



Viewpoint

Locating critical AI geopolitics

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The title of this essay takes inspiration from a 1994 article, co-written by Dodds and Sidaway, entitled “Locating critical geopolitics” (Dodds & Sidaway, 1994). That article took stock of the developing field, emphasising geopolitics as a form of representational practice. It celebrated emerging critical work on the “production and dissemination of geostrategy” (ibid.: 519) through routes formal (e.g. the academy and think tanks), practical (e.g. foreign-policy professionals), and popular (e.g. mass media and cultures). The article also argued, however, that critical geopolitics needed to attend to structural contexts—that is, “the material circumstances within the global geoeconomic and the global geopolitical orders” (ibid.: 520).

Here, we build on that earlier piece by examining how geopolitical discourses frame the widely touted material-technological shifts initiated by AI. There is no lack of such rhetoric coming from the corporate sector, including firms involved in producing AI technologies. This is evident in the emergence of what we call ‘corporate geopolitics’—a genre distinct from the familiar categories of ‘formal’, ‘practical’ and ‘popular’ geopolitics. For instance, banking and financial services firm JPMorganChase established a Center for Geopolitics in 2025 that issued a 32-page report entitled “The geopolitics of AI: Decoding the new global operating system” (Chollet et al., 2025). Likewise, Goldman Sachs launched a Global Institute in October 2023, focusing on the intersections of geopolitics, technology and global markets. The reports published by these firms vary in emphasis. Whilst they sometimes refer to the “geoeconomics” of AI (for more on this term and its relationship to geopolitics, see Mallin & Sidaway, 2024), they also mobilize classical geopolitical terminology. The JPMorganChase report, for instance, foregrounds “energy and hardware” as “the new chokepoints”, situating Sino-US competition within “an AI-influenced geopolitical landscape” (Chollet et al., 2025: 2). Locating critical AI geopolitics becomes imperative in this context. A critical geopolitics approach eschews the reification of AI’s geopolitical and geoeconomic propensities as inevitable or determinant. Instead, it interrogates how AI acquires geopolitical meanings through formal, practical, popular and corporate

narratives and practices, and to what ends and consequences.

We recently asked ChatGPT, a large-language model (LLM) developed by the US-based company OpenAI, to sketch some conceptual premises of AI geopolitics. It responded with the following: “In this landscape, ‘normal’ political operations—state administration, corporate strategy, public participation—are not simply automated; they are redefined”; and “AI is becoming both a terrain and an actor in geopolitics: something fought over, through which struggles occur, and around which new imaginaries coalesce”. Deepseek, a Chinese LLM, when asked the same question, described the geopolitics of AI as “the new great game”—referencing the 19th century imperial rivalry between the Russia and Britain for control over Asia—in which AI serves both as a “geopolitical resource and battleground”. Such machine-generated depictions reflect a plethora of publicly available reports and media stories that invoke classical geopolitical metaphors; arms races, chokepoints, curtains, frontiers and so on. It is noteworthy how the words of Mackinder echo through public discourse on AI, seen via the prophetic tagline, “Who controls AI controls the world” (Thomann (2019) and Gill (2020), for instance, cite this phrase in their writings). Araya (2022 n. p.) invokes Mackinder more explicitly, observing that China’s continued forays and investments into AI have made it “the locus for what Halford Mackinder described as the geographic centre of global power”. Such rhetoric reproduces what Megoran (2010: 187) calls “neoclassical geopolitics”, referring to “ways of thinking about the effects of geography on international relations” that draw up and creatively rework the “Mackinder-Haushofer-Spykman traditions”.

This emergent geopolitical discourse that situates AI within older discursive traditions is becoming more widely visible, intersecting with formal, practical, popular and corporate realms. The growing ubiquity of these discourses raises questions about how representations of AI constitute geopolitical truth claims about the conduct of global trade and interstate relations, and how those truth claims, in turn, shape concrete practices related to conflict and competition on the global stage (“naming and acting”, per Agnew, 2009: 426). In what follows we

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consider to two major sets of claims that are taking shape within an AI geopolitics framework. First is the assertion that AI is transforming defense and warfare. The implication here is that states can accrue significant military advantage by mobilizing advanced AI technologies and targeting. The second claim is that AI can propel geoeconomic power and create what Kayla Blomquist (2026: 949) describes as “new sites for status competition and prestige cultivation”. The implication here is that states should invest in the infrastructures (notably data centres and multiple data sources) that enable this development of advanced AI capability (see too Furlong, 2021).

We begin with the extensive discourse about AI revolutionising the conduct of warfare. For instance, in February 2024, *Time* magazine ran a

cover story with the banner “The First AI War”. The artwork for the cover depicted the familiar blue and gold flag of Ukraine outlined by the country's pre-2014 territorial borders and overlaid by a network of nodes and connections (the cover can be viewed at: <https://timecoverstore.com/featured/the-first-ai-war-time.html>). The article's author, Vera Bergengruen (2024), describes how US tech giants had offered AI technologies to Kyiv, transforming Ukraine “into an AI War Lab”. *Time* has subsequently published articles on Israel's use of AI in its war on Gaza –also viewed by some as the “first full-scale AI war” (Grundy-Warr & Sidaway, 2025)— and what this situation bodes for the future of warfare (Serhan, 2024). Such narratives seek to make sense of what AI has yielded on the battlefield, in targeted cities, and in the skies above



Fig. 1. Cover from *The Economist*, 25 January 2025, on “China's Lean, Mean AI Machine” (Source: Reprinted with permission © The Economist Newspaper Limited, London, 2025).

them. At the same time, these narratives suggest that conducting war without such technologies is becoming an impossibility, and that future war capability will hinge on AI development.

The geoeconomic consequences of AI are being denoted as similarly epoch-defining. Current discourses place AI at the centre of superpower rivalry, equating AI dominance with geopolitical dominance. In their January 25, 2025, issue, *The Economist* ran a cover story “China’s lean, mean AI machine”, depicting an arm-wrestling match between China and US-flagged robots (Fig. 1). And in a cartoon (Fig. 2) posted that same week on the Instagram account of US-backed *Radio Free Asia*, exiled Chinese cartoonist Wang Liming (under the name Rebel Pepper) portrayed a mechanical whale (embellished with the iconography of the Chinese flag and the ‘Deepseek’ label) overshadowing American tech/AI firms, including Google, Microsoft and NVIDIA, as well as the Statue of Liberty. The text accompanying the post describes how DeepSeek, an open-source AI alternative to U.S.-based ChatGPT, had shaken global markets. DeepSeek, as the post notes, has “close ties to the Chinese government” and is “at the core of the Chinese government’s vision for an economic recovery driven by high-tech innovation” (*Radio Free Asia*, 2025). However, for their June 20, 2026, issue, *The Economist* ran another cover story portraying the bald eagle symbol of the United States holding a computer mouse in its beak (Fig. 3) alongside the banner “America’s AI Power Grab: Anthropic and the Geopolitics of Frontier Models”. The story inside notes that America’s apparent setbacks in its war with Iran have led many commentators to focus on American decline. But *The Economist* offers an alternative interpretation of US power based on the Trump Administration’s decision to deny access to the frontier AI applications developed by Anthropic:

The news is full of how an ignominious peace deal with Iran exemplifies a decline in American power. That conclusion could hardly be more wrong. On June 12th, the Trump administration ordered Anthropic to block foreigners from Fable and Mythos, its latest and most capable frontier AI models. In an instant, everyone learned that the American government can decide who may use the world’s most important technology. You don’t get much more powerful than that. (*The Economist*, 2026)

Traditional practitioners of statecraft, including state officials and think-tank experts, have likewise placed AI front and centre in

formulating practical courses of action. The prominent foreign policy journal, *Foreign Affairs*, published a series of articles on AI including one by Daniel Benaim (2025), who served as Deputy Assistant Secretary of State for Arabian Peninsula Affairs in the Biden Administration. Benaim points out that President Donald Trump’s visit to Saudi Arabia, Qatar and the UAE in May 2025 was not only about regional geopolitical concerns, but also about “business deals and, above all, artificial intelligence”. Indeed:

During the trip, Trump agreed to sell advanced U.S. chips to Saudi Arabia and the United Arab Emirates and to invest in AI megacampuses in the Gulf that will host U.S. firms. One such site, in Abu Dhabi, could become the world’s largest concentrated cluster of the computing power fuelling artificial intelligence. (ibid.)

This was not merely a disinterested observation. The Middle East Institute, a Washington, DC-based think tank, where Benaim is now an affiliate, had earlier published a report entitled *The Role of the Middle East in the US-China race to AI supremacy* (Carchidi & Soliman, 2024), stressing the need for US policy makers to appreciate the breadth and complexity of this putative supremacy contest.

In short, AI has become deeply entangled with geopolitical discourse and practice. Key purveyors of geopolitical discourse appear to have reached a consensus about the inexorability of AI and its influential role in the struggle for global economic and political supremacy—though the complex determinations at work, to draw on Raymond Williams (1977: 87), comprise “never only the setting of limits, but also the exertion of pressures”. Critically understanding AI geopolitics requires us to situate and historicize relationships between corporations, technology, resources, labour and sovereign powers, including their digital-military-industrial complexes. These relationships lead Schmid et al. (2025: 1930) to caution against references to an “AI arms race” (see Eslami et al., 2026), arguing that “much of the AI hype is not indicative of a proper arms race but rather part of competition among economically and politically leading powers, albeit with undeniable geopolitical overtones.” Apropos here is Pasquinelli (2023: 13) wide-ranging history of AI, which approaches the subject “in a similar way that historical and political epistemology has studied, in the modern age, the rise of *mechanical thinking* and scientific abstractions in relation to socio-economic developments” (italics in the original).



Fig. 2. Image by Rebel Pepper accompanying the article, “In the Blink of an AI” (Source: Reproduced with permission from Radio Free Asia).



Fig. 3. Cover from *The Economist*, 20 June 2026, on “America’s AI Power Grab: (Source: Reprinted with permission © The Economist Newspaper Limited, London, 2026).

The development of critical geopolitics in the last forty-plus years has scrutinized the assumptions, rationalities, and outcomes of geopolitical imaginations, situating these in worldly and embodied histories (Moisio, 2025). Nonetheless, there remains further potential “for expanding our interpretative horizons of geopolitics” (Ferraz de Oliveira & Ashworth, 2026:5). While we have focused on Western narratives here, there can be no doubt that other geopolitical cultures and traditions mediate the production of diverse AI worldviews (e.g. Woon, 2026). As this essay has signaled, the current proliferation of AI geopolitics and their ideological backdrops invite us to rekindle, deepen and extend analytical, empirical and methodological agendas.

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Klaus Dodds: Writing – original draft, Writing – review & editing.
James D. Sidaway: Writing – original draft, Writing – review & editing.
Chih Yuan Woon: Writing – original draft, Writing – review & editing.

Declaration of competing interest

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Data availability

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