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Congress of the United States
House of Representatives
SELECT COMMITTEE ON THE CHINESE COMMUNIST PARTY

June 27, 2025

The Honorable Howard W. Lutnick
Secretary
U.S. Department of Commerce
1401 Constitution Avenue
NW Washington, DC 20230

Dear Secretary Lutnick,

I applaud the Trump Administration's continued leadership in harnessing American innovation as strategic leverage. President Trump's recent deal with the United Arab Emirates (UAE) holds the potential to reinforce U.S. technology dominance accompanied by appropriate guardrails. As the administration advances similar agreements with other partners, I urge the adoption of an **America First AI Policy** to protect our lead in artificial intelligence and prevent the People's Republic of China (PRC) from co-opting the global AI ecosystem.

As you recently alluded to in a statement on "Transforming the U.S. AI Safety Institute into the Pro-Innovation, Pro-Science U.S. Center for AI Standards and Innovation," this competition will shape the future—not just of technology, but of national power. The stakes could not be higher. The winner will determine whether the 21st century is defined by American values or by the techno-authoritarian model advanced by the Chinese Communist Party. The U.S. currently holds a lead in frontier AI capabilities, but China is advancing rapidly, as shown by its release of DeepSeek R1.[1] We must act decisively to secure our advantage while it still confers strategic flexibility.

It is not only China's ability to build frontier AI that poses a threat—it is also who the Chinese are willing to share these immense capabilities with. Historically, the development of weapons of mass destruction—such as al-Qaeda's anthrax lab or the Khan proliferation network—required rare combinations of technical expertise and radical intent.[2] But access to sufficiently capable AI systems may soon eliminate the need for highly trained experts. AI could enable non-state actors to generate step-by-step instructions for constructing bioweapons targeted at Americans. These risks are no longer hypothetical; they are present now and growing.[3] PRC

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[1] Select Committee on the Chinese Communist Party, U.S. House of Representatives, DeepSeek Unmasked: Exposing The CCP's Latest Tool for Spying, Stealing, and Subverting U.S. Export Control Restrictions (April 2025)
[2] U.N. Security Council, ISIL (Da'esh) and Al-Qaida Sanctions List: Yazid Sufaat, June 2023 and Molly MacCalman, *"A.Q. Khan Nuclear Smuggling Network,"* Journal of Strategic Security, 2016.
[3] Roger Brent and T. Greg McKelvey Jr., *"Contemporary AI foundation models increase biological weapons risk,"* RAND Corporation, June 2025 and Jasper Gotting et al., *"Virology Capabilities Test (VCT): A Multimodal Virology Q&A Benchmark,"* Secure Bio, April 2025.

models could be exported, licensed, or leaked to non-state actors or authoritarian regimes, increasing the risk of AI-enabled attacks. Preventing Chinese-origin AI from becoming a global proliferation threat must be central to any U.S. AI strategy. Just as uranium, and its proliferation, was the critical resource of the nuclear age, advanced semiconductors are the key enabler of power in the AI era.

Vice President Vance recently warned that even if powerful AI systems become destabilizing, the United States might not be able to pause their development unilaterally—doing so could allow China to leap ahead.[4] His remarks reinforce a central strategic point: the longer and more secure the United States leads in advanced AI, the greater our ability to impose safeguards and manage risk without undermining national security. The UAE deal, and others like it, must preserve U.S. leadership and ensure partners do not become independent centers of frontier AI development that could constrain American options.

This underscores a consistent theme advanced by the Trump Administration and the Commerce Department under your leadership: security must be foundational to any deal involving semiconductors and AI.[5] The PRC may try to exploit historic ties to the UAE (or other partners) to gain access to U.S. compute, either through influence or more aggressive means. Even U.S.-owned data centers overseas must be protected from compromise. Any agreement must also preserve U.S. flexibility to revise terms as threats evolve. Accordingly, I offer the following recommendations to strengthen the strategic and security posture of such deals:

1. **Use AI Diplomacy to Secure Influence and Supply Chains**: U.S. AI leadership is a powerful diplomatic tool that President Trump has already used to significant effect. Higher-income partners, such as the UAE, will be able to invest dollar-for-dollar in U.S. infrastructure, furthering U.S. AI capability and capacity. Others may be be able to help replace China in the AI supply chain—mining rare earths, building components, or producing trusted hardware. Each prospective partner nation will have something unique to offer.

2. **Require Location Verification for Advanced Chips**: As proposed in the bipartisan Chip Security Act, require city- or state-level location reporting for advanced chips. If tampered with or diverted to the PRC, manufacturers must notify the Department of Commerce. This will enable proactive export control enforcement, identify circumvention pathways, and help ensure only trusted buyers receive licenses.[6]

3. **Secure U.S. Control Over Compute Infrastructure**: Ensure that no more than 49% of any U.S. hyperscaler's advanced compute capacity is located overseas. We should also prevent any single non-treaty ally from hosting more than 10% of total global compute used to train frontier AI models and set a goal of 0% of advanced U.S. compute falling into PRC hands—while implementing a roadmap to achieve it.

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[4] Ross Douthat, *"JD Vance on His Faith and Trump's Most Controversial Policies,"* The New York Times (May 21, 2025).
[5] U.S. Mission UAE, *"UAE and US Presidents Attend the Unveiling of Phase 1 of New 5GW AI Campus in Abu Dhabi,"* (May 17, 2025).
[6] Scott J Mulligan, *"Can 'Location Verification' Stop AI Chip Smuggling?"* AI Frontiers, (May 19, 2025).

4. **Base Agreements on Compute, Not Chip Count**: The reported export cap of 500,000 advanced chips per year to the UAE may appear fixed, but chip capability will increase dramatically over time. Instead, agreements must be framed in terms of aggregate computational power to preserve America First access.

5. **Prohibit PRC Access to U.S. Technology in AI Infrastructure**: Ban Chinese-origin semiconductors and equipment from advanced AI data centers involving U.S. tech. Prohibit physical or remote access by Chinese entities or nationals to these centers.

6. **Enforce Strict Security Standards at Overseas AI Data Centers**: Require robust cyber, physical, and personnel security—including tamper-evident cameras and monitoring of critical components.

7. **Keep Frontier Model Weights Under U.S. Jurisdiction**: All training of frontier models should take place within the United States, and resulting model weights must remain physically and legally under U.S. control. These weights are the most sensitive—and weaponizable—component of AI systems.

8. **Require U.S. Strategic Alignment from Partners**: Nations that benefit from U.S. AI must choose sides. Partners must refuse to support PRC military agreements or basing, adopt U.S.-equivalent export controls, and implement robust inbound and outbound investment screening and restrictions. In particular, I recommend that the UAE, including all of its sovereign wealth funds and private investors (such as the former G42 China-focused fund now being managed by state-linked fund Lunate) should be restricted from investing in the PRC AI and semiconductor industries.

The administration's AI diplomacy is an opportunity to expand American influence, solidify strategic alliances, and reinforce our technological lead. I support these efforts and hope the above measures prove helpful as you work to lock in terms that advance U.S. national security.

The House Select Committee on the Strategic Competition Between the United States and the Chinese Communist Party has broad authority to investigate and submit policy recommendations on countering the economic, technological, security, and ideological threats of the Chinese Communist Party to the United States and allies and partners of the United States under H. Res. 5 Sec. 4(a).

Sincerely,

John Moolenaar
Chairman

cc: The Honorable Marco Rubio
Secretary, U.S. Department of State

The Honorable Michael Kratsios
Director, Office of Science and Technology Policy