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The A.I. Tsunami = US Strategic Success

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By Karsten Riise
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One more chip stock jumps 32,% driven by the AI tsunami. This time it is Marvell Technologies. Interestingly, the AI tsunami surprised even IT industry insiders like this company itself:

> *"In the past, we considered AI to be one of many applications within cloud, but its importance and therefore the opportunity has increased dramatically," Murphy said.* [*CNBC, May 26, 2023*]

Marvell Technologies is specialized in connectivity, data storage, and networking technologies for data centers. It is therefore telling that even Marvell was not kept in the loop about Microsoft's enormous investments in AI and data centers for AI.

The AI revolution is driven by Microsoft and OpenAI, obviously in coordination with the US government. Microsoft corporate clients, a few top universities, and key suppliers like NVIDIA and AMD have been fully involved in a closed circle – the rest have been kept in the dark.

Even Google seems surprised. Google is now scrambling to even stay in the AI game.

There are three reasons for this.

1. Just two years ago, nobody, not even OpenAI or Microsoft, knew that a technological breakthrough in AI was so close.
2. Microsoft wanted to take the lead with a surprise on Google and everybody else in the industry.

The US government wanted to keep China and Russia in the dark for as long as possible.

The US government has succeeded enormously in this. Just a year ago, China thought they had the AI lead with Wu-Dao 2.0 and that the pace in AI would be slow, gradual, and set by China. China is completely hoodwinked. Russia still doesn't get it.The US is executing the perfect strategic surprise. Surprises are seldom achievable at the strategic level, but the US pulls it off in AI. All big software developers are working high speed to integrate Microsoft's AI into their products.

In 2024, **AI will be all over work and leisure.** And more than 120 enormous new Microsoft data centers will be ready all over the World to run it. We have no total figures. But the investments in AI in hardware and software in the West can easily exceed $ 200 billion or 1% of US GDP per year. And it will penetrate EVERYWHERE.

In 2025, **the social and military effects of this will be profound.** By the way, Microsoft is also a key contractor to develop systems for the US Navy and Army. Amazon, another AI participant, is also a key US security contractor.

Russia and China are still sleeping – and AI is taking off.

When they wake up, it may take even China nearly a decade to catch up. If they ever do.

Before Russia and China get in on the big use of AI everywhere, the US will have realized economic and military advantages beyond imagination.

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