

CSIS

CHINESE BUSINESS & ECONOMICS



## Newsletter

### April 2026

This month, Trustee Chair senior experts joined the CSIS Economics Program in a commentary exploring the **evolving role of export controls in U.S.-China competition** ahead of the expected May Trump-Xi meeting. Trustee Chair Scott Kennedy also joined CSIS's Brian Hart and Will Todman for a **discussion on the Iran war's impact** on China's negotiating strategy and potential outcomes from the upcoming Trump-Xi talks.

To promote wider understanding of our recent report, ***The Power of Innovation***, Scott Kennedy published a summary that describes the report's key findings in **ten charts**, and the team issued a blog post describing the **emerging role of China's private sector** in contributing to the country's strategic goals in space.

Deputy Director Ilaria Mazzocco also appeared as a guest on several radio programs, speaking about how **Chinese EV companies are outpacing their U.S. counterparts** and **the future of Mexico's EV industry** in the face of the rise of Chinese EVs.

### Featured Analysis

#### **A Match Made Under Heaven: The Emerging Role of China's Private Sector in Space**

Blog Post, April 14, 2026

[Read Here](#)



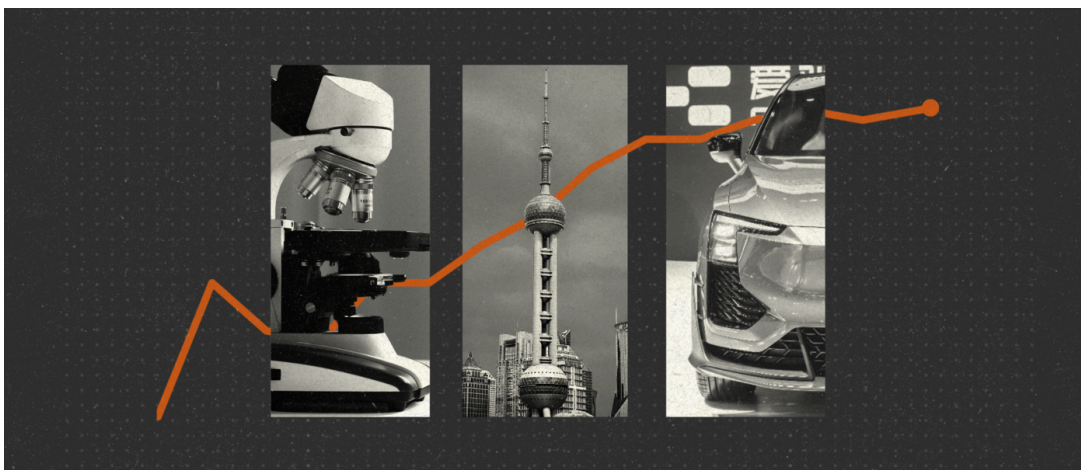
In this blog post, Trustee Chair intern **Andy Yang** argues that China's private space sector is becoming an increasingly important part of Beijing's military-civil fusion strategy, with firms like LandSpace helping translate commercial advances in reusable rockets into capabilities with clear dual-use value. He contends that this matters because reusable launch technology could accelerate China's ability to deploy low Earth orbit infrastructure at scale, even though the United States still holds a major lead, and he concludes that U.S. policymakers need a sharper understanding of this evolving ecosystem to keep restrictions on PLA-linked firms targeted and credible.

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## China's High-Tech Drive in 10 Charts

Commentary, April 10, 2026

[Read Here](#)



In this commentary, **Scott Kennedy** breaks down the main findings of his CSIS report, *The Power of Innovation: The Strategic Value of China's High-Tech Drive*, through 10 charts.

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## Reining in the Export Control Arms Race

Commentary, April 10, 2026

[Read Here](#)



**Kate Koren, Scott Kennedy, Philip Luck, and Ilaria Mazzocco** argue that U.S. export controls are moving beyond their traditional role as targeted national security measures, becoming a broader tool of economic coercion. They trace this shift from relatively narrow, multilateral controls to more expansive and increasingly unilateral economic statecraft, warning that this mission creep is fueling a tit-for-tat U.S.-China escalation. Finally, the authors urge policymakers to restore clearer limits and discipline to the use of export controls, especially ahead of Trump and Xi's May meeting.

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### **Has the Iran war upended U.S.-China negotiations?**

*State of Play Podcast, April 9, 2026*

[Listen Here](#)



**Scott Kennedy** and **Brian Hart** join **Will Todman** to assess the Iran war's impact on U.S.-China negotiations, if the war has changed China's strategy, and if we should expect a different outcome from the May summit as a result of the delay.

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### **How China's superfast charging cars are leaving American EVs in the dust**

*On Point with Meghna Chakrabarti, April 9, 2026*

[Listen Here](#)



In this interview, **Ilaria Mazzocco** joins Meghna Chakrabarti, Zitong Zhang, and Natalie Neff to examine why Chinese EV companies are outpacing their U.S. counterparts. She traces BYD's rise, explains how Chinese policy helped build both demand and manufacturing capacity, and shows why EVs offered Beijing a rare opportunity to leapfrog legacy automakers. The discussion suggests that China's lead is not just about one fast-charging battery, but about a broader industrial ecosystem, and that the United States risks falling further behind.

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**What does the future hold for Mexico's Chinese EV boom?**

*KJZZ Interview, April 3, 2026*

[Listen Here](#)



In this radio interview, KJZZ's Nina Kravinsky interviews **Ilaria Mazzocco** and Jorge Guajardo, a former Mexican ambassador to China, on the rise of Chinese cars in Mexico, how they have been a big driver of Mexico's expanding electric vehicle infrastructure, and how, as a result, car manufacturers from elsewhere have been unable—or unwilling—to keep up.

## Events

### **Press Briefing: Previewing the Trump-Xi Summit** May 7, 2026

[Watch Here](#)

CSIS will host a call-in press briefing on Thursday, May 7, at 10:00 a.m. ET with a range of experts, including Trustee Chair **Scott Kennedy**, to preview the upcoming Trump-Xi summit in Beijing. A transcript will be available after the press briefing concludes.

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### **NSF's National Security Mission for the Twenty-First Century** April 3, 2026

[Watch Here](#)

In this CSIS Renewing American Innovation (RAI) event, RAI Director **Sujai Shivakumar** and NSF Acting Director **Brian Stone** host a half-day, multi-panel

discussion on the National Science Foundation's national security mission and how it can address the challenges of the twenty-first century, including the rise of China as a technological and military competitor. The event features Trustee Chair **Scott Kennedy** and non-resident expert **Jeannette Chu** alongside other leading experts.

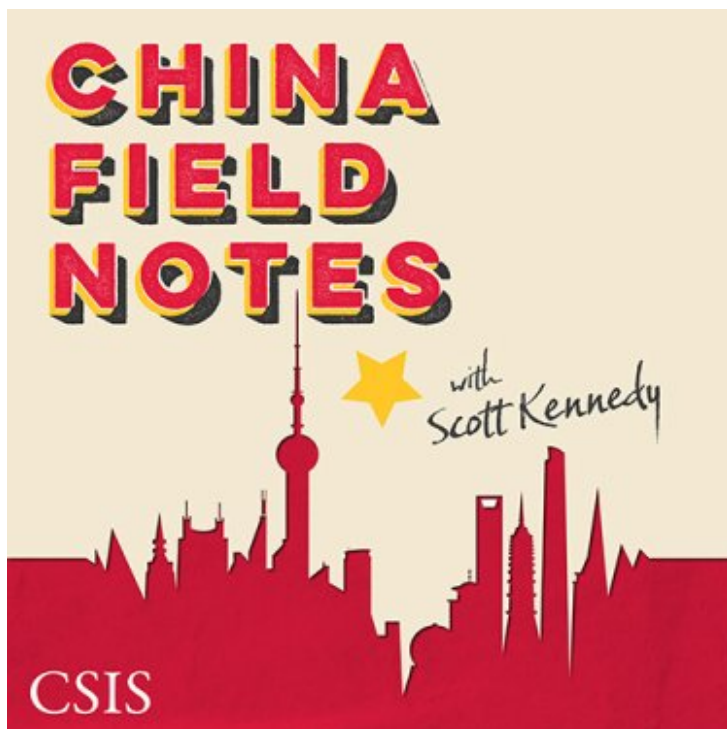
## Big Data China

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Big Data China bridges the gap between cutting-edge quantitative academic research and the Washington policy community. Interactive features and analysis from Big Data China on topics such as significant shifts in popular sentiment in China regarding the causes of economic inequality, China's post-Reform Era trajectory, and the expansion of Chinese state sector influence over private firms are all available on our microsite [here](#).

## China Field Notes Podcast



Subscribe

Catch up on the current episodes of our podcast *China Field Notes with Scott Kennedy*. Understanding China has become more difficult than ever, yet also more important than ever. Hardening geopolitics has made travel to China more difficult, but not impossible. In this podcast, Scott Kennedy offers an on-the-ground look at China, featuring insights from those shaping the country and scholars studying it firsthand.

## In The News

### **With tariffs stalled, Trump's China policy drifts**

*Reuters*, April 21, 2026

"Their entire original strategy was centered around using tariffs to pressure China into major concessions. That effort quickly ran aground," said **Scott Kennedy**, a China expert at the Center for Strategic and International Studies think tank. "There has been no coherent Plan B." [Read here.](#)

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### **China steps up Iran diplomacy while seeking smooth summit with Trump**

*Reuters*, April 16, 2026

"There is zero chance China will reach some sort of grand bargain with the United States," said **Scott Kennedy**, trustee chair in Chinese business and economics at the Washington-based Center for Strategic and International Studies. [Read here.](#)

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### **Americans Crave Low-Cost Chinese EVs**

*Placeholder*, April 21, 2026

In this video, **Ilaria Mazzocco** explains how, although Chinese car brands are virtually nonexistent on US roads, that hasn't kept them from breaking through online, showing inflation-weary Americans what they're missing. [Read here.](#)

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### **How China is winning the global energy war**

*Semafor*, April 14, 2026

Dependence on Chinese supply chains comes with its own risks, and "the type of power that a country can exercise through its dominance in the production of renewable energy hardware is really untested," said **Ilaria Mazzocco**, deputy director for Chinese business and economics at the Center for Strategic and International Studies in Washington, DC. Still, she said, "this isn't going to work in the same way as oil and gas. Imagine China blocking solar panel exports — it just won't have the same shock on energy markets" as closing the Strait of Hormuz. [Read here.](#)

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### **Iran war propels Asia's EV market**

*E&E News by Politico*, April 10, 2026

"I think ultimately it comes down to two things: If you buy an electric vehicle, are

you going to be able to use it?” said **Ilaria Mazzocco**, senior fellow in Chinese business and economics at the Center for Strategic and International Studies. “The other is: Is your government very hesitant to enable the shift because there’s concerns about big companies struggling and employment?” [Read here.](#)

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### **Beyond the Hype: Why China’s Innovation Story Demands a Movie, Not a Snapshot**

*AmCham China*, April 9, 2026

In this interview, Trustee Chair **Scott Kennedy** unpacks China's innovation ecosystem, cutting through both the hype and the alarmism to map where China is genuinely pulling ahead, where it continues to fall short, and why the assumptions driving policy in Washington may be doing more harm than good. [Read here.](#)

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### **Anticipating the Trump-Xi Summit in Beijing**

*Penn Project on the Future of U.S.-China Relations*, April 7, 2026

In the lead-up to President Trump’s planned visit to Beijing later this Spring, for a much-anticipated summit with Chinese leader Xi Jinping, the Penn Project on the Future of U.S.-China Relations convenes five of its current and alumni fellows, including Trustee Chair non-resident expert **Margaret Jackson**, to share their expectations for the summit and what it may portend for the near-term future of U.S.-China relations. [Watch here.](#)

## Trustee Chair in Chinese Business & Economics

Scott Kennedy, *Senior Adviser and Trustee Chair in Chinese Business & Economics*

Ilaria Mazzocco, *Deputy Director and Senior Fellow*

Ryan Featherston, *Associate Fellow*

Isabella McCallum, *Program Manager*

Andy Yang, *Intern*

Antonio Tintoré Vicent, *Intern*

Jeannette L. Chu, *Senior Associate (Non-resident)*

Michael Davidson, *Senior Associate (Non-resident)*

John L. Holden, *Senior Associate (Non-resident)*

Margaret Jackson, *Senior Associate (Non-resident)*

Claire Reade, *Senior Associate (Non-resident)*

Daniel H. Rosen, *Senior Associate (Non-resident)*

Deborah Seligsohn, *Senior Associate (Non-resident)*

Logan Wright, *Senior Associate (Non-resident)*



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