How Artificial Intelligence is Reshaping U.S.-Vietnam Relations: Policy Opportunities, Governance Challenges, and Strategic Implications

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ABSTRACT

Artificial intelligence (AI) is becoming a visible component of U.S.-Vietnam relations, but diplomatic alignment, institutional arrangements, operational delivery and developmental outcomes are different empirical claims. This article examines whether shared priorities have produced identifiable implementation mechanisms and observable technological activities. It integrates policy convergence, collaborative governance, absorptive capacity and asymmetric interdependence into a four-dimensional assessment framework. A bounded, purposively selected corpus of 14 publicly identifiable policy, corporate, government and independent-reporting documents issued between 2021 and October 2026 is assessed using transparent coding and source-strength rules. The comparison of four initiatives identifies differing levels of substantiation: FPT's AI Factory has reported deployed infrastructure and subsequent operating metrics; the government–NVIDIA arrangement and Qualcomm research centre demonstrate institutional activity but reveal limited independently assessed research outcomes; and FPT–Qualcomm cooperation remains primarily documented at agreement level. The three propositions receive qualified or unresolved support rather than being presented as causal proof. The study contributes a replicable distinction between observable implementation and demonstrated domestic capability formation, with implications for evaluating asymmetrical technology partnerships beyond this case.

Keywords: AI, U.S, Vietnam relations, policy

INTRODUCTION

Artificial intelligence (AI) has become an increasingly significant dimension of international economic relations, technological competition and public governance. Unlike earlier forms of digital cooperation primarily concerned with connectivity and information exchange, contemporary AI partnerships involve access to advanced computing infrastructure, proprietary models, specialized human capital and regulatory arrangements governing technological development and deployment. These characteristics create new opportunities for international collaboration while raising questions about the distribution of technological capabilities, institutional accountability and strategic dependence. For emerging economies, the central policy challenge is not merely securing access to advanced technologies but ensuring that international cooperation contributes to sustainable domestic innovation and institutional development.

The United States-Vietnam relationship offers a relevant case for examining these dynamics. Vietnam adopted its National Strategy on Research, Development and Application of Artificial Intelligence until 2030 in January 2021, establishing AI development as a domestic policy priority before the subsequent elevation of bilateral relations (Prime Minister of Vietnam, 2021). In September 2023, the two countries established a Comprehensive Strategic Partnership, identifying science, technology, innovation and digital cooperation as a new area of strategic engagement. The Joint Leaders' Statement included an initial US$2 million commitment from the U.S. government for semiconductor workforce development, reflecting growing attention to the technological foundations of bilateral cooperation (United States & Vietnam, 2023). Although this funding was not specifically allocated to AI, it illustrated the expansion of the bilateral agenda toward advanced technologies and supporting capabilities.

Subsequent developments have given this agenda a more concrete institutional and commercial dimension. Partnerships involving NVIDIA, Qualcomm and Vietnamese technology enterprises have introduced initiatives in AI computing infrastructure, research and engineering collaboration. Meanwhile, the United States adopted an AI Action Plan and export-oriented AI policy measures in July 2025, while Vietnam enacted its dedicated AI Law in December 2025, effective from March 2026. These developments demonstrate an expanding range of policy instruments and participating organizations, but they also raise questions about whether strategic alignment has produced coordinated implementation and measurable domestic technological benefits.

Despite increasing attention to AI diplomacy and international technology governance, the relationship between bilateral policy alignment and substantive technological cooperation remains analytically challenging. Diplomatic declarations, investment announcements and the establishment of research facilities are frequently interpreted as indicators of progress, although they represent different stages and forms of institutional development. Moreover, the presence of technologically advanced foreign partners does not independently establish the extent of domestic knowledge acquisition or the distribution of control over critical technological resources.

This article asks: To what extent has the convergence of U.S. and Vietnamese AI policy priorities translated into institutionalized technological cooperation, and what conditions shape its developmental implications? It examines developments from January 2021 to 14 October 2026 and differentiates political authorization, institutional commitments, observable operations and verified learning outcomes. The contribution is not a claim to invent a new stage theory, but a source-sensitive diagnostic approach that combines implementation maturity with domestic capability and dependency indicators. The framework also sets limits on what official and corporate public records can substantiate.

LITERATURE REVIEW

International technological cooperation has conventionally been associated with knowledge exchange, technology transfer and the diffusion of innovation across national boundaries. However, these processes do not necessarily produce equivalent developmental outcomes. Rogers (2003) conceptualizes diffusion as the communication of innovations through social systems, whereas Dolowitz and Marsh (2000) examine how knowledge about policies and institutional arrangements is transferred across political contexts. The distinction is consequential: the circulation of technological knowledge does not guarantee its effective adoption, just as the adoption of external policy models does not ensure their institutional compatibility. In AI, this problem is intensified by the complementary resources required for technological development, including computing infrastructure, data, expertise and regulatory capacity. International AI cooperation must therefore be understood as a multidimensional process involving not only technological exchange but also the governance of access, implementation and capability development.

At the policy level, the literature on convergence helps explain why countries with different political and economic systems may nevertheless pursue overlapping technological objectives. Bennett (1991) distinguishes convergence in policy goals from convergence in instruments and administrative practices, while Knill (2005) emphasizes that similarity in policy outcomes should not be confused with the processes producing it. Holzinger and Knill (2005) identify international harmonization, transnational communication, regulatory competition and independent responses to similar problems as potential mechanisms of convergence. These explanations have different implications for bilateral technology partnerships. Similar innovation strategies may reflect shared economic pressures rather than direct policy transfer, while diplomatic agreements may facilitate cooperation without requiring harmonized domestic regulations. Consequently, the presence of comparable AI development ambitions cannot independently establish the existence of coordinated governance arrangements.

The distinction is particularly relevant to AI, where international coordination coexists with fragmented regulatory and institutional approaches. Cihon et al. (2020) show that international AI governance involves trade-offs between centralized coordination and institutional fragmentation, indicating that cooperation cannot be equated with regulatory uniformity. Applied to bilateral relationships, this suggests that substantive collaboration may emerge through selective compatibility between national priorities rather than comprehensive policy convergence. Vietnam's 2021 AI Strategy preceded the 2023 elevation of U.S.–Vietnam relations, while

subsequent American and Vietnamese policy instruments developed along different trajectories. This sequence creates an important analytical question: whether bilateral engagement has generated additional institutional mechanisms and technological resources, or primarily provided diplomatic support for priorities that already existed independently.

Yet explaining the emergence of cooperation does not explain its implementation. Collaborative governance research addresses this limitation by examining how public and private actors coordinate activities across organizational boundaries. Ansell and Gash (2008) emphasize the influence of institutional design, leadership, incentives and power asymmetries, while Emerson et al. (2012) identify principled engagement, shared motivation and capacity for joint action as interacting components of collaborative governance. These approaches suggest that political authorization becomes operationally significant when participating organizations establish responsibilities, mobilize resources and develop mechanisms for joint decision-making and accountability. In AI partnerships, these conditions are especially important because governments may define national priorities while private technology firms control infrastructure and technical expertise, and universities or domestic enterprises undertake research and application development.

Such institutional complexity complicates conventional assessments of international cooperation. A bilateral statement, a government–corporate research agreement and a commercial computing partnership may all contribute to technological engagement, yet each distributes authority, responsibility and expected benefits differently. Their developmental implications therefore depend not simply on the number of agreements but on whether implementation arrangements connect participating organizations to clearly defined activities and outcomes. Collaborative governance theory helps explain this transition, although its application to bilateral AI partnerships must account for the prominent role of multinational technology firms and the possibility that commercially organized initiatives advance independently of centralized intergovernmental coordination.

The question of whether implemented initiatives generate lasting domestic benefits introduces the literature on technological learning and innovation systems. Cohen and Levinthal (1990) conceptualize absorptive capacity as the ability to recognize, assimilate and exploit external knowledge, emphasizing the importance of prior expertise and cumulative learning. Nelson (1993) extends attention to the institutional relationships underpinning national innovation systems, while Lundvall (1992) emphasizes interactive learning among economic actors. These perspectives suggest that technological development is not simply a function of acquiring advanced equipment or attracting foreign investment. Rather, its sustainability depends on the capacity of domestic firms, research institutions and public organizations to adapt external technologies, generate new knowledge and maintain learning processes over time.

This distinction is fundamental to evaluating AI cooperation. Access to advanced computing facilities may lower barriers to experimentation and deployment, but the resulting developmental gains depend on who uses these resources, whether local researchers participate in technological development and whether acquired expertise remains available to domestic institutions. Similarly, an international R&D partnership may provide valuable training opportunities without necessarily generating independent research capabilities or locally retained intellectual property. Absorptive capacity therefore shifts attention from investment announcements and physical infrastructure toward the organizational processes through which technological access is converted into cumulative knowledge. It also cautions against treating technology adoption and indigenous capability development as interchangeable outcomes.

Nevertheless, technological learning occurs within international networks characterized by unequal ownership and control. Gereffi et al. (2005) demonstrate that governance relationships in global value chains shape opportunities for supplier upgrading and the distribution of decision-making authority. Farrell and Newman (2019) further explain how control over central nodes in transnational networks can generate asymmetric leverage. These perspectives are particularly relevant to AI because access to advanced semiconductors, computing platforms, foundation models and associated software ecosystems is concentrated among a limited set of technology providers. Consequently, the same partnership that expands domestic technological capabilities may simultaneously increase dependence on externally governed infrastructure and proprietary architectures.

The relationship between capability development and dependency is therefore more complex than a simple

opposition between autonomy and foreign participation. International technological integration can accelerate learning by providing access to resources that would be costly to develop independently. However, the durability of these gains may depend on licensing conditions, research access, the portability of acquired skills and the ability of domestic organizations to adapt or substitute technological components. From this perspective, strategic autonomy should not be equated with technological self-sufficiency. A more relevant consideration is whether cooperation expands domestic actors' capacity to make informed technological choices and manage external dependencies.

These theoretical debates illuminate the distinctive governance challenges of U.S.-Vietnam AI cooperation. The relationship brings together a technologically advanced economy with established AI infrastructure and an emerging AI economy seeking to strengthen its domestic innovation ecosystem. The partnership creates potential complementarities between American technological resources and Vietnamese development priorities. However, these complementarities operate through different institutional arrangements, including government-level commitments, corporate infrastructure investment and research partnerships. Their effects cannot be inferred from diplomatic alignment alone. Policy convergence explains the formation of a common agenda; collaborative governance identifies the conditions for coordinated implementation; absorptive capacity shapes domestic learning; and asymmetric interdependence influences the distribution and durability of technological benefits.

The theoretical contribution is an integrated diagnostic rather than a new general theory of implementation. Policy convergence studies specify the similarity of goals and instruments (Bennett, 1991; Knill, 2005); collaborative governance identifies institutional conditions for joint action (Ansell & Gash, 2008; Emerson et al., 2012); technology-transfer and absorptive-capacity scholarship distinguishes external access from internal learning (Dolowitz & Marsh, 2000; Cohen & Levinthal, 1990); and network-governance research highlights unequal technological control (Gereffi et al., 2005; Farrell & Newman, 2019). None alone is sufficient to classify the evidentiary status of a bilateral AI project. The present study combines their observable implications within a common case-level assessment, without assuming that every initiative advances linearly through four stages. Three propositions guide the analysis: P1, shared strategic objectives may facilitate cooperation despite divergence in instruments; P2, movement from authorization to operations requires identifiable delivery actors, resources and activities; and P3, access contributes to durable domestic capabilities only where learning and technological choices can be evidenced. The propositions are assessed through explicitly stated tests in the Methods and Results, rather than inferred from diplomatic rhetoric.

METHODOLOGY

This study uses a structured, theory-informed documentary case comparison covering January 2021-14 October 2026. The unit of comparison is the individual AI-related policy or partnership initiative, not the bilateral relationship as an undifferentiated whole. Four focal initiatives were selected because publicly accessible documentation identifies actors and implementation intentions: FPT–NVIDIA AI Factory, the Vietnam government–NVIDIA R&D/data-centre arrangement, Qualcomm's Vietnam AI R&D centre, and FPT–Qualcomm automotive engineering collaboration. The comparison is purposive and descriptive; it does not estimate the causal impact of the 2023 diplomatic upgrade.

The core analytical corpus comprises 14 named items: (1) Vietnam's 2021 AI strategy; (2) the September 2023 bilateral leaders' statement; (3–4) FPT's April and December 2024 AI Factory releases; (5–6) NVIDIA's and the Vietnamese government's December 2024 R&D announcements; (7–8) the June 2025 Vietnamese government account and Reuters report on Qualcomm's research centre; (9) FPT's February 2026 Qualcomm collaboration release; (10) Law No. 134/2025/QH15; (11) Decision No. 367/QD-TTg; (12–13) the July 2025 U.S. AI Action Plan and Executive Order 14320; and (14) FPT's published 2025 financial-performance highlights. Stanford's 2026 AI Index and the IMF AI Preparedness Index are used separately as contextual benchmarks, not as evidence of bilateral outcomes. The count describes the identifiable documents included in this revised audit corpus; it is not represented as the yield of a previously recorded systematic database search.

For transparency, the retrospective source-retrieval scope is the official Vietnamese legal and government portals (chinhphu.vn, en.baochinhphu.vn), White House policy publications, corporate news and investor-relations

pages (FPT, NVIDIA), Reuters reporting, Stanford HAI and IMF DataMapper. Reproducible query strings for a follow-up search include 'Vietnam artificial intelligence 127/QD-TTg', 'U.S. Vietnam comprehensive strategic partnership technology 2023', 'FPT NVIDIA AI Factory Vietnam operation', 'Vietnam NVIDIA R&D centre December 2024', 'Qualcomm AI R&D Vietnam June 2025', 'FPT Qualcomm automotive February 2026', 'Vietnam AI law 134/2025/QH15' and 'executive order 14320 AI technology exports'. Documents are included where they concern an identified policy instrument or one of the four initiatives, fall within the study window and describe a dated commitment, responsible organization, operating activity or measurable output. Promotional repetition without distinct empirical content, undated summaries and unrelated general AI news are excluded. Because original search-result logs and exclusion tallies were not retained, no PRISMA-style screening totals or claim of exhaustive retrieval is made. A future reproducibility archive should preserve URLs, access dates, language, search dates and exclusion decisions.

Each initiative is coded across four dimensions using the following rule: A (policy alignment) requires explicitly matching priorities in dated official texts; I (institutionalization) requires a named implementing actor, formal arrangement or allocated resource; O (operation) requires dated evidence of a facility, service, staffed activity or identifiable technical output, with announcement-only intentions coded 'not established'; and C (capability development) requires evidence of domestic participation and retained or transferable skills, research outputs, intellectual property or expanded technological options. Entries are tagged P (primary legal/policy record), S (self-reported government/corporate activity), X (external journalistic corroboration) or M (independently measured outcome). A third-party report confirming a launch is not treated as an independent audit of performance. Status labels are 'documented', 'partially documented' and 'not established from available sources'—the last does not mean the activity did not occur. Two authors' independent coding and inter-coder agreement cannot be asserted without records; these classifications should therefore be regarded as an explicit, inspectable author assessment rather than reliability-tested content analysis.

Table 1. Operational codebook for documentary assessment

Dimension	Minimum observable evidence	Insufficient evidence / boundary
A: alignment	Dated statements of overlapping AI/technology priorities	Similar broad aspirations alone do not prove bilateral coordination
I: institutionalization	Named parties and roles; signed arrangement; allocated resource or specified facility	MoU or launch intention does not prove service delivery
O: operations	Dated facility opening, accessible service, deployed infrastructure or observed technical activity	Projected investment, installed hardware alone or press launch does not verify use or impact
C: capability & autonomy	Verified local training, publications, IP, sustained access, adaptation or option to switch providers	Jobs promised or partner presence cannot establish domestic learning
Evidence strength	P primary policy/legal; S self-report; X external reporting; M independently measured output	External confirmation of an announcement does not automatically equal M

RESULTS

Policy alignment and the evolution of bilateral AI cooperation

The development of U.S.–Vietnam AI cooperation reflects the interaction between Vietnam's domestic technological modernization agenda and the expanding strategic importance of advanced technologies in bilateral relations. The sequence of policy developments is particularly important because Vietnam established its National Strategy on Research, Development and Application of Artificial Intelligence until 2030 through Decision No. 127/QD-TTg on 26 January 2021, more than two years before the September 2023 elevation of

bilateral relations to a Comprehensive Strategic Partnership. The strategy articulated national ambitions for AI research, application and ecosystem development, indicating that demand for technological upgrading originated within Vietnam's domestic policy framework rather than emerging solely from subsequent diplomatic engagement (Prime Minister of Vietnam, 2021).

The September 2023 Joint Leaders' Statement nevertheless marked an important change in the political environment for bilateral technology cooperation. By identifying science, technology and digital innovation as a new breakthrough area, the two governments incorporated technological development into the broader strategic relationship. Cooperation priorities extended across semiconductor supply chains, workforce development, digital infrastructure and innovation, creating opportunities for collaboration in sectors complementary to AI. The statement included an initial US$2 million U.S. government commitment to semiconductor workforce development. Although this funding was not an AI-specific allocation, it demonstrated movement from general diplomatic support toward a defined technological cooperation instrument (United States & Vietnam, 2023).

The instruments support different goals without showing harmonized governance. This provides documentary support for P1's narrower claim of strategic compatibility alongside divergent domestic implementation instruments. It does not demonstrate that such compatibility itself caused any specific investment. The law's operative date is 1 March 2026 under Article 34 (National Assembly of Vietnam, 2025), and Decision No. 367/QD-TTg specifies a separate national implementation plan (Prime Minister of Vietnam, 2026).

These developments reveal complementary but institutionally distinct policy trajectories. U.S. policy increasingly emphasizes the international deployment of American AI technologies, whereas Vietnam's legal framework addresses the governance of AI development and use within its jurisdiction. Their objectives may support technological cooperation, but the instruments differ in function, scope and accountability. Moreover, the reviewed documents do not establish that Vietnam has automatically become a participant in the U.S. AI export programme or that the two countries have harmonized their AI regulatory obligations. The observable result is therefore stronger bilateral agenda alignment accompanied by continued differentiation in domestic governance instruments. This pattern is consistent with P1 and suggests that policy convergence has primarily created an enabling environment rather than a unified bilateral AI governance regime.

Table 2. Policy evolution and bilateral AI alignment (2021-2026)

Year	Policy development	Governance orientation	Implications for cooperation
2021	Vietnam National AI Strategy	Domestic capacity building	Establishes pre-existing national priorities
2023	U.S.-Vietnam Comprehensive Strategic Partnership	Bilateral strategic alignment	Elevates technology cooperation
2024	Vietnam-NVIDIA agreement	Public–private institutional cooperation	Introduces a named AI research initiative
2025	U.S. AI Action Plan and EO 14320	International AI technology exports	Creates an export-oriented policy framework
2025-2026	Vietnam's AI Law	Domestic AI regulation	Establishes legal conditions for AI activities

Source: Authors' compilation from official Vietnamese and U.S. policy documents. Policy instruments are not treated as equivalent measures of implementation.

From diplomatic commitments to operational technology partnerships

FPT announced a planned US$200 million AI Factory partnership with NVIDIA in April 2024 and reported installing H100-based infrastructure in December (FPT, 2024a, 2024b). A later 2025 company financial disclosure states that its factories entered operation; it reports that the Vietnam and Japan systems ranked 38th

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and 36th respectively in the June 2025 TOP500 list, and claims 11 services, more than 111 billion tokens generated, integration of over 25 large language models and use by more than 25,000 AI professionals after six months (FPT, 2026a). These are unusually specific operational indicators, but most are company-reported aggregate AI Factory figures rather than independently audited Vietnam-only outcomes. TOP500 rankings provide externally checkable infrastructure context, not evidence of local learning, access distribution or productivity. The US$200 million is a stated project plan, not U.S. public finance or audited disbursement.

One early and substantial initiative emerged in April 2024, when FPT announced a strategic partnership with NVIDIA involving a planned US$200 million investment in an AI Factory. The project was designed around NVIDIA H100 GPUs and associated software infrastructure, with applications envisaged in generative AI, autonomous driving and other areas of technological development (FPT, 2024a). In December 2024, FPT reported that its Vietnamese AI Factory had been equipped with thousands of H100 GPUs and was preparing to offer services from January 2025 (FPT, 2024b). These reports demonstrate a more concrete form of technological cooperation than a general partnership announcement because they identify a domestic implementing enterprise, a stated financial commitment, specified computing technologies and an infrastructure deployment timeline.

The FPT-NVIDIA initiative also indicates a shift in the role of Vietnamese firms within international AI partnerships. Rather than participating exclusively as purchasers of finished applications, FPT positioned itself as a domestic provider of computing services and AI development infrastructure built on foreign technology. This distinction matters because local infrastructure provision can potentially improve access for Vietnamese enterprises and researchers. Nevertheless, the announced US$200 million represents a planned investment associated with FPT's project, not a verified U.S. government financial contribution or an aggregate measure of bilateral AI investment. Similarly, reported GPU deployment provides evidence of installed technological resources but does not independently establish their utilization rates, research productivity or economic returns.

A second institutional pathway emerged on 5 December 2024, when the Vietnamese government and NVIDIA signed an agreement concerning the establishment of the Vietnam Research and Development Center and an AI data centre. Official accounts identified the Ministry of Planning and Investment as the government signatory, while NVIDIA announced that its first research and development centre in Vietnam would focus on AI and software development, engaging universities, researchers, enterprises and government institutions (Vietnam Government Portal, 2024; NVIDIA, 2024). Compared with the enterprise-led FPT initiative, this agreement illustrates a more direct interface between national authorities and a foreign technology corporation.

The relationship between these two NVIDIA-related initiatives is analytically significant. The FPT project concerns domestic computing infrastructure and AI services developed through commercial cooperation, whereas the government–NVIDIA agreement establishes a broader institutional basis for research and technological engagement. Although both involve the same foreign technology provider, they should not be treated as a single investment or presumed to share identical ownership, financing and implementation arrangements. Their coexistence instead suggests that bilateral AI engagement is developing through overlapping commercial and public–private channels.

The four initiatives therefore supply non-equivalent evidence of implementation. A computing-services project with company-reported operational metrics, a government–corporate R&D agreement, a centre whose launch has external news corroboration, and an engineering collaboration announced in 2026 cannot be pooled as four equivalent successes. The comparative matrix below applies identical tests to each, recording absent outcome evidence without mistaking missing disclosures for project failure. This makes the empirical boundaries relevant to P2 and P3 visible rather than embedding them in general narrative.

Table 3. Cross-case evidence matrix (evidence available through 14 October 2026)

Initiative	**A / I**	**O: verifiable activities**	**C: domestic gains**	**Source type / uncertainty**
FPT–NVIDIA AI Factory	A contextual; I documented	Partially documented: FPT reports deployed GPUs, 2025	Not established: Vietnam-only user	S + potentially verifiable TOP500;

		operations and aggregate usage; TOP500 ranking checkable	access, training, R&D, IP and benefits	metrics company-reported
Government–NVIDIA R&D centre	A contextual; I documented agreement	Not established beyond formal commitment in the cited documents	Not established: personnel, outputs and retained IP not assessed	P/S; a signed agreement is not proof of staffed operations
Qualcomm Vietnam AI R&D centre	A contextual; I documented	Partially documented: launch corroborated by Reuters; continuing research outputs not independently measured	Not established: skills transfer and Vietnamese research outputs	S + X launch reporting; no performance audit
FPT–Qualcomm engineering	A contextual; I agreement documented	Not established: technical work proposed, deliverables not verified	Not established: shipped applications or locally retained know-how	S; company announcement only

Source: Coded comparison of the 14-item core corpus. A = alignment; I = institutionalization; O = operational activity; C = local capability. 'Not established' means that the cited public documents do not adequately substantiate the specified claim. Metrics published by FPT are explicitly treated as self-reported, even when detailed.

Capability development and technological asymmetry

The expansion of AI partnerships has occurred against a substantial disparity in technological resources and institutional readiness between the United States and Vietnam. Stanford University's 2026 AI Index reports that U.S. private AI investment reached US$285.88 billion in 2025, compared with US$12.41 billion in China and US$20.92 billion in Europe (Stanford HAI, 2026). The IMF AI Preparedness Index, based on 2023 observations, assigns the United States a score of 0.77 and Vietnam 0.48, compared with an average of 0.46 for emerging-market economies (IMF, n.d.). Although these indicators are not direct measures of bilateral cooperation, they establish important contextual differences in technological ecosystems and readiness for AI adoption.

The disparity helps explain why partnerships with established U.S. technology providers may be attractive to Vietnam. Developing advanced AI systems requires substantial computing resources, research expertise and supporting software infrastructure. Cooperation with NVIDIA and Qualcomm potentially enables Vietnamese organizations to access these capabilities through domestic facilities and engineering partnerships, reducing some barriers associated with independent technology development. The FPT AI Factory illustrates this opportunity through an announced investment in advanced GPU-based infrastructure, while Qualcomm's research presence and technical cooperation with FPT provide additional opportunities for engineering specialization.

However, the publicly documented initiatives reveal different types of capability acquisition. The FPT–NVIDIA arrangement concerns computing infrastructure and service provision; the government–NVIDIA agreement emphasizes an institutional platform for AI research; and Qualcomm's initiatives focus on R&D and access to specialized engineering technologies. These distinctions are important because greater computing capacity, research participation and application development are not interchangeable indicators of technological upgrading. Each may contribute to domestic capabilities through different organizational mechanisms, and each requires different evidence to establish its developmental effects.

From an absorptive-capacity perspective, the involvement of Vietnamese engineers, universities and enterprises offers potential channels for knowledge accumulation. Yet the available public records provide limited comparable information about the number of specialists trained, jointly produced research outputs, domestically retained intellectual property or measurable improvements in institutional performance. The documented presence of technology providers therefore establishes opportunities for learning more clearly than it

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demonstrates the realization of long-term learning outcomes. Nor can installed computing infrastructure alone establish whether Vietnamese researchers enjoy sustained access to the resources necessary for independent experimentation.

The same initiatives illustrate the continuing relevance of technological asymmetry. AI infrastructure built around NVIDIA accelerators and associated software ecosystems may support rapid deployment while preserving reliance on externally developed hardware and platforms. Qualcomm's technical partnerships may likewise improve domestic engineering capabilities while retaining important technological dependencies within proprietary architectures. These characteristics do not negate the benefits of cooperation, nor do they establish coercive relationships. Rather, they indicate that capability development may occur within governance arrangements in which control over critical technological components remains unequally distributed.

National policy developments add a further dimension to these implementation conditions. Vietnam's 2026 AI legal framework provides a domestic basis for regulating AI systems, while the U.S. export-oriented framework places commercial technology deployment within American policy and compliance requirements. Consequently, technological cooperation must operate across regulatory systems with different objectives and institutional responsibilities. The publicly reviewed documents do not provide sufficient evidence to determine how individual partnerships allocate rights over data, intellectual property, software portability or long-term technological access. Such information is necessary before drawing stronger conclusions about the distribution of technological autonomy.

Assessment of the three propositions

P1 is supported in a limited, descriptive sense: Vietnam's AI strategy (2021) predates the bilateral diplomatic elevation (2023), while subsequent U.S. export policy and Vietnamese AI legislation differ in instruments but are compatible with selected technology projects. An alternative explanation pre-existing Vietnamese priorities and commercial opportunities rather than bilateral policy convergence as the main driver cannot be excluded. The evidence consequently supports coexistence and complementarity, not a causal effect of convergence.

P2 receives qualified support. Named counterparties, projects and resources are identifiable across all four initiatives, but credible operational evidence is uneven. FPT's subsequent operating disclosures substantiate activity more strongly than an initial announcement, and external reporting corroborates Qualcomm's centre launch; neither independently proves sustained institutional performance. The government–NVIDIA and FPT–Qualcomm arrangements do not meet the same operational test within the cited documents. P3 remains unresolved empirically: the cases demonstrate opportunities for computing access and technical learning, alongside supplier-controlled hardware and platforms, but disclose insufficient comparable evidence of retained skills, IP, local research outputs or technological substitution. These conclusions assess evidentiary strength, not the ultimate success or failure of the initiatives.

The evidence also reveals an uneven transition between levels of cooperation. Political alignment is observable in bilateral statements; institutionalization is demonstrated through named partnerships and implementing organizations; and operational maturity varies according to the infrastructure, facilities and technical activities documented in individual initiatives. Evidence of enduring domestic capability development remains more limited. These findings suggest that bilateral AI cooperation has acquired greater institutional and operational substance than diplomatic declarations alone would indicate, while its longer-term developmental and governance consequences remain insufficiently measured. The resulting pattern is one of expanding technological integration accompanied by differentiated implementation maturity and continuing questions about capability retention and technological control.

DISCUSSION

The findings suggest that artificial intelligence is reshaping U.S.-Vietnam relations primarily through the diversification of technological cooperation and the emergence of new institutional connections, rather than through the establishment of a unified bilateral AI governance regime. The expansion from diplomatic commitments to computing infrastructure, research arrangements and specialized engineering partnerships

demonstrates that cooperation has acquired operational substance. However, this development has not occurred uniformly across policy, institutional and technological dimensions. The distinction matters because different forms of cooperation create different opportunities for capability development and different demands for public oversight. Three interrelated implications emerge from the findings: policy alignment operates through selective complementarity rather than regulatory convergence; implementation advances through a fragmented network of public and private actors; and technological integration may strengthen domestic capabilities while preserving structural dependencies.

This study's finding is narrower than a claim that AI has already transformed bilateral economic relations. It shows a distribution of documentary evidence across policy, institutional and operational dimensions, with comparatively weak evidence on local capability retention. Three implications follow: selective complementarity can coexist with divergent national AI rules; corporate delivery can advance beyond diplomatic declarations while leaving accountability fragmented; and greater technological access need not equal greater domestic control. The propositions have different evidentiary statuses, so recommendations below are explicitly normative rather than presented as observed outcomes.

The first implication concerns the relationship between policy convergence and bilateral cooperation. Bennett (1991) distinguishes convergence in policy objectives from convergence in instruments, while Holzinger and Knill (2005) emphasize the institutional conditions shaping policy similarity. The U.S.–Vietnam case supports this distinction but also suggests that substantive cooperation does not necessarily require extensive regulatory harmonization. Vietnam's 2021 AI Strategy established domestic objectives before the diplomatic upgrade of September 2023, while subsequent U.S. policies emphasized international technology exports and Vietnam developed a dedicated domestic legal framework for AI. These trajectories are not identical, but they are potentially complementary: Vietnam seeks technological upgrading and institutional capacity, whereas U.S. technology providers and policymakers have incentives to expand international technological engagement. Their interaction can generate cooperation without eliminating differences in national governance priorities.

This finding suggests that selective policy complementarity may be a more useful explanation than comprehensive policy convergence for emerging-technology partnerships between countries with unequal technological capabilities. Rather than transferring a common regulatory model, cooperation can develop where national objectives intersect around specific projects. The Comprehensive Strategic Partnership provided an enabling political framework, but the implementation instruments identified in the Results emerged through different institutional channels. The significance of diplomatic alignment consequently lies less in producing uniform national policies than in facilitating connections between domestic development priorities and externally available technological resources. This interpretation also qualifies causal claims about the 2023 diplomatic upgrade: because Vietnam's AI strategy preceded the partnership and commercial incentives shaped corporate engagement, diplomatic alignment should be understood as a potentially facilitating condition rather than the demonstrated primary cause of subsequent investments.

A second implication arises from the diversity of implementation arrangements. Collaborative governance theory emphasizes institutional design, coordination and capacity for joint action (Ansell & Gash, 2008; Emerson et al., 2012). The empirical findings indicate that these requirements differ across the partnerships examined. The FPT–NVIDIA AI Factory involves infrastructure investment and commercial service provision, while the government–NVIDIA agreement creates an institutional channel for research cooperation. Qualcomm's research presence and subsequent technical collaboration with FPT introduce additional forms of technology development and engineering engagement. These initiatives demonstrate that implementation extends beyond government-to-government commitments, but they do not constitute a single centrally administered bilateral program.

This pattern highlights a limitation of interpreting international technological cooperation exclusively through formal diplomatic institutions. In AI, private corporations frequently control infrastructure, specialized knowledge and technological platforms essential to implementing public policy ambitions. Consequently, implementation may advance through commercially organized partnerships even where government-to-government coordination remains limited or is not publicly documented. Such arrangements can improve flexibility and accelerate technological access, but they may also fragment accountability across organizations

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operating under different contractual obligations and performance expectations. The relevant governance question is therefore not simply whether cooperation has been institutionalized, but how authority, resources and responsibility are distributed across the institutions through which cooperation takes place.

The distinction has practical consequences for evaluating implementation. An AI Factory providing computing services, a research centre supporting technological development and a technical agreement facilitating engineering collaboration generate different forms of output. Their effectiveness cannot be assessed through the same indicators. Infrastructure initiatives require evidence of operational capacity, accessibility and utilization; research partnerships require information on sustained collaboration and scientific outputs; and engineering arrangements require evidence of technical development and application. A differentiated evaluation framework is therefore necessary to avoid treating all partnerships as equivalent manifestations of bilateral progress. This extends collaborative governance reasoning by emphasizing that international AI cooperation may exhibit multiple forms of institutional maturity simultaneously, rather than progressing through a single implementation pathway.

The third implication concerns the relationship between technological access, domestic learning and structural dependence. Cohen and Levinthal's (1990) absorptive-capacity framework suggests that external knowledge produces lasting benefits when participating organizations possess the ability to assimilate and apply it. The establishment of advanced computing facilities and research partnerships potentially creates opportunities for Vietnamese firms, engineers and research institutions to improve technological capabilities. However, the findings also indicate that access to sophisticated infrastructure and participation in research arrangements are not sufficient indicators of sustained domestic learning. Such outcomes depend on opportunities to undertake independent research, develop transferable expertise and retain knowledge beyond particular commercial relationships.

This issue becomes more consequential when considered alongside asymmetric interdependence. Farrell and Newman (2019) demonstrate how control over strategically important network nodes can create structural leverage, while Gereffi et al. (2005) explain how governance arrangements influence the distribution of capabilities within international production networks. The concentration of advanced AI hardware, software architectures and proprietary platforms among major technology providers creates conditions in which technological upgrading and continued external dependence may develop together. For Vietnam, access to NVIDIA-based computing infrastructure or Qualcomm's engineering technologies can support domestic innovation while leaving essential components of the technological ecosystem outside local control. The findings do not establish that these dependencies have produced coercive outcomes or measurable restrictions on Vietnamese partners. They nevertheless identify structural conditions that may influence the long-term distribution of benefits.

Importantly, dependence should not be equated with the absence of developmental gains. The objective of international technological cooperation is not necessarily complete technological self-sufficiency, particularly where developing every component of advanced AI systems independently would impose considerable costs. A more meaningful distinction concerns whether cooperation expands the technological options available to domestic institutions. Partnerships can contribute to capability development when local organizations acquire transferable skills, participate meaningfully in research, access reusable resources and develop the competence to evaluate or adapt externally supplied technologies. Conversely, technological adoption may increase without comparable gains in institutional autonomy when essential expertise and operational decisions remain concentrated among suppliers. The developmental value of cooperation should therefore be assessed through both capability accumulation and the ability to govern technological dependencies, rather than through investment volume or infrastructure availability alone.

These findings carry implications for bilateral AI policy. For Vietnam, the priority is not simply to attract additional technology investments but to connect cooperation initiatives with identifiable domestic learning objectives. Publicly supported research and infrastructure partnerships could be evaluated using indicators such as Vietnamese researchers' participation in joint projects, access to computing resources, research outputs, specialized skills development and the subsequent use of acquired capabilities by domestic organizations. Such measures would help distinguish immediate technological access from sustainable capability formation. They

should, however, be proportionate to the maturity and purpose of each initiative, since experimental research partnerships cannot reasonably be assessed against the same criteria as established commercial operations.

For U.S. policymakers and participating technology firms, effective cooperation requires greater attention to the institutional conditions supporting technology adoption and local participation. Commercial expansion and developmental objectives are not inherently contradictory, but their compatibility cannot be assumed. Transparent cooperation arrangements, clearly defined technical responsibilities and opportunities for sustained research engagement could reduce uncertainty for participating institutions. At the bilateral level, a shared monitoring framework distinguishing announced commitments, operational activities and demonstrated outputs could improve policy coordination without requiring the disclosure of commercially sensitive information. Such an approach would also make it easier to assess whether cooperation is expanding primarily through individual commercial initiatives or generating broader institutional capacities.

The study's theoretical addition lies in making a distinction often blurred in accounts of technology diplomacy: project maturity and developmental value are separate axes. The four-part coding scheme is adapted from existing implementation, governance and technology-learning approaches; novelty lies in integrating source-strength appraisal with cross-case comparison, not in claiming a previously unknown four-stage sequence. A partnership may show documented operations (O) without documented domestic learning (C), and several pathways may coexist within one bilateral relationship. This is potentially transferable to AI partnerships involving other late-industrializing countries and dominant platform suppliers, provided future research tests the codebook with field evidence and multiple coders. The remaining weaknesses are substantial: purposive selection may omit unsuccessful or undisclosed projects; source searches were reconstructed rather than logged contemporaneously; company data are not an audit; and public evidence cannot reveal confidential licensing or IP arrangements. Future studies should combine contract-level access, interviews, utilization statistics and verifiable local outputs before making stronger causal or developmental claims.

The broader theoretical contribution is to show that emerging-technology partnerships can advance unevenly across political, institutional and developmental dimensions. Policy complementarity may facilitate engagement without regulatory convergence; operational initiatives may proliferate without unified bilateral governance; and technological integration may deepen without immediately producing independently verifiable domestic capabilities. This differentiated understanding moves beyond treating cooperation as either a diplomatic success or a dependency risk. Instead, it identifies the institutional and technological conditions under which expanding international AI partnerships may generate sustainable developmental benefits. In the U.S.-Vietnam relationship, the most consequential question is therefore no longer whether AI cooperation has emerged, but how its increasingly diverse arrangements can translate technological integration into durable domestic capabilities and accountable governance.

CONCLUSION

AI has expanded the U.S.-Vietnam technology agenda and generated identifiable research, infrastructure and engineering arrangements, but the evidence varies significantly across initiatives. A transparent comparison of four cases supports a distinction between strategic compatibility, formal institutionalization, documented operations and durable local capability development. FPT's operational disclosures provide concrete though largely self-reported activity metrics; the other initiatives offer more limited evidence of sustained delivery, and none of the reviewed documentation is sufficient to establish broad locally retained technological capabilities. Accordingly, P1 receives limited descriptive support, P2 qualified support and P3 remains empirically unresolved. The integrated diagnostic framework helps policymakers avoid equating diplomatic commitments, infrastructure announcements and developmental outcomes. The next research priority is independent project-level evidence of utilization, research participation, skill retention and the governance of technological dependencies.

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