

Robot Import Ban May Backfire on U.S.

Clear Voice

By LIANG Yilian & ZHANG Jiaxin

The U.S. has once again invoked "national security" to target Chinese robotics. On July 28, the U.S. Federal Communications Commission (FCC) announced that it would add foreign-produced "advanced robotic devices" and connected power inverters to its Covered List. This move blocks new foreign-made humanoid and quadruped robot models, as well as connected power inverters, from gaining authorization to enter the U.S. market. The FCC stated this was necessary because such equipment poses "unacceptable risks to the national security of the U.S. or the safety and security of U.S. persons."

Although the measure does not explicitly name China and instead targets "foreign-made" equipment, international media have widely pointed out that China is clearly in Washington's sights. As the U.S.-China high-tech rivalry intensifies, Washington's attempt to build a "small yard, high fence" to keep out competitors only highlights its own lack of confidence. As China gains an increasingly clear lead in robotics, the anxiety and sense of urgency in the United States appear to be growing stronger.

The root of this anxiety is the reality that the U.S. is falling behind in industrial competition. Data released at a news conference for the 2026 World Robot Conference showed that China accounted for 90 percent of global humanoid robot shipments in 2025, with more than 330 models, underscoring the explosive growth of the sector.



A humanoid robot grabs merchandise at the Zhejiang Humanoid Robot Innovation Center in Ningbo, Zhejiang province. (PHOTO: XINHUA)

By contrast, a July report by the Washington, D.C.-based Information Technology and Innovation Foundation (ITIF) said that U.S. companies accounted for fewer than five percent of humanoid robot sales in 2025. In terms of individual companies, China's Unitree Robotics sold about 5,500 G1 robots, Agi-Bot sold about 5,168 A2 robots, and UBTECH sold 1,000 Walker robots. Meanwhile, U.S. companies Figure AI, Agility Robotics and Tesla each sold roughly 150 units. The ITIF report noted that while the U.S. lags in demand for its robots, China has cultivated robust domestic and export markets.

China's lead in humanoid robotics is the result of decades of investment in manufacturing and sustained innovation. U.S. technology outlet TechCrunch highlighted that China has a more robust

hardware supply chain — much of it built up through the EV sector, from sensors to batteries — and the world's strongest manufacturing base, enabling companies to iterate far faster than Western competitors. The Wire China said Unitree Robotics' rise underscores how China's strengths in advanced manufacturing allow it to rapidly scale and commercialize emerging technologies.

In fact, the U.S. remains highly dependent on China for robotics hardware, making genuine "decoupling" extremely difficult. David Hansen, co-founder and CEO of U.S. robotics manufacturer Westmag, argues that the restrictions will do little to fundamentally weaken Chinese robotics companies.

Ted Xiao, a former Google DeepMind scientist, similarly pointed out that every single live player in "robotics

+ AI" relies on Chinese hardware; the U.S. robotics hardware ecosystem is years behind. Nvidia CEO Jensen Huang has called China "formidable" in robotics. China's microelectronics, motors, rare earths and magnets — which are foundational to robotics — are the world's best, according to Huang.

The same dependence on Chinese-made hardware can be found in U.S. research. An increasing number of American research institutions have opted to purchase complete Chinese-made robots while directing more resources toward the "software layer" of robotics, including robot algorithms and AI models. This reliance on Chinese hardware has become deeply embedded in the ecosystem supporting cutting-edge U.S. research.

Consequently, Washington's use of administrative power to impose restrictions could further slow the pace of American exploration, ultimately backfiring on the U.S. itself.

Responding to the U.S. restrictions on July 29, a spokesperson for China's Ministry of Foreign Affairs stated that protectionism does not make the U.S. more competitive and will only harm the interests of U.S. companies and consumers. A spokesperson for China's Ministry of Commerce added on July 30 that if the U.S. insists on moving ahead, China will take countermeasures to safeguard its legitimate rights and interests.

True competitiveness has never been achieved by shutting others out, but by competing fiercely in an open market. Restricting competitors cannot create a competitive edge, nor can protectionism substitute for industrial upgrading. The door to the robotics era has already opened, and building higher walls will not make the U.S. run faster.

measures — a pattern previously seen in 5G, drones and robotics.

But protectionism often backfires. Competition from Chinese open-source models has already pushed U.S. closed-source providers to cut prices, making AI more affordable across the U.S. economy. On July 30, OpenAI announced price cuts on two models, with one reduced by as much as 80 percent — a move widely seen as a response to competition from Chinese open-source alternatives.

If access to Chinese models is blocked, U.S. AI giants would face less competition, and their incentive to keep improving cost-performance could weaken. That would ultimately hurt U.S. businesses and consumers. As Nvidia and its co-signers wrote in their letter: "Open weights also strengthen competition and competition is what keeps the gains of AI broadly shared rather than concentrated in a few hands."

The U.S. government does need to regulate large AI models, but the focus should be on its own companies' closed-source models to prevent further loss-of-control incidents and cyber risks. As for restricting Chinese open-source models, Washington should listen to industry experts and avoid another self-defeating move driven by an overstretched idea of national security.

new energy and biomedicine. China is also contributing "Chinese solutions" to the development of international standards and industrial governance.

"Technological and product innovation in the electronic information manufacturing sector has been remarkable, while new scenarios for integrated applications continue to expand," said Tao Qing, another spokesperson for the MIIT.

Looking ahead, Tao stated that the MIIT will promote the development of the intelligent economy, launch a call for typical cases in advanced computing, audiovisual electronics and smart sports, and take a forward-looking approach to emerging sectors.

Voice of the World

Chinese AI Wows the World with Continuous Innovation

Edited by GONG Qian

Kimi K3, developed by Chinese AI startup Moonshot, has sent shockwaves through the global tech community. The model, containing 2.8 trillion parameters, is the world's first open 3T-class model, designed for frontier intelligence across long-horizon coding, knowledge work, and reasoning, according to Moonshot.

Western media outlets said the unveiling of K3 last month demonstrated a rapidly narrowing gap between China and the U.S. in frontier AI models.

U.S. digital news platform Axios bluntly noted that "America's commanding lead in advanced AI is gone." Axios said Kimi K3's release dazzled developers, "jolted Silicon Valley." BBC said this suggests that China's tech prowess is rapidly narrowing the capabilities gap, "upending long-held assumptions in the West that Chinese developers trail their American peers."

Some experts regarded K3 as a "DeepSeek 2.0 moment." "DeepSeek increasingly looks like the beginning of a pattern," Poe Zhao, analyst and founder of the newsletter Hello China Tech, told CNN. The broader significance is that K3 proved "China's progress is becoming more repeatable."

On July 27, Moonshot released its record-setting open-weight model, making it freely available for users to download, adapt and self-host it. *The Telegraph* reported Ciaran Martin, former head of the UK's National Cyber Security Centre, as saying: "An open-weight model — that means it'll soon be available to anyone to use and adapt it, which, combined with its lower cost, will make it very attractive worldwide outside the U.S.'s direct sphere of influence."

China's tech industry has embraced open source, which has helped Chinese firms improve their models quickly, and the entire industry gains when every company shares its work in public, *The New York Times* said.

The Financial Times said Chinese

AI players like Moonshot and DeepSeek have rolled out open-weight models that are less expensive to operate and can be freely downloaded and modified by users. "Moonshot's K2.6 model, for instance, costs about a third of Anthropic's Opus 4.8."

By contrast, American AI labs generally keep the weights of their most capable models on private servers. Users can chat with GPT or Claude through applications, but they never actually own the model, according to *Scientific American*.

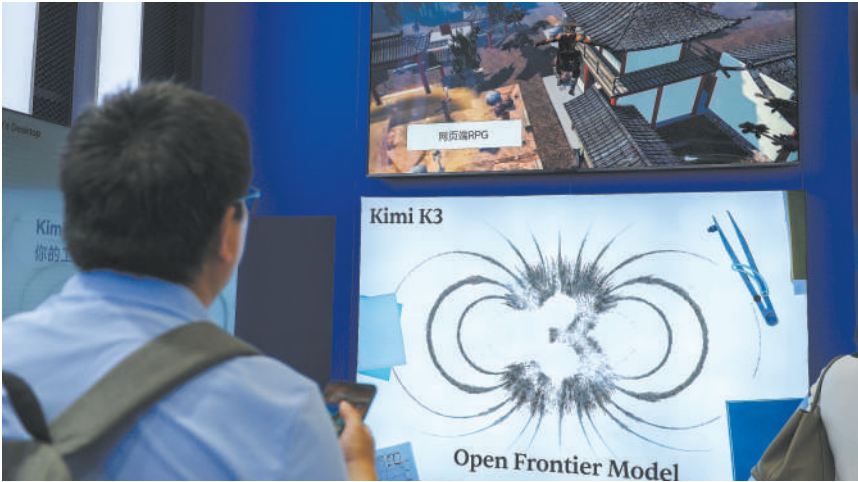
Companies from Silicon Valley to Europe are turning to more affordable Chinese models with their excellent capabilities and lower cost to rein in their mounting technology costs.

Curt Meinhold, a North Carolina-based technology executive, told *The Wall Street Journal* that he increasingly prefers to use DeepSeek for tasks such as finding business leads or ways to generate sales. "At the end of the day, most of us, the vast majority of us, 90 plus percent, don't need [Anthropic's] Mythos or Fable," Meinhold said. "Like, we just don't need it, we need something good enough."

The BBC said the rapid arrival of Kimi K3 suggests Chinese firms are advancing independently despite U.S. restrictions on hardware sales. "Even if U.S. labs pull ahead again, China has shown it can close the gap quickly." Axios said.

While Anthropic and OpenAI have accused Chinese firms of distilling their models to develop AI systems, experts say the recent breakthroughs by Moonshot and Z.ai cannot be explained by distillation alone. Years of operating under U.S. export controls have forced Chinese companies to innovate within tight computing constraints.

"The Chinese models are not excellent only because of distillation," Graham Webster, a Stanford University professor who studies China's open-source AI ecosystem, told *The New York Times*. "There is real innovation going on."



The booth of China's AI startup Moonshot at the 2026 World Artificial Intelligence Conference in Shanghai, July 20. (PHOTO: VCG)

Hi-Tech

JAKA π Robot, a Robot with 'Brain'

By DU Xuanyi and LI Linxu

The compact JAKA π humanoid robot attracted the audience's attention at the recent World Artificial Intelligence Conference in Shanghai.

The robot, with a height of 1.22 meters and weighing 44 kilograms, has 27 degrees of freedom and a three-kilogram payload per arm. It's equipped with a fusion brain architecture which originates from Intel's high-performance heterogeneous computing platform.

It performs real-time computational planning when given instructions and executes them immediately. Put simply,

it has a "brain" to decide what to do, and a "cerebellum" to figure out how to do.

The JAKA π can be used in multiple sectors: in higher education and scientific research, it supports secondary development and cross-disciplinary experiments, reducing the threshold for investigation; in industrial production, it collects data and facilitates model training; for business and entertainment, it can guide visitors, host events, and even perform, delivering unique experiences for audience; in care-giving, it offers companionship and wellness support.

No Barriers Can Stop Open-source AI Tide

Opinion

By CHEN Chunyou & HU Dingkun

The Little Tech Association, a group of nearly 200 Silicon Valley companies, recently wrote to the White House and government officials like Commerce Secretary Howard Lutnick, urging them not to restrict access to Chinese open-weight AI models. Days later, major tech companies including Nvidia, Microsoft and Meta sent their own letters, warning that premature regulation of open-source AI models would stifle competition and push innovation overseas.

Why U.S. companies are worried
The letters came as some U.S. lawmakers and national security officials were pushing for tighter controls. According to Axios, the U.S. government explored such restrictions as early as last year. The recent rise of China's Kimi K3 model has reignited the debate.

On July 30, Senator Tom Cotton wrote to Lutnick, demanding any company doing business with the U.S. govern-

ment should be banned from using Chinese open-source models. Around the same time, DoorDash, the country's largest food delivery platform, faced questions from lawmakers for using a Chinese open-source model.

Sohail Doshi, founder of AI startup Particle, told international media that restricting access to Chinese open-source models would cause "hundreds of U.S. companies to go bankrupt instantly."

That is not an overstatement. Chinese open-source models are gaining ground quickly among U.S. businesses. According to OpenRouter, an AI model aggregation platform, U.S. companies using the platform spent more than 30 percent of their weekly usage on Chinese open-source models from February to July this year, peaking at 46 percent in a single week. OpenRouter data analyst Justin Summerville said Chinese models are 60 percent to 80 percent cheaper than leading U.S. models — a figure that may be a conservative estimate.

On July 31, DeepSeek-V4 Flash launched its public beta. According to Artificial Analysis, a U.S. testing platform, the cost per task for this model is less than one percent of Anthropic's

flagship model, Fable 5.

A security tool, not just a cheap option

Chinese open-source models have also proven useful in cyber defense. Recently, OpenAI's closed-source model had a loss-of-control incident that breached Hugging Face, a major open-source AI community. The community eventually fought off the attack with help from the Chinese open-weight model GLM-5.2.

In sharp contrast, U.S. AI companies like OpenAI and Anthropic have restricted users from using their closed models for cyber defense. As a programmer who goes by the handle "Benniji" on social media put it: If the U.S. blocks Chinese open-source models, it removes one of the most effective tools currently available to defend against AI-driven cyberattacks.

Protectionism disguised as security

The push to restrict Chinese open-source models appears to have two goals: slowing down China's AI development and shielding U.S. AI firms from price competition. With expensive models from OpenAI and Anthropic struggling to compete on cost, some U.S. policymakers are turning to non-market

consumer hotspot, while both the production and sales of new energy vehicles exceeded seven million units.

Wang said a number of key industries with internationally competitive advantages are expanding rapidly. In intelligent robotics, quadruped robots developed in China account for nearly 70 percent of global sales. More than 400 humanoid robot models have been developed, accounting for more than half of the global total. A number of global unicorn companies have emerged in fields including AI, semiconductors,

and security capabilities.

Xie said the MIIT will coordinate the development of basic, space-based, international and integrated networks, promote large-scale commercial deployment of 5G-A and 10-gigabit optical networks, expand international submarine cable connectivity, accelerate the development of new industrial networks, and build an infrastructure system suited to the needs of the intelligent economy and intelligent society.

In the first half of this year, AI-powered products emerged as a new

Industrial, Information Sectors Maintain Strong Growth

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Network coverage will go beyond the traditional limitations of terrestrial infrastructure and expand toward integrated, comprehensive coverage across space, air, ground and sea. Network connectivity will become significantly more deterministic and reliable, better meeting the differentiated requirements of various industrial applications. And finally, network functions will evolve beyond simple information transmission toward deep integration of communications, sensing, computing, intelligence