

US Democrat Jim Himes calls chip restrictions the key lever against China in AI race

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Just two weeks before the US midterm elections, Jim Himes, the top Democrat on the House Intelligence Committee, said he did not believe America would maintain its lead over China in frontier AI indefinitely, describing restrictions on advanced chips as Washington's key leverage.

"I don't believe for one second that we're going to maintain a lead over Chinese frontier models forever. But we should for as long as we can," said Himes at a Brookings event in Washington. "And the one real lever we have there, of course, is just slowing the dispersion of advanced chips into China."

Himes is a member of the "Gang of Eight", a bipartisan group of congressional leaders briefed on classified national security matters. His comments come ahead of the midterm elections next month, with recent polls suggesting Democrats could regain control of Congress.

A Reuters/Ipsos poll that closed on Monday found Democrats lead Republicans 47 per cent to 35 per cent on the "generic ballot", which asks participants the party they would vote for if the congressional elections were held today.

Himes was speaking at the event titled "AI on the ballot: Data centres and the 2026 midterms", which examined local opposition to data centres and global expansion of AI infrastructure.

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Trump rejects working with China on AI despite Xi's recent visit

A panel of experts at Wednesday's event also discussed how chip constraints could shape the ongoing AI race between the US and China.

Whether China can produce enough chips to meet domestic AI demand and also compete abroad remains the "big question", said Kyle Chan, a fellow at the Brookings Institution.

"In the near term, we are not competing with China for building AI data centres abroad," he said. "China is constrained by their chips, by their own chip production capacity."

In the medium to long term, however, he sees several Chinese companies gearing up for broader global expansion, including offering cloud and AI services abroad.

If China's chip production ramps up, Chan said, Chinese firms could be poised to offer "package deals with the models, the hardware, maybe even the energy to go along with that, in a kind of repeat, in some ways, of the Belt and Road Initiative, but for AI".

The two countries face different challenges: the US has an energy bottleneck, and China a chip bottleneck, according to Chan.

"In the US it's always about connecting to the grid, getting new power to power all these data centres and these chips. In China, they complain constantly about not having enough compute, not having enough chips themselves," he said.

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“What’s interesting is for China, they do see compute as part of their national infrastructure, and they’ve been working hard to kind of build out their data centre capacity.”

Elsewhere in the conversation, Himes addressed allegations that foreign adversaries were amplifying opposition to data centres in the US.

“There’s a tonne of allegations out there that the Chinese and two or three other people are putting out lots of inflammatory stuff about data centres,” he said, while conceding he did not know if this was true.

“A big part of it is China,” Trump told Fox News in August.