

AI for Politics

A Primer

Understanding the Technology and its Political Implications



What is AI?

Definition

AI stands for Artificial Intelligence. It refers to computer systems designed to perform tasks that typically require human intelligence.

The Evolution of the Term

The definition of AI has changed significantly over time. Programs that play chess or control airplane autopilots were once called AI. However, as these challenges were solved, they became considered traditional computer programs rather than AI.

Modern AI Definition: Today, when people talk about AI, they usually refer to programs like ChatGPT—systems that can understand and respond to human language in remarkably human-like ways.

A Breakthrough Technology

ChatGPT represents a significant breakthrough in computing. You can access it from your computer or phone at chat.openai.com. Its impact can be seen in the stock market and investment trends.



AI vs Traditional Computing

Traditional Programs

How They Work

Made by writing explicit **rules** and logic (e.g., "IF X THEN Y")

Output

Predictable and based on pre-defined logic

Examples

Chess programs, calculators, email filters

Limitations

Cannot learn or adapt beyond their programming

Artificial Intelligence

How They Work

Trained on massive amounts of data rather than programmed with rules

Data Sources

YouTube videos, Wikipedia articles, Spotify songs, and billions of text samples

Core Technology

Known as **Machine Learning**, a field of computer science

Key Challenge

Requires enormous amounts of data—sometimes used without proper rights

The AI Boom and Economic Impact

The breakthrough in artificial intelligence technology has triggered a significant economic shift, visible across global financial markets.

Market Observation

The impact of this new breakthrough can be seen in the stock market

Investment capital is flowing rapidly into companies that enable AI infrastructure and development.

Investment Trend

Money is flowing into companies that provide the essential hardware and software for AI systems.

Stock Performance

Key hardware providers have seen dramatic increases in stock prices, reflecting massive investment in AI infrastructure.

Market Drivers

Companies racing to build data centers, acquire GPUs, and develop AI capabilities are driving valuations higher.

Global Impact

The AI boom is reshaping technology sectors and creating new opportunities across industries worldwide.



NVIDIA Corp

NASDAQ: NVDA

UPCOMING EVENT

Q3 Earnings Call • 5:00 PM EST

Market Summary > NVIDIA Corp

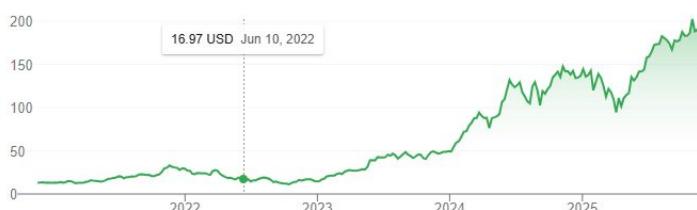
184.30 USD

+171.21 (1,307.95%) ↑ past 5 years

Nov 19, 12:31 PM EST • [Disclaimer](#)

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1D | 5D | 1M | 6M | YTD | 1Y | **5Y** | Max



Open	184.79	Mkt cap	4.48T	52-wk high	212.19
High	187.86	P/E ratio	52.45	52-wk low	86.63
Low	183.28	Div yield	0.022%	Qtrly Div Amt	0.010

More about NVIDIA Corp >



Advanced Micro Devices Inc

NASDAQ: AMD

Market Summary > Advanced Micro Devices Inc

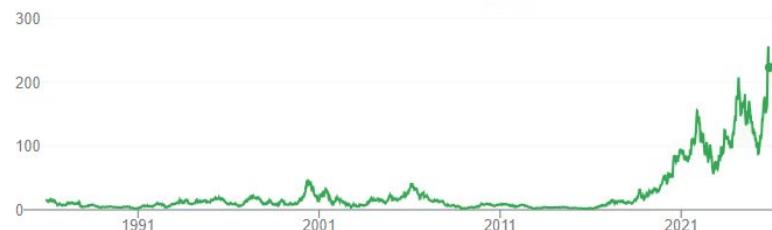
222.69 USD

+209.19 (1,549.53%) ↑ all time

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1D | 5D | 1M | 6M | YTD | 1Y | 5Y | **Max**



Open	230.26	Mkt cap	365.87B	52-wk high	267.08
High	235.28	P/E ratio	110.05	52-wk low	76.48
Low	222.53	Div yield	-	Qtrly Div Amt	-

More about Advanced Micro Devices Inc >

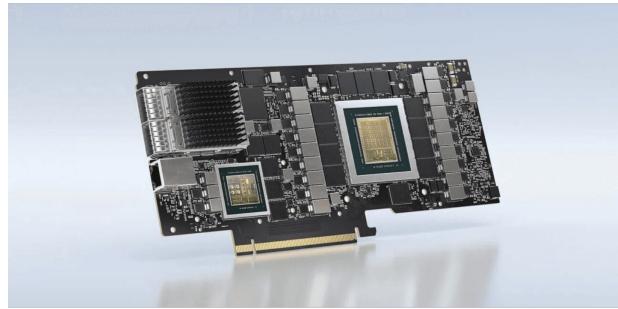
The Hardware Enablers: Nvidia and AMD

What is a GPU?

Nvidia and AMD create a critical computer component called a **GPU** (Graphics Processing Unit). Most computers need a GPU to function, but they are especially essential for AI applications.

Why GPUs for AI?

GPUs are designed to perform many calculations in parallel, making them ideal for training artificial intelligence models on massive datasets. This parallel processing power is what enables modern AI breakthroughs.



GPU: Nvidia, AMD (parallel processing, AI training)

CPU: Intel (sequential processing, general computing)

Market Competition

Nvidia currently dominates the AI chip market, but AMD is actively challenging this lead. Both companies are racing to provide the most powerful and efficient hardware for the booming AI industry.



What are GPUs Used For?

Use 1

Gaming

GPUs provide high-performance graphics rendering, enabling smooth gameplay and realistic visual effects in modern video games.

Use 2

Cryptocurrency Mining

GPUs perform complex mathematical calculations required for blockchain operations and cryptocurrency mining, making them essential for this industry.

Use 3

Training Artificial Intelligence

The massive parallel processing power of GPUs is ideal for training machine learning models on enormous datasets, making them critical for AI development.



Common AI Products in the Wild

ChatGPT

The first widely available AI chatbot.

Access:

Available from computer or phone at chat.openai.com

Capability:

Responds to user queries in remarkably human-like ways

Grok

Elon Musk's ChatGPT competitor with looser moderation.

Philosophy:

Features fewer restrictions, appealing to the anti-censorship crowd

Platform:

Heavily integrated into X (formerly Twitter) for unique social media use cases

DeepSeek

A Chinese ChatGPT rival gaining global traction.

Capability:

A very smart and capable AI chatbot with advanced reasoning abilities

Market Position:

Represents growing competition from non-Western AI developers

Cursor

An AI IDE built for software developers.

Use Case:

Used to code software significantly faster than traditional methods

Impact:

Enables developers to work 10 to 100 times faster on coding tasks

AI and Politics: Energy and Data Centers

The Infrastructure Challenge

Chips sold by Nvidia and AMD require **massive amounts of electricity** to function. Companies create enormous computer rooms called **data centers** to train and run AI systems.

2x

Growth by 2030

Data center energy demand is expected to more than double by 2030, making energy policy a critical political issue.

Current Energy Impact

Data centers accounted for approximately **4% of total U.S. electricity use in 2024**, and this percentage is rapidly increasing as AI adoption accelerates.

Political Implications

Policies regarding **electricity generation** and **electricity costs** are now trending topics in political discourse.

Governments must balance AI innovation with energy sustainability and affordability.



AI and Politics: Censorship and Free Speech

AI as a Censorship Tool

AI can be used to **enforce censorship** through automated content moderation, filtering, and removal of content deemed inappropriate or harmful.

Content Moderation Functions

AI systems automatically flag, filter, or remove content based on predefined rules, making moderation faster and more consistent at scale.

The Counter-Movement

In response, some AI systems like **Grok** are designed with **fewer restrictions**, appealing to those concerned about censorship and promoting freedom of expression.

Anti-Censorship Appeal

Grok's less-restricted approach has made it popular with communities that prioritize free speech and are skeptical of heavy-handed content moderation.

Political Implications

Policies regarding AI will inevitably relate to **censorship and free expression** in many ways. Governments must balance platform safety with freedom of speech, creating a complex policy landscape.



AI and Politics: National Security

The Core Risk

Using **foreign-developed AI systems** in critical national security tasks poses significant risks to national security infrastructure. When sensitive information is shared with these systems, that data could potentially be accessed or used by foreign governments.

The DeepSeek Example

DeepSeek is a capable Chinese AI system. If sensitive government or military information is shared with DeepSeek, that data could potentially be used against the United States by China. This creates a significant vulnerability in national security.

Data Security Concerns

Critical information shared with foreign AI systems—including military strategies, intelligence data, infrastructure details, or classified communications—could be intercepted, stored, or analyzed by foreign intelligence agencies. This represents a fundamental threat to national security.

Policy Implications

Governments must implement strict policies to ensure that **trusted, secure AI systems** are used for all critical national security tasks. This includes:

Domestic AI Preference

Prioritizing AI systems developed and controlled domestically for sensitive government operations

Vetting Requirements

Establishing rigorous security audits and certifications for any AI used in national security contexts

Data Protection

Implementing strict protocols to prevent sensitive information from being shared with foreign AI systems

Supply Chain Security

Ensuring that AI hardware and software components come from trusted, verified sources

AI and Politics: Regulation

The Core Debate

Regulation can make AI develop **faster or slower**. Policymakers face a fundamental choice: should they accelerate AI innovation or implement safety guardrails?

Acceleration Approach

Policies that promote innovation, funding, and open access to data and models. This approach prioritizes economic growth and technological leadership.

Deceleration/Safety Approach

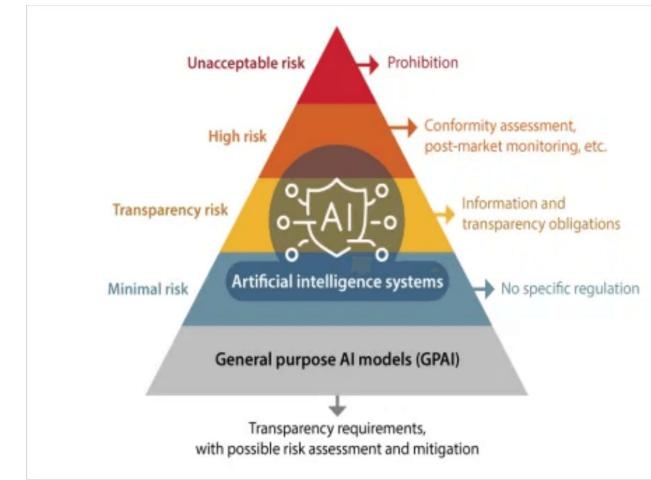
Policies that impose safety guardrails, ethical guidelines, and licensing requirements. This approach prioritizes risk mitigation and societal protection.

Key Considerations

Policymakers must weigh the benefits of **acceleration** (economic growth, technological leadership) against the risks that necessitate **deceleration** (safety, misuse, societal impact).

Political Implications

The regulatory choices made today will shape the future of technology, the global economy, and democratic societies for decades to come.



Conclusion: The Political Future of AI

Key Takeaway 1

AI is a Fundamental Shift

AI represents a fundamental transformation in computing, driven by massive datasets and specialized hardware (GPUs). This is not an incremental improvement but a paradigm shift.

Key Takeaway 2

Economic Impact is Profound

The economic impact is visible in stock markets, with companies like Nvidia and AMD experiencing dramatic growth. Investment capital is flowing rapidly into AI infrastructure.

Key Takeaway 3

Four Political Pillars

Political discussions center on Energy (data center power), Censorship (content moderation), National Security (foreign AI risks), and Regulation (innovation vs. safety).



The decisions made today about AI policy will shape the future of technology, economy, and democracy.

Informed policymaking is essential.