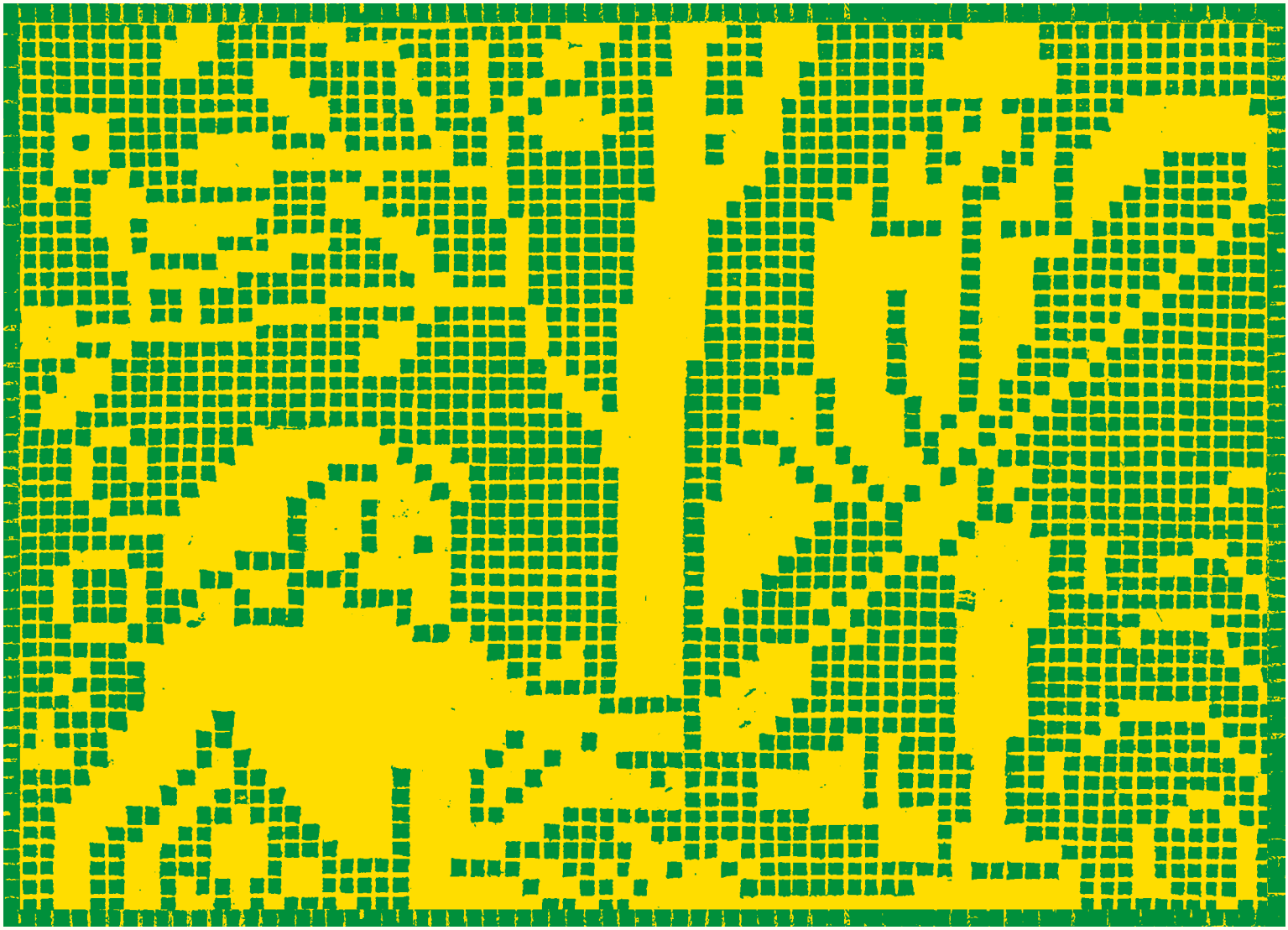
CHAPTER 1:

AI'S FALSE GODS

WHAT'S PROPPING UP THIS BUBBLE AND WHY IS IT SO HARD TO NAME?



The "common sense" around artificial intelligence has become potent over the past two years, imbuing the technology with a sense of agency and momentum that make the current trajectory of AI appear inevitable, and certainly essential for economic prosperity and global dominance for the US. In this section, we break down the narratives propping up this "inevitability," explaining why it is particularly challenging—but still necessary—to contest the current trajectory of AI, especially at this moment in global history.

1.1: THE AGI MYTHOLOGY: THE ARGUMENT TO END ALL ARGUMENTS

The promise that artificial general intelligence, or "AGI," is hovering just over the horizon is tilting the scales for many of the debates about how AI is affecting society. AI firms investing in the development of very large models at scale constantly assert that AGI is months or weeks away[1], poised to have transformative effects on society at large—making this central to their sales pitch for investment.[2] The discourse around AGI adds a veneer of inevitability to conversations about AI; if one company doesn't achieve it, another will. This also gives governments an excuse to sit on their hands even as current versions of AI have profound effects on their constituents, as though the race to create AGI has its own momentum.

If anything, under both the Biden and Trump administrations, the US government has instead positioned itself as chief enabler: ready to wield every tool at its disposal—including investment, executive authority, and regulatory inaction—to push American AI firms ahead of their competitors in this race to AGI.[3] It's worth noting that those most vocal about their

fears about the so-called "existential risks" posed by AGI have done as much to prop up and speed along industry development as anything or anyone else.[4] OpenAI's assertion that "it's hard to fathom how much human-level AI could benefit society, and it's equally hard to imagine how much it could damage society if built or used incorrectly"[5] drives home that the AI boosters and the existential ("x-risk") fearmongering both play a role in propping up this vision of AI with supreme capabilities.

WHAT IS AGI? THE HISTORY OF ARTIFICIAL GENERAL INTELLIGENCE

As Brian Merchant chronicles in his report "AI Generated Business," the term AGI, coined in 1997, captured the notion of a "general intelligence" as a counterpoint to the then-dominant current in AI research, "expert systems," which operated on rule-based logic designed as a formalized representation of how humans think.[6] Where expert systems only worked in the narrowest of applications, AGI would operate broadly across a wide range of domains. But developers in the field largely ditched these ways of thinking about AI, turning instead to deep-learning techniques that proved more effective and that form the basis of today's automated decision-making systems, among others.

Interest in AGI was revived in the 2010s when companies like OpenAI seized on the term, first as shorthand for a form of machine intelligence intended to rival and eventually surpass human intelligence, and later as a term "central to their marketing efforts."[7] The images invoked by AI firms is instructive, from Anthropic founder Dario Amodei's use of the sublime imagery of "geniuses in a data center" capable of paradigm-changing scientific leaps like "designing new weapons or curing diseases,"[8] to the straightforwardly commercial logic underpinning OpenAI's agreement with Microsoft: AGI is when AI can create $100 billion in profits.[9]

In this sense, ChatGPT walked so that AGI could run; the current crop of LLMs in the consumer market are examples of brilliant marketing—proof, as AI firms argue, that big, unexpected advancements in AI were not only possible but "just around the corner."[10] AGI has since been positioned as the next big step in the LLM advancement trajectory, albeit with little proof, beyond speculation, of how far or wide this leap will have to be.[11] However, while this belief seems to be spreading among the general public, it is widely contradicted by many within the AI research community. For instance, in a recent survey of members of the Association for the Advancement of AI, 84 percent of respondents said that the neural net architectures that large models rely on are "insufficient to achieve AGI."[12] In another, more fundamental, debunking of AGI claims, scholars like Emily Bender[13] and Henry Farrell,[14] among others, have contested the basis of claims to AGI, arguing instead that large models can "never be intelligent in the way that humans, or even bumble-bees,"[15] are because AI cannot, in fact, create. It can only reflect, compress, even remix content that humans have already created to help people to coordinate or solve problems.[16]

While current AI models make the promise of AGI more tangible for policymakers and the general pub-

lic, AGI is conveniently distanced from the fundamental and persistent limitations of LLMs on the ground that AGI, by definition, will be a wholly new paradigm that leapfrogs these material concerns. The mythology around AGI masks the shallowness of today's AI models, providing substance and imagination that innovations are just around the corner.

IF AGI WERE HERE, HOW WOULD WE EVEN KNOW?

Despite bold public claims from the tech industry that AGI is "as little as two years"[18] away, the research community has yet to agree.[19] A recent survey by the Association for the Advancement of AI (AAAI) of nearly five hundred AI researchers found that 76 percent of respondents assert that scaling up current approaches to yield AGI is unlikely or very unlikely to succeed.[20]

So how will we even know when AGI is here? The metrics currently on offer are largely narrow, vague, and self-serving benchmarks[21]—and some researchers have argued that the preoccupation with AGI is "supercharging bad science."[22] In place of scientific breakthroughs, industry labs are hinging claims to proximity to AGI on grandiosely named tests like "Humanity's Last Exam"[23] and "Frontier Math"[24] that gauge only a very narrow ability to answer clear, closed-ended questions[25]—poor proxies for the promises these companies make about the capability of this technology like inventing cures to cancer or solving for climate change. AI company Hugging Face's Chief Science Officer Thomas Wolf has argued we're currently testing systems for their ability to be obedient students, rather than for their mastery of bold counterfactual approaches or the ability to challenge their own training data, which might show more promise for solving complex, intractable problems.[26] In 2025, a group of AI researchers from across academia and industry pointed to an endemic challenge within the current field of AI evaluations that is more preoccupied with "coarse-grained claims of general intelligence" than "real-world relevant measures of progress and performance."[27]

In sum, there is a widespread and endemic lack of clarity on both the definition and time scales of the AGI conversation, which makes it hard to contest or reason its merits. *The more urgent inquiry, however, is who and what does this disproportionate focus on AGI work in service of? How will it shape the current trajectory of AI?*

WHO BENEFITS FROM AGI DISCOURSE?

AGI has become the argument to end all other arguments, a technological milestone that is both so abstract and absolute that it gains default priority over other means, and indeed, all other ends. It is routinely cast as a technology so all-powerful that it will overcome some of the most intractable challenges of our time—and that both investment into the sector and

ancillary costs are justified by the future solutions it will offer us. For example, Eric Schmidt recently dismissed the climate costs imposed by AI by asserting that humans aren't set up to coordinate to solve climate change. Thus, the reasoning goes, we need to supercharge data centers—because in the long term, AGI has the best shot at solving for it.[28] This not only reflects abstract AI solutionism at its peak; it also serves to flatten and disguise the problem of climate change itself as waiting for its technical silver bullet, rendering the challenges of political will, international cooperation, and material support for people to rebuild homes or house climate refugees—everything it will take to meaningfully "solve" climate change—invisible.[29]

Presenting AI as a quick technical fix to long-standing, structurally hard problems has been a consistent theme over the past decade (as we explore in our chapter on **Consulting the Record**), but past variants of technosolutionism at least had to demonstrate how the technology would solve the problem at hand. With AGI, though, we're not clear how this transformation will happen beyond the assertion that the current state of affairs will be overhauled. The debates around DOGE transforming government using AI have this flavor: In his interview with Ben Buchanan, Ezra Klein speaks of the general sentiment that with superintelligent AI potentially around the corner, the government will inevitably need to be taken apart and rebuilt in the age of AGI.[30] It's the same logic that dictates that if AGI is truly going to propel scientific discoveries of the kind that Amodei promises, then perhaps there will be no need for federal funding for science at all.

AGI'S MARKET-BOOSTING FUNCTION

Asserting that AGI is always on the horizon also has a crucial market-preserving function for large-scale AI: keeping the gas on investment in the resources and computing infrastructure that key industry players need to sustain this paradigm. As we've argued, this current avatar of large-scale AI was set in motion by the simple rule that scaling up data and compute would lead to performance advancements—a logic that sedimented the dominance of the handful of companies that already controlled access to these inputs, along with pathways to market,[31] and in whose hands power would be further concentrated if AGI ever were achieved.[32] The quest for the ever-shifting goalpost of AGI only reinforces this "bitter lesson" (as Anthropic CEO Amodei calls it).[33]

There's a lesson here from the 1980s, when, even before the term AGI was in vogue, the Reagan administration pushed for a wildly ambitious (for the time) "Strategic Computing Initiative" that was focused on propelling general advancements in "AI"—along the lines of the AGI promise.[34] It was propelled by the promise of new military capabilities, anxieties about Japanese domination on AI, and the potential of private-sector opportunities. A billion dollars in taxpayer money was spent then on a program, now universally acknowledged as a failure, that didn't yield results even on the terms it set for itself. The postmortem of why it failed yields varied conclusions, but one is

worth underscoring: Then, as now, these advancements hinged not on revolutionary feats in science, but on scaling up computing power and data.

Coincidentally, existential risk arguments often have the same effect: painting AI systems as all-powerful (when in reality they're flawed) and feeding into the idea of an arms race in which the US must prevent China from getting access to these purportedly dangerous tools.[35] We've seen these logics instrumented into increasingly aggressive export-control regimes. By drawing attention to the very systems they purportedly aim to contest, x-risk narratives create a Streisand effect: encouraging more people to see the AI dystopia in their present, fueling adoption and bolstering industry players rather than curbing their power. They have also narrowed the scope for policy intervention, bolstering a debate centered around the two poles of accelerationism and deceleration rather than facilitating a broad dialogue about AI development and its societal implications.

Ultimately, these twin myths around AGI position AI as powerful and worthy of investment, and draw attention away from the evidence to the contrary.

DISPLACING GROUNDED EXPERTISE: WHO IS DISEMPOWERED BY THE AGI DISCOURSE?

Elevating AGI over other paths to solving hard problems is just a supercharged form of technosolutionism,[36] **but it also means that those with technical expertise—not only those driving the tech development but also those fluent in using this new suite of tools—are normalized as primary experts across broad areas of society and science in which they lack domain-specific context and experience.**[37] This has been a familiar fight over the past decade of AI development: Those with lived experience and sector-specific knowledge have had to advocate for a determining role in questions around whether, and how, AI is deployed.

Whether that means nurses having a say in how AI is integrated in patient care, or parent groups fighting against the use of facial recognition on their children in the classroom, there has been a consistent push to recenter who is counted as an expert on baseline questions about AI integration. (Notably, some of this has often resulted in tokenistic approaches that provide nominal seats at the table to impacted communities—too little, too late.) AGI presents a more formidable version of this challenge given its abstract and absolutist form. For example, narratives around AGI upending the world of work routinely position workers across industries as being subjects—or worse, collateral damage—of a great transformation, rather than as participants and indeed experts in the ways in which these transitions will take place.[38]

1.2: TOO BIG TO FAIL: INFRASTRUCTURE AND CAPITAL PUSH

The AI industry's growth model, fueled by the assertion that infinitely increasing scale leads to superior products, has spawned AI firms that are positioned to be too big to fail. Americans are actively subsidizing this unstable system under the premise that the adoption of AI is a "national strategic priority." As we illustrate in this chapter and in Chapter 1.4, though, this has enabled an industrial-policy approach that will ultimately undermine, rather than strengthen, our national security. Finally, we discuss how the abundance agenda, with its seemingly benign focus on what it calls "supply-side progressivism," is a very convenient tool for big AI to justify expanding its energy needs.

Tech firms are deploying unprecedented amounts of capital to maintain their lead and advance in the current paradigm of "scale is all you need" AI, doubling down on infrastructure build-out and seeking federal funding and regulatory support across several dimensions: access to chips and associated hardware to equip data centers, approvals for the construction of the data centers themselves, and the energy necessary to power them. The stock market is riding this hype wave, and the "Magnificent Seven" stocks (Alphabet, Amazon, Apple, Meta, Microsoft, Nvidia, and Tesla) now represent more than 30 percent of the S&P 500, the largest sector of the index—in prominent part because of the AI boom.[1]

It's important to remember that the pursuit of scale was a choice that locked us into a future where a handful of Big Tech firms retained control of the market (see the Introduction). This is not the only way for AI to develop, nor is advancement measured on a narrow set of self-serving benchmarks[2] a meaningful proxy for evaluating the societal utility of these systems.[3] But because it is what these key market players have doubled down on, and because of their centrality to market indices, the success or failure of the AI bubble will now have a profound effect on the stock

market as a whole.[4] This raises the stakes around the push for public investment in AI infrastructure—a move that is at best a hedge, and at worst a subsidy, for the profoundly risky and self-interested set of bets by AI firms. If successful, this effort will lock in infrastructures that the public will pay dividends on for years to come, in the form of financial and material costs (see Chapter 2: Heads I Win, Tails You Lose), creating a path dependency toward continued dominance by large AI firms.

TECH'S CAPEX FRENZY

Firms like Microsoft, Google, and Meta need AI to be profitable because they have funded the AI boom—at many orders of magnitude more than traditional venture capital[5]—boosting the valuations of startups that are far from demonstrating the kind of profitability that traditional investors would seek. They have gone all in on the most capital- and resource-intensive version of AI by adopting the "scale is all you need" paradigm as canon. This is not the only way to approach building AI models, and the companies leading AI development have occasionally gestured toward the need for model efficiency to address compute infrastructure bottlenecks. This was brought home especially by the release of DeepSeek's R1, which demonstrated model capabilities on par with the leading-edge models of US firms, without anything like the scale US firms rely on.[6]

But rather than make concerted efforts to build models differently, many dominant firms are doubling down on this approach by seeking public investment and the rollback of regulation to de-risk the expansion of the AI market. For example, within weeks of the DeepSeek announcement, OpenAI announced its Stargate investment with SoftBank, which will allocate a $100 billion investment into data center infrastructures for model training.[7]

GETTING HIGH ON AI SUPPLY

The US has adopted a position over the past two years that treats AI as an exceptional sector core to the nation's economic and national security interests. This stance exists in tension with growing friction with Big Tech firms, most clearly articulated in the Biden administration's Executive Order on Competition, which articulated the perpetuation of national monopolies as antithetical to the national interest.[8] The Trump administration has likewise bought into AI boosterism even as it has gestured toward the need for antitrust, mostly as a political tool for addressing firms it sees as adversarial to its interests.[9] As chief case in point, Trump's pick to head the FTC, Andrew Ferguson, vowed to go after tech monopolies while taking a hands-off approach to AI regulation, proving that attacks on corporate tech power reach their limit when it comes to AI.[10] In tandem, a cadre of appointments related to the environment and energy—including Lee Zeldin as head of the EPA; Jacob Helberg as under secretary for economic growth, energy and the environment; Doug Burgum as dual interior secretary and

"energy czar"; and David Sacks as a newly created "AI czar"—have inextricably tied support for a strong national AI industry to achieving energy dominance, positioning energy expansionism as the essential tool to achieve the administration's economic nationalism agenda.[11]

Recent movements from within the federal government have backed this stance: The Department of Energy recently announced it had identified sixteen federal sites across the country positioned for rapid data center construction,[12] and in April the Trump Administration signed an executive order ramping up domestic coal mining using growth in demand from AI data centers as justification.[13]

Small (AI) Is Beautiful? Differentiating to Avoid Industry Co-Option

A growing number of technologists and civil society organizations advocate for smaller models as the alternative trajectory to the bigger-is-better paradigm.[14] This makes sense, because many of the clearest pathologies within the AI industry are driven by scale: from climate impacts; to risks of contagion effects from privacy, security, and accuracy failures; to the ways in which scale breeds ultra-concentrated markets in AI. The dangerous impacts of the vague and all-encompassing "AGI" (see Chapter 1.1) also demonstrate the scale thesis taken to its logical end: a system that exists at a scale and level of universality that, hypothetically, displaces all other forms of expertise and value.

But industry is flocking to a version of the "small is beautiful" thesis, too, as part of their plans for market expansion, creating a familiar risk of co-option of the alternative by the same players who have driven and shaped this current paradigm. In the summer of 2024, Microsoft heralded "tiny but mighty" smaller language models that would provide impressive performance despite a reduced number of parameters.[15] Apple, Meta, and Google also released AI models with many fewer parameters, signaling that industry is incentivized to move away from simply bigger-is-better in pursuit of compute-efficient methods.[16] DeepSeek only propelled this trend, making it clear that frugality would be a key competitive advantage in this market.[17]

This is only superficial common ground. Positioning "smaller" models as one of the options in an "all of the above" approach for the biggest AI companies should not be confused with a rejection of the bigger-is-better paradigm. As Satya Nadella said after the DeepSeek announcements, signaling that these efficiencies only consolidate benefits for the tech giants best placed to capture demand (see Chapter 2: Heads I Win, Tails You Lose): "As AI becomes more efficient and accessible, we will see exponentially more demand."[18] It also ignores that pushing advancements at the "frontier" of this tech is still dictated by scale, even as firms play around with a mix of approaches across their portfolio to target different types of consumers. Most importantly, the large-scale version of this tech is what drives these firms' policy lobbying around infrastructure expansion with deleterious impacts on the public. **Movements that aim to disrupt the consensus around scale-driven AI must explicitly name and distance themselves from this industry-driven discourse.**

AI FIRMS WANT TO BE TOO BIG TO FAIL

These infrastructure investments function to lock us into a world where US continued dominance in the AI market is guaranteed by the government, and, for now, largely supported by investors in the stock market seeking to avoid an end to the AI bubble—while taxpayers foot the bill (whether by taxes that contrib-

ute to these investments, or more directly through increased energy bills, as we unpack in Chapter 2: Heads I Win, Tails You Lose). AI industrial policy serves either to secure demand via procurement policies[19] or to underwrite and attract continued investment (as is the case with the Stargate deal). This approach to AI is akin to industry bailouts—rarely a popular policy stance—but compared to the auto industry and banking, the AI market is much more speculative and its value to the public is unproven.

The Abundance Agenda: AI's Fundamental Incompatibility with Supply-Side Progressivism

The emergence of "abundance" as a narrative strategy and policy platform is being used by tech firms to get access to scarce public subsidies and energy. This stance has formed around a constellation of thinkers and organizations working across party lines to articulate a policy agenda premised on building a policy apparatus in support of more, and more efficient, construction of critical resources with low supply and high demand, including housing, healthcare, and energy. It operates under the presumption that (1) government regulation makes building too burdensome in these sectors, leading to cost inflation; and (2) progressives have focused too intently on subsidy programs that cut or block access, rather than on the underlying reasons for cost inflation. The solution, abundance movement advocates posit, is to push forward "supply-side progressivism," or, as Ezra Klein puts it, "to take innovation as seriously as they take affordability"[20] by implementing regulatory reforms that speed development and solve scarcity.

Abundance proponents centrally contend with energy markets, in that they argue in favor of cutting regulation to enable an increase in energy production. For example, Jerusalem Demsas wrote in the Atlantic that the ability for NIMBY-minded community organizations and climate groups to shut down renewable development is hindering the US's ability to meet its climate goals.[21] Klein and Derek Thompson argue that overhauling energy infrastructure is crucial to mitigating climate change, emphasizing that the first step toward an abundant clean-energy future is reducing the current fossil fuel reliance from 60 percent as of 2022 to nearly 0 percent.[22]

As a growing number of AI companies prioritize building and opening new data centers, more energy is needed to meet the staggering demand. **One might think that AI-driven demand would concern abundance advocates, because AI firms soak up the available supply of renewable energy.** Data centers already account for 4.59 percent of all energy used in the US. That number has doubled since 2018.[23] Goldman Sachs estimates that data center power demand will grow 160 percent by 2030.[24] These are staggering numbers wreaking havoc on an already fragile energy grid.

Instead, we see a more uneasy alliance, where the abundance agenda potentially converges with the energy deregulation camp for whom the "urgent" need to advance AI is being used as a justification to fast-track and expand fossil fuel production and use. At the House Oversight Committee hearing on data centers, AI, and energy, legislators repeatedly threw renewables under the bus, even touting that China is powering their AI systems with coal-fired plants.[25] The fossil fuel company talking point that wind and solar are not a reliable source of energy to meet data centers' 24/7 demands is deeply ingrained,[26] with legislators and data center trade groups pivoting toward the expansion of nuclear—rather than renewable—energy to provide "reliable" and sturdy energy for AI. Despite the substantial evidence on hand, this sustainability critique has not been taken seriously by abundance advocates skeptical of the climate movement.

1.3: AI ARMS RACE 2.0: FROM DEREGULATION TO INDUSTRIAL POLICY

The fusing of economic and national security goalposts under the banner of the US-China AI arms race is a critical asset for US AI firms: It affords them patronage not just from their own government, but potentially from the many other nation-states vying for a fighting chance at national competitiveness in this market; it insulates them from regulatory friction by framing any calls for accountability as not just anti-innovation but harming national interests; and—as we explore in Chapter 1.2: Too Big To Fail—is a key factor in positioning them as not just too big, but too strategically important, to fail.

Nation-states have developed their own flavors of "AI Nationalisms," embarking on initiatives designed simultaneously to support homegrown development and sovereign infrastructures free of dependency on US tech firms, and to attract AI investment.[1] But though AI nationalism is on the rise globally, the rhetoric around the AI arms race remains centered around two poles: the US and China. Since the mid 2010s, the notion of a US-China AI arms race has been primarily deployed by industry-motivated actors to push back against regulatory friction. A frequent motif in policy discussions at moments where the industry has sought to stem the tide of regulation, the notion of an arms race was one of the key arguments made against the introduction of a federal data protection law, a package of antitrust reforms targeting the tech industry in 2022, and an omnibus AI Accountability Bill that was considered before Congress.[2]

In the past two years, this so-called race has taken on a new character (let's call it the "AI arms race 2.0"), taking shape as a slate of measures that go far beyond deregulation to incorporate direct investment, subsidies, and export controls in order to boost the interests of dominant AI firms under the argument that their advancement is in the national interest (what we refer to as AI industrial policy[3]). Such an

approach predates the Trump administration. Arguably a number of the core measures propping up the AI arms race 2.0 were outlined under the Biden Administration; Jake Sullivan, in particular, was a vocal proponent of the logics of economic security.[4] The Biden administration's AI Executive Order,[5] National Security memo,[6] and export controls[7] all established an intent for the US government to widely adopt AI and to clear the pathway for the industry to expand through infrastructure build-out, while simultaneously hindering the advancement of strategic adversaries like China by limiting the export of leading-node chips. Unsurprisingly, this stance ran parallel to the lobbying platforms of firms like OpenAI that have sought government cooperation, with a narrow list of conditionalities such as the use of renewable energy and compliance with security measures.[8] OpenAI specifically has made threats that it will relocate its business absent commensurate support from the US government.[9] Since inauguration, the Trump administration has escalated support for the AI industry, rolling back the conditionalities articulated by the Biden administration by repealing the AI Executive Order and replacing it with a blanket assertion: "It is the policy of the United States to sustain and enhance America's global AI dominance in order to promote human flourishing, economic competitiveness, and national security."[10]

A NEW SILICON VALLEY CONSENSUS BEYOND TARGETED ADS TO TARGETED AI WEAPONS?

While the Trump administration has firmly asserted AI as a strategic national asset, they are likely to expect the industry to act in ways that align more closely with state interest. The specifics of what that means is left deliberately hazy, but a popular refrain has been that companies should be devoted less to targeted advertising, and more to AI that would bolster national security—and defense tech is increasingly front and center of events like the Hill & Valley Forum,[11] an annual consortium of Silicon Valley elites and DC lawmakers that first convened in March 2023 to combat China's influence on the American tech industry.[12] Cofounded by Palantir's Jacob Helberg, the Hill & Valley Forum is more aligned than ever before with state national security interests,[13] as Helberg,[14] like Michael Kratsios and David Sacks, is one of many industry representatives who find themselves in key policy roles under the Trump administration.[15]

So far, the industry seems to support this vision. This is best seen in the rhetoric of Palantir's CEO Alex Karp, who has long framed the company's mission as addressing a civilizational need to support democratic and Western supremacy through leading-edge technology. But emboldened by Trump's intent to scale

up mass deportations and police surveillance, Karp has escalated, saying in an investor call in early 2025: "We are dedicating our company to the service of the West and the United States of America, and we're super-proud of the role we play, especially in places we can't talk about. Palantir is here to disrupt. And, when it's necessary, to scare our enemies and, on occasion, kill them."[16]

Karp isn't alone. **Since the Biden administration's shift toward securitization of AI in 2024, companies that have historically distanced themselves from the military have also doubled down on national security:** After making an amendment to its permissible use policy enabling its tools to be used by militaries,[17] OpenAI has increasingly leaned in to making policy arguments on security grounds,[18] going so far as to assert that expanding fair use under copyright law to include AI development is a security imperative.[19] In February 2025, Google amended its guidelines to allow its AI technologies to be used for military weapons and surveillance, despite ongoing protests by its employees and a long-standing ban on use of its technology for weapons following the Project Maven protests of 2018.[20] And Meta made an announcement in November 2024 that it would make its Llama models available to the US government for national security use.[21]

Meanwhile, Anthropic's CEO Dario Amodei recently wrote about the threat of authoritarian governments establishing military dominance on AI as a reason to accelerate US leadership[22] and the VC firm Andreessen Horowitz operates an "American Dynamism" practice expressly designed to support the national interest in strategically important sectors: aerospace, defense, public safety, education, housing, supply chain, industrials, and manufacturing.[23]

A DOUBLE-EDGED SWORD: CHIP DIFFUSION AND "SOVEREIGN AI"

It's worth noting that the AI arms race 2.0 has shifted from being an absolute policy advantage for the tech industry writ large to being a double-edged sword for some: Aggressive restrictions on the export of chips are closing off a huge market for US AI hardware companies and data center products, which has left firms like Nvidia and Oracle deeply unhappy.[24] During the Biden administration, the implementation of export controls restricting the sale of semiconductors to certain countries through the "diffusion framework" received the bulk of the criticism, with a number of firms invested in the global chip market particularly up in arms about the impact to their businesses.[25] The Trump Administration may make changes to the diffusion rule,[26] and is internally fragmented between factions that are supportive of tariffs and hawkish toward China, and those that are interested in global expansion of the AI market.[27]

For its part, Nvidia—the leading semiconductor firm, which is most directly affected by the export controls—has embarked on a push for "sovereign AI," a term coined by the company to refer to nations' abilities to produce their own AI using some combination of homegrown infrastructures, data, workforces, and business networks.[28]

Nvidia's stance is an example of a play at market expansion. As the provider of computing chips for the data center infrastructures central to sovereignty initiatives, the company stands to benefit from nation-states' growing interest in building out their own homegrown industries and attracting AI investment. For chip manufacturers, the push toward sovereign AI can be seen as a way of diversifying their customer base away from the hyperscalers and hedging their business against the potential slump in the demand from these companies.[29]

The European Union and its member states have also espoused interest in sovereign investment into AI in a bid to compete at the frontier. The European Commission has gradually repurposed its existing European high-performance supercomputing capacity toward training large-scale AI models.[30] To further up the ante, the Commission announced a €20 billion InvestAI initiative to establish European "gigafactories" that would house one hundred thousand GPUs with the objective to facilitate training of models with "hundreds of trillions" of parameters.[31] Investment has also picked up in the member states. In February 2025, France hosted the Paris AI Action Summit, during which president Emmanuel Macron announced around €110 billion in investment pledges to boost France's AI sector, with a focus on infrastructure investments.[32, 33] In Germany, the new government coalition has agreed to house at least one of the gigafactories, complemented with commitment to develop a sovereign tech stack, as well as support for a budding "Eurostack" movement, an informal coalition[34] at the European level that aims to reduce European tech dependencies by developing domestic alternatives.[35]

These investments at the level of the EU and its member states still pale in comparison to the scale of the private investment plans in the US, with the $500 billion joint venture fund Stargate announced in January 2025; the fund arguably cements monopoly dominance by a cartel of US-based firms.[36] Meanwhile, the UAE and Saudi Arabia are geopolitical swing states, given their financial capital to sustain infrastructural build-out, and have been flooding the market with money via the AI funds MGX, G42, and the Saudi Public Investment Fund (PIF) for AI,[37] money that the leaders of AI firms are avidly seeking.[38]

Nationalism thus still remains a critical shaping force in AI policymaking: The "AI arms race" has if anything become increasingly complex in a moment of geopolitical uncertainty, and is wielded by firms both to avert regulation and to court investment.

1.4: RECASTING REGULATION AS A BARRIER TO INNOVATION

There has been a swift and aggressive narrative attack on AI regulation as anti-innovation, superfluous bureaucracy, and unnecessary friction. We've seen a total reversal in the US federal stance and, increasingly, a regulatory chill reverberating across quarters in the EU. We saw early signs towards the end of Biden's term setting the government's primary role as enabler of the AI industry,[1] and with the Trump Administration it is the headlining message. The headwinds against baseline accountability against the tech sector in general, and AI companies in particular, are greater than ever.

The tech industry's fickle policy promises have also revealed their true colors. Companies spent 2023 insisting they were extremely concerned about safety and were firmly "pro-regulation."[2] But as the center of power has shifted towards a deregulatory current, any superficial consensus on guardrails has just as quickly fallen away. OpenAI's CEO Sam Altman, for instance, went from testifying in a Congressional hearing that regulation is "essential" to lobbying against a minor safety provision in just fifteen months.

The government's narrative change has been just as swift. In 2023, future-looking existential ("x-risk") concerns took center stage. In policy fights these x-risk safety concerns have often eclipsed the long list of material harms arising from corporate AI control, often moving public and policy attention away from enacting policy and enforcing existing laws on the books to hold companies accountable.[3] Notably, Vice President Harris's speech on the sidelines of the UK AI Safety Summit called out this tension explicitly, and set up an (implicit) counterpoint to the x-risk-dominated agenda at the rest of the summit led by former prime minister Rishi Sunak: "These [existential] threats, without question, are profound, and they demand global action. But let us be clear. There are additional threats that also demand our action—

threats that are currently causing harm and which, to many people, also feel existential."[4] Harris went on to describe the ways in which ordinary people have already been harmed from faulty, discriminatory, and inaccurate AI systems.

Unlike other regulatory conversations, the broad philanthropic and government interest in addressing x-risk safety concerns eventually served to further cement government relationships with the tech industry. The vast majority of efforts under the safety umbrella have been voluntary and industry-led—for example, numerous safety validation standards within the UK and US AI Safety Institutes were set by or done in collaboration with industry players like Scale AI[5] and Anthropic[6]—revealing that the government had been successfully convinced to regulate AI in lockstep with and led by industry-centered expertise. On the other hand, when the rubber met the road with SB 1047, the California bill that sought to impose baseline documentation and review requirements on the largest AI companies for a very narrow class of advanced models, large parts of the tech industry pulled out the rug and pushed against even this narrow regulatory intervention with all their might.[7] Even Anthropic—which positions itself as a company responsive to safety and the risks of AI—waffled on SB 1047 support, first coming out against the bill before dragging their feet into a hedged statement of support, saying the "benefits likely outweigh its costs," but "we are not certain of this."[8] Government players fell in line, with key Democratic legislators[9] framing the bill as detrimental to innovation.[10] In a letter to Governor Newsom, eight Democratic members of Congress succinctly summed up this position: "In short, we are very concerned about the effect this legislation could have on the innovation economy of California."[11] Facing immense pressure, Governor Newsom ultimately vetoed the bill.

The fight for SB 1047 opened the floodgates for pitting regulation against innovation. A recent one-two punch has shifted the terrain entirely: Groups advocating for legislation mirroring SB 1047's provisions are being politically targeted by Republicans[12] and a new troubling bill, SB 813,[13] is gaining support in California that allows AI firms to self-certify their models as safe and then use that certification as a legal shield to avoid liability in a civil action for harm.[14]

At the federal level, there was vanishingly little progress legislatively, leaving large swaths of industry use entirely outside of regulatory constraints. Biden's now-repealed EO[15] and the OMB memo[16] were bright spots, making strong progress in terms of hooks for actionable accountability via targeting government use of and procurement of AI. Even public investment proposals such as the National AI Research Resource pilot, originally positioned as a counterforce to concentrated power and resources in the AI industry, was recast under Biden's 2024 National Security Memo as a national competitiveness project. Former National Security Advisor Jake Sullivan's October 2024 speech before the National Defense University also firmly positioned the US government as an enabler of frontier AI companies and emphasized the need for US investment in the AI sector to go full steam ahead in order to shore up the country's strategic positioning against China.[17]

Still, despite a far-from-coherent policy stance on AI under Biden, the attack on regulation ushered in by the Trump administration cannot be overstated.[18] Since being elected, President Trump has positioned regulation as a clear-cut way for the US to "lose" the global arms race, and his allies have propagated fears of Chinese control of global AI infrastructure as a threat to American security and democracy. On his first day in office, Trump gutted Biden's Executive Order on AI, replacing it with his own Executive Order set to revoke existing federal AI policies that "act as barriers to American AI innovation."[19] At a series of high-profile events including Davos, the French AI

Action Summit, and the Munich Security Conference, the Trump administration's message rang loud and clear: Global regulation is a targeted economic attack on US companies, and the antithesis to innovation. Meanwhile, the administration has expressly targeted the administrative state, calling into question the independent status of enforcement agencies and gutting the federal workforce, including key employees tasked with enforcing existing laws to rein in corporate dominance (this included unlawfully firing key Democratic FTC Commissioners with a record on tech enforcement). The Trump administration's recent OMB memos do little to impose accountability on AI systems, and are instead designed to fast-track the procurement of AI across the federal government.[20]

Meanwhile, AI Industrial policy—or financial and regulatory support for expanding the national AI industry—is being positioned as the counterpoint to regulation, and a more appropriate role for government intervention. Unsurprisingly, Silicon Valley tech and AI executives have fallen[21] quickly[22] into[23] line, shoring up their seats at the table. Because, while Trump's tangible industrial AI policy moves remain to be seen, the dominos set in motion by the Biden administration are poised to rapidly accelerate under Trump.

Trump's agenda for global AI dominance is mutually reinforced by an expansive energy dominance agenda, and his administration has repeatedly highlighted the need to expand US energy resources[24] to remain competitive in AI.[25] Debates about permitting requirements for infrastructure build-out had already taken center stage during the Biden administration. Senator Joe Manchin's Energy Permitting Reform Act of 2024 expediting review procedures for energy and mineral projects advanced out of committee with a bipartisan vote.[26] The bill is supported by a coalition of fossil fuel companies and tech lobbyists, who claim that AI tech innovation is tied to energy expansion. As they wrote in a letter to Congress: "America's leadership in global innovation depends on the passage of permitting reforms that allow the US to build critical energy infrastructure."[27]

In some ways, the Trump administration's pro-enforcement posture toward Big Tech companies—seen in the continuation of the DOJ's case against Google and the FTC's recent trial against Meta—is consistent with the Biden administration's antitrust policies, and runs orthogonal to the otherwise deregulatory headwinds and hands-off approach to the tech industry. At the same time, these cases are not designed to strike at the root of power facing the AI industry, which has received an "all systems go" message from the Trump White House, but rather to curtail Big Tech censorship and undermine platform authority over state power. Already we see tech companies attempt to wield political favor to end the trials.[28] And Google is set to argue that structural separation will undermine US national security issues,[29] potentially derailing bold antitrust remedies from the court. Despite these cases, it is unlikely that the Trump DOJ and FTC are set to broadly undermine the AI industry's market power as a matter of policy, no matter how the antitrust suits are decided.[30]

The drift toward deregulation has begun even in the European Union, traditionally seen as a staunch regulatory power. Driven by rightward electoral shifts, increasing securitization of AI, and new geopolitical realities driven by Trump, the once proudly proclaimed digital regulation agenda is now seen as a liability by European policymakers. In addition to scrapping planned bills, such as the AI Liability Directive that created a product liability framework for AI,[31] there is appetite in the high halls of EU policymaking to walk back on rules already agreed to. While backtracking is constrained by the embarrassing optics of bending under US pressure—at least thus far—when it comes to implementation, there is growing pressure to create as much flexibility as possible so as to mute

the impact of the laws without changing their letter.[32] This push to create flexibility for domestic companies is complicated by the importance of these rules as a rare source of leverage in the nascent trade war between the EU and the US.[33] The extent to which European digital regulation becomes a pawn in this debate remains to be seen.

More generally, the tone in the European Union and member states has become more enabling, paralleling the developments elsewhere. French President Emmanuel Macron's "plug, baby, plug" quip at the Paris Action Summit crystallized this shift in sentiment.[34] Leveraging the tools of statecraft and existing infrastructures (such as abundant nuclear energy in France) toward promoting the development of AI is increasingly central to the broader push toward European sovereignty. In addition to new public investments in AI infrastructures, new political coalitions and power players are also emerging in the background to facilitate this change. A recent large public-private partnership with an investment pledge of €150 billion by a collective of leading European industrial giants and tech companies, complemented by direct access to heads of European states to discuss a "drastically simplified regulatory framework for AI," is one example of these changing winds.[35]

Absent from this discussion is the role regulation can play in fostering innovation within markets, particularly given the dynamism and complexity that AI exhibits. By creating a stable regulatory environment with robust competition among firms and an equal playing field that enables new entrants to thrive, well-crafted regulation can act as an enabler rather than an adversary to innovation in emerging markets (See Chapter 4: A Roadmap for Action).

Chapter 1: AI's False Gods Endnotes

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