

EXECUTIVE BRIEF | SEPTEMBER 2026

The Threshold Compact

Governing Superintelligence the Way the World Governed the Bomb

Logan Reed | Former U.S. Army Captain | Former Intelligence Contractor Supporting U.S. and Partner Special Operations Forces | Technology Modernization and Responsible AI

THE PROPOSAL IN ONE SENTENCE

Treat artificial superintelligence as the strategic weapon it is, and govern it the only way rivals have ever governed such a weapon: not by trusting one another, but by letting one another look. The Threshold Compact is a binding charter among the world's frontier AI labs, led by private-sector professionals and overseen by governments, co-chaired by American and Chinese members, verified through the hardware frontier AI requires, and enforced by lawful restrictions on that hardware. Its purpose is not to stop this technology. It is to make sure we reach what it promises: cures for diseases that have killed our children for all of history, the end of material scarcity, and abundance shared with every nation rather than hoarded by whoever wins a race. Verification is the price. Abundance is the prize.

The problem

The strongest argument against slowing the race to superintelligence is that our adversaries will not slow down. It is true. It is also why the current path cannot hold, because every capable nation believes the same thing about everyone else. The race runs at the speed of the most fearful participant, not the most prudent. No one will stop on a rival's promise, and no one should. Restraint by agreement is impossible. Restraint by verification is not.

The deeper problem is that reaching superintelligence first does not mean being able to control it. Reliable human control over such a system remains unproven, whichever lab or country builds it. Good intentions and national allegiance do not resolve that uncertainty, and the consequences of losing control are too serious to cross that threshold on the promise that safeguards will follow. The framework must govern not only who crosses and how openly, but whether and on what evidence anyone crosses at all.

The builders already know this. In 2023 the leaders of OpenAI wrote that superintelligence will need "something like an IAEA" with the power to inspect and audit. In July 2026 Demis Hassabis proposed an industry-funded standards body modeled on FINRA, and in September the three leading labs were reported to be discussing one. Revising its Responsible Scaling Policy in February, Anthropic wrote that the strongest safeguards "might prove outright impossible to implement without collective action," and its chief executive now calls for pacing agreements and embedded outside evaluators. Voluntary restraint has been tested and has collapsed. What the industry is reaching for lacks two things: the other superpower, and consequences.

The window is physical and it is closing. Among the 500 largest known AI compute clusters, roughly 75 percent of capacity is in the United States and 15 percent in China, and the chips are made by a handful of firms. Compute is to AI what fissile material was to the bomb: hard to make, hard to hide, and possible to count. That will not remain true forever.

Why each party joins

The frontier labs gain a level field, a statutory safe harbor, one set of standards instead of fifty, and the thing they now say in public: they would slow down if they knew their rivals had too. The United States converts a temporary compute lead into a durable verification arrangement while it still controls the chips, as the Non-Proliferation Treaty turned a temporary nuclear lead into fifty years of advantage. China gets what it demanded in August, a co-equal seat in defining safety and identical obligations for American firms, plus a basis for negotiating lawful access to the hardware supply chain. Everyone else gets an Abundance Program delivering the safe fruits of the technology without racing for it, the bargain that kept the nuclear club small.

The proposal

The Compact establishes the Threshold Authority: a Board of Principals seating the chief executive of every frontier lab, voting by name in public; American and Chinese Co-Chairs with a joint veto over charter changes and none over enforcement; an Oversight Council of government designees that receives every report and can compel answers, audit the Inspectorate, and order reviews without running the institution; an Independent Inspectorate under an Inspector General on a single seven-year term; a Safety Research Commons where members pool work on control and evaluation while keeping products proprietary; and a Council on Human Dignity whose dissents are published.

Element	Design
Membership	Frontier Labs meeting published compute or capability criteria, state-owned or private, no exemptions; Infrastructure Members (chip designers, fabricators, lithography suppliers, cloud operators); Associate Members; Anchor Governments, which seat the Oversight Council and enact the statutes giving the charter legal force.
Reporting	Training declarations before any run above a public threshold, paired with capability-based triggers; standardized evaluations before deployment, with a mandatory pause and Board review of the developer's evidence of control at defined tripwires; incident reports within 72 hours; full review before any open-weight release.
Verification	A Compute Registry tracking every advanced accelerator from manufacture; declared facilities open to announced and unannounced inspection under managed-access rules; independent analysis of energy data and satellite imagery; hardware-enabled safeguards in future chips; a protected and rewarded whistleblower channel.
Transparency	Quarterly Compliance Reports and an annual State of the Frontier, each in a public version and a restricted annex with the same core findings, delivered to every member government the same day, every redaction disclosed and explained.
Funding	A levy on registered compute paid by members, building a permanent endowment. No government funding of the Inspectorate or Secretariat. Independence protected by fixed terms, a post-employment bar, published votes, and the Oversight Council.
Enforcement	A five-rung public ladder: notice; penalties and bond forfeiture; suspension and named censure; lawful compute restrictions executed by Infrastructure Members under the anchor statutes; expulsion and referral to governments for sanctions on the organization and its executives.

The path

Three years is the careful timetable, and I do not believe we have three years to spare. The recommended fast path stands up a working Authority in twelve to eighteen months: the two presidents agree one sentence; the American and Chinese frontier labs and their hardware suppliers convene within thirty days; founding members sign an interim compact with immediate declarations, incident reporting, and bonds; governments seat the Oversight Council and route existing export-control data to an interim Registry by executive action; a first public Compliance Report appears at day ninety; the charter is signed and the Inspectorate stood up by month nine; anchor statutes pass and unannounced inspections begin by month eighteen. Until the statutes pass, the teeth are bonds, censure, and publication. The nuclear framework was provisional for a decade. It held.

The ask

- **To the Presidents of the United States and China.** Agree on one sentence: that the frontier labs of both nations should convene within thirty days, with their hardware suppliers, to draft a compact for the verified and collaborative development of advanced AI, co-chaired by both industries, overseen by both governments, and open to all who meet its obligations.
- **To Congress and legislators in every nation hosting a frontier lab.** Begin drafting the anchor statute now: recognize Authority standards, protect those who report violations, provide a defined safe harbor for those who comply, and set lawful procedures for acting on referrals.
- **To the chief executives of the frontier labs.** Say publicly that you would join such a compact if your peers did, and name one member of your leadership team to attend the founding convening.