# From Global AI Governance to Strategic Containment: The New AI Cold War?

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Abstract

The shift from global and multilateral AI governance initiatives to national security-driven containment marks a critical turning point in technological regulation. As frameworks focusing on international collaboration like the **Global Partnership on AI (GPAI)** or **OECD AI Principles** give way to restrictive policies, a new paradigm of technological sovereignty emerges. This transition is best exemplified by the **Framework for Artificial Intelligence Diffusion (IFR 0694-AJ90)** that prioritizes export controls, licensing policies, and compute restrictions over making AI trustworthy, responsible, human centered etc., reflecting broader tensions between innovation and national security.

The securitization of AI governance is evident in increasingly restrictive national policies: **China's AI Security and Algorithm Regulations** reinforce domestic control, **Japan's AI Strategy 2022** emphasizes export security, **India's AI Mission** prioritizes defense applications, and **Russia's AI Strategy** focuses on Sovereignty & national security. Simultaneously, semiconductor supply chain rivalries—often described as the **"Chip Wars"**—intensify economic competition, creating new technological hierarchies that resemble but also transcend Cold War-era containment strategies.

This study examines three interconnected dimensions:

1. **The Transition from Global Governance to Containment Logic** – How AI governance has shifted from international cooperation toward control and restriction.

2. **The Emergence of New Technological Blocs** – How alliances between states and corporations reshape global AI ecosystems.

3. **The Convergence of State and Corporate Power** – How governments and technology firms co-produce AI governance through infrastructure control, surveillance, and export policies.

Through an interdisciplinary framework integrating **Science, Technology, and Society (STS) studies**, **Foucault's concept of governmentality**, and **Fearon's costly signals theory**, this research investigates whether **semiconductor and AI diffusion controls function as effective deterrents or, conversely, accelerate alternative technological ecosystems**. Engaging critically with **CSET's Decoding Intentions report**, this study examines how initiatives like the **U.S. CHIPS Act** and **China's Semiconductor Development Plan** embed national security imperatives into AI governance and infrastructure.

The research raises a key question: **Do contemporary AI containment strategies signal a new Cold War, or do they represent a more profound transformation in global power structures?** By examining **alternative AI ecosystems**—such as **China's DeepSeek and European AI initiatives**— this study reveals the systemic limits of technological containment in an era where AI diffusion increasingly resists traditional geopolitical control.

Beyond conventional geopolitical analysis, this research **reframes AI sovereignty as an infrastructural phenomenon**, where access to compute, model weights, and semiconductor supply chains determines geopolitical influence. It synthesizes historical Cold War containment strategies with contemporary digital governance challenges, offering new theoretical insights into evolving relationship between technological power, economic competition, and AI regulation. Through comparative policy analysis and a critical examination of governance documents, this study illuminates the tensions between national security imperatives and inherently distributed

nature of AI development, **suggesting new frameworks for understanding technological sovereignty in an interconnected world**.

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