

EDITORIAL HIGHLIGHTS

01-08-2026

Gen Z's Voice Must Lead to a Humane Education System (the hindu Page no 6)

Syllabus Mapping

1. GS Paper: GS Paper 2
2. Syllabus Topics:
 1. Issues relating to development and management of Social Sector/Services relating to Education and Human Resources.
 2. Important aspects of governance, transparency, and accountability.

Gen Z's voice must lead to a humane education system

With the successful demonstration by the Cockroach Janta Party, a point has been made. A light has been shown in our national darkness. We can use that light, or we can continue to curse the darkness. The choice is always there. Gen Z has pronounced a fiat. It will be wise on our part to take heed. The education system needs not just an overhaul but also a complete change. A change in policy itself. We must now sit down and work out a system in which examinations are seen as fair, conducted professionally, and taken happily and voluntarily. Competitive examinations should no longer be associated with student suicides.

India's education system has produced extraordinary professional talent, yet its admission culture has also created a dangerous emotional environment in which marks, ranks, and single-shot competitive examinations are often treated as the sole measures of intelligence, worth, and future possibility. This must change. Examinations need to become more inclusive, projecting students' worth and abilities even as they assess a candidate's competence for the chosen field of higher education. Gen Z is very aware of the competitive world it has inherited and is quite capable of making prudent choices for its future. It is up to us – parents, teachers, and policymakers – to consult with them and evolve a system that is fair, robust, and respected.

Assessing competence
A fair system of admission must adopt a multi-dimensional assessment of competence. Admissions should combine moderated school performance, discipline-specific aptitude, analytical writing, structured interviews where appropriate, practical or scenario-based tasks, and verifiable portfolios, projects, internships, community work and co-curricular achievement. Such an approach would test not only memory and speed but also reasoning, persistence, communication, judgment, ethical orientation and suitability for a chosen field. Entry-level institutions themselves, with the involvement of competent schoolteachers, should design and administer these assessments with transparent criteria and proper safeguards. Examinations should be redesigned to assess application, interpretation and higher-order thinking rather than predictable patterns that feed the coaching industry. This would preserve standards while aligning admissions more closely with real ability, educational purpose and student potential.

Industry, parents, and students must together broaden the meaning of educational success beyond a few high-pressure professional courses. Regular industry interaction through career fairs, internships, mentorship programmes, workplace visits, and alumni engagement can make students aware, even at the school level, of emerging opportunities in newer sectors and reduce blind dependence on competitive examinations for

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traditional career paths. Parents, especially those with limited access to reliable information and who often resort to unaffordable loans, need structured counselling in local languages on courses, careers, costs, scholarships, aptitude, mental-health risks, and the difference between a child's interests and parental ambitions. Students must be helped to assess their abilities, dispositions, and aspirations realistically through guidance and aptitude-based conversations rather than prestige-driven choices. When informed industry exposure, responsible parental support, and self-aware student decision-making come together, educational choices become more rational, humane, and less fear-driven. This is the groundwork on which a fair and effective entry-level assessment system can be built.

Role of elected representatives
The Constitution treats education as a public good, not a commercial race, and places a clear duty on the state to protect equality, dignity, and the right to education, especially for children and weaker sections. When the coaching ecosystem becomes exploitative – creating inequality, displacing formal schooling, and harming student well-being – Parliament and State legislatures must respond through law, regulation, and oversight. Members of Parliament and Members of the Legislative Assemblies may not be individually liable for a persistent social problem, but they remain institutionally responsible for creating and enforcing safeguards on fees, advertising, mental-health support, hostel standards, and fraudulent practices. In the face of evidence of student suicides and commercialisation, persistent inaction invites democratic and legal scrutiny, making urgent action a constitutional responsibility.

Does one size fit all? No. A centralised agency such as the National Testing Agency rests on the assumption that one examination model can fairly judge all students across disciplines, regions and social contexts; this assumption is flawed – especially in a country such as India, which is varied in every possible way. Institutions and professional bodies are better placed to define what they seek in candidates because they understand the intellectual and academic demands, skills, aptitude and ethical orientation required for specific courses leading to careers. A single national test also creates logistical overload and demographic unfairness: language, geography, school background, digital access, and local educational disadvantages all affect performance, making a "one-test-fits-all" model neither educationally sound nor socially just.

A decentralised system, with universities or clusters of institutions designing and conducting their own assessments within broad University Grant Commission norms, would allow for more relevant and balanced evaluation. Students, too, may be consulted through structured representation in identifying appropriate modes

of assessment, though access to live question papers or confidential content should be strictly avoided. To preserve sanctity and prevent paper leaks, these safeguards are essential: encrypted digital paper transmission; multi-layered question banks with algorithmic randomisation; strict vetting and rotation of paper setters; secure printing and sealed distribution protocols; independent audit and surveillance of examination centres. And severe penal consequences for any breach. Additional safeguards may include biometric candidate verification, time-staggered papers, and post-examination forensic review of anomalies.

Properly scheduled, decentralised examinations spread across the academic calendar would reduce stress, avoid nationwide disruption from a single failure, and permit institutions to test genuine competence and readiness rather than coaching-driven examination technique alone.

Entrance exams should help our students assess themselves for their abilities and competency in a chosen field. Students should undertake the exams willingly, with the clear understanding that it is indeed a competitive world, and that they have a self-worth even beyond the particular exam that they are sitting for. When alternate career choices are there, the pressure on the students is much less; and if they are passionate about a profession, then they will learn to work hard for it.

A humane direction for reform
India requires a shift from rank-based filtration to capacity-based recognition. A just admissions system should ask not only who scored highest under exam pressure, but who has the aptitude, motivation, ethical seriousness, resilience, and capacity to grow in a chosen field. Such a system would still value excellence, but it would define excellence more intelligently and more humanely. Over the past few days, Gen Z has brought us face-to-face with a dark secret we have long lived with: the overemphasis on certain professions. This generation has choices, and we must allow them to choose responsibly while understanding the consequences.

The constitutional promise of education cannot be fulfilled by a structure that rewards fear, debt, and psychological distress while calling the result merit. The alternative lies in holistic assessment, regulation of coaching commercialisation, institutionalised mental health support, industry involvement, and sustained counselling for parents and students, keeping interests, abilities, and dignity at the centre of educational choices. This will help create happier and more confident young people who choose careers deliberately, not out of compulsion, paving the way for a better India and a better world. If these changes begin now, the suicides caused by entrance examination stress can come to an end.

The time has come to rethink merit, reform admissions, and restore dignity to every student's academic journey

Western Ghats Conservation with Science and Dialogue (the Hindu Page no 6)

Syllabus Mapping

3. GS Paper: GS Paper 2 & GS Paper 3
4. Syllabus Topics:
 1. Conservation, environmental pollution and degradation, environmental impact assessment.
 2. Government policies and interventions for development in various sectors and issues arising out of their design and implementation.
 3. Issues relating to development and management of Social Sector/Services (Forest Rights and Indigenous communities).

Western Ghats conservation with science and dialogue

The Western Ghats, spanning six coastal States of India, are internationally recognised for their rich biodiversity. They contain 39 biodiversity hotspot areas, including national parks, reserved forests, and wildlife sanctuaries declared World Heritage Sites (WHS) by UNESCO in 2012. To protect this natural heritage, the Western Ghats Ecology Expert Panel (WGEEP) was constituted in 2010 under the chairmanship of ecologist, academic, and writer Madhav Gadgil. Its report recommended declaring 142 talukas covering 44 districts in the entire Western Ghats into Ecologically Sensitive Area (ESA), while sub-dividing it into three Ecologically Sensitive Zones (ESZ). Such a declaration would regulate human activities to protect fragile ecosystems and, once notified under the Environment Protection Act, 1986, would provide legal protection.

The ESA journey

Following strong local and political opposition in the States concerned to the WGEEP recommendations, the central government constituted a high-level working group headed by Krishnaswamy Kasturirangan in 2012 to review them. The group limited restrictions on economic activities and livelihoods to ecologically sensitive natural landscapes, reducing the area covered to only 37% of the Western Ghats.

Based on this recalibrated report, the Ministry of Environment, Forest and Climate Change (MoEF&CC) issued the first draft notification in 2014. Since the matter remained unresolved, the Ministry constituted an expert panel headed by former Director General of Forests Sanjay Kumar in 2022 to examine the concerns raised by the stakeholder States. Following the expert panel's deliberations, Gujarat and Goa appear to have agreed to the finalisation of the ESA notification, while Maharashtra has sought a fresh review.

Discussions between the Centre and other States, including Karnataka, Kerala, and Tamil



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The Ecologically Sensitive Area debate highlights the need for balanced, inclusive conservation approaches

Nadu, are ongoing. A "phased rollout" or "State-wise finalisation" is possible after the inclusion of this clause in the 2024 draft notification.

Between 2015 and 2026, five draft notifications were issued as the Centre and States did not reach a consensus. Following the expiry of the last notification, in July 2026, the Ministry has extended the expert panel's tenure by another year.

The case of Karnataka

Karnataka has 10 districts in the Western Ghats, with 23.4% of the State's population residing there. Around 20,668 square kilometres have been identified for ESA declaration. Regardless of the government's political affiliation, the State has consistently opposed the proposal, citing its potential impact on agriculture, plantations, mining, and infrastructure development.

A study by this writer covered villages located in the proximity of 10 WHS across four districts – Chikmagalur, Kodagu, Shivamogga, and Udupi – and three other important sites in Uttara Kannada and Udupi, including the Kali Tiger Reserve, Mundigekere Bird Sanctuary (five acres and a breeding ground for cattle egrets in Sirsi), and Mookambika Wildlife Sanctuary. The study highlighted local perspectives on livelihoods and conservation efforts.

In villages adjoining the Kali Tiger Reserve and Kudremukh National Park, some residents reported accepting or considering rehabilitation packages. Those opposing relocation felt that they might eventually have to follow due to declining village populations and the resulting threat to village life. Even villages with granted forest rights have faced challenges due to restrictions on minor forest produce collection and agricultural practices. Concerns were also raised over the rejection of forest rights claims by non-tribals with long-standing residence, including in a village (at least 150 years) near the

Balahalli Reserved Forest. Meanwhile, local officials and some communities supported regulating environmentally harmful activities such as stone quarrying and unplanned tourism projects, including proposals for forest ropeways.

With specific reference to the notifications, it must be noted that local communities faced similar restrictions whenever these areas were declared protected zones, even before the WGEEP was constituted. Many residents believe that buffer zones extend 10 kilometres from core areas and fear possible eviction from their lands. Stakeholders across the study districts unanimously expressed concerns that reliance on satellite imagery for identifying ESA areas was unfair, as they were convinced that it could not distinguish plantation crops such as arecanut, shade-grown coffee, rubber, and coconut from forest cover. They also raised concerns that no committees had physically visited their villages.

In this context, Karnataka's case requires an empathetic approach that addresses genuine stakeholder concerns before a final decision is taken.

Protecting indigenous communities

In the broader context, the Union government's decision to proceed with the ESA notification for the Western Ghats reflects political will to protect ecology and biodiversity. Conservation efforts cannot be indefinitely delayed as it will result in States losing their control in such areas; ecological systems transcend administrative boundaries.

More importantly, ESA should include indigenous communities living deep within forests, as they naturally follow conservation principles and maintain a sacred, sustainable relationship with the environment despite challenging conditions. Their presence serves as a bridge between forests and mainstream society, while their absence risks the loss of biocultural diversity.

America's Tariff State is Expanding. India Must be Patient (Indian express page no 15)

Syllabus Mapping

5. GS Paper: GS Paper 2 & GS Paper 3
6. Syllabus Topics:
 1. Effect of policies and politics of developed and developing countries on India's interests.
 2. Indian Economy and issues relating to planning, mobilization of resources, growth, development, and employment.
 3. Effects of liberalization on the economy, changes in industrial policy, and their effects on industrial growth.



HERE IS A fundamental shift underway in US trade policy. After more than a year in which President Donald Trump relied mainly on executive powers to impose tariffs, the US Congress is now moving to strengthen and expand his tariff strategy through legislation.

The clearest example is the Russia sanctions Bill. On July 28, the US Senate voted 86-12 to advance the Bill, which would authorise Trump to impose tariffs of up to 100 per cent on countries buying Russian oil, including India. The strong bipartisan vote makes Senate approval highly likely. The Bill must still pass the House of Representatives and be signed by the President before becoming law.

The message is clear: Tariffs are no longer just presidential actions under existing laws — they are increasingly becoming an instrument of US economic and foreign policy, backed by Congress. India should recognise this structural shift and frame its trade strategy accordingly, rather than treating each new tariff measure as temporary or isolated.

The events of July 24 had already pointed in the same direction. Exporters had expected the temporary Section 122 tariff to expire and US imports to revert to normal WTO most-favoured-nation (MFN) tariff rates. Instead, Washington kept the tariff in place by replacing one legal instrument with another.

Just hours before the Section 122 tariff expired, the US Trade Representative imposed new Section 301 tariffs on imports from 60 economies, citing forced-labour concerns. The tariff burden remained largely unchanged: only its legal basis changed. This showed that maintaining higher tariffs had become a policy objective, regardless of the legal instrument used.

India's experience illustrates this shift. Although Washington reduced India's tariff from the proposed 12.5 per cent to 10 per cent after recognising its ban on imports made with forced labour, it still imposed the tariff despite producing no credible evidence that India imports goods made with forced labour. The objective appeared to be not simply

America's tariff state is expanding. India must be patient



ILLUSTRATION: C R SANKUMAR

to remedy an unfair trade practice but to preserve a broader tariff-based strategy.

The result is a US tariff system that is becoming increasingly permanent, layered and unpredictable. Tariffs are now imposed through multiple legal authorities — including MFN tariffs, Section 232, Section 301, and potentially new legislation such as the Russia sanctions Bill. A cotton T-shirt imported into the United States now faces a 26.5 per cent tariff (16.5 per cent MFN plus 10 per cent under Section 301), while an auto part attracts 27.5 per cent (2.5 per cent MFN plus a 25 per cent Section 232 duty). Some products, including smartphones and generic medicines, remain duty-free — for now.

This marks a sharp departure from the traditional trading system. For decades, WTO commitments kept tariffs in countries broadly stable. The United States is now using an expanding range of executive and legislative powers to raise tariffs in violation of its commitment at the WTO.

More measures are in the pipeline. The US is expected to conclude another Section 301 investigation into alleged excess manufacturing capacity, including India's textiles, steel and petrochemicals. Trump has also proposed 100 per cent tariffs on imported generic medicines from August 2028, rising to 200 per cent a year later unless production shifts to the US. Given that India supplies nearly half of all generic prescriptions dispensed in the US and almost 38 per cent of its pharmaceutical exports go to the US market, these proposals ignore the impact on American consumers.

Rather than negotiating under pressure, India should strengthen its competitiveness, diversify export markets and preserve its policy autonomy

ventory for exports. Yet these concessions have neither slowed US tariff actions nor secured meaningful commercial gains. Instead, they have weakened India's negotiating position.

In any trade negotiation, concessions are exchanged for reciprocal benefits. When a country makes unilateral concessions outside the negotiating process, the other side simply accepts them without offering anything in return. That is why countries negotiating trade agreements avoid unilateral concessions and keep all offers on the table until a balanced deal is reached.

This has important implications for the proposed India-U.S. bilateral trade agreement (BTA). Although officials say the agreement is "99 per cent complete", the main US concession no longer exists. Under the February 6, 2026 joint statement, Washington had offered to reduce reciprocal tariffs on Indian exports from 25 per cent to 18 per cent. But that offer disappeared on February 20 when the US Supreme Court struck down the reciprocal tariff regime. Since then, the United States has been unable to offer any comparable commercial benefit, making it difficult to justify further Indian concessions.

India has little reason to rush into a BTA. Unlike many US allies in Europe and East Asia, it does not depend on American security guarantees and is therefore under less pressure to accept an unbalanced deal. More importantly, a trade agreement would not shield India from future tariffs. The European Union, Japan and South Korea — all close US partners with trade agreements — continue to face new Section 301 investigations and other trade actions.

In 2019, India imposed retaliatory tariffs on 28 US products in response to steel and aluminium tariffs, arguing that such action was permitted under WTO rules. Today, however, retaliation appears far less feasible.

Rather than negotiating under pressure, India should strengthen its competitiveness, diversify export markets and preserve its policy autonomy. Temporary export losses are a smaller cost than permanent concessions that weaken India's long-term interests.

India should sign a trade deal only when it delivers stable, reciprocal commercial benefits; not short-lived relief from an unpredictable US tariff regime. A lasting trade partnership cannot be built on a foundation of changing tariffs.

The writer is founder, GTRI

In Indo-Pacific, a Steady Projection of Power (Indian express page no 15)

Syllabus Mapping

7. GS Paper: GS Paper 2
8. Syllabus Topics:
 1. Bilateral, regional, and global groupings and agreements involving India and/or affecting India's interests.
 2. Effect of policies and politics of developed and developing countries on India's interests.



RAM RAJYA
BY RAM MADHAV

In Indo-Pacific, a steady projection of power

IS INDIA emerging as the third power in the Indo-Pacific region alongside the US and China?

In the past decade, Prime Minister Narendra Modi has substantially increased engagement with the countries in the region. He has participated in ASEAN-India Summits 12 times, East Asia Summits nine times, visited Japan eight times, Singapore five times, Indonesia four times and Australia three times. He has been present at all six Quad leader-level summits since 2021. Modi is the only Indian PM to have visited almost every country in the Indo-Pacific. Despite differences, Modi and Chinese President Xi Jinping bumped into each other over 20 times in the last 12 years, although not all can be called serious engagements.

In his address to Parliament in 2007, then Japanese PM Shinzo Abe invoked the terminology of "Indo-Pacific" for the first time for the region known as "Asia-Pacific" since the 1980s. Soon, the term captured the world's attention, with the US using the phrase "Indo-Asia-Pacific" initially, before officially adopting the term in 2018. It even renamed its command Indo-Pacific Command. Several coun-

tries came out with Indo-Pacific strategies. Two countries that refused to adopt this terminology were China and Russia. In 2018, Wang Yi, the Chinese foreign minister, said it would "dissipate like sea foam", dubbing it an effort by the Western powers to encircle and contain China.

Keeping complexities in mind, Modi adopted a gradualist approach to dealing with the region. In the Quad, while the US proposed a "Free and Open Indo-Pacific" as the motto, Modi suggested Free, Open and "Inclusive" Indo-Pacific, leaving some ambiguity over the question of excluding any country. He proclaimed the concept of "ASEAN Centrality" to the Indo-Pacific at the Shangri La Dialogue in Singapore in 2017. However, in the last couple of years, a new assertion is visible. First came the initiative to develop a \$10-billion maritime facility — the Great Nicobar Island Development Project. Sitting just 40 nautical miles north of the Strait of Malacca, which witnesses around 100,000 ship crossings annually, 60 per cent belonging to China, this is in a way India's proclamation of its geostrategic activism.

Modi's engagements with the leaders of Japan, Indonesia, New Zealand and Australia in July also indicated an assertion of power.

These engagements went far beyond trade and technology, involving defence deals and strategic maritime collaborations. During Japanese PM Sanae Takaichi's visit to Delhi in July, India formally agreed to build a trilateral Track 1.5 dialogue mechanism with Japan and the Philippines, hinting at its readiness to step into a tense maritime zone — the East and South China Seas.

The Takaichi government increased its defence budget last year to \$58 billion, inching towards the 2027 target of 2 per cent of GDP. South Korea also increased its defence spending steeply to almost \$45 billion and aims to take it to 3.5 per cent of GDP by 2035. This surge is indicative of the realisation that the US's interest and involvement in the region is waning and the China challenge is mounting. In an interview in 2013, Lee Kuan Yew argued that "the size of China's displacement of world balance is such that the world must find a new balance in 30 to 40 years".

Through his recent initiatives, Modi raised the bar for India in the Indo-Pacific. Through his personal relationships with leaders in the region and deftness in managing relations with diverse powers based on the principle of strategic autonomy, is Modi poised to build that balance?

The writer, president, India Foundation, is with the BJP

Can Chinese AI Models Shape Future of Tech Race (Indian express page no 17)

Syllabus Mapping

9. GS Paper: GS Paper 2 & GS Paper 3

10. Syllabus Topics:

1. Effect of policies and politics of developed and developing countries on India's interests.
2. Science and Technology—developments and their applications and effects in everyday life.
3. Awareness in the fields of IT, Computers, and Artificial Intelligence.

Can Chinese AI models shape future of tech race

Models like DeepSeek and Kimi K3 may be narrowing the gap with US rivals. This raises questions about the future of AI, who might take the lead, and how

RISHIKA SINGH

IN JANUARY 2025, the release of a Chinese artificial intelligence (AI) model called DeepSeek R1 drew global attention and briefly triggered market panic. It was a low-cost, quality product that was compared to ChatGPT and other top models from the US as discussions about AI-related overspending were gaining ground.

DeepSeek also evoked curiosity and questions — just how capable is China's AI sector? In parallel, OpenAI, the company behind ChatGPT, accused DeepSeek of copying its technology, with a Trump administration adviser backing the claim.

A similar sequence seems to be playing out now. Chinese company Moonshot AI's Kimi K3 model, released in July, is said to rival models from US-based OpenAI and Anthropic. It boasts features such as coding, financial consulting and video editing.

Amid its rise, Anthropic accused Moonshot AI of illicitly extracting the capabilities of its Claude model, with one US official describing it as "an assault on every economy that prizes the entrepreneur, rewards private capital, and relies on fair and honest competition." China's Commerce Ministry then accused the US of "AI hegemonism".

"Markets react strongly when a Chinese release challenges assumptions about permanent US technological leadership. Another sell-off is certainly possible," said Lizzi Lee, a Senior Analyst focusing on China at the Economist Intelligence Unit, told *The Indian Express*. "Semiconductors or specialised chips are crucial hardware required to run AI models, and the US government has sought to restrict advanced variants from reaching China."

Restrictions, as part of the larger geopolitical rivalry, mean that Chinese labs "may not have the capacity to provide commercial access to a closed model," he said.

What makes the Kimi case unusual, he said, "is that it is one of the most popular models trying a custom licence approach — open-weight for most, but requiring large companies to strike a commercial agreement with Moonshot."

Lizzi Lee said that the approach also fits China's broader industrial strategy: "Beijing wants AI to spread quickly across manufacturing, cloud services, local governments... Open weights help accelerate that diffusion. There is a diplomatic angle, too. China increasingly presents open models as part of international technological cooperation."

Just this month, the Chinese government spearheaded the creation of a new AI

• HOW KIMI STACKS UP AGAINST 'OPEN-WEIGHT' COMPETITORS

Kimi K3 has been billed as the world's largest 'open-weight' AI system with 2.8 trillion (tn) 'parameters'. In the context of AI, parameters are settings that determine how systems respond to user prompts, based on the large amounts of data they have been trained on.

Model	Parameters (tn)	Release Date
Kimi K3	2.8	July 2025
Moonshot AI 2.8 tn	2.8	July 2025
DeepSeek V4 Pro	~1.5	July 2025
DeepSeek 1.6 tn	1.6	July 2025
MiniMax 428 bn	0.428	July 2025
Alibaba 397 bn	0.397	July 2025
Qwen 3.5	~0.5	July 2025
MiniMax M3	~0.5	July 2025
Kimi K2	~1.0	July 2025

The chart shows the total parameters of each company's flagship model between July 2025 and July 2026. Company names are in bold.

What is Kimi K3?

Kimi K3 is an advanced AI model released by the Chinese company Moonshot. It is said to rival the likes of OpenAI and Anthropic.

It is an 'open-weight' system, which means it can be downloaded and modified.

US companies have generally not followed the open model path, but many Chinese AI models open-weight.

Zhao said, "Leading US companies already have global cloud platforms and en-

terprise customers. Chinese labs can use open weights to reach developers more quickly, build an ecosystem and generate demand for their products.

have been trained on. Parameters are assigned "weights" or numerical values that indicate their relative significance, which guide the model's response.

Lee said that a massive parameter count indicates large investment in compute (software and hardware used for training and running AI systems), data and engineering. But the model's capability also depends on factors like data quality.

Poe Zhao, a China Tech Analyst and Founder of the online publication Hello China Tech, told *The Indian Express*: "An open-weight model allows developers to download its parameters, run it locally and customise it. Open source usually implies broader disclosure, including enough code and training information to understand and modify how the model was produced."

Conceptually, "open-source" simply means that the underlying code behind software is publicly shared so anyone can use and modify it to create their own programs. Openness is often seen as a way to democratise technology, but has also drawn counterarguments on malicious actors manipulating code and posing security risks.

The open-close debate

US companies have generally not followed the open model path, but many Chinese AI models open-weight.

Zhao said, "Leading US companies already have global cloud platforms and en-

governance body, with President Xi Jinping stating that "AI development should not be a solo performance... but a symphony of international cooperation".

Future of the AI race

Kimi arrives at a time of several overlapping, AI-related debates in the US, touching upon tech access and national security.

In a recent open letter, industry giants called for shifting towards open-weight models. "Software developed by the open-source community now supports most of the internet and underlies systems used by the world's largest technology companies, as well as the US military and federal agencies... The US now faces a similar choice with AI," it said.

Zhao said that the letter is an "important industry signal, although it is too early to call it a major shift...". While companies behind AI infrastructure (like Nvidia) have until now advocated for open-weight models, presumably to spread adoption and the demand for their products, companies that created proprietary models (like Anthropic) have had reservations.

Lizzi Lee said the story has "clear parallels with earlier disputes involving semiconductors, electric vehicles and other industries. Rapid Chinese technological catch-up has often been followed by arguments over technology transfer and intellectual property."

The US government is also reportedly investigating whether Moonshot illegally accessed advanced chips to train models. One reason for this may be increasing adoption of Chinese AI within the US. For price-conscious users, open-weight models also allow for need-based customisation.

With every new advanced Chinese model, the gap between the countries is narrowing, but with caveats. Zhao argued that export controls on chips, for instance, have also encouraged China's investment in efficiency and domestic alternatives. However, "K3 does not prove that export controls have failed. It shows that progress in AI models is influenced by more than access to the most advanced chips," he said.

Parity with the US may be far off, he said, with companies holding an edge in compute, capital, global distribution and chips.

The rise of Chinese AI companies could also offer other countries "more choice, lower costs and greater ability to deploy models locally." This, in turn, could give Chinese companies more influence over technical standards, further intensifying what is becoming a two-player race for global AI dominance.