

Government AI Spending 2025: A Sourced Dataset for Two Choropleth Maps

TL;DR

- **No government publishes a clean, comparable “AI procurement” figure**, so any map necessarily mixes four incompatible things: multi-year *mobilization targets* (EU “€200B,” France “€109B” — both mostly private capital), *annual government AI budgets* (South Korea, Japan, UK), *cumulative contract obligations* (US federal ~\$7.2B), and *state appropriations* (NY Empire AI \$275M). Treat every cross-entity comparison as indicative, not exact, and shade maps on ratios with a confidence overlay.
- **For the headline US federal number, use \$7.2 billion** in AI contract obligations (Brookings, cumulative Sept 2023–March 2026), with Bloomberg Government’s \$19.6 billion fiscal-2025 “federal sales footprint” of the top AI firms as an upper-bound alternative. The Department of Defense dominates every measure (from 46% of the Bloomberg footprint to ~99% of obligated AI dollars in the Brookings sample).
- **At the US state level, only New York has a clean, documented AI appropriation (\$275M Empire AI)**; almost every other state has no comparable AI-specific spending figure and should be left unshaded (“no comparable data”).

Key Findings

1. Federal US AI procurement (2025) is best stated as a range, not a point. Estimates span ~\$3.3B (NITRD nondefense AI R&D budget request — not procurement), → \$7.2B (Brookings cumulative AI contract obligations), → \$19.6B (Bloomberg Government fiscal-2025 sales footprint of the 25 most AI-influential firms). I recommend **\$7.2B as the “AI procurement/contract obligations” headline**, explicitly flagged as cumulative Sept 2023–March 2026. Brookings states the value of funds obligated “increased to \$7.2 billion (up 966% from 2024) and the value of potential awards increased to \$91.8 billion (up 1,912%).” The \$91.8B is a *ceiling/potential* figure (future appetite), not money spent — do not map it as actual spending.

2. The biggest announced numbers are mostly private capital and multi-year. The EU’s InvestAI “€200 billion” and France’s “€109 billion” are mobilization targets stretching to ~2030, dominated by private commitments. The EU figure is structured as ~€50B EU-public + €150B from the private European AI Champions Initiative (60 firms including Airbus, SAP, Siemens, Volkswagen); of the EU’s €50B, €20B is ring-fenced for AI gigafactories. France’s €109B, per CNBC, is “private investment in the ‘coming years’” — including €30–50B from the UAE/MGX, €20B from Canada’s Brookfield, €10B from Bpifrance, and €3B from Iliad. **Neither is government procurement** and both will distort any per-capita map.

3. South Korea and Japan have the cleanest annual government AI budgets. South Korea’s 2025 government AI budget was ~3.3 trillion won; per the Korea Times, the government “proposed to spend 10.1 trillion won (\$7.27 billion) on artificial intelligence (AI) initiatives in 2026 — more than triple the 3.3 trillion won allocated for 2025.”

The Korea Times Separately, Korea allocated 2.4 trillion won (US\$1.67B) for public-sector AI adoption across 33 agencies. Japan budgeted ~¥196.9B (~\$1.3B) for AI activities in FY2025, with a much larger ¥387.3B AI line in the FY2026 draft (part of METI’s ¥1.23 trillion chips-and-AI budget).

4. China runs through state-backed funds, not line-item procurement. The National AI Industry Investment Fund launched January 2025 at 60.06 billion yuan (\$8.21B), drawing capital from Phase III of the China Integrated

Circuit Industry Investment Fund. The broader National Venture Capital Guidance Fund targets ~1 trillion yuan (~\$138B) over 20 years across AI, quantum, and other frontier tech. Government VC funds invested an estimated \$912B over the past decade per Stanford FSI, ~23% AI-related.

5. US state-level data is extremely thin. New York’s Empire AI is the only clean appropriation: a “10-Year, \$275 Million Investment” in an AI computing center at the University at Buffalo, New York Governor “funded by over \$400 million in public and private investment, including a \$250 million State capital grant... and \$25 million over ten years in SUNY New York Governor funding... more than \$125 million from the founding institutions” (Simons Foundation et al.). Other state figures (a “\$310M Texas AI initiative,” “\$180M California regulatory infrastructure”) come from a single secondary blog and are low-confidence.

Details

Data-comparability caveats (read before using either table)

- **What counts as “AI spend” differs wildly.** Procurement obligations ≠ budget appropriations ≠ R&D requests ≠ mobilization targets ≠ private-investment pledges. Each row below is labeled by type and confidence.
- **Time horizons differ.** Some figures are single fiscal years (Korea, Japan, NY); others are cumulative or run to 2030 (EU, France, China VC fund).
- **Fiscal-year boundaries differ** (US FY ends Sept 30; Japan/UK FY ends March 31; Korea/EU/China calendar year).
- **Currency conversion** uses approximate 2025 rates (€1≈\$1.08; £1≈\$1.30; ¥150≈\$1; ₩1,380≈\$1; ¥7.3 RMB≈\$1). Re-converting at fiscal-year-average rates will move figures by several percent.
- **Government AI procurement reporting is inconsistent across countries** — most lack any equivalent of USASpending.gov keyword tagging, so cross-country figures are not audited to a common standard.
- **GDP** = nominal 2024, IMF World Economic Outlook (April 2026 edition, via IMF/Worldometer). **Population** = 2024–25 (US Census Vintage 2024/2025; World Bank/UN for others). **US state GDP** = BEA 2024 preliminary; **US state population** = Census Vintage 2024.

The four ratios

The user requested all four directions. Note that **GDP-per-AI-dollar** and **population-per-AI-dollar** are simply **the reciprocals** of AI/GDP and AI-per-capita. They are included in the tables, but for map shading the intuitive metrics (AI \$/capita and AI/GDP %) are preferable; the reciprocal directions produce extreme, hard-to-color ranges.

TABLE A — Countries (AI investment, USD ~2025; ratios computed)

Entity	AI investment (USD)	Type / confidence	GDP 2024 (USD)	Population	AI \$/capita	AI/GDP (%)	GDP per AI\$	Pop per AI\$
United States (federal)	\$7.2B	AI contract obligations, cumulative Sept’23–Mar’26 — MEDIUM	\$29,298B	340.1M	\$21.17	0.0246%	\$4,069	1 person per \$21.17

EU (institutional)	~\$216B (€200B)	InvestAI mobilization target to ~2030, mostly private — LOW comparability	\$19,400B	449.2M	\$480.8	1.11%	\$90	1 per \$481
China	\$8.2B	National AI Industry Investment Fund (Jan 2025) — MEDIUM ; broader \$138B 20-yr VC fund	\$18,945B	1,408M	\$5.82	0.0433%	\$2,310	1 per \$5.82
France	~\$118B (€109B)	Paris-summit commitments, mostly private, multi- year — LOW comparability	\$3,170B	68.6M	\$1,720	3.72%	\$27	1 per \$1,720
Germany	\$5.4B (€5B)	Public AI- strategy spend, cumulative to 2025 — MEDIUM	\$4,684B	83.6M	\$64.6	0.115%	\$867	1 per \$64.6
United Kingdom	\$2.6B (£2B)	AI Opportunities Action Plan, 4-yr Spending Review — MEDIUM	\$3,640B	69.1M	\$37.6	0.0714%	\$1,400	1 per \$37.6
Japan	\$1.3B (¥196.9B)	FY2025 AI activities budget — MEDIUM	\$4,190B	123.8M	\$10.5	0.031%	\$3,223	1 per \$10.5
South Korea	\$2.4B (3.3T won)	2025 govt AI budget — MEDIUM- HIGH (2026: \$7.3B)	\$1,870B	51.7M	\$46.4	0.128%	\$779	1 per \$46.4
Spain	~\$1.6B (€1.5B)	ENIA national strategy — LOW/MEDIUM	\$1,731B	48.9M	\$32.7	0.0924%	\$1,082	1 per \$32.7
Italy	~\$1.1B	National AI fund —	\$2,376B	58.9M	\$18.7	0.0463%	\$2,160	1 per

	(~€1B)	LOW/MEDIUM						\$18.7
Netherlands	~\$0.2B (€200M)	Groningen AI factory; no clean national total — LOW	\$1,218B	18.0M	\$11.1	0.0164%	\$6,090	1 per \$11.1
Iran	~\$0.18B	\$115–215M 2025 AI R&D budget — LOW	~\$434B	89.5M	\$2.01	0.0415%	\$2,411	1 per \$2.01

(France ratios recomputed at €109B × \$1.08 = ~\$118B; if only the public Bpifrance €10B (~\$11B) is counted as government, France’s AI/GDP falls to ~0.35% and AI/capita to ~\$160 — illustrating how definition-sensitive this entity is.)

TABLE B — US States (AI investment, USD ~2025; ratios computed)

State	AI investment (USD)	Type / confidence	GDP 2024 (USD)	Population 2024	AI \$/capita	AI/GDP (%)	GDP per AI\$	Pop per AI\$
New York	\$275M	Empire AI state capital appropriation (FY25) — HIGH ; >\$400M w/ private	\$2,297B	19.87M	\$13.84	0.0120%	\$8,353	1 per \$13.84
Texas	~\$200M	UT Austin AI institute (secondary source) — LOW	\$2,694B	31.29M	\$6.39	0.0074%	\$13,470	1 per \$6.39
California	est. <\$50M	GenAI pilots (RFI2 \$1 contracts), Anthropic/Copilot deals — LOW ; no clean total	\$4,103B	39.43M	\$1.27	0.0012%	\$82,060	1 per \$1.27
All other 47 states + DC	no comparable data	— leave unshaded	(BEA avail.)	(Census avail.)	—	—	—	—

Notes on states: New York’s Empire AI is a \$275M state investment within a >\$400M public-private consortium (\$250M state capital + \$25M/10yr SUNY operating + \$125M+ from founding institutions; [New York Governor](#) a later FY26 expansion added \$90M). **California** has no single AI budget line; it procures via the \$1-per-pilot RFI2 mechanism [CA](#) and discounted vendor deals (Anthropic Claude at 50% off for state and local agencies; [CA](#) Microsoft 365 Copilot free pilot), with employee GenAI access funded under the Budget Act of 2025. **Maryland, New Jersey, Connecticut, Pennsylvania, and Utah** run documented but small program-level AI pilots (Utah launched the nation’s first Office of AI Policy). Cross-state philanthropy is also material: the Center for Civic

Futures + Rockefeller Foundation are funding \$8.5M of multi-state public-benefit AI projects. [StateScoop](#) For a map, capture state GDP and population for all 50 states from BEA/Census, but only shade entities with a documented AI figure.

Source notes by entity

- **US federal:** Brookings, "Where does federal AI spending stand in 2026?" (\$7.2B obligated / \$91.8B potential, DoD ~99% of sample); Bloomberg Government, "Top AI Companies Have \$19 Billion Federal Contracting Footprint" (\$19.6B fiscal-2025 sales footprint, DoD \$9.1B/46%); NITRD AI R&D Investments FY2025 (\$3,316.1M nondefense R&D request); [Nitrd](#) GAO-26-107859; CSIS (confirms the \$3.3B is nondefense AI R&D, not procurement).
- **EU:** European Commission, AI Continent Action Plan (Apr 9, 2025) and InvestAI materials; CSIS, "The EU AI Continent Action Plan."
- **France:** Paris AI Action Summit (Feb 10–11, 2025); CNBC, Fortune, Euronews, CSIS coverage; OECD France country note (2025).
- **Germany:** OECD.AI / AI Watch national strategy report (€5B public to 2025); Bundesregierung.
- **UK:** GOV.UK AI Opportunities Action Plan and One-Year-On report; 2025 Spending Review (£2B; £1B sovereign compute; £500M Sovereign AI Unit).
- **Japan:** Japan Times/Bloomberg (FY2026 METI budget ¥1.23T); White & Case (Basic AI Plan); Chambers (¥196.9B FY2025).
- **South Korea:** Korea Times/Korea Herald/Bloomberg (2026 budget 10.1T won; 2025 ~3.3T won); Fintech HK (2.4T won / \$1.67B public-sector adoption, 33 agencies).
- **China:** Global Times/China Daily/SCMP (¥60.06B national AI fund); CNN/Reuters/RAND (\$138B VC guidance fund; \$8.2B AI fund); Stanford FSI (\$912B govt VC over a decade).
- **Iran:** Recorded Future, ts2.tech, Envisioning (\$115M–\$215M; National AI Document 2024; parliament-approved plan May 2025).
- **GDP/Population:** IMF WEO (April 2026); Worldometer; US Census Vintage 2024/2025; BEA "GDP by State."

Recommendations

1. **Shade the maps on the ratio, not raw dollars**, and publish two versions per map (AI \$/capita and AI/GDP %). Keep the "GDP per AI dollar" and "population per AI dollar" reciprocals in the data table for completeness but do not use them for shading (their ranges are extreme).
2. **Use a confidence overlay** (e.g., hatching for LOW-confidence cells: EU, France, Netherlands, Iran, Texas, California). Leave all non-NY states and all unlisted countries unshaded as "no comparable data."
3. **Pick ONE definition per map and state it in the legend.** Recommended: "government AI budget/procurement, 2025, latest available," with a footnote that France/EU figures are mobilization targets including private capital — so they will dominate any per-capita map and should be asterisked or shown in a separate "announced investment" map.
4. **For a defensible apples-to-apples country map, restrict to government AI budgets/funds:** US (\$7.2B), China (\$8.2B fund), Germany (\$5.4B cumulative), UK (\$2.6B), South Korea (\$2.4B), Japan (\$1.3B), Spain (\$1.6B), Italy (\$1.1B), Netherlands (\$0.2B), Iran (\$0.18B) — and drop or asterisk EU/France.
5. **Benchmarks/thresholds that would change the picture:** (a) if the US FY2026 figures (Brookings \$7.2B

obligated / \$91.8B potential; DoD's \$13.4B FY2026 AI request) become confirmed *obligated* spend, the US per-capita figure roughly doubles toward ~\$40; (b) South Korea's confirmed 2026 jump to 10.1T won (\$7.3B) lifts it to ~\$141/capita, overtaking every peer except France/EU; (c) if China's \$138B VC fund deploys on its stated schedule (~\$7B/yr) it would roughly match the US on intensity.

Caveats

- The €200B (EU) and €109B (France) numbers are the weakest for a procurement map: they are political mobilization targets, largely private, multi-year, and not yet spent. Mapping them at face value makes France (~\$1,720/capita) and the EU (~\$481/capita) dwarf actual government buyers like Japan (\$10.5) and the US (\$21) — an artifact of definition, not reality.
- US federal \$7.2B is keyword-based (any contract mentioning "AI") and cumulative across ~2.5 years; it is not a clean single-year figure. Bloomberg's \$19.6B is a total-sales footprint of AI firms (which sell far more than AI to the government), so it over-counts pure AI procurement. The widely repeated "\$3.3B FY2025" figure is the NITRD nondefense AI **R&D budget request** mislabeled by a vendor blog as procurement — do not cite it as procurement.
- DoD dominance is consistent but the *magnitude* varies by metric: 46% of the Bloomberg footprint vs ~99% of obligated AI dollars in the Brookings sample.
- Iran's GDP is volatile and sanction-distorted; IMF nominal estimates for 2024 vary widely (~\$400–465B), and its AI budget figures (\$115M vs \$215M) conflict across sources.
- China's \$8.2B is one fund's registered capital, not annual government spending; the \$138B figure is a 20-year leveraged target with heavy local-government and private co-investment.
- State-level: only New York is reliable. Treat the Texas (~\$200M) and California (<\$50M) cells as illustrative estimates from secondary sources, not documented procurement; if rigor is paramount, leave even these unshaded.
- All currency conversions are approximate 2025 spot rates; conversions and the choice of fiscal year vs calendar year will move every foreign figure by a few percent.