

Brief: Biden's China Strategy Is Taking Shape

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Background: The U.S. is virtually unmatched in its military, economic and diplomatic power, but over the past five years or so, it's had to confront the limits of its might as it tries to pressure China into doing things it doesn't want to do. As often as not, pushing China too far goes against Washington's own interests. **The U.S.-China trade war**, U.S. naval operations **in the East and South China seas**, and inconsistent efforts to keep friends and allies from drifting into China's orbit illustrate as much. The U.S. is now attempting to formulate a new, more comprehensive, more coherent strategy for competing with China on multiple fronts.

What Happened: On Thursday, after a two-hour call with Chinese President Xi Jinping, **U.S. President Joe Biden couched his infrastructure spending plans in strategic terms**, declaring that China is going to "eat our lunch." This is some crafty messaging meant to drum up the political will needed to overcome Washington's longstanding struggles with major infrastructure buildouts. But it is indeed a strategic issue. Meanwhile, the U.S. is ramping up targeted measures to **limit exports of sensitive technologies that could empower China's own tech sector**, as well as the People's Liberation Army. **The trick for Washington** is to avoid inadvertently accelerating innovation in China or gutting U.S. firms that rely on Chinese consumption. A senior Pentagon official said the priority of the Pentagon's newly launched China Task Force will be **tech and supply chain vulnerabilities**.

There are also signs that the U.S. is preparing to dramatically **increase support for domestic chipmaking operations** in light of the ongoing global chip shortage — something hurting U.S. automakers — and the collective realization that it's **overly dependent on Taiwanese chip factories** located an easy missile's flight from mainland China.

Bottom Line: The outlines of the Biden administration's strategy, or at least its priorities, are starting to take shape. It will still challenge China directly by, for example, keeping some tariffs around, continuing the offensive against Huawei and other Chinese tech giants, and looking for more substantive ways to defend the maritime interests of East Asian allies. But the bigger emphasis will be on out-competing China and on leveraging U.S. diplomatic strengths by finding ways to coordinate more closely with its friends and allies. It all makes sense on paper, but none of the strategy's components are easily executed.

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