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Global AI Power Mapping:

Domains, Alliances, and Rule Spaces

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Key Judgments

- **Model rankings are insufficient for mapping global AI power.** Public model performance matters, but it does not by itself determine strategic AI influence.
- **AI power is distributed through domains, not only firms.** States, platforms, cloud systems, data regimes, standards bodies, security alliances, industrial systems, and capital networks all shape how AI capability becomes usable and consequential.
- **The United States and China remain the two leading AI capability domains, but they do not exhaust the global AI power structure.** Other actors may exercise influence through regulation, services, language reach, capital, compute, security systems, or deployment markets.
- **The European Union may exercise AI power primarily through rules rather than frontier model dominance.** Its influence lies in regulatory standards, compliance requirements, privacy governance, risk classification, and market access conditions.
- **India, the Gulf states, Russia, and the Global South occupy distinct positions in the emerging AI order.** India matters through services and language-scale deployment; the Gulf through capital, energy, and compute; Russia through sovereign-security applications; and the Global South through localization, public-sector deployment, and platform competition.
- **Overlap zones will become key arenas of AI competition.** Southeast Asia, the Middle East, Africa, Latin America, Central Asia, Eastern Europe, and the Eurasian borderlands may become contested spaces for AI infrastructure, standards, platforms, localization, data governance, and geopolitical alignment.

Executive Summary

Global AI power should not be measured only by market share, user numbers, company valuations, or public model rankings. These indicators capture visible competition, but they do not fully explain the deeper distribution of AI capability, influence, and control.

A more accurate map of global AI power must account for the institutional, infrastructural, financial, regulatory, linguistic, industrial, and security systems through which AI is developed and deployed. These include national backing, political alliances, language zones, data sovereignty, platform ecosystems, compute infrastructure, capital networks, standards regimes, public-sector adoption, and military or intelligence integration.

Policy Brief

This policy brief proposes a domain-based approach to global AI power mapping. Rather than treating AI competition as a single leaderboard of models or firms, it maps AI power as a set of overlapping domains of influence. These domains combine technological capability with institutional authority, infrastructure control, regulatory power, capital allocation, language-cultural reach, industrial embedding, and security integration.

The brief identifies seven proposed AI power domains: the U.S.-Backed AI Domain, China-Backed AI Domain, EU Regulatory Domain, India Service and Language Domain, Gulf Capital and Compute Nodes, Russian Sovereign Security AI Domain, and Global South AI Application Zones.

The central argument is that global AI power is not a single market-share contest. It is a layered and networked structure shaped by states, platforms, data regimes, infrastructure, capital, standards, languages, industrial systems, and security institutions.

Why This Matters

AI competition is often framed as a race among leading companies or a contest over the best-performing frontier models. This framing is useful but incomplete. It can obscure the wider systems through which AI capability becomes economic influence, institutional power, and strategic leverage.

For policymakers, a domain-based map provides a clearer basis for identifying where AI power is accumulating. Some actors may lead in model development, while others may shape regulation, finance compute infrastructure, control language-cultural markets, supply public-sector systems, or integrate AI into security institutions. These forms of power are not interchangeable, but they can reinforce one another.

The future AI order will not be determined only by benchmark performance. It will also be shaped by control over cloud infrastructure, data regimes, standards, capital flows, public-sector adoption, industrial deployment, and security integration.

A narrow model-centered view risks underestimating regulatory powers, capital nodes, service hubs, sovereign-security systems, and Global South application markets. A domain-centered view offers a more accurate foundation for strategy, alliance planning, technology policy, and risk assessment.

Analytical Note

This brief builds on the definition of AI power developed in EPINOVA–2026–PB-58, where AI power refers to the capacity of an AI system to shape decisions, mobilize resources, influence behavior, or alter real-world outcomes within a specific institutional, operational, and rule environment (Wu, 2026a).

It also extends the AI capability stratification framework developed in EPINOVA–2026–PB-59 by shifting the unit of analysis from layers of AI capability to global domains of AI power (Wu, 2026b).

This policy brief therefore treats global AI power as a domain-based structure shaped by states, firms, platforms, data regimes, compute infrastructure, capital networks, standards, language communities, industrial systems, public institutions, and security architectures.

A domain is not the same as a country, company, or formal alliance. It refers to a sphere of influence in which AI capability becomes scalable, governable, deployable, and strategically consequential. “Rule spaces” refer to the legal, regulatory, institutional, operational, and political conditions under which AI systems are trained, deployed, restricted, exempted, or authorized.

The proposed domains are analytical categories rather than fixed geopolitical blocs. They are designed to capture overlapping relationships among infrastructure, regulation, capital, platforms, languages, industrial systems, and security institutions, rather than reduce AI competition to a single ranking.

1. Why Global AI Power Cannot Be Measured Only by Model Rankings

Public AI competition is often described through model benchmarks, chatbot adoption, company valuations, user numbers, and market share. These indicators are important, but they capture only the most visible layer of AI competition.

They do not fully explain the deeper distribution of global AI power.

A country, region, or institutional bloc may not control the strongest public frontier model, yet it may still exercise significant AI influence through regulation, infrastructure, capital, energy resources, talent pipelines, language reach, data governance, security institutions, public-sector adoption, or industrial deployment.

Foundation models depend not only on model architecture or benchmark performance, but also on data, compute, institutional adoption, deployment environments, and governance conditions (Bommasani et al., 2021; AI Index Steering Committee, 2026). For this reason, global AI power mapping should move beyond a model-centered approach toward a domain-centered approach. The key question is not only which model performs best on public benchmarks. It is also which actors control the conditions under which AI is developed, deployed, financed, regulated, localized, secured, and operationalized.

2. Variables of Global AI Power Mapping

A comprehensive AI power map should include at least thirteen mapping variables: national backing, political alliances, language zones, cultural influence, data sovereignty, platform ecosystems, compute infrastructure, capital networks, standards regimes, security domains, industrial embedding, public-sector adoption, and military and intelligence integration.

These variables show that AI power is not located only within firms or frontier model laboratories. It is distributed across institutions, infrastructures, markets, states, rule systems, industrial networks, and security architectures.

AI power therefore has both technical and institutional dimensions. A frontier model may provide capability, but capability becomes power only when it is connected to data, infrastructure, users, capital, regulatory permission, organizational adoption, operational authority, and strategic purpose. NIST’s AI Risk Management Framework and OECD work on AI measurement and governance similarly treat AI systems as socio-technical systems embedded in organizational, legal, and institutional contexts (National Institute of Standards and Technology, 2023, 2024; OECD, 2026a).

In this sense, global AI power mapping should identify not only who builds advanced models, but also who controls the surrounding systems that make those models scalable, deployable, governable, and consequential.

3. Proposed AI Power Domains

As shown in **Figure 1**, global AI power domains do not form clean territorial blocs. They overlap across infrastructure, regulation, capital, platforms, language communities, public-sector adoption, and security systems.

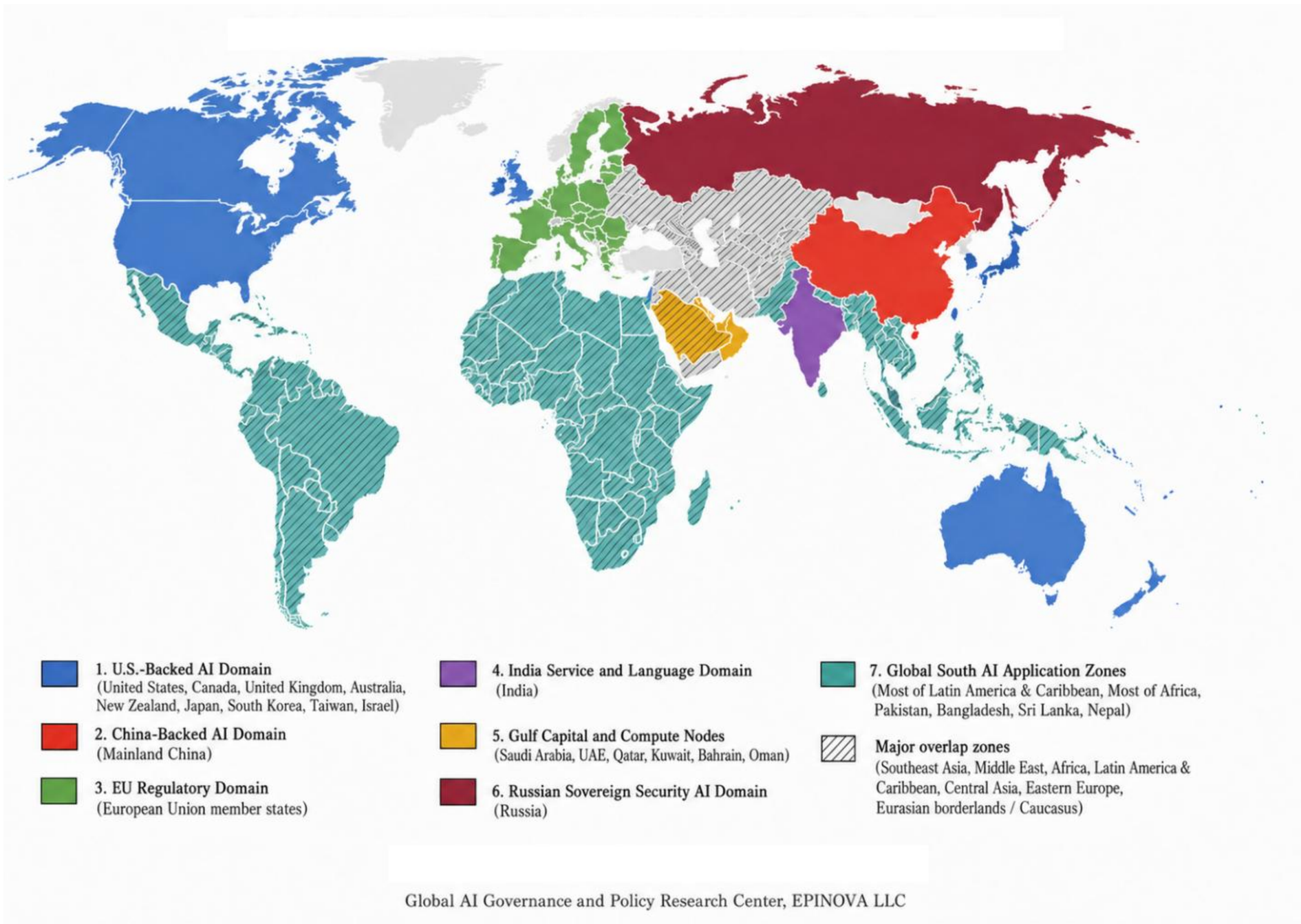

Figure 1. Global AI Power Domains and Major Overlap Zones

This conceptual map illustrates seven proposed AI power domains: the U.S.-Backed AI Domain, China-Backed AI Domain, EU Regulatory Domain, India Service and Language Domain, Gulf Capital and Compute Nodes, Russian Sovereign Security AI Domain, and Global South AI Application Zones. Hatched areas indicate major overlap zones where AI infrastructure, standards, cloud deployment, capital, localization, data governance, and geopolitical alignment may be contested.

Note: Domains are approximate analytical categories rather than fixed geopolitical blocs. Country placement reflects the primary analytical classification used in this policy brief and does not imply exclusive alignment, formal alliance status, or uniform national policy. Overlap zones indicate regions where multiple AI power domains may interact, compete, or coexist.

Source: Author's conceptual mapping based on the AI power domain framework developed in this policy brief, with reference to Wu (2026a, 2026b) and to AI capability, compute, governance, development, and infrastructure assessments from AI Index Steering Committee (2026), Lehdonvirta et al. (2025), OECD (2026a, 2026b), UNCTAD (2025, 2026a, 2026b), and World Bank (2026).

3.1 U.S.-Backed AI Domain

The U.S.-backed AI domain rests on a dense ecosystem of frontier model companies, global platform firms, cloud providers, semiconductor design, venture capital, research universities, and alliance networks. Its core advantage is the ability to combine frontier model development with global software platforms, advanced chip design, deep capital markets, cloud infrastructure, startup formation, and integration with allied economies.

This domain is not limited to the United States as a territory. It extends through allied markets, enterprise software systems, cloud contracts, English-language digital ecosystems, venture capital networks, and global platform dependency. The 2026 AI Index treats AI leadership as a multi-dimensional structure involving models, investment, research, adoption, policy, infrastructure, and societal impact rather than public model performance alone (AI Index Steering Committee, 2026).

3.2 China-Backed AI Domain

The China-backed AI domain derives strength from industrial applications, infrastructure-scale deployment, domestic data ecosystems, state-market coordination, platform systems, manufacturing integration, and governance mechanisms. Its strategic position lies in the integration of AI with manufacturing, logistics, urban systems, public administration, infrastructure networks, and security applications.

This domain may not be captured accurately by public chatbot rankings alone. Its significance lies in the embedding of AI into production systems, infrastructure networks, public governance, and strategic industrial policy. China’s New Generation Artificial Intelligence Development Plan frames AI as a strategic technology linked to industrial upgrading, economic transformation, and national competitiveness (State Council of the People’s Republic of China, 2017).

3.3 EU Regulatory Domain

The EU regulatory domain is built around standards, compliance systems, privacy governance, market access rules, risk regulation, institutional oversight, and normative influence over AI deployment. Its power does not depend primarily on frontier model dominance. It depends on the ability to shape the rules under which AI systems are designed, deployed, audited, marketed, and governed.

Through market access, compliance obligations, privacy rules, and risk classification, the EU can influence global corporate behavior beyond its own borders (Bradford, 2020; Siegmann & Anderljung, 2022). The EU AI Act reinforces this regulatory position by establishing a horizontal, risk-based legal framework for AI systems and general-purpose AI models in the European market. Its phased implementation means that EU rule-making will continue to shape compliance expectations through 2026 and beyond (European Commission, 2024, 2025).

3.4 India Service and Language Domain

The India service and language domain is shaped by software services, technical labor, English-language capability, multilingual markets, public digital infrastructure, and global service integration. Its influence comes from talent scale, IT services, language reach, software implementation capacity, digital public infrastructure, and the ability to serve both domestic and global markets.

India's AI power is not only a question of frontier model ownership. It also lies in the ability to deploy, adapt, maintain, localize, and integrate AI systems across business services, public administration, education, finance, and multilingual user environments. The IndiaAI Mission emphasizes democratized access to compute, data quality, domestic AI capabilities, talent development, startup support, and socially impactful AI projects, while 2026 government materials continue to frame AI as a public infrastructure and inclusion agenda (Principal Scientific Adviser to the Government of India, 2024; Press Information Bureau, Government of India, 2026).

3.5 Gulf Capital and Compute Nodes

The Gulf capital and compute domain is best understood as a node-based formation rather than a fully integrated bloc. Its significance lies in sovereign capital, energy resources, data-center investment, compute infrastructure, AI financing, and strategic positioning between major AI blocs.

The Gulf states may not constitute a single AI bloc in the same way as the United States or China. However, they can become strategically important nodes by financing AI firms, building compute capacity, hosting data centers, and positioning themselves as intermediaries between Western, Asian, and Global South markets. Because compute availability is increasingly treated as a core input for AI capability, energy-rich and capital-rich compute nodes may become more strategically significant over time (Lehdonvirta et al., 2025; OECD, 2026a).

This domain depends less on frontier model ownership than on the ability to finance, host, power, and broker AI infrastructure across competing technology ecosystems. Recent large-scale AI infrastructure initiatives in the Gulf suggest that the region is becoming more relevant as a capital-and-compute node rather than as a conventional model-centered AI bloc (Reuters, 2025; United Arab Emirates, 2017).

3.6 Russian Sovereign Security AI Domain

The Russian sovereign security AI domain is centered on national security priorities, sovereign technology systems, strategic autonomy, cyber capabilities, military applications, and state-centered control over sensitive AI deployment.

Its influence may be less visible in public AI markets and more concentrated in security, cyber, military, intelligence, information operations, and sovereign-control domains. This illustrates a broader feature of global AI power: not all influence appears through commercial adoption or public model rankings. Some AI power is embedded in closed systems, security institutions, strategic autonomy efforts, and state-controlled applications.

Russia's national AI strategy connects AI development to national interests, scientific and technological development, and strategic priorities, including defense and security-related applications (President of the Russian Federation, 2019).

3.7 Global South AI Application Zones

The Global South AI application zones are shaped by infrastructure needs, education systems, public services, local-language adaptation, development finance, digital inclusion, platform competition, and governance experimentation. These zones may not dominate frontier model development, but they will become central arenas for AI deployment, localization, public-sector adoption, standards diffusion, and infrastructure competition.

Their significance lies in demand, adoption, and institutional experimentation. In many cases, AI power in the Global South will be shaped by which external actors provide cloud systems, language models, digital identity tools, public-sector AI platforms, education systems, financial infrastructure, and governance templates. The World Bank's 2026 development work frames AI as a general-purpose technology whose benefits depend on institutional capacity and inclusive deployment, while UNCTAD's 2025 and 2026 materials emphasize infrastructure, data, skills, and investment concentration as key factors shaping whether AI narrows or widens development gaps (UNCTAD, 2025, 2026a, 2026b; World Bank, 2026).

4. Overlap Zones

The overlap zones identified in Figure 1 are not peripheral to the framework. They are central arenas in which AI power domains interact across infrastructure, regulation, platforms, capital, supply chains, language communities, public-sector adoption, and security relationships.

Major overlap zones include Southeast Asia, the Middle East, Africa, Latin America, Central Asia, Eastern Europe, and the Eurasian borderlands. These regions may become important arenas of AI infrastructure competition, standards diffusion, language localization, data governance, public-sector adoption, cloud deployment, platform alignment, and geopolitical bargaining.

In overlap zones, AI power will not be determined only by which model is technically superior. It will also depend on financing terms, cloud availability, regulatory compatibility, language support, public-sector partnerships, security relationships, infrastructure investment, and local political acceptance. World Bank and UNCTAD assessments of AI and development both emphasize that infrastructure, connectivity, data, skills, institutional capacity, and investment distribution strongly shape whether AI adoption supports inclusive growth or deepens dependency (UNCTAD, 2025, 2026a; World Bank, 2026).

5. Strategic Implications

Global AI power should be mapped as a layered and networked structure, not as a simple leaderboard of models or companies.

The central strategic question is not only which actors control the most advanced frontier models. It is also which actors control compute and energy, platforms and cloud infrastructure, standards and regulation, data regimes, public-sector AI infrastructure, language-cultural zones, security systems, and military integration.

These dimensions will define the future structure of global AI power. A model-centered view explains visible competition; a domain-centered view explains strategic influence. It shows how AI power moves through infrastructure, law, alliances, capital, languages, platforms, data systems, industrial deployment, public institutions, and security architectures.

This shift has direct policy implications. Governments and institutions seeking to assess AI power should not focus only on model performance or firm-level market share. They should also map the broader domains in which AI capability becomes scalable, governable, deployable, and strategically consequential. This is consistent with socio-technical approaches to AI governance, which emphasize organizational context, risk management, infrastructure, public-sector adoption, and institutional accountability alongside technical performance (National Institute of Standards and Technology, 2023, 2024; OECD, 2026a, 2026b).

6. Limitations

This policy brief offers a conceptual framework for mapping global AI power, not a complete empirical index. The proposed domains are analytical categories rather than fixed geopolitical blocs. Their boundaries are fluid, overlapping, and likely to change as AI capabilities, infrastructure, regulation, capital flows, and security priorities evolve.

The framework also does not assign universal weights to the variables of AI power. Frontier model capability, compute access, regulation, language reach, data sovereignty, capital networks, industrial embedding, and military integration may matter differently across sectors and regions. A variable that is decisive in one domain may be secondary in another.

The proposed domains should therefore be read as an initial mapping structure rather than an exhaustive classification. Some actors may belong to multiple domains at once, and some regions may shift between domains depending on infrastructure contracts, political alignment, standards adoption, language ecosystems, or security partnerships.

Finally, the framework does not assume that AI power is inherently beneficial or harmful. The same domain structure may support innovation, public-sector modernization, economic development, surveillance, dependency, coercion, or strategic instability depending on governance conditions and political context. Further work is needed to operationalize indicators, compare domains empirically, and track changes over time.

Conclusion

Global AI power is not only about which company has the best model. It is about which actors control the domains in which AI capability is developed, deployed, regulated, financed, localized, secured, and operationalized.

A global AI power map should therefore show overlapping domains of state backing, platform ecosystems, language-cultural influence, compute infrastructure, capital networks, standards regimes, data sovereignty, industrial systems, and security institutions.

The future AI order will not form a single hierarchy. It will emerge as a layered system of competing, overlapping, and partially interoperable AI power domains.

In this structure, the decisive question is no longer simply who leads in AI model performance. It is who controls the environments in which AI becomes usable, scalable, governable, and strategically consequential.

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