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Signaling Without Settlement:

An Assessment of Trump's Beijing Visit and the Politics of Managed U.S.–China Competition

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Core Judgment

High-level visit, low-text outcome. Strong political performance, limited substantive delivery. The summit did not reset U.S.–China competition; it reproduced that competition in a more manageable form.

Key Judgments

- **Political framework, not codified settlement.** The summit gave Beijing the language of "constructive strategic stability," but no joint communiqué, deliverables list, implementation schedule, or binding follow-up mechanism emerged.
- **Strategic optics for China, transactional talking points for Washington.** Beijing gained the image of leader-level strategic management on Chinese soil. Washington gained deal narratives around aircraft, agriculture, energy, finance, and technology, but many remain unevenly verified.
- **Broad commercial agenda, uneven execution.** Boeing exposed the limits of the summit's delivery: 200 aircraft fell below the reported 500-aircraft expectation. Agriculture was mixed: soybeans reflected continuity, while beef license renewals offered a more concrete but still purchase-unverified access signal.
- **H200 access as controlled technology access, not détente.** Reported clearance for around 10 Chinese firms to purchase Nvidia H200 chips suggests selective licensing, not a rollback of export controls. Pending deliveries keep the arrangement closer to policy authorization than verified execution.
- **Strategic resources remain reciprocal chokepoints.** AI chips and rare earths mirror each other: Washington controls advanced compute access, while Beijing retains leverage over critical mineral inputs. A rare-earth truce may reduce pressure, but not restore supply-chain trust.
- **Hormuz showed convergence, not cooperation.** Both sides want the Strait of Hormuz open, but the summit produced no joint maritime mechanism, energy-security framework, or operational plan.
- **Stabilized optics, unresolved structure.** The visit lowered the temperature but did not resolve Taiwan, technology controls, tariffs, supply-chain security, financial access, Iran-related risk, or military crisis-management gaps.

Policy Brief

Executive Summary

President Trump's visit to Beijing produced a major political spectacle but a thin public record. The Chinese side framed the summit around a new vision of building a "constructive China-U.S. relationship of strategic stability," presenting it as a framework for guiding bilateral relations over the next several years. This language elevated the visit above a routine diplomatic exchange, but it remained a broad political formulation rather than a binding agreement. It did not specify enforceable mechanisms on tariffs, export controls, military crisis management, Taiwan, financial access, aircraft procurement, energy purchases, or agricultural trade.

The U.S. side emphasized transactions, including aircraft purchases, agricultural sales, energy flows, financial services, AI chips, and broader corporate market access. Yet Boeing became the clearest market test of the summit's limits: a visible deal signal that investors treated as under-delivery rather than breakthrough.

The summit's strongest pattern was therefore not breakthrough, but managed ambiguity and managed optionality. Managed ambiguity was the summit's diplomatic form: it allowed both governments to claim success without committing to a detailed joint text. Managed optionality was its operational output: it preserved reversible openings across commerce, technology, and strategic resources without locking either side into binding obligations. Controlled access was the technology-policy mechanism through which selective H200 availability could be permitted without dismantling the broader export-control architecture.

This pattern appeared across the summit's main domains: Boeing showed under-delivery in traditional manufacturing; Nvidia H200 showed controlled access in strategic technology; rare earths showed reciprocal supply-chain leverage; and Hormuz and energy discussions showed limited strategic convergence without operational cooperation.

The visit mattered because it demonstrated that U.S.–China competition remains governable at the leader level. But it did not reset the relationship. It stabilized the optics of competition without resolving its structure.

Why This Matters

Trump's Beijing visit matters less for what it formally delivered than for what it revealed about the current operating logic of U.S.–China competition. The summit showed that both governments still prefer managed competition over uncontrolled escalation, but also that neither side is prepared to codify a broader settlement.

This distinction matters for policymakers, firms, and markets. Political signals may temporarily reduce risk, but without contracts, licenses, shipment data, regulatory approvals, or institutional mechanisms, they should not be treated as durable outcomes.

For policymakers, the risk is mistaking stabilization for settlement. For firms, the risk is treating political openings as bankable commitments. For markets, the risk is pricing political optics as durable policy change.

Methodological Note

This brief evaluates the Beijing visit by comparing official readouts, reported commercial announcements, summit-related equity-market reactions, and follow-on verification indicators. It distinguishes between political signaling, transactional expectations, and verified delivery, treating market response and implementation evidence as useful tests of whether summit claims move beyond optics.

The brief uses three related but distinct concepts. Managed ambiguity describes the summit's diplomatic form: a structure that allowed both governments to claim success without a detailed joint text. Managed optionality describes its operational output: reversible openings across diplomacy, commerce, technology, and strategic resources. Controlled access describes the technology-policy mechanism: selective, licensed, and politically reversible access to strategic technologies without a broader rollback of U.S. export controls.

Table 1 summarizes the brief's cross-domain evidence map. A fuller comparison of Chinese public framing, U.S. public framing, reported signals, verification gaps, and analytical assessments is provided in **Appendix Table A1**.

Table 1. Cross-Domain Evidence Map of the Beijing Visit

Domain	Main Signal	Verification Gap	Assessment
Political framing	Strategic stability language and great-power equality framing	No detailed joint implementation text	Framework without settlement
Boeing	200-aircraft announcement below reported 500-aircraft expectation	No contract details, buyer allocation, aircraft models, or delivery schedule	Under-specified delivery
Agriculture	Soybean continuity; beef export-license restoration	No purchase quantities, shipment schedules, tariff adjustments, or customs-confirmed trade flows	Unevenly verified commitment
Financial services	Payment-network and capital-market access narratives	No licensing, settlement-network approval, or expanded operating scope	Market-access optionality
Corporate confidence	Positive statements from U.S. executives on China's market and cooperation prospects	No specific policy relief, regulatory change, or binding investment commitment	Signaling, not delivery
H200 / AI chips	Selective licensing and reported per-customer cap	No verified shipments, end-use terms, or durable licensing framework	Controlled access
Rare earths	Truce discussion and continued Chinese leverage over critical inputs	No durable export-license normalization or supply-chain guarantee	Reciprocal chokepoint
Hormuz / energy	Shared interest in keeping Hormuz open and energy flows stable	No joint maritime mechanism, energy-security framework, or enforcement plan	Convergence without cooperation
Overall outcome	Managed ambiguity and managed optionality	Few contracts, licenses, shipments, or institutional mechanisms publicly verified	Stabilization without structural reset

Sources: Author's assessment based on official Chinese and U.S. readouts, public reporting on summit-related commercial and technology issues, sector-specific market reactions, and follow-on verification indicators. Full source details are listed in the References and **Appendix Table A1**.

Note: This table summarizes the brief's cross-domain evidence map. It is not a list of confirmed summit outcomes. It distinguishes public signals, market reactions, and reported policy openings from verified delivery.

1. Political and Diplomatic Outcomes: Strategic Framing Without Codified Agreement

The summit's most important political product was vocabulary. Beijing framed the visit around a new vision of constructive strategic stability, presenting the meeting as a high-level effort to guide U.S.–China relations over the next several years (Xinhua, 2026a).

This language matters. It seeks to move U.S.–China relations away from pure confrontation and toward a framework of managed competition. It also serves Beijing's broader diplomatic objective: to position China not as a subordinate actor responding to U.S. pressure, but as a co-equal great power whose relationship with Washington must be managed at the strategic level.

But political language is not the same as institutional settlement. The publicly visible documents do not provide a detailed roadmap for tariff relief, export-control revisions, procurement verification, military communication protocols, or Taiwan-related restraint. The outcome is therefore best understood as a strategic frame without codified mechanisms.

The absence of a detailed joint text may itself be politically functional. A full joint communiqué would have forced both sides to reconcile incompatible priorities. Beijing wanted language on equality, stability, and red lines. Washington wanted transactional wins and domestic proof of deal-making. Ambiguity allowed both sides to claim success without binding themselves to a shared interpretation.

Taiwan remains the clearest structural constraint. Beijing treats Taiwan as the central political-security issue in the relationship; Washington has no visible incentive to publicly modify its policy posture in a way that would satisfy Beijing. This asymmetry makes a detailed joint text difficult. The summit could produce stability language, but not a genuine security settlement (Madhani et al., 2026).

Assessment: The diplomatic outcome was meaningful as theater and framing, but thin as policy architecture. It created a shared language of stability without creating a shared mechanism for stability.

2. Commercial and Market Deliverables: Transactional Signals Without Verified Execution

The commercial agenda was broad. It covered aircraft, agriculture, energy, finance, consumer technology, electric vehicles, AI chips, and broader corporate market access. But the verified deliverables were limited.

Boeing was the summit's most visible commercial stress test. Trump announced that China would purchase 200 Boeing aircraft, but this fell below earlier expectations of a roughly 500-aircraft package. The lack of immediate details on aircraft type, delivery timing, buyer allocation, and contract status weakened the announcement's credibility as a completed deal. Boeing's share-price decline after the announcement suggested that investors viewed the outcome as under-delivery rather than a durable commercial breakthrough (Lawder & Shepardson, 2026; MarketWatch, 2026).

This matters because Boeing was the easiest commercial outcome to quantify. If the most visible transaction could not generate a positive market response, the broader commercial package should be treated cautiously.

Agriculture served both as a domestic political signal for Washington and as a limited goodwill channel for Beijing. Soybeans represented continuity rather than a fresh summit breakthrough: U.S. Treasury Secretary Scott Bessent said existing Chinese purchase commitments meant soybeans were “all taken care of,” tempering expectations for additional soybean buying (Cao & Jackson, 2026). Before the summit, U.S. beef producers had already identified restored China access as a key objective, after hundreds of U.S. beef plants lost eligibility to export to China over the previous year (Cao et al., 2026). Beef, by contrast, provided a more concrete access signal. Chinese customs data showed that Beijing renewed export licenses for hundreds of U.S. beef processing plants during the summit period, including facilities owned by Tyson Foods and Cargill, after more than 400 plants had lost eligibility over the previous year (Zhang et al., 2026). Yet license renewal is not the same as verified delivery. Without purchase quantities, tariff adjustments, buyer commitments, shipment schedules, or customs-confirmed trade flows, agriculture should be treated as an unevenly verified commitment: more concrete than rhetoric, but short of delivered trade.

Financial services and payments also belong in the category of optionality rather than breakthrough. Reporting indicated that Citigroup and other corporate executives joined the U.S. delegation, while AP reported that the delegation included the CEOs of Mastercard and Visa and that Trump raised expanding China-market access for U.S.-based credit card companies (Madhani et al., 2026; Reuters, 2026). But the visit did not publicly produce a decisive regulatory opening. A meaningful breakthrough would require licensing progress, settlement-network approval, expanded operating scope, or clear regulatory guidance.

Apple and Tesla represent another form of commercial signaling. Reuters reported that Apple, Tesla, Meta, Boeing, and Citi executives were among more than a dozen CEOs and senior executives accompanying Trump to China (Reuters, 2026). Their presence underscored that major U.S. firms still require a stable China operating environment, but there is no visible evidence that the summit produced specific policy relief on data governance, market access, supply-chain regulation, or consumer-market treatment.

Chinese official-media reporting also amplified positive statements from U.S. business leaders accompanying the visit. Executives including Elon Musk, Jensen Huang, Tim Cook, Cristiano Amon, Jane Fraser, David Solomon, Larry Fink, and others were quoted as expressing confidence in China’s long-term market prospects, innovation capacity, and the value of expanded U.S.–China commercial cooperation. This messaging strengthened Beijing’s public narrative that the summit restored business confidence and created momentum for practical cooperation. Yet these statements should be distinguished from verified deliverables. Corporate optimism does not by itself demonstrate new market access, regulatory relief, confirmed purchase volumes, export-license implementation, or binding investment commitments (China News Service, 2026).

Assessment: The commercial agenda was wide but shallow. The visit generated transaction narratives and corporate-confidence optics, not transaction closure. It gave Washington talking points and gave Beijing a business-confidence narrative, but it did not provide strong evidence of commercial execution.

3. Strategic Technology and Controlled Access: H200, AI Chips, and the Limits of Tech Détente

The Nvidia H200 issue is the technology counterpart to the Boeing case. Whereas Boeing tests traditional manufacturing delivery, H200 tests strategic technology access.

Reports indicated that the United States cleared around 10 Chinese firms to buy Nvidia's H200 chips, including major technology firms and distributors. However, reporting also indicated that no deliveries had yet been made. This places the H200 arrangement in a zone between policy authorization and commercial execution (Sharecast News, 2026).

The reported cap of up to 75,000 H200 chips per Chinese customer should be interpreted carefully. A cap is not a delivery number. It is a ceiling within a controlled licensing regime (Sharecast News, 2026). It allows Washington to claim flexibility while preserving control over scale, end-use, distribution, and reversibility. It also allows Nvidia and other U.S. technology firms to maintain limited commercial access to China without dismantling the export-control architecture.

This is why H200 should not be read as technology détente. It is better understood as controlled access: licensed, capped, monitored, and politically reversible. Washington is not reopening unrestricted advanced-compute trade with China. It is creating a narrow channel that can be widened, slowed, suspended, or revoked depending on broader political conditions.

For Beijing, H200 access is useful but incomplete. Chinese firms may gain access to near-frontier compute, but only through a licensing structure controlled by Washington. This reinforces dependence even as it provides short-term capability relief.

Market optimism around Nvidia reflected selective expectations about controlled access, not a broad repricing of U.S.–China technology relations. A real technology breakthrough would require broader changes to export controls, compliance terms, chip categories, cloud-compute access, and supply-chain restrictions. None of that was publicly codified.

Assessment: H200 represents a controlled-access bargain, not a rollback of technology competition. It institutionalizes a controlled-access model: commercial access under strategic supervision.

4. Strategic Resources and Chokepoints: Rare Earths, Energy, and Hormuz

The summit was not only about trade. It was also about managing reciprocal vulnerabilities in strategic resources.

Rare earths are the material counterpart to advanced AI chips. If H200 shows how Washington controls China's access to advanced compute, rare earths show how Beijing controls Western access to critical manufacturing inputs. Discussions around extending a rare-earth truce may reduce immediate pressure, but they do not restore supply-chain trust (Jackson et al., 2026).

The strategic structure remains intact: China retains leverage over materials essential to defense systems, electric vehicles, batteries, electronics, and industrial manufacturing. A truce may slow escalation, but it does not remove dependency.

Energy and Hormuz form the second resource layer. The summit took place amid Iran-war pressure and concerns over maritime access. Both Washington and Beijing have an interest in keeping the Strait of Hormuz open. The United States wants to prevent energy disruption from worsening inflation and global market volatility. China wants stable energy imports and secure maritime flows. Both sides have reason to oppose a fully militarized or toll-based Hormuz regime (Lee & Lawder, 2026).

But convergence is not cooperation. The summit did not produce a joint maritime enforcement mechanism, energy-security framework, or operational plan for Hormuz. China's interest in keeping Hormuz open does not make it a U.S. partner in Gulf security. It simply means that, under current conditions, Chinese and U.S. interests partially overlap.

Assessment: Strategic resources reveal the summit's deeper logic. The United States controls advanced compute; China controls critical minerals; Hormuz controls energy flows. The summit helped manage these chokepoints but did not remove them.

5. Implications for U.S.–China Competition

The summit suggests that U.S.–China competition is entering a phase of controlled openings rather than reconciliation. In this phase, each side permits limited movement where it serves immediate interests, but neither side dismantles its structural leverage.

Washington may allow controlled H200 access while preserving the broader export-control architecture. Beijing may discuss rare-earth truce extensions while retaining mineral leverage. China may signal interest in U.S. energy or aircraft purchases while avoiding overly large, politically costly binding commitments (Lawder & Shepardson, 2026; Sharecast News, 2026; Jackson et al., 2026; Lee & Lawder, 2026). The United States may welcome Chinese purchases while avoiding language that suggests strategic concession.

This is neither pure decoupling nor normalization. It is a system of managed optionality.

Managed optionality has four implications.

First, business opportunities will remain politically conditional. Companies may receive openings, licenses, purchase signals, or regulatory access, but those openings can be narrowed, delayed, or reversed quickly.

Second, markets should discount political announcements until implementation is visible. The Boeing case shows why presidential statements are not equivalent to confirmed contracts. Market confidence should depend on verifiable details: buyers, delivery schedules, licensing records, shipment data, and regulatory approvals.

Third, strategic competition will become more selective, not less intense. Both sides may cooperate or transact in narrow areas while maintaining pressure in others. Limited openings in aircraft, chips, energy, or finance should not be mistaken for a broader easing of U.S.–China rivalry.

Fourth, ambiguity may stabilize the short term while increasing future disappointment. Because both sides can interpret the summit differently, expectations may diverge. If promised transactions do not materialize, or if selective openings are later reversed, the same ambiguity that helped the summit succeed politically may become a source of renewed friction.

6. Limitations

This assessment is based on publicly available official readouts, media reporting, company-related market reactions, and early sectoral signals as of May 15, 2026. Because few formal documents, contract details, licensing records, shipment data, or departmental follow-up statements have been released, several findings should be treated as provisional.

Equity-market reactions are used as suggestive indicators, not definitive proof of causality. Share prices also reflect firm-specific fundamentals, broader market conditions, sector-wide expectations, and investor positioning. Market movements are therefore useful for testing whether summit-related claims were immediately credible to investors, but they should not be treated as conclusive evidence of policy impact.

The central judgment may need revision if follow-on agreements, procurement details, H200 deliveries, rare-earth export normalization, or financial-access approvals become publicly verifiable in the coming weeks.

7. Watchpoints: What Would Prove This Was More Than Optics

The summit should be judged by follow-through, not ceremony. The next 30 to 90 days will determine whether the visit becomes a real policy inflection point or remains primarily a political performance.

Table 2. Post-Summit Watchpoints for Testing Whether the Beijing Visit Moves Beyond Optics

Timeframe	Indicator	Why It Matters
1–2 weeks	Joint or departmental follow-up documents	Shows whether broad summit language becomes codified.
30 days	Boeing order details	Clarifies whether the 200-aircraft announcement is binding.
30–60 days	Chinese buyer allocation for Boeing aircraft	Tests commercial execution.
30–90 days	Agricultural purchase and shipment data	Tests whether farm-state promises become trade flows.
30–90 days	Energy purchase data or LNG/oil contracts	Tests whether energy discussions become transactions.
30–90 days	H200 shipment approvals and actual deliveries	Distinguishes licensing from execution.
30–90 days	Rare-earth export-license normalization	Tests whether the truce reduces supply-chain pressure.
60–90 days	Visa, Mastercard, Citi, or payment-network approvals	Tests financial-access claims.
Ongoing	Taiwan, Hormuz, Iran, and military communication behavior	Tests whether strategic stability has operational meaning.

Sources: Author's assessment based on official Chinese and U.S. readouts; Reuters and MarketWatch reporting on Boeing (Lawder & Shepardson, 2026; MarketWatch, 2026); Reuters reporting on soybeans and U.S. beef export-license renewals (Cao & Jackson, 2026; Zhang et al., 2026); public reporting on Nvidia H200 licensing (Sharecast News, 2026); Reuters reporting on rare earths and Hormuz (Jackson et al., 2026; Lee & Lawder, 2026); sector-level equity-market reactions; and follow-on verification indicators.

Note: The listed indicators are not confirmed outcomes of the summit. They are proposed verification points for assessing whether summit signals become codified policy changes, binding contracts, actual shipments, licenses, or institutional mechanisms.

The key test is whether the summit's signals become verifiable policy changes, contracts, shipments, licenses, or institutional mechanisms.

Final Assessment

The Beijing visit should be understood as a summit of managed optionality rather than a settlement summit. Its purpose was not to finalize a comprehensive U.S.–China agreement, but to keep multiple channels—diplomatic, commercial, technological, and resource-related—open without forcing either side into binding commitments.

Across the summit's main domains, the pattern was consistent. Politically, Beijing gained a framework of constructive strategic stability and a visible affirmation of great-power equality, without a codified settlement. Commercially, Washington gained transactional talking points, but the Boeing case exposed the limits of under-specified delivery. Technologically, selective H200 access suggested controlled access rather than a rollback of U.S. export controls. Strategically, rare earths, energy flows, and Hormuz highlighted reciprocal chokepoints without resolving the dependencies behind them.

The visit's real output was therefore not settlement, but a set of controlled openings, capped expectations, and reversible signals across diplomacy, commerce, technology, and strategic resources. It stabilized the optics of competition, but did not resolve its structure.

Policy Brief

Appendix Table A1. Full Cross-Domain Comparison of Public Framing, Reported Signals, Verification Gaps, and Analytical Assessments

Domain	Chinese Public Framing	U.S. Public Framing	Reported / Market Signal	Verification Gap	Analytical Assessment
Political framing	Constructive strategic stability; long-term relationship management; great-power equality	Leader-level engagement; transactional success; keeping channels open	High-level visit produced strong optics but limited joint documentation	No detailed joint communiqué, implementation schedule, or binding follow-up mechanism	Political framework without codified settlement
Taiwan and security risk	Taiwan as a core sovereignty and red-line issue	No visible shift in U.S. policy posture	Taiwan remained structurally unresolved	No new crisis-management protocol or restraint mechanism	Stabilization without security settlement
Aircraft / Boeing	Not framed as a central Chinese concession	Presented as a major commercial outcome	200-aircraft announcement fell below reported 500-aircraft expectation; Boeing shares reacted negatively	No public details on model, delivery schedule, buyer allocation, or contract status	Visible deal signal, under-specified execution
Agriculture	Trade-stabilization channel; limited goodwill signaling	Farm-state political gains; broader farm-purchase narrative	Soybeans appeared largely tied to existing commitments; China renewed export licenses for hundreds of U.S. beef processing plants during the summit period	No clear purchase quantities, tariff adjustments, buyer commitments, shipment schedules, or customs-confirmed trade flows	Unevenly verified commitment: beef access improved, soybean breakthrough limited
Financial services and payments	Chinese media highlighted confidence from major financial executives in China's market and capital-market opportunities	Financial access and payment networks presented as possible gains	Citi, Goldman Sachs, BlackRock, Visa, and Mastercard-related narratives signaled interest in deeper engagement, but regulatory outcomes remained unclear	No clear licensing, settlement-network approval, expanded operating scope, or capital-market access mechanism	Market-access optionality, not regulatory breakthrough
Consumer technology and EVs	Chinese media highlighted U.S. executive confidence in China's market, innovation capacity, and AI development	Apple, Tesla, Qualcomm, Nvidia, Meta, and other corporate exposure highlighted by delegation optics	U.S. executives publicly expressed optimism about China's market and bilateral cooperation, but equity-market confirmation of concrete policy relief remained limited	No specific relief on data governance, market access, supply-chain rules, AI-chip controls, or consumer-market treatment	Corporate optimism as public signaling, not verified policy relief

Appendix Table A1. Full Cross-Domain Comparison of Public Framing, Reported Signals, Verification Gaps, and Analytical Assessments (Cont.)

Domain	Chinese Public Framing	U.S. Public Framing	Reported / Market Signal	Verification Gap	Analytical Assessment
AI chips / Nvidia H200	Access to near-frontier compute remains useful but externally controlled	Selective licensing presented as commercial and technology opening	Reported clearance for around 10 Chinese firms; reported 75,000-unit cap per customer; deliveries not yet verified	No confirmed shipment data, end-use terms, or durable license framework	Controlled access, not technology détente
Rare earths / critical minerals	Retains leverage over critical manufacturing inputs	Seeks truce extension and supply-chain pressure reduction	Rare-earth truce discussions reduced immediate pressure but did not normalize trust	No durable export-license normalization or supply-chain guarantee	Reciprocal chokepoint management
Energy / Hormuz / Iran	Stable energy imports and open maritime flows serve Chinese interests	U.S. seeks Chinese support for keeping Hormuz open and reducing energy disruption	Strategic convergence on open Hormuz, but no operational cooperation	No joint maritime mechanism, energy-security framework, or enforcement plan	Convergence without cooperation
Overall summit outcome	Strategic stability and equality narrative	Transactional success narrative	Public record remained thin relative to political spectacle	Few contracts, licenses, shipments, or institutional mechanisms publicly verified	Managed ambiguity and managed optionality

Sources: Author's assessment based on Chinese official readouts (Xinhua, 2026a, 2026b); Chinese state-linked reporting on U.S. executive statements (China News Service, 2026); AP reporting on unresolved summit disputes, Taiwan, Hormuz, and payment-network access (Madhani et al., 2026); Reuters reporting on Boeing, soybeans, U.S. beef export-license renewals, corporate participation, rare earths, and Hormuz (Cao & Jackson, 2026; Cao et al., 2026; Jackson et al., 2026; Lawder & Shepardson, 2026; Lee & Lawder, 2026; Reuters, 2026; Zhang et al., 2026); public reporting on Nvidia H200 licensing (Sharecast News, 2026); MarketWatch reporting on Boeing's market reaction (MarketWatch, 2026); and sector-specific equity-market reactions and follow-on verification indicators.

Note: This table compares public framing, reported signals, and verification gaps. It does not treat reported announcements as confirmed outcomes. The analytical assessment distinguishes between political signaling, transactional expectations, and verified delivery.

Policy Brief

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