

White House Expands AI Strategy to Secure U.S. Economic Lead

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The U.S. government has released a new 23-page AI Action Plan outlining its strategy to lead the global artificial intelligence sector. Backed by three executive orders and launched by President Donald Trump, the plan calls the AI race “an industrial revolution, an information revolution, and a renaissance all at once.”

The plan emphasizes U.S. dominance in AI innovation, the expansion of energy and data infrastructure, and the need for tighter export control, particularly against strategic competitors like China.

According to Deutsche Bank analysts, three major themes explain why AI leadership is a top priority.

1. Innovation and Economic Power

The United States is home to 42 of the world's top 50 AI companies, with 33 located in California. In 2023, American firms secured nearly 75% of global AI venture capital, according to the Stanford AI Index. Of the 65 top AI models released globally last year, 40 originated in the U.S., compared to 15 in China and 3 in Europe.

Instead of adopting the European Union's regulatory model, the U.S. is favoring a deregulatory approach. The White House plan urges federal agencies to remove restrictions that could hinder AI development.

2. Infrastructure and Energy Investment

While often seen as a digital technology, AI depends heavily on physical infrastructure, particularly data centers, which consume increasing amounts of electricity. About half of the world's data centers are located in the U.S., and their energy demand has more than doubled in five years, from under 2% of national electricity use in 2018 to 4.4% in 2023. Forecasts suggest it could reach 12% by 2028.

The plan calls for modernizing power grids, easing permitting rules, and expanding nuclear and advanced energy sources. In 2023, North America invested \$114 billion in energy infrastructure, outpacing both China and Europe, according to the International Energy Agency.

3. International Strategy and Trade Policy

The AI Action Plan also serves national security goals. It seeks to prevent foreign rivals, especially China, from benefiting from U.S. research and investment without equivalent commitments. The government is now tightening export controls, encouraging allied nations to adopt similar policies, and proposing tariffs for non-compliance.

Additionally, it calls for measures to ensure AI tools used abroad are sourced from trusted U.S. providers and are subject to location verification and oversight.

The plan asserts that AI should support, not replace, human labor and emphasizes the importance of avoiding ideological bias in AI systems.