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Thursday, September 17, 2026

AI, Economy, and Global Conflict Daily Briefing

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This edition omits: Global AI News Briefing. Available sections are published first.

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China AI, Robotics and Semiconductors In-Depth Briefing

China AI, Robotics and Semiconductors In-Depth Briefing 2026-09-17

Thursday, September 17, 2026

Today's Top 5 Key Takeaways

1. Huawei Connect 2026 opens today in Shanghai, unveiling AI infrastructure strategies and new products under the theme of building an agentic world.
2. Minister of State Security Chen Yixin defined AI as a regime security threat in a state-run publication, explicitly naming Anthropic's Claude Mythos and OpenAI's GPT-5.5-Cyber as cyber threats.
3. In OpenRouter's September 14 rankings, Chinese models claimed 7 of the top 10 spots globally, processing approximately 72% of total tokens among the top 10.
4. Biren Technology is pursuing a third equity placement of \$1 billion just eight months after its Hong Kong listing, accelerating the fundraising race for domestic Chinese GPU development.
5. The Shanghai Artificial Intelligence Laboratory released its 744B agent model, Atria-Dawn-Preview, under an MIT license, ranking first across five agent benchmarks.

Chinese AI Models & Platforms

■ Chinese AI Models Dominate Global Usage Rankings

In the weekly rankings released by OpenRouter on September 14, Chinese models took 7 of the top 10 spots. DeepSeek V4 Flash ranked first with 12.1 trillion tokens, followed by Zhipu AI's GLM 5.3 Flash in second place with 10 trillion tokens. Xiaomi's MiMo-V2.5, Tencent's Hy3, and Alibaba's Qwen followed behind.

At the end of 2024, Chinese models accounted for less than 2% of OpenRouter's volume. That landscape has reversed in just a year and a half. DeepSeek alone processes 16.3% of total tokens—higher than the respective shares of Google, Anthropic, or OpenAI.

The most widely used model in Claude Code is GLM 5.3 Flash, surpassing Claude Opus 5 by a factor of 4.4. A Chinese model has become the primary workhorse within a US-developed developer tool.

For AI enterprises seeking to lower inference costs, Chinese model APIs represent a cost-effective option, though routing data through Chinese servers entails security concerns.

■ Atria-Dawn-Preview 744B Sets New Standard for Chinese Agent Models

The Shanghai Artificial Intelligence Laboratory uploaded Atria-Dawn-Preview to Hugging Face on September 11. On September 14, a research paper co-authored by more than 140 researchers was published on arXiv.

The model is a 744-billion-parameter Mixture of Experts (MoE) architecture built on GLM-5.2, activating approximately 40 billion parameters per token. It features a 256K context window and is released under an MIT license, permitting unrestricted commercial use and redistribution.

Designed for agentic execution rather than simple conversational tasks, the model utilizes tools and executes multi-step workflows to deliver verifiable outcomes. It secured first place across five agent benchmarks, including DeepSearchQA (96.0) and BrowseComp (92.5).

Weaknesses remain. On SWE-bench Pro, it scored 59.6, falling short of Claude Opus 5's 74.7 and reflecting relative weakness in real-world code repository operations. Furthermore, all performance metrics are self-reported and await independent verification.

■ Chinese State Media Frames US Proposals for AI Deceleration as Self-Interest

In an editorial published on September 14, China Daily pushed back against proposals by Sam Altman, Elon Musk, and Dario Amodei to slow the pace of frontier model development. The central thesis of the editorial asked: "When the creators of a monster speak of control, is it out of concern for humanity, or concern over competitors?"

The editorial argued that after export controls on chips and manufacturing equipment failed to halt China's model development, the US turned to a slowdown narrative as a new tactic. It also dismissed Anthropic's allegations of illicit distillation, asserting that "American research labs engage in the exact same practices."

At a regular Ministry of Foreign Affairs press briefing on September 14, spokesperson Guo Jiakun similarly rebuffed the proposals as "fear-mongering." China views discussions surrounding AI safety fundamentally as instruments designed to preserve US technological hegemony.

Robotics, Humanoids & Embodied Intelligence

■ China Ships Over 40,000 Humanoid Robots in H1, Securing 97% Global Market Share

In the first half of 2026, shipments of Chinese humanoid robots exceeded 40,000 units, accounting for 97% of the global market. Annual shipments are projected to surpass 100,000 units.

On September 1, the national standard GB/T 47245-2026 for Robot Intelligent Control Systems took effect. In June, the Ministry of Industry and Information Technology (MIIT) and the State-owned Assets Supervision and Administration Commission (SASAC) launched a specialized initiative for humanoid robot real-world deployment and training, targeting the creation of over 100 application scenarios and the deployment of more than 10,000 units across 10 provinces and municipalities by year-end.

September brought a succession of mass production milestones. On September 12, UBTECH's Liuzhou factory commenced operations with an annual production capacity of 10,000 units—equivalent to one robot every 10 minutes. On September 8, XPENG launched its IRON production line in Guangzhou, featuring 80% automation across core processes and targeting the production of 1,000 units by year-end.

In South Korea, Noto, LG Electronics, and Mobilint have initiated humanoid projects based on domestic NPUs. While China leads in production volume, South Korea aims to differentiate through on-device AI chips.

AI Semiconductors & Computing Infrastructure

■ Biren Technology Seeks \$1B Third Placement in Hong Kong

According to Bloomberg, Biren Technology is preparing a share placement of approximately \$1 billion. This marks its third round of capital raising in the eight months following its January 2026 Hong Kong IPO.

Biren is recognized as one of China's "Four Little Dragons" in GPUs. Despite being placed on the US Entity List in October 2023, it has continued to raise funds in Hong Kong. After securing HK\$7.07 billion in its first placement in July, the third placement targets approximately HK\$7.8 billion, which will fund next-generation product mass production and supply chain security.

The fundraising race among domestic Chinese AI chipmakers is accelerating. Cambricon reported first-half revenue of 6 billion yuan, a 108% year-over-year increase, while Moore Threads posted 17.36 billion yuan, up 147%. These surges reflect domestic AI chip demand pivoting toward local alternatives under export controls.

Rising demand for memory semiconductors such as HBM presents commercial opportunities, though export controls maintain high uncertainty surrounding supplies to Chinese customers.

■ Huawei Connect 2026 Opens Today: Reviewing the AI Chip Roadmap

Huawei Connect 2026 takes place in Shanghai from September 17 to 19 under the theme "Intelligence Illuminates a New Future."

At the event, Huawei updated its AI infrastructure roadmap and released its "Intelligent World 2035" report, outlining ten strategic directions spanning Artificial General Intelligence (AGI), compute clusters, agent operating systems, and chip design.

Regarding the Ascend processor roadmap, the Ascend 950DT is scheduled for release in Q4 2026; DeepSeek has reportedly placed orders for 160,000 units of this processor. However, HBM shortages make mass deliveries difficult this year, with full fulfillment expected to take over a year. The Ascend 960 is slated for Q4 2027, with products manufactured on SMIC's 7nm process targeted for 2027.

■ Huawei Connect 2026 Unveils Telecom-AI Convergence Strategy

At Huawei Connect, which opened today, strategies integrating telecommunications and artificial intelligence will be unveiled.

Huawei previously announced its "AI-Centric Network" vision at MWC Shanghai in June, while ZTE champions "AIR MAX." Chinese telecom equipment makers have established AI-RAN—integrating AI directly into base stations—as their next strategic frontier.

The MIIT's 15th Five-Year Plan for Information and Communications formally targets the commercialization of 6G by 2030, establishing goals of 9,800 EFLOPS in intelligent computing capacity and 4 trillion yuan in sector revenue. It also mandates a 95% 5G penetration rate and 75% coverage for sub-1ms compute latency across urban areas.

In June, China deployed its first commercial 5G-A ultra-uplink network spanning 1,000 base stations. The deployment of edge AI, running inference at subscriber access points, is also accelerating. Huawei plans to address the "last kilometer" challenge through all-in-one edge AI inference appliances.

South Korean telecom carriers are also preparing for the transition to AI-RAN.

Policy, Regulation & National Strategy

■ State Security Minister Chen Yixin Defines AI as Regime Security Threat

Minister of State Security Chen Yixin published an article in the state-run journal China Cyberspace (中国网信), reported on September 14 by The New York Times and Bloomberg.

Chen identified three core threats posed by AI: threats to the political stability of the Communist Party, cyberattacks and disinformation orchestrated by foreign adversaries, and military competition with nations including the United States. He noted that deepfakes synthesizing President Xi Jinping or party officials could trigger social unrest.

In an unprecedented move, Chen singled out foreign AI models by name, specifically identifying Anthropic's Claude Mythos and OpenAI's GPT-5.5-Cyber. He alleged that both models possess hacking capabilities capable of targeting China's critical information infrastructure. This marks the first time a top Chinese security official has publicly cited specific foreign AI models by product name.

The article concluded that party control and government oversight must be further tightened, even as AI continues to be cultivated as a strategic industry. While the United States frames AI risks around human existential challenges, China views the technology through the lens of regime security.

Foreign enterprises launching AI services in the Chinese market may face tighter regulatory scrutiny under the justification of national security.

■ First Week of Exit and Entry Administration Regulations Implementation

The Exit and Entry Administration Regulations have officially taken effect. Under the new rules, authorities can impose exit bans on individuals caught transferring export-controlled technologies. No new enforcement cases were reported during the first week of implementation. Meanwhile, the founder of Manus AI has remained barred from leaving the country since March. The broader impact of these regulations on AI talent mobility is expected to accumulate over time.

US-China Tech Hegemony

■ Trump-Xi Summit: D-7

One week remains until the September 24 summit in Washington. Core agenda items include AI chip trade, frontier model risk management, and intellectual property protection.

During an appearance at the All-In Summit on September 15, President Trump shared details of a speakerphone conversation with NVIDIA CEO Jensen Huang, characterizing AI risk narratives as a "hoax" and declaring that "robots will not take over the world." He argued that slowing US progress would only benefit China.

On the US side, a joint cybersecurity advisory (AA26-251A) cited large-scale model distillation by six Chinese AI enterprises. China's Ministry of Commerce countered by framing distillation as standard technical exchange, warned of retaliatory measures, but expressed openness to dialogue.

Concessions on chip exports appear unlikely, with Commerce Secretary Lutnick ruling them out. Whether the Busan trade truce will be extended remains the central substantive issue.

■ Apple Siri AI Launches Without China

On September 14, Apple released its new Siri AI in English beta alongside iOS 27. Korean language support is scheduled for October. Siri AI is unavailable in China and has not launched in the EU. A separate Chinese edition is currently being developed in partnership with Alibaba and Baidu.

Structural barriers preventing US AI services from entering China due to geopolitical factors continue to solidify. In a September 14 address in Vienna, European Central Bank President Christine Lagarde warned that reliance on US AI confers "leverage that no trading partner has ever possessed." The United States accounts for roughly 75% of global AI computing capacity, while

Europe holds about 5%. While China has built its own ecosystem, Europe and South Korea remain heavily reliant on the United States.

Commentary by Attorney Kyung-jin Kim

The reality demonstrated by the OpenRouter rankings is clear: the AI models most heavily utilized by global developers are already Chinese. The driving factor is overwhelming cost competitiveness. DeepSeek V4.1 Flash charges an input rate of just \$0.003 per million tokens for cached hits.

Minister Chen Yixin's commentary represents the flip side of the coin. China is aggressively fostering AI as an industry while simultaneously defining it as a threat to regime security. Barring foreign AI models, enforcing cross-border data controls, and cracking down on deepfakes form a cohesive apparatus—opening markets while locking the gates.

One week remains until the September 24 summit. With no concessions on chips and escalating disputes over distillation, both sides nevertheless express willingness to talk. The meeting is most likely to conclude with agreements aimed merely at preventing further escalation.

Three central challenges emerge from these developments: establishing clear data routing and security standards when adopting Chinese AI models, closely monitoring regulatory shifts regarding exports of HBM and semiconductor equipment to China, and advancing substantive discourse on AI infrastructure sovereignty.

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World Economy Top 10

World Economy Top 10 **2026-09-17**

Reference: 2026-09-16 05:30 KST - 2026-09-17 05:30 KST

Today's Top 10 Highlights

1. The U.S. Federal Reserve raised the benchmark interest rate by 0.25 percentage points to 3.75–4.00 percent at its September 16 meeting. This marks the first increase since July 2023, decided by a unanimous 12-0 vote, with 16 out of 18 officials projecting further rate hikes within the year on the dot plot. Chair Warsh stated that inflation has remained high for too long.
2. Global bonds sold off, pushing the 10-year U.S. Treasury yield back up to 5 percent. Following the September 16 rate hike and Chair Warsh's inflation warning, it touched approximately 5.008 percent intraday.
3. International oil prices stayed above \$100 per barrel. As of 7:00 a.m. U.S. Eastern Time on September 16, Brent crude rose 1.63 percent to \$108.34, and Saudi Arabia decided to redirect more crude exports through the Strait of Hormuz instead of the East-West pipeline that was halted due to a drone strike.
4. U.S. stock markets declined following the rate hike. On September 16, the Dow dropped 631.21 points, or 1.21 percent, to close at 51,461.90, the S&P 500 fell 0.45 percent to 7,551.81, and the Nasdaq slipped 0.01 percent to 25,978.42.
5. Gold and silver plunged after the rate hike announcement. On September 16, spot gold dropped by about \$100 to trade below \$4,300 per ounce at one point, and silver also fell below \$64 per ounce.

6. U.S. retail sales for August increased by 1.2 percent month-over-month, beating expectations of 0.8 percent. Reversing July's sluggishness, this was the largest monthly gain since March, with total sales reaching \$773.9 billion (Census Bureau, September 16).

7. The U.S. dollar strengthened on September 16, with the dollar-yen rate reaching 155.37 yen, a one-week high. Ahead of the Fed's decision and the Bank of Japan meeting, the U.S. Dollar Index remained in the 99.50 range.

8. U.S. import prices for August rose 0.7 percent month-over-month, exceeding the expected 0.4 percent. They were up 7.0 percent from a year earlier, marking the largest increase since August 2022 and adding to inflationary pressures (Bureau of Labor Statistics, September 16).

9. The pan-European STOXX 600 index rose 0.2 percent on September 16, halting a two-day decline. It climbed ahead of the Fed's decision as oil prices stabilized and bank stocks showed strength.

10. Expectations are dominant that the Bank of Japan will raise its interest rate to 1.25 percent at its September 18 meeting. If raised, it will be the highest level since April 1995.

Market Indicators

The 10-year U.S. Treasury yield touched 5 percent again on September 16, and the dollar-yen rate reached a one-week high at 155.37 yen. U.S. stock markets closed lower, with the Dow at 51,461.90, the S&P 500 at 7,551.81, and the Nasdaq at 25,978.42. Europe's STOXX 600 gained 0.2 percent, and Japan's Nikkei 225 rose 0.78 percent.

Central Banks and Policy

The Fed raised interest rates to 3.75–4.00 percent for the first time in three years, and most officials projected further rate hikes within the year. Expectations are high that the Bank of Japan will raise its rate to 1.25 percent at its September 18 meeting.

Commodities and Energy

Brent crude stayed above \$100, and Saudi Arabia decided to increase exports through the Strait of Hormuz. Following the rate hike announcement, gold dropped below \$4,300 per ounce and silver fell below \$64 per ounce.

Key Watchpoints for the Next 24 Hours

Market focus will be on the Bank of Japan's rate decision and Governor Ueda's press conference on September 18, the Bank of England's decision, the repair status of the Saudi East-West pipeline, whether navigation through Hormuz recovers, and market reactions regarding the timing of the Fed's next rate hike.

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International Conflict Briefing

International Conflict Briefing 2026-09-17

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Key Developments Today

1. Kim Yo-jong, Vice Department Director of the Workers' Party of Korea, completely rejected the International Atomic Energy Agency's call for denuclearization and reaffirmed North Korea's status as a nuclear-armed state.
2. U.S. Central Command officially announced that the Strait of Hormuz remains open to international navigation despite Iran's claims of a blockade.
3. A humanitarian disaster occurred in the Gaza Strip when a house damaged by previous bombardments collapsed, killing 21 people.
4. Satellite imagery was released showing extensive damage to U.S. military bases in the Gulf region caused by Iranian missile strikes.
5. The International Maritime Organization issued an emergency navigation warning urging an end to attacks on merchant vessels and seafarers in Middle Eastern waters.

Frontline Developments

- Kim Yo-jong, Vice Department Director of the Workers' Party of Korea, strongly criticized the International Atomic Energy Agency's resolution demanding denuclearization. She claimed that North Korea's status as a nuclear-armed state is irreversible.
- U.S. Central Command explained that the Strait of Hormuz remains open for international navigation despite Iranian threats.

- Satellite imagery confirmed that key U.S. security facilities in the Gulf region were destroyed by Iranian ballistic missile strikes.
- Yemen's Houthi rebels claimed to have shot down a Saudi Air Force fighter jet and released a video source.
- The Syrian interim government abolished the terrorism court from the former Assad regime, but tensions with Kurdish forces persist.

Civilian Casualties and Humanitarian Situation

- In the Gaza Strip, a residential building cracked from previous bombardments collapsed, killing 21 Palestinian civilians, including 8 children.
- In Odesa, Ukraine, a Russian kamikaze drone attack damaged a multi-story residential building, injuring 3 civilians, including a 3-year-old child.
- In Kyiv, Ukraine, an overnight drone attack severely damaged an educational facility building and caused a nearby fire.

Diplomacy, Sanctions, and Military Support

- The U.S. House of Representatives passed a bill significantly strengthening economic sanctions against Russia and continuing defense support for Ukraine.
- The Secretary-General of the International Maritime Organization demanded a halt to targeted attacks on innocent seafarers and merchant vessels passing through conflict waters.
- North Korea announced that it would maintain its stance of strengthening its nuclear forces in response to the International Atomic Energy Agency's infringement on its sovereignty.

Watchpoints for the Next 24 Hours

- Observe the responses of the U.S., Japan, and South Korea around the Korean Peninsula and monitor whether military tensions escalate following North Korea's statement rejecting denuclearization.
- Assess the potential for physical friction in the Strait of Hormuz between the U.S. military's announcement and Iran's claim of maritime control.
- Watch for patterns of retaliatory airstrikes by Russia following the passage of the U.S. House's anti-Russia sanctions bill.

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Global Incidents and Disasters Briefing

Global Incidents and Disasters Briefing **2026-09-17**

Period: 2026-09-16 07:40 KST - 2026-09-17 07:40 KST. 7 items.

Correction Notice

1. This article was revised after re-checking sources and the text. The items regarding Mount Etna and the typhoon in Japan were excluded because the basis for the respective dates could not be confirmed. The Ebola item was also excluded due to an error describing the determinations of the authorities and the World Health Organization as identical. The times below distinguish between occurrence times and reporting times.
2. A medical group stated that at least 67 people died in a gold mine collapse in Sudan. Three people died in flash floods in New Mexico, United States. France compiled all-cause excess mortality during the heatwave period.

Today's Summary

Heavy Rain and Flooding

1. 3 dead in flash flooding in New Mexico, United States

Flooding occurred near Newcomb early in the morning of September 16, local time. Police responded to a report at around 12:30 AM. Two adults and one minor died. This information was reported at 05:22 KST on September 17.

Heavy Snow and Heatwave

2. Estimated at least 817 all-cause excess deaths during heatwave in France

Santé publique France released statistics on September 16, local time. It investigated regions that experienced heatwaves from July 27 to August 20. All-cause excess mortality was estimated at a minimum of 817. This is not the total number of deaths for the entire summer. Nor is it a figure confirmed to be solely deaths directly caused by the heatwave.

3. 1 hiker dead in mountain heavy snow in Washington State, United States

According to reports on September 16, the accident began the preceding Sunday. A couple hiking in the Enchantments became trapped in a snowstorm. Search and rescue reached the two around 3:30 AM on Monday. The woman died, and the husband was transported to a hospital with severe hypothermia. The exact cause of death is under investigation.

Wildfires

4. Tuéjar wildfire in Spain stabilized

On the evening of September 16, local time, the Tuéjar wildfire entered a stabilization phase. The provisional damaged area is approximately 835 hectares. Authorities rule out natural causes and suspect human ignition. Whether it was intentional or negligent has not been determined. Firefighters are monitoring for rekindling.

Accidents

5. At least 67 dead in gold mine collapse in West Kordofan, Sudan

On September 16, a Sudanese medical organization announced casualties from a gold mine collapse. It stated that at least 67 people died at the al-Jara mine near al-Nuhud. Local sources suggested the possibility that ground

weakened by heavy rains was the cause. Rescuers searched with hand tools due to a lack of equipment. They reported that the death toll could rise.

6. At least 3 dead in news helicopter crash in Los Angeles, United States

Just before 7:00 PM on September 15, local time, an NBC news helicopter crashed. At the time, it was covering a nearby bus accident. At least three people died, and there were also fatalities on the ground. At the time of initial reporting, the exact distinction between onboard occupants and ground victims was under investigation. US aviation authorities are investigating the cause of the accident.

7. 5 occupants confirmed dead in medical mission light aircraft in Colombia

On September 16, local time, Colombian authorities confirmed the deaths of all occupants. The light aircraft crashed on September 13 while returning from a medical mission in the Chocó region. The pilot and four female medical workers died. The pilot had provided his own aircraft for the medical mission. Search efforts were hampered by rugged terrain and severe weather.

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