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Analysis of today
Assessment of tomorrow

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Apple—technology as political capital

Apple's announcement in February 2025 that it would invest up to $500 billion in the USA over the next four years triggered a strong reaction in technology and political circles. But only now is this announcement taking on a full political dimension: on 24 April, the White House officially included Apple's investment as one of the key points in a document entitled "TRUMP EFFECT: A Running List of New U.S. Investments".

One day later, Apple confirmed that it will move the assembly of all iPhones for the US market from China to India. The stock market reacted negatively, but the political narrative is set: Apple is now becoming a symbol of America's industrial renewal under President Trump's leadership.

The centrepiece of the investment is the construction of a 250,000-square-metre server factory in Houston, Texas, that is scheduled to enter operation in 2026. The plan envisages the creation of 20,000 new jobs in research and development, engineering, AI, and software architecture.

Apple Intelligence, presented at WWDC 2024, relies on its own high-security standard hardware, which requires its own servers and infrastructure in the country.

Apple is not only investing in physical production but also in training centres, AI academies and regional development zones. The projects are spread across more than a dozen states, including Michigan, Arizona, Nevada and North Carolina.

It is estimated that Apple's 20,000 jobs could generate a further 32,000 indirect jobs at a multiplier of 1.6 (i.e., for every new direct job, there are around 0.6 additional jobs in supporting sectors such as logistics, construction, hospitality, and local services).

The company says it already supports 2.9 million jobs in the US today. In addition, Apple plans to increase its "Advanced Manufacturing Fund" from $5 billion to $10 billion, which would allow subsidies for domestic suppliers of silicon and high-precision components.

But the crucial question remains: How much of this $500 billion is actually "new" investment? Previous promises made in 2018 ($350 billion) and 2021 ($430 billion) have not been independently verified, and Apple will not publish a detailed breakdown of the investment structure this time either.

Complete vertical integration

In contrast to competitors such as Google, Amazon, and Microsoft, which rely on public cloud platforms and third-party providers for hardware production, Apple is introducing a strategy of complete vertical integration with this step: design, silicon, assembly, servers, and software under one roof.

The AI infrastructure developed and stationed in the US helps the company stand out in terms of data control and development speed.

> Apple Intelligence is not just a technical platform but part of a broader plan for digital autonomy

The move is also a response to the risks of international trade: Apple's system must work without relying on unpredictable supply chains from China or Taiwan.

The plan and the message are clear — Apple Intelligence is not just a technical platform but part of a broader plan for digital autonomy.

Departure from China

While the AI infrastructure is being developed in the USA, Apple is moving iPhone assembly for the US market from China to India at the same time. The move has a double effect: it reduces dependence on Chinese assembly capacity, but it also sends a signal to the stock market that costs will temporarily rise.

On 25 April 2025, Investopedia reported that Apple shares fell 0.9% in pre-market trading following the announcement of the relocation

of iPhone production for the US market from China to India.

> The inclusion of Apple's investment in the White House's official list reveals a clear political interest in portraying this economic move as a direct result of the president's measures

The move can be interpreted as part of a broader strategy: Apple is centralising AI and computer processing in the US while spreading the physical assembly of phones and consumer electronics across Asia to reduce risks and balance political pressure from Washington.

The inclusion of Apple's investment in the White House's official list, labelled the "Trump effect", reveals a clear political interest in portraying this economic move as a direct result of the president's measures.

This narrative emerges, although Apple has been planning to diversify production and invest in AI for years. According to Reuters, negotiations with state officials and partners in Texas have already begun in the second half of 2023.

Is technological progress being instrumentalised for political purposes?

The Trump administration is using this announcement as proof that its policy of tariffs, protectionism, and bringing industry back into the country is right. However, analysts warn that some of the investment is simply a recalculation of existing spending, operating costs, and previous announcements, undermining the claims of an entirely new plan.

If Apple's investment is used as a campaign tool without precise monitoring and transparency mechanisms, there is a risk that the investment will become a PR tool with no real insight into implementation.

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Presenting each step a company takes as a personal victory for the president can devalue institutions and distract from structural challenges like tax policy, education, access to skilled labour, and technical infrastructure.

Moreover, such announcements can be used to pressure large companies—"invest at home or face tariffs"—which fundamentally threatens free market principles and blurs the line between economic policy and political tactics.

Apple's $500 billion commitment has the potential to reshape not only the company's strategy but also the broader technological map of the United States. If implemented on the scale announced, it could become a symbol of the return of a key industry and of digital resilience and autonomy in deciding the technological future.

But for this announcement to become more than an impressive figure, it needs regular reports, an independent review of employment, publicly available data on infrastructure investments and concrete results from the development of its own artificial intelligence systems.

Otherwise, Apple might serve as an example of what happens when technological progress is instrumentalised for political gain. And then the crucial question will not be what Apple has announced but who uses this announcement,

with what intention and at what price.