advanced semiconductors are manufactured in Asia. However, with recent tensions around the Himalayas, South China Sea, and the Taiwan Strait, there is a lot of risk for volatility.

The guiding principle at the Foreign Policy Research Institute is that “a nation must think before it acts.” The Asia Program is committed to providing thoughtful analysis as the region faces mounting threats, challenges, and opportunities. Our cohort of experts produce timely examinations for the various issues of the day as well as in-depth research investigations through our many reports.

INTRODUCTION

Few notes of concord survive contact with Donald Trump. Trump's election in 2016 upended settled assumptions; one by one he knocked down the pillars of consensus and convention that held up decades of American diplomacy. The strongest and most consequential of these pillars concerned China. For more than forty years, American diplomats and statesmen worked to integrate China into an American-led economic order. By doing so, they hoped to align Beijing's behavior (and, if lucky, the entire Chinese political regime) with liberal norms. Their hopes proved vain. China did not moderate or liberalize. The new president, rejecting both the means and ends of engagement, pushed for a less cataleptic strategy.

That was five years ago. Those who see Trump as a champion of the new hawkish "bipartisan consensus on China" have been nonplussed by the first moves of his second administration. Trump invited Xi Jinping—but no other foreign leader—to attend his swearing-in. One of his first acts as president was an executive stay of the TikTok ban. Trump publicly browbeat a dozen countries with threats and blandishments in the week that followed—but not the People's Republic of China. Contrary to expectation, Trump's inaugural address barely glanced on China. It does not outline, or even hint at, what Trump's approach to America's greatest challenger might be.

This obscurity is by design. Trump sees no advantage in giving advance notice. Quite the opposite: he clearly believes

that the more inscrutable and erratic he seems, the better off the United States will be. This attitude was expressed neatly when the editorial board of the Wall Street Journal asked Trump about the approach he would take toward Taiwan if elected president. Trump replied that the Chinese would not dare attack Taiwan under his watch. After all, "[Xi Jinping] knows that I am f—ing crazy." Like Richard Nixon before him, Trump is ready to play the lunatic.¹

If this is one reason Trump's campaign never published or endorsed any detailed policy proposals regarding China, there are others. As one member of Trump's transition team puts it, "Trump is a pragmatist not an ideologue. He does not like tying his hands. He prefers to have strong personalities underneath him with conflicting views. He wants them to fight it out. He wants to pick the winner of each battle." If this risks strategic incoherence, then so be it: "If you want to see what an ideologically unified administration looks like, look back at Bush and Cheney. That is the sort of disaster we want to avoid."²

This leadership style should be considered by any analyst who forecasts the new administration's future. Trump positions himself as the kingmaker among competing centers of power. He encourages a certain level of disagreement in the ranks. This report provides a framework for thinking about these disagreements—especially in regard to the United States' relationship with China.

ANALYTICAL APPROACH

Since Trump's 2020 defeat, Republicans have understood that the contours of their party's China policy were not frozen in place. The GOP is a party in transition. It is led by a man who gathers blocs otherwise at odds into one large tent. Which ideas and interests should guide their joint enterprise are not (and likely will never be) settled. The best each side can do is lay out their case.

The last four years have seen many Trumpists lay out their cases. Via Twitter thread, essay, roundtable, conference panel, and podcast, their debates see-saw; at each turn, scholars, pundits, politicians, and former officials have unveiled their designs for American relations with China. This report draws on these public discussions to typologize the main positions in these debates and examine the assumptions underlying them. To supplement the public discussions more than thirty off-the-record interviews were conducted with congressional aides, think tankers, former Trump officials, Trump transition figures, and individuals nominated for positions in the second administration. The subjects of these interviews range from cabinet-level officials to the research assistants who are actually responsible for getting things done in Washington.

Drawing on both these private interviews and the public discussions of China policy, this report outlines the fundamental divides that have separated the various camps of argument. These camps are intellectual constructs. Though some arguments are strongly associated with this or that specific individual, the

"schools of thought" outlined are not organized coalitions or factions. Many thinkers are located squarely at the intersection of different schools. Likewise, Republican politicians—including Trump himself—often flit between positions, lending rhetorical support to different stances as the situation demands. This is one reason why so many Trump supporters felt betrayed at least once during Trump's first administration: no man's vision of Trumpism is endorsed by Trump himself. Trump's coalition is invariably larger and more varied than his supporters wish.

**With Donald Trump in power,
present strength does not
preclude future weakness.
Those who lose today may win
tomorrow.**

It is likely that each of the eight schools of thought identified here will have some influence on this administration; the strength of each's influence will wax and wane as events roll forth. Individuals who champion each of the eight schools are already present in the new administration. Some of these schools have greater strength than others. But in Trumpworld, no win is permanent. **Over the course of his first administration, Donald Trump barreled through six Secretaries or acting secretaries of defense, five White House communication directors, four national security advisors, and four White House chiefs of staff.** With Donald Trump in power, present strength does not preclude future weakness. Those who lose today may win tomorrow.



US Secretary of State Marco Rubio, Japanese Foreign Minister Iwata Takeshi, and Republic of Korea Foreign Minister Cho Tae-yul in Munich, Germany, February 15, 2025. (Flickr | US Department of State)

This report thus lays out all of the Republican schools of thought on China policy, giving them approximately equal treatment. The purpose is not to take sides in their debates. Instead, it attempts to steelman each case and outline the deeper assumptions each is built upon. The hope is that unearthing these assumptions may prove useful both for the officials tasked with navigating these debates and for the pundits and journalists who will cover them.

POINTS OF CONSENSUS

Amid these debates, one finds several points of consensus. The disputing intellectuals, wonks, and politicians all agree that China is the most significant foreign policy problem the United States now faces. They describe China as a challenge that must be met in many dimensions: military, economic,

and technological (some would add “ideological” to this list, but that is a point of debate, not consensus). Trumpists agree that the US armed forces are poorly structured and lack the resources needed to counter the military challenge posed by the People’s Liberation Army (PLA). They agree that America’s commercial and financial relationship with China underwrote the rise of a powerful rival while undermining America’s own industrial base. They believe that China has taken advantage of the traditional American commitment to globalization and free markets, and that doubling down on this commitment is foolish. To level the playing field, some mix of tariffs, export controls, capital controls, and industrial policy is necessary. They agree that the Biden administration’s China policy—while an improvement on that of the Obama administration—had nonetheless been feckless. They believe that the Biden administration articulated geopolitical goals that it had not resourced, cared too much about perceptions of amity and too

little about perceptions of strength, and had not sold the American people on its foreign policy priorities.

As Alex Wong, principal deputy national security advisor for the new administration, observed last year:

I could present you with multiple articles that call for the United States to bolster military spending, increase allied defense cooperation, implement harder technological and investment strictures, build supply chain resiliency, neutralize Chinese influence operations, and cast a light on the depredations of the [Chinese Communist Party's] authoritarian and genocidal rule. You would be hard pressed to identify which articles support what general vision for the US-China endgame.³

But if those responsible for shaping China policy agree on many of the tactical maneuvers and strategic expedients that the United States must adopt, there are often fundamental disagreements about the purpose of these actions. The official searching for a tool to reshape distorted trade balances might smile on tariffs—but so might the official aiming to protect a strategic industry, the official seeking to weaken the legitimacy of the Chinese government, or the official looking for additional leverage in otherwise unrelated negotiations. These aims cannot all be reconciled. Circumstances will force the administration to prioritize some over others. In that moment of decision, “general visions” will begin to matter.

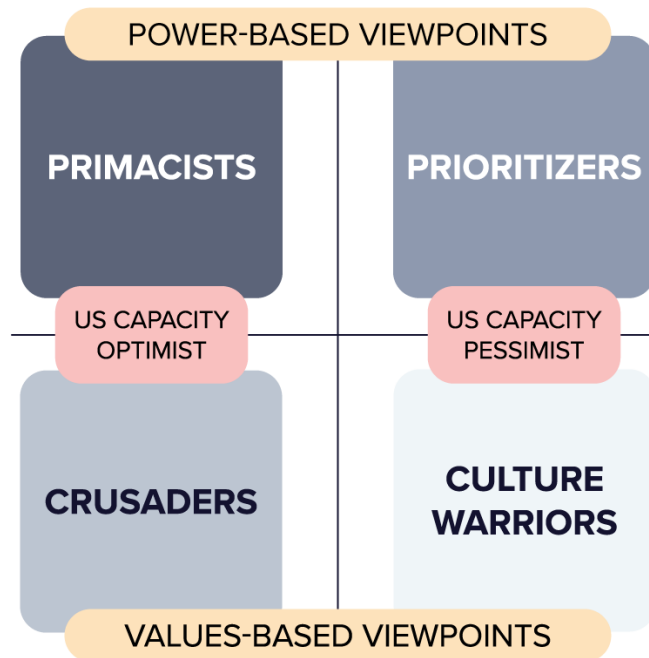
The debates Trumpists have over the general vision of China policy can largely be sifted into two buckets: economics and geopolitics. In theory, one’s position

on the CHIPS Act or currency devaluation might be tied to one’s position on military aid to Taiwan. In practice, this is not so. The economic and geopolitical debates occur on different planes. It was not unusual for individuals with an economic portfolio to say things like, “Obviously I care about the military balance, but I do not have the time to think in depth about it—I export all of my thinking on that to Bridge Colby.”⁴ Those with a national security background, for their part, were just as likely to describe problems of currency, investment, and trade as problems beyond their paygrade.⁵

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Elected politicians must work in both modes. It is common for two Republican politicians to be closely allied in the economic sphere but not in the geopolitical sphere—or vice versa. For example, as senators, Marco Rubio and JD Vance were close allies on the economic front. Both senators were deeply committed to reinvigorating American industrial policy. Their staffs worked together closely here. There are few meaningful distinctions between the economic strategy each office endorsed. In contrast, the two senators’ takes on the geopolitical problem posed by China are more difficult to reconcile. It is not easy to imagine JD Vance sponsoring either the Hong Kong Human Rights and

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Democracy Act or the Uyghur Forced Labor Prevention Act, bills that Rubio proudly presents as “the greatest turning point in US-China relations in decades.”⁶

The need to separate the economic and geopolitical angles of the China challenge will be revisited later in this report. For now, each will be discussed separately, looking at the two debates as their own participants do.

THE GEOPOLITICAL DEBATE

One way to represent the core principles at play in the geopolitical debate is with a classic two-by-two matrix.

Optimism vs. Pessimism

On the x-axis is the single most important

difference between the various geopolitical schools of thought found in Trumpworld: assessments of American power and state capacity. Where one falls in many of the most prominent debates—such as “Can the United States afford to support both Ukraine and Taiwan?” or “Should the ultimate goal of our China policy be victory over the Communist Party of China, or should it be détente?”—has less to do with one’s assessment of China and more to do with one’s assessment of the United States. What resources can be mustered for competition with China? Just how large are stores of money, talent, and political will?

Those on the right quadrants of my diagram provide pessimistic answers to these questions. They buttress their case with measurables: steel produced, ships at sea, interest paid on the federal deficit, or the percentage of an ally’s gross



A December 2024 event hosted by the Korean American Relations Seminar, one of twelve student-led cultural and professional clubs disbanded in 2025 at the US military academy at West Point. (Facebook | West Point Korean American Relations Seminar - KARS)

domestic product spent on defense. Against these numbers are fearsome statistics of Chinese industrial capacity and PLA power. Changes in technology, which favor shore-based precision munitions at the expense of more costly planes and ships, further erode the American position. This is a new and uncomfortable circumstance. The last time the United States waged war without overwhelming material superiority was in 1812.⁷

To these material realities, many skeptics of American power point to cultural or institutional obstacles that suggest the US military is less lethal than it once was. Tallied here are the failures of the US military in Afghanistan (and especially the botched 2021 withdrawal), the numerous fires and crashes that have marked the US Navy's surface fleet, and the diversity, equity, and inclusion (DEI) initiatives defended by the general brass in the Biden era. As the incoming director of policy planning at the State

Department puts it: "The brass is woke and incompetent, and senior officers and civilian leaders tolerate and even encourage wokeness and incompetence; or to say better, they excuse and deny incompetence in furtherance of wokeness."⁸

To the Trumpists who see American power through this frame, there is only one logical response: the United States must limit its ambitions. This means either radically reprioritizing defense commitments to focus on China or retreating from conflict with China altogether.⁹

Trumpists in the left two quadrants see things differently. Where the pessimists see settled facts, the optimists see possibilities. The optimists recognize many of the same trends as the pessimists,¹⁰ but view them as self-inflicted mistakes that can, and should, be reversed. An inadequate defense budget is not a law of the universe but a

political choice. A failing industrial base, DEI defense programs, and reliance on aging weapons platforms are all choices. Trump has won. He will choose otherwise. Implicit in the optimist view is a longer time horizon—there *is* still time to turn things around.¹¹ But this window will not be open forever.¹² Optimists fear that pessimistic assessments erode the political will needed to make changes while change is still possible.¹³

The arguments between pessimists and optimists could be reframed as a matter of risk. [However] the pessimists are most worried about the downside risks of a crisis with China in the near future (2025–28).¹⁴ The optimists balance that possibility against the longer-term risks America will face as it withdraws from other regions of the world or abandons defense capabilities that are not needed in the Pacific theater. Optimists believe this second class of risks is large and that the United States should not court them.¹⁵ Even an America in desperate need of defense reform has some capacity to “walk and chew gum at the same time.” This issue is at the crux of their arguments on Ukraine: in material terms, aid to Ukraine is not coming at Taiwan’s expense. It is relatively cheap. What stops America from helping both beleaguered nations?

The pessimists do not view that question purely in material terms. In their debates, the pessimists are quick to highlight the few weapons systems being shipped across the Atlantic that might be used in the Pacific,¹⁶ but their critique reaches higher than this. The costs of the war in Ukraine (and the Middle East) are measured not just in bullets, but in attention and effort: There are only so many minutes the National Security Council may meet. Washington can

only have a few items on its agenda at any given time. The executive branch is stodgy, slow, and captive to bureaucratic interests; the legislative branch is rancorous, partisan, and captive to public opinion; the American public does not care about the world abroad. Accomplishing anything meaningful in the United States—much less the drastic defense reforms both sides of the debate agree are necessary—requires singular attention and will.

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If this seems like a pessimistic take on the American system—well, it *is* one. It is common for Trumpists in the optimistic quadrants to argue that the People’s Republic of China is riddled with internal contradictions. In a long-term competition between the two systems, they are confident that these contradictions will eat China from the inside out, and that America’s free and democratic order will eventually emerge victorious. None of the pessimists interviewed made similar predictions. If they have anything to say about internal contradictions, it is American contradictions they focus on.¹⁷



The US, Japan, and Republic of Korea conduct a trilateral aerial exercise in November, 2024. (stratcom.mil)

Power-Based vs. Values-Based Perspectives

So much for the optimist-pessimist divide. What is the y-axis?

This can be thought of as a pole, with “power-based” perspectives on one hand and “values-based” perspectives on the other.

Trumpists in the top two quadrants ground their arguments in cold calculations of *realpolitik*. From this perspective, international politics is first and foremost a competition for power. States seek power. The prosperity, freedom, and happiness of any nation depend on how much power its government can wield on the world stage. While states might compete for power in many domains, military power is the most important. A state frustrated by a

trade war might escalate to a real war, but a state locked in deadly combat has no outside recourse. The buck stops with the bullet.¹⁸

From the power-based perspective, then, the goal of American strategy must be the maximization of American power, with military force as the ultimate arbiter of that power. This force does not need to be realized in combat—ideally, its deterrent power will be strong enough that it is never actively used. The ideal means of American strategy is a military posture and alliance system strong enough to deter the Chinese from resorting to war.

The left and right quadrants of this perspective disagree on the best way to build that sort of power. The upper right quadrant—the “Prioritizers”—do not believe America will ever possess power sufficient to compel China into submission; a stable *détente* between the two countries is the best outcome that America can attain. Even this modest aim will only be possible if the United States prioritizes the threat posed by China

above all others.¹⁹

Trumpists who argue from the upper left quadrant—the “Primacists”—also speak the language of *realpolitik*. They maintain, however, that the sacrifices the Prioritizers propose will weaken American power. They believe that the existing American alliance system contributes to America’s strength today and will contribute to America’s potential strength in the future. Instead of limiting American aims, the Primacists are more concerned with expanding American means. They are confident this can be done if the American people have the confidence to do so.

The lower two quadrants, whose arguments are labeled “values-based,” operate under a different frame. The people in these quadrants believe that American foreign policy should not be evaluated by a single variable. They see connections between what America does abroad and what America is like at home. They have strong values-based commitments to specific ways of life that are expressed in their vision for American strategy.

Those in the bottom left quadrant are labeled “Crusaders” because of their normative commitments to an American-led order. For this group, the character of the international order is a question not just of national security but moral right. American foreign policy always has been, and always will be, downstream of American ideas of right and wrong—the only question is whether one will admit or obfuscate this reality. This group finds little gain in obfuscation. They argue that America and its allies are knit together not only by shared security interests but also by a shared vision of the good. The values shared by the liberal bloc explain

why these countries share security interests in the first place.²⁰ After all, China is an authoritarian power whose influence operations threaten the integrity of democracies across the world. Many Crusaders view this political-ideological threat as the most dangerous one that China poses.

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For these reasons, those in this quadrant are especially skeptical of détente; they do not believe permanent compromise with China is possible. They attribute Chinese belligerence to the communist political system that governs the country.²¹ For them, tensions in US-Chinese relations are less the expected clashes between a rising power and the ruling hegemon than a battle between two incompatible social systems. Pointing to the close cooperation that ties Iran, North Korea, Russia, and China together, the Crusaders argue (contra the Prioritizers) that the world is gripped in a general contest between democratic order and a resurgent authoritarianism whose different parts cannot be disentangled from each other. At stake are basic questions of moral right—not just abroad,



President of the People's Republic of China Xi Jinping with Russian President Vladimir Putin at a 2024 welcoming ceremony in Beijing. (kremlin.ru)

but at home. An America stripped of its hegemony, humiliated abroad, and economically dependent on authoritarian powers will struggle to preserve freedom and virtue inside its own borders.

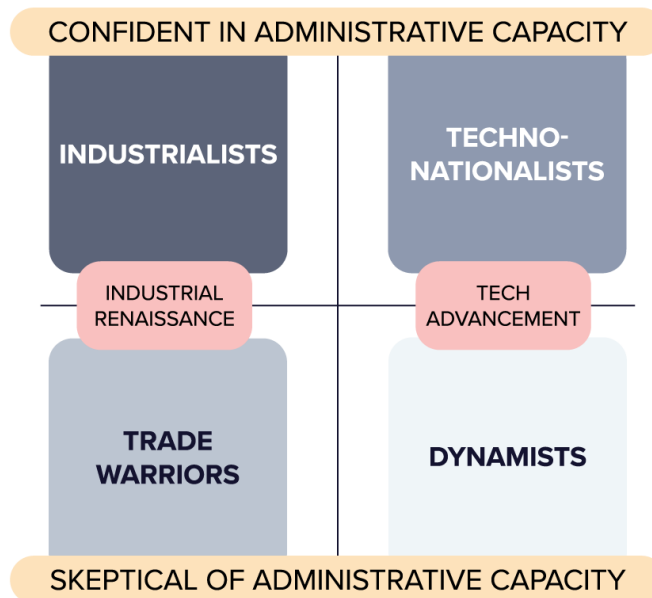
Those in the bottom right quadrant—the “Culture Warriors”—also think about foreign affairs through the lens of regime and right. For them, however, the hostile regime is their own. Culture Warriors link the liberal international order to the free trade agreements all Trumpists despise and the administrative “deep state” all Trumpists distrust. They see the liberal international order as an international extension of the progressive order they are trying to tear down at home. As one official tapped for service in the State Department rather pungently puts it: “There is an increasing disconnect between America’s stature on the geopolitical stage and superpower status and the well-being of actual Americans. What good does it do for America to remain globally dominant when all this translates to is preserving the spoils

system for Jeffrey Epstein’s buddies?”²²

There are echoes of the 1960s New Left in the Culture Warrior argument. Both the new left of yesterday and the new right of today are rebellions against “the establishment.” Both reject the pieties of their day; both see a bloated national security state as a symbol of the dehumanizing values they reject. Both groups correctly point out that there is no natural limit to the quest for primacy. Both argue that a totalizing foreign policy will lead to the bureaucratization of American life.²³

Only the most radical Culture Warriors are ready for a twenty-first-century march on the Pentagon. Most aim for an easier target: a relatively modest foreign policy. Instead of defending an entire international order, it is enough to defend America. Instead of deterring authoritarianism, it is enough to deter China. China does not need to be defeated—it is enough to convince the Chinese to accept some sort of détente.²⁴

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This is somewhat similar to the ends sought by the Prioritizers. Little wonder so many of the Primacists and Crusaders interviewed believed the Prioritizers were Restrainers in disguise. Again and again this accusation was made: Prioritizer arguments are just an attempt to make isolationism sexy.²⁵ The Prioritizers do not actually believe in *realpolitik*—*realpolitik* is just a respectable way to attack the existing international order they despise.

There is an irony to this critique. Just as Primacists and Crusaders condemn the false face of the Prioritizers, so the Prioritizers and the Crusaders condemn the false face of the Primacists. Many of those interviewed insisted that their Primacist opponents made such-and-such argument not for the *realpolitik* reasons they professed, but because of their (hidden) commitment to liberal ideals. Ideals that cannot be defended on their own merits had to be prettied up with talk of hard power.²⁶

All of these suspicions of subterfuge are overblown. Both Primacists and Prioritizers believe the arguments they make. Yet their suspicions are revealing. All sides clearly believe there is a political advantage in couching one's arguments in *realpolitik* logic. That fact alone tells us something about the likely contours of a Trump presidency—and perhaps the beliefs of Trump himself.

THE ECONOMIC DEBATE

As with the geopolitical debate, it is helpful to conceptualize the divisions over economic statecraft among Trump's followers as taking place on a two-by-two chart. The x-axis of this chart describes the battleground on which economic competition with China must be fought: is this a contest to push forward the frontiers of technology and

science, or does competition with China require a broader-based revitalization of American manufacturing capacity writ large? The y-axis, in turn, spans the gap between those who are confident that the administrative state can be used to strengthen the American economy and those skeptical of any bureaucratically administered industrial policy.

There are key tenets all quadrants share. Nearly all Trumpists claim that it is imperative for the United States to “win” economic competition with China. They regularly frame this as in terms of security and sovereignty. “If we want political independence,” one told me, then “we must first have economic independence. Lose that and you lose your country.”²⁷ Marco Rubio framed the matter in similar terms during his confirmation hearings: “If we stay on the road we’re on right now, in less than ten years virtually everything that matters to us in life will depend on whether China will allow us to have it or not. Everything from the blood pressure medicine we take to what movies we get to watch –and everything in between— will depend on China.”²⁸

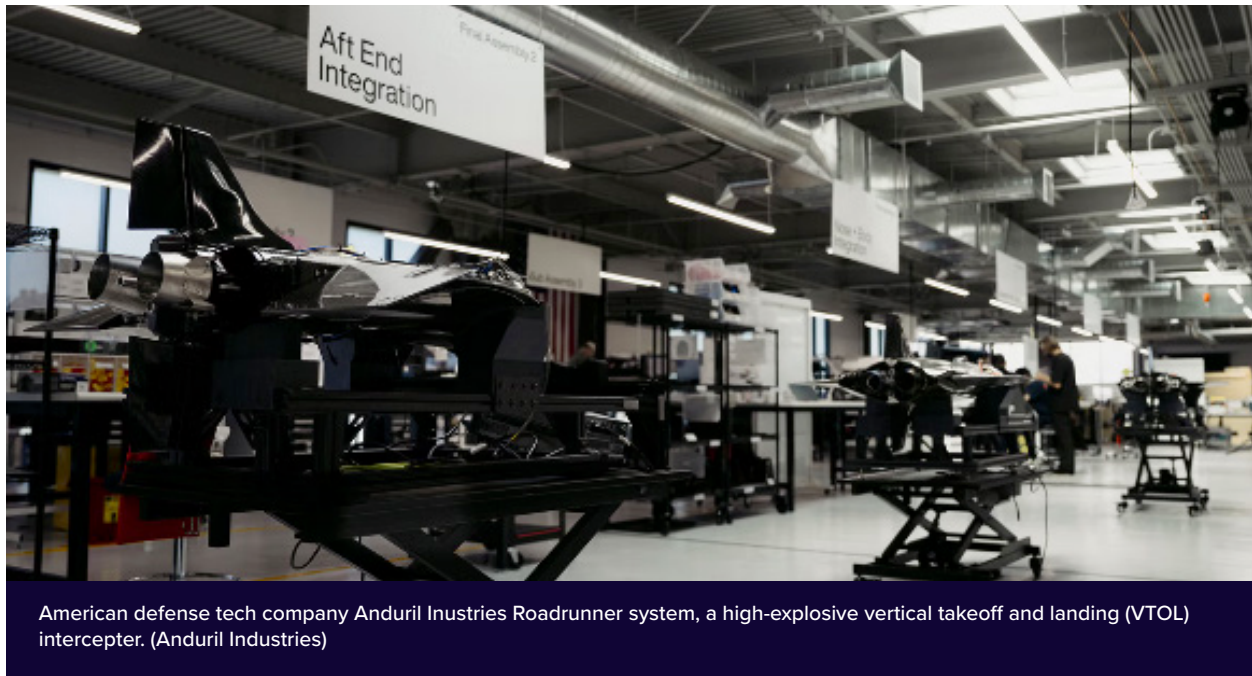
There is less agreement on what grounds independence must be secured. For some, “winning” the economic competition with China means maintaining American leadership on the bleeding edge of new technology. For others, victory means a renaissance in American manufacturing and industrial capacity.

Those in the right quadrants of the diagram are focused squarely on the promises of high technology. These Trumpists believe that economic dynamism and military power are primarily functions of technological innovation. Some industries matter more

than others. To win the future, you must occupy the commanding heights of tomorrow’s economy—*today*. In its most extreme forms, this translates to a fixation on artificial intelligence (AI), the industry that promises the most total disruption to the existing global economy.²⁹ Most Trumpists in these quadrants are not this extreme. They seek victory in several battleground industries. The exact list differs from individual to individual, but they often include software, robotics, aerospace, drones and autonomous vehicles, semiconductors, batteries, new energy technologies, and biotech.³⁰

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These technologies all have obvious military applications. Many in the technology-oriented quadrants are former national security professionals who have only branched out into the world of economic security over the last decade. These Trumpists are laser-focused on the technologies that might provide the United States with a “third offset” advantage. One frankly admits that when evaluating the US-China competition as a whole, he does not care about the



gross domestic product growth numbers of either power—what matters is who is furthest out on the technological edge and who controls the supply lines of critical technology sectors. Whether the Chinese are able to maintain high growth rates does not matter to his calculations.³¹

Other technology-oriented Trumpists come to their position via professional experience in the worlds of finance, venture capital, or engineering. A particularly large subset is associated with defense tech companies such as Palantir, Anduril, and the new band of start-ups operating out of El Segundo.³² They share the concerns of their national security compatriots but add to them lessons drawn from the last three decades of American history. They describe the story of American economic growth over these decades as the story of Silicon Valley's rise. Silicon Valley triumphed through disruptive technological change. By these means, upstarts like Facebook and Google—which at the turn of the

millennium either did not exist or were not yet publicly traded—transformed into trillion-dollar behemoths. These technologists expect new firms will follow in their footsteps. The question is whether these new firms will be American or Chinese.

Republican technologists believe there are terrible stakes in this race. They often cite the total factor productivity gap that divides the United States from Europe as a warning sign: This is what will happen to America if another country's tech sector "pulls ahead."³³ China is the only country whose tech sector can credibly threaten to do so. If America unwisely invests limited resources in inefficient and outmoded industries, the Chinese will race ahead.

The Trumpists who draw on ideas from the left side of the axis find these arguments insufficient. They do not measure American competition with China in terms of blue-chip initial public offerings, patents filed, or new large

language models. They point instead to broader measures of American industrial strength—measures like steel production, manufacturing share, and global trade balances. Their goal is not to lead the globe's next technological revolution so much as to kickstart an industrial renaissance in the American heartland.

Three main arguments are given for this position.

The first is that winning blue-chip firms do not emerge out of a vacuum. Technological revolutions often require an entire “industrial commons” with crosslinked supply chains and shared talent pools.³⁴ As Oren Cass, the intellectual don of these quadrants, puts it: “Industrial expertise is not something bought off the shelf, it comes embedded deep within an ecosystem of relationships between educational institutions and firms; experienced workers and new hires; and researchers, engineers, and technicians. What a nation can make efficiently tomorrow depends heavily on what it makes today, which is one reason why saying it doesn't matter what we make in America is so wrong-headed.”³⁵

Many of these ideas are grounded in a close study of China's economic model. It is common for Chinese firms to pivot from one industry to another. Phone companies become electric battery companies; car companies build semiconductor fabs; software companies start to manufacture drones. This is easy for these Chinese firms to do because each belongs to a group of interlocking industries that share skilled labor pools, domestic suppliers, and industrial know-how.³⁶ In other words, if China has an advantage in manufacturing solar panels and electric vehicles, it is because they first had an advantage in manufacturing

liquid-crystal display screens and iPhones. Those who advocate for a manufacturing renaissance argue that what is true of China will also hold true in the United States.³⁷

The second argument of the industrially inclined is more focused on national security. They fear that in times of war, leadership in semiconductors and software applications will not be sufficient for victory. The premise of this point is simple: any violent contest between China and the United States will be a terrible, bloody, protracted affair. If past wars pattern future ones, great power conflict means that both parties will stretch their industrial capacity to its limit. In that day of woe, outmoded industries will matter. Whether a country can smelt steel, refine rare earths, and build ships will decide death or survival. “It is foolish,” one Trump official tells me, “to imagine that the external sources of these goods will not be disrupted or interdicted in a time of global war.”³⁸ The time to prepare for that possibility is now.

Trump was elected on the promise that his administration would bring wealth to the backwaters—especially the Rust Belt.

The third argument of those in the left quadrants goes as thus: competition with China is not merely a matter of economic domination. It is also a contest to see which country can better secure the blessings of prosperity and safety for its people. Trump was elected on the promise that his administration



Rusting steel stacks of a former steel manufacturer in Pennsylvania. (Wikimedia | CyberXRef)

would bring wealth to the backwaters—especially the Rust Belt. What does the technological frontier mean to Detroit or to Buffalo? Will American industrial policy restore “dignity” to the majority of American workers—or will it simply make richer those parts of America already rich?³⁹

Where technologists see the history of Silicon Valley as a playbook for future success, industrial-minded Trumpists see in its history a cautionary tale.⁴⁰ The economic growth that America experienced over the last three decades was not evenly distributed. Its benefits went disproportionately to the class of creative urbanites that Trumpism is a revolt against. Any industrial or trade policy that entrenches the advantages of this class will result in a hollow “victory” over China.

The Trumpists who argue thus doubt that even a hollow victory might be

attained. They predict that a hard line against China can only be maintained if their party keeps control of the country—something Republicans will fail to do if they cannot deliver on their basic election promises. But the problem they see is larger than partisanship. Many of those on the left-hand side of this axis describe the American social contract as “strained” or “brittle.” If the Trump administration cannot boost the prospects of working-class Americans or reverse the harms wreaked by globalization on the American people, class resentment and social upheaval. It will be difficult to compete with China, much less “win” any competition with it, if America’s own social order is cracking apart.⁴¹

Trust vs. Lack Thereof in the Administrative State

The x-axis of the diagram marks out differing visions of the battleground on which the Chinese must be beaten. The

y-axis records disagreements on the type of economic weaponry America should bring to battle. Those in the upper quadrants are confident that state subsidies and regulation are the most powerful tools the new administration might draw on. Those in the bottom quadrants are distrustful of bureaucrats, worry about the consequences of creating an administrative leviathan that may not remain in Republican hands, and doubt that even Trump-aligned officials have the skills needed to intervene so directly in the American economy.⁴² They prefer policy tools less reliant on congressional appropriation or extensive bureaucratic supervision.

Industrialists skeptical of industrial policy are drawn to tariffs. These “Trade Warriors” see several special advantages in a tariff regime. Like subsidies, tariffs can be used to right unbalanced trade relations and protect industries important to the “industrial commons” of the United States. Unlike industrial policy, tariffs can be implemented cleanly with no additional government outlay.⁴³ The Office of the US Trade Representative has fewer than 250 employees; no more would need to be hired to institute a far-reaching tariff regime. Tariffs are fully compatible with a nightwatchman state—indeed, tariffs were the primary economic tool of the nightwatchman state that presided over nineteenth-century America’s climb to power.

Trade Warriors tend to look at the American economy through an international lens. They describe American economic realities as a function not of state and market, but of *states* and market. Unlike subsidies and domestic investment, tariffs provide American leaders with a source of diplomatic leverage that might be used to change

the policy of foreign states. At its most elaborate, as in the chair of Trump’s council of economic advisors’ proposal to “restructure the global trading system,” graduated tariffs are seen as a tool by which to restructure the monetary and industrial policies of the entire developed world in America’s favor.⁴⁴

The “Dynamists,” share the Trade Warriors’ skepticism about the American administrative state. They accept the need—or at least the political necessity—of new tariffs, but do not see tariffs as central to their program.

The bottom-right quadrant, labeled the “Dynamists,” share the Trade Warriors’ skepticism about the American administrative state. They accept the need—or at least the political necessity—of new tariffs, but do not see tariffs as central to their program. Many agree with Vivek Ramaswamy’s argument that tariffs should be “focused entirely on eliminating US dependence on China in those critical sectors for US security...[for] if we were really serious about decoupling from China in those critical sectors, that actually means more, not less, trade with allies like Japan, South Korea, India, Vietnam.”⁴⁵

These Dynamists are instead focused squarely on deregulating the American economy and reforming the American state. In their eyes, Chinese drone dominance is less a product of Chinese



US Secretary of Defense Pete Hegseth and Polish Defense leadership tour static displays in Poland during February, 2025. (Flickr | US Secretary of Defense)

industrial policy than a result of the Federal Aviation Administration's "war on technology;"⁴⁶ America's failure to match the stunning new infrastructure of China is best blamed on the National Environmental Policy Act regime;⁴⁷ and cutting-edge developments in AI, crypto, and software engineering would have already transformed the American economy if not for the "regulatory capture, special interests, and perverse structural incentives" that have sheltered entrenched incumbents from real competition.⁴⁸

Dynamists believe that many of these deficiencies stem from the outmoded structure and personnel of the US government itself. The DEI programs of the Biden administration are taken as a synecdoche of the structural problems of the federal workforce as a whole: too bureaucratic, too full of make-work, too protected from meaningful competition, and too hostile to meritocracy.⁴⁹ For America to become truly competitive with

China, it must cut loose all deadweight. Many federal employees should be fired—but those who are not should be given far more freedom of action than is currently the case.

The "Industrialists" and "Techno-nationalists" who occupy the upper two quadrants of the diagram strenuously dispute this framing of America's failures. Government intervention in the economy can work. Across the Pacific, it is working right now. China did not become such a menacing threat through a commitment to small government. The intellectual centers of this movement—magazines like *American Affairs* and think tanks like American Compass—regularly publish detailed reports seeking lessons from the Chinese experience.⁵⁰ If Beijing is unafraid to use industrial policy, subsidies, and direct intervention to dominate key sectors, Washington should not be afraid to do the same.

In practice, differences between the Techno-nationalists and the Industrialists are generally papered over; industrial policy's place in the Republican Party is too tenuous for either side to afford much sniping at the other. But these differences exist.

This approach assumes that knowledge is the key constraint on effective administrative power. There are wise and unwise ways to use the state. Judicious industrial policy promises a level of finesse that other tools do not. As one researcher well respected in Industrialist circles told me, tariffs and deregulation will never bring about the competitiveness America needs to pull ahead. Tariffs are “blunt instruments... What we need are more targeted tools.”⁵¹ Industrialists see bipartisan efforts like the CHIPS Act as evidence that the American system is not just ready for industrial policy but capable of succeeding in it.⁵²

This framework also appeals to the Techno-nationalists, who believe that America's future rests on a specific set of high-end technologies in desperate need of boosted development. In practice, differences between the Techno-nationalists and the Industrialists are generally papered over; industrial policy's place in the Republican Party is too tenuous for either side to afford much sniping at the other. But

these differences exist. The Techno-nationalists are generally more sensitive than the Industrialists to the fiscal costs of American industrial policy. They realize that there is not money to fund everything, and they have strong preferences as to how the purse should be spent. More importantly, many worry that there is no time to bring about a full-bore manufacturing renaissance: the clock of conflict is ticking. The state of the American defense industrial base and developments in specific American technologies may decide whether China welcomes war or fears it. There may only be a few years to prepare the United States for that point of conflict.⁵³

This is profoundly different from how the Industrialists think about the problem of China and the American economy. In a perceptive essay, Micah Meadowcroft describes the two schools of thought as such: on the one hand, there are “[Techno-nationalists who] want to decouple from China and invest here at home because they expect a shooting war” and fear that America has not done enough to deter it. On the other hand, Industrialists like “[JD] Vance, [who are] worried about the defense industrial base *because* the process of rebalancing trade with China and rebuilding America may heighten tensions to the point of open conflict.”⁵⁴



The Beijing Great Hall of the People decorated at the 2017 arrival of President Trump. (Flickr | Trump White House Archived)

For the Techno-nationalists with a national security background, China is *the* central problem—it is the adversary to be outcompeted, contained, and deterred. But often in the arguments emanating from the other three camps, China seems less like an enemy than a rhetorical device. Some will hail Chinese statecraft as an example to emulate. Others will summon a Chinese boogeyman that must be defeated. But in many of these cases, the real problem identified is not China per se, but the economic order that enabled its rise. The real target is a free-market consensus that prioritizes free trade and capital mobility over national resilience. Were the Chinese Communist Party to collapse tomorrow, the essential policies each group advocates would not change.

That China is such a powerful rhetorical weapon is revealing in its own way. Much like the geopolitical debate's preoccupation with *realpolitik*, the economic debate's insistence on foregrounding competition with China says something important about the anxieties of those in Trump's orbit, as well as the arguments deemed most convincing to Trump himself.

CONCLUSIONS

There are several takeaways one might draw from this exercise.

First: Not every dispute has calcified along doctrinaire lines.

This report has had little to say about Taiwan because positions on Taiwan policy do not match up neatly with any of the schools identified. There are Prioritizers, Primacists, and Crusaders who believe that extending a formal security guarantee to the Taiwanese is necessary; there are members of each camp who think any move of this sort profoundly unwise. Other disputes that seem to “cross party lines” include chip export controls, the true stakes of the AI race, the strength of the Chinese economy, the ideal US military force structure, and the role of peripheral regions like Africa or South America in the Sino-American rivalry. On issues like these, there may be room for an ambitious policy entrepreneur to have an outsized impact.

Second: The most pressing disputes over geopolitical and economic competition with China often have little to do with China itself.

Serious debates about Chinese strengths or intentions are rare; instead, Republican discussions have largely focused on the scope of American power and the broader implications of this competition for both America’s global standing and its domestic economy. Similarly, in debates over economic policy, China is frequently invoked as either a pretext for action or a model to follow, but the underlying arguments stem from deeper ideological

divides—disagreements over the nature of economic progress or the proper role of the market and state.

Notably absent from these discussions was serious consideration of how China might respond to American policy.

Notably absent from these discussions was serious consideration of how China might respond to American policy. Rarely did any of my interviewees frame their arguments in terms of “if we do X, then Beijing will do Y.” Rarer still were counterarguments voiced against other people’s faulty forecasts. This is not because Trumpists are unwilling to argue with each other—over the last two years, debates over China policy have been quite public. None of those interviewed were unwilling to rip into the perceived errors of rival camps.

The essential problem is that questions over how one should model Chinese perceptions or predict Chinese reactions are simply not central to these debates. Every person interviewed was capable of engaging with these questions when prompted. Some did so quite thoughtfully. But none raised these issues on their own accord.

Third: Policy can collapse under the weight of conflicting aims.

This administration may struggle to adjudicate competing aspirations. On many issues—tariffs, revitalizing the defense industrial base, export controls,


a rhetorically tough line on China, diplomatic engagement with India, and so forth—groups of officials who subscribe to different schools of thought may support the same policy. This does not mean policy will be able to accomplish everything dreamed of it. Often times one goal will have to win out at the expense of the other.

This will be particularly important when it comes to sequencing the administration's actions. The administration will have to carefully consider which issues are worth raising tensions over, which are worth raising tensions over (but not *now*), and which are not worth raised tensions at all. There is no obvious framework for deciding these questions—especially if and when the winning arguments in the economic and geopolitical debates clash. With Republicans out of power, these two debates could proceed in parallel, neither one deeply impacting the other. This will not be true with Republicans in full control of the federal government.

Fourth: At the heart of these disputes lies a fundamental question: What is America capable of?

Can America still do great things? For the last four years, Trumpists have answered “no.” They have cast the federal government as a bloated machine run by inept bureaucrats whose culture has been hijacked by “wokeism” and whose institutions have been weaponized against them. Trump has vowed to change all of that. Whether he succeeds will shape America's approach to China.

These issues will not stay in the background when it comes time to gauge the military strength or economic resilience of the United States. They are important inputs into the Trumpist worldview. The friction these officials

encounter in the bureaucracy, the success the administration has in expelling “wokeness” from American institutions, and Trump's popularity with the broader public will all influence their perception of American strength. Those steeped in the technical intricacies of export controls and nuclear strategy may scoff at the idea that culture war battles will decide the course of world events. Nevertheless, *they will*. For Trump and his supporters, China is not just an adversary to outmaneuver, but a mirror and a standard. Competition with China cannot be severed from their larger quest to rechart the destiny of the American nation. 

1 James Taranto, [“Weekend Interview: Trump Tangles with the Journal’s Editors,”](#) *Wall Street Journal*, October 18, 2024. Trump has expressed similar sentiments many times. For a review, see Daniel Drezner, [“Does the Madman Theory Actually Work?”](#) *Foreign Policy*, January 7, 2025.

2 I have conducted more than thirty off-the-record interviews with congressional aides, think tankers, former Trump officials, Trump transition figures, and individuals nominated for positions in the second administration. Interview 12.

3 Alex Wong, [“Competition with China: Debating the Endgame,”](#) Ronald Reagan Presidential Foundation and Institute, October 16, 2023.

4 Interview 28.

5 Interviews 2, 3.

6 US Department of State, [“Biography: Marco Rubio,”](#) accessed February 2, 2025.

7 Interview 5. See also Robert Greenway et al., [“A Conservative Defense Budget for Fiscal Year 2025,”](#) Heritage Foundation Special Report No. 281 (April 2025).

8 Michael Anton, [“Why It’s Clearly Not in America’s Interest to Go to War Over Taiwan,”](#) *The Federalist*, December 20, 2021.

9 Interviews 4, 5. For representative public statements, see Alex Velez-Green and Robert Peters, [“The Prioritization Imperative: A Strategy to Defend America’s Interests in a More Dangerous World,”](#) Heritage Foundation Special Report no. 288 (August 2024); and Elbridge Colby’s comments in [“The Most Dangerous Moment: A Debate on America’s Role in the Pacific,”](#) *Uncommon Knowledge*, December 5, 2023.

10 For two influential statements, see Mackenzie Eaglen, [“10 Ways the US Is Falling Behind China in National Security,”](#) American Enterprise Institute, August 9, 2023, and [“Keeping Up with the Pacing Threat: Unveiling the True Size of Beijing’s Military Spending,”](#) American Enterprise Institute, April 29, 2024; Jerry Hendrix, [“The Age of American Naval Dominance Is Over,”](#) *The Atlantic*, March 13, 2023.

11 Interviews 10, 16.

12 For one influential spokesman’s perception of the window, see Matt Pottinger, “The Stormy Seas of a Major Test,” in *The Boiling Point: Urgent Steps to Defend Taiwan* (Stanford University Press, 2024), 7–39, esp. 27–28. See also the introduction to Jonathan Ward, *The Decisive Decade: American Grand Strategy for Triumph Over China* (Diversion Books, 2023).

13 Interview 21. For a representative statement, see Ivan Kapanathy’s concerns about public opinion in Taiwan and the United States posted in [“Should the](#)

[United States Change Its Policies Toward Taiwan?”](#)

Brookings Institution, convening April 16, 2024, and [“The Collapse in One China,”](#) Center for Strategic and International Studies, June 17, 2022.

14 Interview 4. For a representative public articulation, see Alex Velez-Green, [“The Case for Urgency Against China,”](#) *The National Interest*, September 13, 2023. Contrast this with David Sacks and Ivan Kapanathy’s argument that “a full-blown conflict in the Taiwan Strait is neither imminent nor inevitable. Although the Chinese military is rapidly modernizing and preparing for a conflict over Taiwan, it is not yet ready or willing to go to war with the United States. The PLA is still several years away from achieving the capability to take Taiwan by force (assuming US intervention), and Russia’s struggles in Ukraine have likely induced some short-term caution in Beijing.” Sacks and Kapanathy, [“What It Will Take To Deter China in the Taiwan Strait,”](#) *Foreign Affairs*, June 15, 2023.

15 Interview 1, 3, 8. For an extreme view, see Mitch McConnell, [“The Price of American Retreat,”](#) *Foreign Affairs*, December 16, 2024; for a version that concedes many of the Prioritizers’ arguments without reaching the same dismal conclusions, see Mike Gallagher, [“America Needs a Strategy for China,”](#) *Wall Street Journal*, August 22, 2024.

16 See, for example, Alex Velez-Green, [“Managing Trade-offs Between Military Aid for Taiwan and Ukraine,”](#) Heritage Foundation Issue Brief no. 5328, August 31, 2023. For prototypical Primacist and Internationalist responses, see Eric Sayers, [tweet](#), November 23, 2024; Daniel Kochis, [“Seven Things Pacific Prioritizers Get Wrong about Aid to Ukraine,”](#) Hudson Institute policy memo, October 2024.

17 Interviews 4, 25.

18 For a thorough rendering of this idea, see Elbridge Colby, *The Strategy of Denial: American Defense in an Age of Great Power Conflict* (Yale University Press, 2021), 1–65. For a Primacist articulation of the same ideas, see [“Tom Cotton Maiden Floor Speech,”](#) C-Span, March 16, 2015.

19 The argument has received its most coherent articulation by Niall Ferguson in [“Kissinger and the True Meaning of Détente,”](#) *Foreign Affairs*, February 20, 2024; see also Elbridge Colby’s endorsement of the piece in an April 6, 2024, [Twitter Thread](#).

20 Interview 1; for a version of this thesis permissible in Trump world, see Alex Wong’s comments on human rights and national security in Alex Wong, [“Balance in the Indo-Pacific: Defining the US Approach,”](#) Hudson Institute, May 30, 2023. See also Mike Walz’s opening statement in [“Waltz Hosts Bipartisan Roundtable on CCP Human Rights Abuses](#)

[and the Beijing.](#)” Rep. Mike Waltz YouTube channel, April 15, 2021; and the points about Marco Rubio and Mike Waltz outlined in Amy Mackinnon, [“Trump’s China Hawks Are Also Uyghur Advocates,”](#) *Foreign Policy*, November 15, 2024.

21 The most influential statement of this was published by the State Department’s Policy Planning Staff during the first Trump administration: Policy Planning Staff, Office of the Secretary of State, [Elements of the China Challenge](#) (November 2020). Miles Yu, who directed that effort, maintains the same position today; see Yu, [“China’s Common Destiny Is America’s Uncommon Challenge,”](#) *Washington Times*, January 5, 2025. For a similar vision of Chinese ambitions from an individual working in the second administration policy office, see Jonathan Ward, *China’s Vision of Victory* (Atlas Publishing, 2019).

22 Niccolo Soldo, [“The Zürich Interviews—Darren J. Beattie: If Only You Knew How Bad Things Really Are,”](#) *Fisted By Foucault*, December 14, 2020. See also Beattie’s essay [“Meet Norm Eisen: Legal Hatchet Man and Central Operative in the ‘Color Revolution’ Against President Trump,”](#) *Revolver News*, September 9, 2020, for a more sustained argument that the foreign policy bureaucracy is an extension of the same forces arrayed against Donald Trump.

23 Interviews 19, 25. The classic statement on the New Left is Carl Oglesby, “Vietnamese Crucible: An Essay on the Meanings of the Cold War,” in *Containment and Change: Two Dissenting Views of American Foreign Policy* (Macmillan, 1970), 3–176.

24 For representative statements from two officials tapped to serve in the administration, cf. Andrew Byers and Randall Schweller, [“A Cold Peace With China,”](#) *The American Conservative*, September 14, 2024; Judy Woodruff, “Tulsi Gabbard on Why She Wants to Prioritize Foreign Policy,” *PBS Newshour*, May 17, 2019.

25 Interviews 1, 3, 17. One consistent difference between Culture Warriors and Prioritizers that few Primacists or Crusaders acknowledge: the Restrainers genuinely fear the possibility of nuclear war. See, for example, Michael Anton, [“Nuclear Autumn,”](#) *Claremont Review of Books* (Fall 2022); [“Tulsi Gabbard on Dick Cheney’s Lust for Nuclear War, and Why She’s on Biden’s ‘Terrorist Watchlist,’”](#) *The Tucker Carlson Show*, September 7, 2024, and Tulsi Gabbard, [“Statement by Tulsi Gabbard on Decision to Continue to Campaign for President and Declining to Seek Re-Election to the House of Representatives,”](#) American Presidency

Project, October 24, 2019. In contrast, most Prioritizers do not view nuclear conflict between China and the United States—or for that matter, Russia and the United States—as likely, and are more narrowly focused on deterring conventional conflict.

26 Interviews 5, 21. This will be familiar to just about anyone logging onto Republican social media spaces, where both Primacists and Internationalists are derided with the smear “neocon.”

27 Interview 12.

28 Doug Palmer, [“Rubio: US Must Break Its Dependence on China,”](#) *Politico*, January 15, 2025.

29 Interviews 19, 20. On this note see also Ivanka Trump, [tweet](#), September 25, 2024.

30 For a strong public example of this perspective, see Liza Tobin, [“Commanding Heights: Ensuring US Leadership in the Critical and Emerging Technologies of the 21st Century,”](#) Testimony for the US House Select Committee on the Chinese Communist Party, July 26, 2023.

31 Interview 27.

32 Recently, the world views of this group have received a significant media coverage. See, for example, Margaux MacColl, [“Rockets, God and Peter Thiel: 36 Hours in the Gundo, Tech’s Latest Startup Haven,”](#) *The Information*, April 5, 2024; Zoe Bernard, [“Inside California’s Freedom-Loving, Bible-Thumping Hub of Hard Tech,”](#) *Vanity Fair*, July 22, 2024.

33 Interviews 20, 24. The graph has gone viral in technologist spaces since its appearance in Valentina Romei, William Crofton, and Colby Smith, [“Why America’s Economy is Soaring Ahead of its Rivals,”](#) *Financial Times*, December 3, 2024.

34 This phrasing comes from interview 23, who draws in turn from Gary P. Pisano and Willy C. Shih, “Restoring American Competitiveness,” *Harvard Business Review* (July-August 2009).

35 Oren Cass, [“Chips Ahoy! Don’t Look Now, but Industrial Policy Is Doing Its Job,”](#) *Understanding America*, August 9, 2024.

36 For a succinct explainer, see Kyle Chan, [“China’s Overlapping Tech-Industrial Ecosystems,”](#) *High Capacity*, January 22, 2025.

37 For a notable public articulation of these ideas, see [“Julius Krein: The Blueprint for an American Manufacturing Renaissance,”](#) *The Realignment*, episode 527, January 7, 2025.

38 Interview 28. The same point is made by Robert Lighthizer in [“Speech: The Naval War College Foundation Symposium,”](#) America First Policy Institute, August 17, 2023.

39 “Dignity” is a common byword among the

Industrialists and Trade Warriors, often juxtaposed with economic efficiency. For a prominent example, see Robert Lighthizer, [“How to Make Trade Work for Workers,”](#) *Foreign Affairs* (July/August 2020).

40 Interview 30.

41 This divide corresponds with, but does not map perfectly onto, other fault lines in the Republican coalition. The recent controversy over H1B1 visas—which pit technologists who believe that steady high-skilled immigration is necessary if America is to maintain its position as a global technological leader stay at the cutting edge against Republicans more sensitive to arguments about the effect H1B1 visa holders have on wages and opportunities for American citizens—echoes many of the same themes covered here.

42 Interviews 14, 15.

43 Interview 30.

44 Stephen Miran, [“A User’s Guide to Restructuring the Global Trading System,”](#) Hudson Bay Capital, November 2024.

45 There are also people whom I would classify as closer to the techno-nationalist side of the equation who make similar arguments about the need to near-shore. See, for example, [“Homeland Security and the China Challenge: A Conversation with Congressman Mark Green,”](#) Hudson Institute, December 17, 2024.

46 This phrasing comes from Marc Andreessen, [“Marc Andreessen: It’s Morning Again in America,”](#) *Uncommon Knowledge*, January 14, 2024.

47 Mike Lee and David Schweikert, [“Unshackling American Infrastructure,”](#) *City Journal*, October 6, 2021; [“How to Prevent Federal Judges from Killing New Energy Projects,”](#) *City Journal*, January 27, 2025; Jon Askonas and Jonathan Berry, [“How to Free Elon Musk’s SpaceX from Federal Red Tape,”](#) *Wall Street Journal*, October 29, 2024.

48 Katherine Boyle, [“Building American Dynamism,”](#) *a16z*, January 14, 2022.

49 This critique of DEI extends out to American struggles with industrial policy—see, for example, Matt Cole and Chris Nicolson, [“DEI Killed the CHIPS Act,”](#) *The Hill*, March 7, 2024.

50 Almost every issue of *American Affairs* includes at least one essay mining the Chinese experience for American advantage. Some notable examples include Stephen Brent, [“Disruptive Innovation in America and China,”](#) *American Affairs* III, no. 4 (Winter 2019); David Adler, [“Guiding Finance: China’s Strategy for Funding Advanced Manufacturing,”](#) *American Affairs* VI, no. 2 (Sum-

mer 2022); Nathan Simington, [“China is Winning. Now What?”](#) *American Affairs* VIII, no. 3 (Autumn 2024); Melik C. Demirel and David Adler, [“Thread- ing the Innovation Chain: Scaling and Manufacturing Deep Tech in the United States,”](#) *American Affairs* VIII, no. 4 (Winter 2024). The attitude at the American Compass is neatly summarized in the title of Marshall Auerback’s essay, [“Contain China if Necessary, but Emulate Features of its Industrial Policy to Ensure Long Term Economic Prosperity,”](#) *American Compass*, June 2020. However, compare Rob Atkinson, [“No, Adopting an Industrial Policy Doesn’t Mean We’re Emulating China,”](#) *American Compass*, April 2021.

51 Interview 23. Similar comments were also made in interviews 20 and 24.

52 Interview 10; see also note 35.

53 For a characteristic example, see Ward, *Decisive Decade*.

54 Micah Meadowcroft, [“Making Sense of the China Problem,”](#) *American Compass*, August 1, 2024. See also his interview with J.D. Vance in [“The World That We Will Live and Die In,”](#) *The American Conservative*, March 15, 2023, for a similar typology.



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