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AI, Economy, and Global Conflict Daily Briefing

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This edition omits: Global AI News Briefing, World Economy Top 10, Global Incidents and Disasters 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 2026-09-20

Sunday, September 20, 2026

Today's Top 5

1. Huawei released its "Intelligent World 2035" report. It projects that by 2035, 900 billion AI agents will handle 90% of all tokens, and computing demand will grow to 10 million times today's level. The report ties together the strategy laid out over the three days of Connect 2026.
2. China Telecom open-sourced Xing4.0, a 29-billion-parameter model trained entirely on Huawei Ascend 910C chips and the MindSpore framework. It is the first case of a model at this scale trained using only Chinese-made chips and frameworks.
3. The Trump-Xi Jinping summit on September 24 is four days away. Altman (OpenAI), Jensen Huang (Nvidia), Amon (Qualcomm), and Cook (Apple) will attend the White House dinner. AI chip export controls and blocking remote access are the central agenda items.
4. A Rhodium Group report estimates the combined revenue of seven major Chinese AI companies at \$10.7 billion. That is one-tenth of the combined revenue of OpenAI (\$40 billion) and Anthropic (\$65 billion). DeepSeek's valuation is 163 times its revenue.
5. Within 48 hours, StepFun's Step 5 (600 billion parameters), Alibaba's Qwen3.8-Omni-Flash, and Zhipu AI's GLM-5.3-FlashX were released one after another. Price competition and inference on domestic Chinese chips are accelerating together.

Chinese AI Models and Platforms

Huawei's "Intelligent World 2035" Report

At Connect 2026, Huawei released a report outlining ten major technology directions. It forecasts that by 2035, 900 billion AI agents will be operating — equivalent to 100 agents per person. Agents will account for more than 90% of all AI tokens, and annual token consumption will grow to 10 million times today's level.

Huawei also released the "Global Digital Intelligence Index 2026" together with Tsinghua University's Institute of Economics. It projects that AI will generate \$27 trillion in economic impact over the next five years. Global digital infrastructure investment will exceed \$4 trillion by 2030.

The report points in one direction: Huawei intends to sell the infrastructure the agent era will need. Ascend chips, the Peerium architecture, the Hi-ONE optical engine, and the Stellar AI Network are all part of this picture.

China Telecom Open-Sources Xing4.0-29B-A4B

China Telecom unveiled the Xing4.0 model on September 19. It has 29 billion total parameters, with 4 billion active parameters per token. Of 64 expert modules, only 4 plus one shared expert activate at a time, a structure designed to save computation. It was trained entirely on Huawei Ascend 910C NPUs using the MindSpore framework — the first case of a model trained solely with Chinese-made chips and frameworks.

On the SWE-bench Verified coding benchmark, it scored 75.00, surpassing Google's Gemma4-26B-A4B. It is released under the Apache 2.0 license.

This demonstrates that a usable model can be trained without Nvidia GPUs. It shows that China can build models within its own ecosystem even as US sanctions continue, and that the software layer of Huawei's chip ecosystem has matured accordingly.

StepFun Releases Step 5 Preview

StepFun (阶跃星辰) released Step 5 Preview on September 18, a 600-billion-parameter reasoning model. Its benchmark performance matched Kimi K3 (2.8 trillion parameters). It has a 1-million-token context window and an output speed of 99.8 tokens per second.

API pricing is \$1 per million input tokens and \$2.7 per million output tokens — half the industry median. With one-fifth of K3's parameters, it achieves comparable performance. The trend of smaller models catching up to larger ones continues.

Alibaba Launches Qwen3.8-Omni-Flash

Alibaba released Qwen3.8-Omni-Flash on September 18. It processes text, images, audio, and video together, with a 1-million-token context window. Across more than 30 benchmarks, scores rose by an average of over 26% compared to the previous generation. Audio input pricing dropped by more than 98%. It supports text in 119 languages and speech in 20 languages, with a focus on performing agentic tasks.

Zhipu AI Launches GLM-5.3-FlashX

Zhipu AI (智谱) unveiled GLM-5.3-FlashX on September 18. Its output speed is 200 tokens per second, five times faster than the previous Flash model. Inference runs on roughly 100,000 domestic Chinese AI accelerators. The base model has 320 billion total parameters, 18 billion active parameters, and a 1-million-token context window.

What stands out is achieving this speed without Nvidia GPUs — a signal that large-scale inference services can run on domestic Chinese chips alone.

Rhodium Report: China's AI Revenue One-Tenth of the US

The US-based Rhodium Group released a report on September 17. The combined annual recurring revenue of China's seven leading AI companies is

\$10.7 billion — roughly one-tenth of the combined \$40 billion for OpenAI and \$65 billion for Anthropic.

ByteDance leads with \$4 billion, followed by Alibaba at \$2.4 billion, Zhipu AI at \$1.8 billion, and Moonshot AI at \$1 billion. MiniMax follows at \$800 million and DeepSeek at \$500 million.

The gap between valuation and revenue is large. Moonshot's valuation-to-revenue ratio is 50x, and DeepSeek's is 163x — steep compared to OpenAI's 34x and Anthropic's 21x. Rhodium concluded that state funding has flowed more heavily toward chips and servers than toward model developers; more than 60% of equity investment in Chinese AI chips came from state-linked funds.

Chinese AI models are gaining users quickly through a strategy of releasing open weights. According to the model-routing service OpenRouter, 7 of the world's top 10 models are Chinese-made.

Robotics, Humanoids, and Embodied Intelligence

9th China Robot Summit in Hangzhou: Evaluation Standards Announced

Two developments emerged from the 9th Robot Summit held in Hangzhou on September 17–18. The organizing committee officially released an "Embodied Intelligence Capability Evaluation Framework." Embodied intelligence — a robot's ability to physically act and complete tasks — can now be measured against a common standard. The "2026 China Embodied Intelligence Overseas Expansion Report" was also released.

Total investment in China's embodied intelligence sector in the first half of the year reached 93.5 billion yuan, five times the same period last year. Robot shipments exceeded 40,000 units, accounting for 97% of the global total. The industry is moving from the exhibition stage to mass production and overseas expansion.

Tesla Optimus Ningbo Audit: Deepening Reliance on Chinese Supply Chains

Tesla's robotics team arrived in Ningbo on September 16 and began a mass-production audit of Optimus starting September 17. The audit covers Sanhua Intelligent Controls, Joyson Electronics, and Tuopu Group. The target is 50,000 units of production in 2026 — a shift of manufacturing capability from the US to China.

Bloomberg reported that Chinese robot component stocks rose on the news. With China holding 97% of humanoid robot shipments, Tesla too is leaning on Chinese supply chains.

UBTECH Begins First U1 Deliveries; AgiBot Starts Selling K1

UBTECH began first deliveries of its U1 humanoid robot on September 16, with cumulative orders reaching 13,361 units. Pricing ranges from 119,800 yuan for the Lite version to 990,000 yuan for the Ultra version. The robot has 88 joints (88 degrees of freedom) and incorporates emotion-AI built on Huawei Ascend chips.

AgiBot began selling its K1 exploration edition on JD.com on September 18, priced at 38,999 yuan, with ByteDance's Doubao large model built in as standard. A consumer humanoid robot priced under 40,000 yuan has now entered the market.

Samsung Seoul Hospital demonstrated humanoid robot-assisted surgery for the first time in the world on September 16.

AI Semiconductors and Computing Infrastructure

Huawei Connect 2026 Semiconductor Strategy Overview

At Shanghai Connect 2026, held September 17–19, Huawei unveiled chips, architecture, and optical engines together. The strategy is to compete not on the performance of a single chip but on the performance of the entire system.

The Ascend 960 SuperPoD links 4,096 NPUs into a single unit, delivering 8 EFLOPS of FP8 compute and 1PB of HBM capacity. By replacing 48,000 optical

modules with 5,500 Hi-ONE units, it cut power consumption by more than 550kW.

The Peerium architecture is designed to link a million processors as though they were a single computer. Huawei's proprietary interconnect standard, UnifiedBus, links CPUs, NPUs, memory, and SSDs. The first-generation product, the Atlas 950 SuperPod, is being deployed at a scale of 256,000 units.

Huawei also moved up its roadmap. The 960DT will launch in Q1 2027, three quarters earlier than originally planned. The 970 is slated for 2028 and the 980 for 2029, with performance doubling each generation.

Even where US sanctions leave China behind on transistor density, the strategy is to raise total computing power by linking tens of thousands of chips into a single system. The axis of competition is shifting from individual chips to system-level design.

Enflame Lists in Shanghai; Biren Pursues Third Capital Raise

Tencent-backed Enflame (燧原科技) listed on Shanghai's STAR Market on September 11. Shares rose 188% on the first day, raising \$911 million. It is the last of China's "four GPU dragons" to go public, with Tencent accounting for 83.8% of its revenue.

Biren Technology (壁仞科技) is pursuing a third capital raise just eight months after listing, worth roughly \$1 billion. Despite being on the US restricted-transactions list, fundraising does not appear to be affected.

Chinese AI chip companies are raising large sums in domestic capital markets, a structure in which development funding does not dry up even under US sanctions.

Huawei Unveils Stellar AI Network 2.0 and ACN

On the second day of Connect (September 18), Huawei unveiled Stellar AI Network 2.0. It cut end-to-end latency within data centers from 20 microseconds to 11 microseconds, and NPO switches lowered connection power from 1,000W to 600W.

Huawei also announced the Agent Communication Network (ACN), centered on digital identity management, dynamic group communication, and collaborative session management — dedicated infrastructure for agents to communicate safely and divide work among themselves. Agent Guardrail blocks 95% of prompt-injection attacks. Stellar AI WAN achieved 95% remote-computing efficiency over a distance of 1,000km.

Huawei Begins Mass Production of Hi-ONE NPO Optical Engine

Huawei announced that it has begun mass production of Hi-ONE, the industry's first NPO optical engine with a built-in light source, delivering 7.2TB/s of total bandwidth. It proposed a 12.8TB/s NPO module standard to the Optical Internetworking Forum (OIF), gaining support from more than 40 organizations. The engine will be deployed in the Ascend 960 SuperPoD, replacing 48,000 conventional optical modules with 5,500 engines.

China Mobile Shifts Strategy Toward Agent Connectivity

China Mobile has shifted its focus from "connecting things" to "connecting agents." Together with Huawei, it has built the world's largest 5G-A network, serving 160 million users, and commercialized a dedicated 5G-A acceleration package for high-speed rail. Its 2026 5G Smartphone White Paper covers on-device large models and AI agents built into handsets.

Huawei is putting forward a dedicated network standard for AI agents ahead of others. If ACN gains traction in international standards discussions, it will affect equipment makers worldwide.

Policy, Regulation, and National Strategy

AI Safety Governance Framework 3.0: Agent Risk Formally Codified for the First Time

China's national standards body, TC260, released "AI Safety Governance Framework 3.0" on September 14. It addresses, for the first time, the risks posed by autonomous agent behavior, dividing them into five categories including planning errors, privilege overreach, and memory tampering.

The framework extends beyond corporate technical documentation to include behavioral guidelines for general users. It is not a mandatory regulation but sets out a safety baseline. Companies including 360 participated in drafting it.

Exit-Entry Administration Regulation Takes Effect: Restricting AI Talent Mobility

The Exit-Entry Administration Regulation, which took effect September 15, restricts the movement of AI talent. It designates export-control violations and threats to technological security as grounds for exit restrictions, with workers in AI, chips, and semiconductors most affected.

China has moved first to establish a safety framework for the agent era. What stands out is the speed rather than the content — and the exit-entry regulation places real restrictions on the overseas movement of Chinese AI talent.

China's framework could gain an early foothold in international standards discussions.

US-China Tech Rivalry and Its Impact on Korea

Trump-Xi Summit Four Days Away: AI CEOs to Attend en Masse

President Xi Jinping will visit the White House on September 24 — his first visit in more than a decade. Altman (OpenAI), Jensen Huang (Nvidia), Amon (Qualcomm), and Cook (Apple) will attend the dinner hosted by President Trump. JPMorgan's Dimon and Citigroup's Fraser will also attend.

AI chip export controls are the central agenda item. The Trump administration shifted Nvidia H200 exports to China to case-by-case review, but Chinese customs is blocking approved H200 shipments. The Commerce Department is also examining rules to block remote access via servers in Southeast Asia, since ByteDance and Alibaba remotely use Nvidia chips hosted on servers in Thailand and Malaysia.

The think tank PIIE said major policy shifts are unlikely. The significance of the dinner lies in the fact itself that AI has become a top-tier agenda item in US-China relations.

SK Hynix-Intel Discuss Ohio Memory Plant

SK Hynix is discussing a plan to lease part of Intel's Ohio plant to manufacture memory chips in the United States, with one option involving a joint venture that includes cloud companies. If realized, it would be the first case of a Korean company producing memory chips on US soil. Both companies say discussions are still at an exploratory stage. Completion of Intel's Ohio plant is slated for 2030–2031.

Apple Continues to Exclude China from Siri AI

Apple released an English-language beta of Siri AI alongside iOS 27, but China was excluded, having not received regulatory approval. In China, Alibaba's Qwen and Baidu separately handle Apple Intelligence features. No launch date for Siri AI in China has been announced.

The divide in AI technology along geopolitical lines is accelerating. The presence of US AI company CEOs at the dinner signals that AI chip exports have become a diplomatic agenda item. Huawei, meanwhile, is accelerating its

Ascend roadmap to build out its own ecosystem under sanctions. Korea is the sole supplier straddling both sides through HBM and memory chips, and SK Hynix's discussions on US domestic production reflect a preemptive move to hold that position.

Attorney Kim Kyung-jin's Commentary

Huawei Connect 2026 repeated the same message across all three days: competing not on the performance of a single chip, but on the computing power of the entire system. The 4,096-unit Ascend 960 SuperPoD, the million-processor Peerium architecture, and the Hi-ONE optical engine all point in that direction. Even where it lags in transistor density, the strategy is to raise total computing power by linking tens of thousands of chips into one system.

The signal worth watching this week is China Telecom's Xing4.0. It built a model on Huawei chips alone that competes with Google's Gemma. Its performance is not top-tier, but it demonstrates a working vertical integration of Chinese chips, frameworks, and models in a single line. Zhipu AI hitting 200 tokens per second on 100,000 domestic accelerators fits the same pattern. An AI ecosystem without Nvidia has moved past the experimental stage and into commercial-grade operation.

At the September 24 dinner table sit Altman, Jensen Huang, Amon, and Cook. Over AI chip exports, these individuals' interests have become a variable in US diplomacy. Korea is not at that table, but it spans both sides through HBM and memory. SK Hynix's Ohio discussions reflect a move to protect that position.

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- F11 YouTube transcript search log: Searched using the keywords China AI, Huawei, robotics, and semiconductors. Reviewed eVUYCiRLgB4 (Bloomberg, "How China

Plans to Win the Global AI Race," 2026-09-18) for context on Chinese models' global usage having surpassed US models. Reviewed YzSIYx-MB4E ("China's Grand Vision for Physical AI and Its Robotics Ambitions," 2026-09-18) for supplementary context on China's robotics ecosystem. No relevant material was missing and no access failures occurred.

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International Conflict Briefing

International Conflict Briefing **2026-09-20**

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Today's Key Developments

1. A Russian drone attack on the Fastiv district of Ukraine's Kyiv region killed a mother and her two children. Tymur Tkachenko, head of the Kyiv regional military administration, announced this on Telegram.
2. Russian forces struck a shopping mall in Dnipro, injuring five people. Oleksandr Hanzha, head of the Dnipropetrovsk regional military administration, announced the number of injured.
3. The Saudi-led coalition announced that it intercepted a ballistic missile fired by the Houthis at Riyadh in the early morning. This is the first time an air raid alert has sounded in Riyadh since fighting in Yemen intensified in July.
4. Iran's Mohsen Rezaei said the conditions for resuming negotiations with the United States had been delivered to mediating countries. The conditions stated by the Iranian side are an end to the war on all fronts, the unfreezing of Iranian funds, and the lifting of the US naval blockade.
5. The Israeli military carried out successive airstrikes on a motorcycle and a passenger car in the Sheikh Radwan area of Gaza City. According to Palestinian tallies, six people were killed in the Gaza Strip that day, including a 10-year-old girl.
6. After two soldiers were lightly wounded in southern Lebanon, the Israeli military carried out retaliatory airstrikes on several points in the south.

7. The commander of US Central Command said that one billion barrels of crude oil had been allowed to pass through the Strait of Hormuz in recent months.

Changes by Front

In the Russia-Ukraine war, Russian forces continued attacking rear cities. In the Fastiv district of Kyiv region, a drone attack damaged houses and vehicles, and one house caught fire. In Dnipro, a 22-year-old woman sought hospital treatment belatedly after the shopping mall strike, raising the number of injured to five. The Ukrainian General Staff said there were 188 combat engagements on the front line over the day, with the fiercest fighting in the Kostiantynivka sector. This figure is from the Ukrainian side.

Fighting between Yemen and Saudi Arabia has spread as far as the capital, Riyadh. Houthi military spokesperson Yahya Saree claimed that sensitive facilities in Riyadh and Aramco facilities in Yanbu were attacked with cruise missiles, ballistic missiles, and drones. Saudi coalition spokesperson Major General Turki al-Maliki announced that the missile targeting Riyadh was intercepted and that attacks aimed at Bisha, Taif, Farasan, and Yanbu were also stopped. Saudi authorities said there were no casualties or damage in Riyadh. However, explosions were heard and black smoke was observed near King Khalid International Airport. In the ground war in Yemen, Al Jazeera reported that 12 Houthi fighters were killed in the Al-Fulayhan area and that 13 government soldiers were killed over two days in Taiz and Lahj.

The Israeli military struck several points in southern Lebanon immediately after two soldiers were lightly wounded there. The Jerusalem Post reported this news in the early hours of the 20th. This incident is reported by a single outlet.

Civilian Casualties and Humanitarian Situation

In Sheikh Radwan, Gaza City, an Israeli airstrike on a motorcycle killed one Palestinian and left one child in critical condition. In the same area, an

airstrike on a passenger car killed three more people. The Jerusalem Post reported that among the dead was the son of a Hamas-affiliated health ministry official. Airstrikes also hit the Nuseirat and Al-Bureij refugee camps, injuring several people. Al Jazeera, citing Palestinian Health Ministry tallies, reported that more than 1,381 people have been killed since the ceasefire was announced in October 2025. The Israeli military announced that it killed Hamas commander Mohammed Suleiman Biyuk in an airstrike on Khan Younis. This claim is from the Israeli military.

The three people killed in the Fastiv district of Kyiv region were one family. Ukrainian authorities confirmed the deaths, and other independent sources have not yet confirmed them.

Diplomacy, Sanctions, and Military Aid

Mohsen Rezaei, adviser to Iran's Supreme Leader, said the conditions for negotiations with the United States had been handed to mediating countries. The Times of Israel and The Jerusalem Post reported this statement. The Jerusalem Post also reported that Turkey revoked the operating license of Iran's Bank Mellat. The commander of US Central Command said one billion barrels of crude oil had passed through the Strait of Hormuz. This figure is from the US military. The US Embassy issued an alert to people staying in Saudi Arabia that flights could be disrupted by intensified fighting between the Houthis and Saudi Arabia.

What to Watch in the Next 24 Hours

Whether the Houthis continue attacks on Riyadh and the scale of the Saudi coalition's retaliatory airstrikes need to be watched. How the United States responds to the negotiation conditions presented by Iran should be observed. Confirmation is needed on whether Israeli airstrikes in southern Lebanon expand. It is necessary to see whether Russian attacks on Ukrainian rear cities continue.

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