The Nation Sets the Tone for “AI Plus”: a Strategic Reading of China’s Three-step AI Strategy for the Next Decade

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In ten years, China will be fully AI-ized.

China's AI is entering a new ten-year period, evolving from industrial empowerment to societal reconstruction.

In August 2025, the State Council issued the "Opinions of the State Council on Deeply Implementing the 'Artificial Intelligence Plus' Initiative" (hereinafter referred to as the "Initiative Opinions"), outlining a strategic blueprint for AI development through 2035.

From the document's positioning, development goals, and key tasks, this "top-level design" unleashes a new direction for China's AI development: it is no longer simply a tool for industrial upgrading, but the infrastructure driving China's modernization and the core of new quality productive forces.

To achieve this goal, the document proposes a three-step approach:

By 2027, lead the way with AI achieving extensive and deep integration with six key sectors, with the penetration rate of applications such as new-generation intelligent terminals and intelligent agents exceeding 70%;

By 2030, AI will fully empower China’s high-quality development, with the penetration rate of applications such as new-generation smart terminals and smart agents exceeding 90%, and the smart economy will become a key growth engine for my China's economic development, promoting technology accessibility and the sharing of results;

By 2035, China will fully enter a new stage of development for the smart economy and smart society, providing strong support for the basic realization of socialist modernization.

Ten years from now, AI will be as universally adopted as electricity and the internet, becoming the “base infrastructure" of society.

Near-term Goals (2027): Point-by-point breakthroughs will be achieved, with accelerated landing in six key sectors, smart terminals and smart agents become key carriers

Over the next two years, China must take the lead in achieving the transition from technological breakthroughs to practical applications, focusing on six key areas: science and technology, industry, consumption, social well-being, governance, and global cooperation. As key drivers for the widespread application of AI, the penetration rate of next-generation smart terminals and intelligent agents must exceed 70%.

As angel investor and veteran AI expert Guo Tao pointed out in an interview with Yicai Global, these sectors share common characteristics: clear data entry points, well-defined business cycles, and strong technology diffusion effects. These characteristics align with the principle of "using one point to drive the whole" and will become a core lever for policy implementation.

In the field of science and technology (AI for Science, AI4S), AI is no longer just a supporting tool but is expected to become a new paradigm for future scientific research, even opening up entirely new research paths in philosophy and social sciences.

For example, for the first time, the document proposes the construction of large scientific models to drive a paradigm shift from "0 to 1" in scientific research. At the same time, AI will also transform the R&D chain, significantly shortening the distance between the laboratory and the market.

In industrial development, it is necessary to not only promote the intelligent transformation of the "three pillar industries" (industry, agriculture, and services) but also foster new "intelligent native industries."

Among them, "intelligent native enterprises" are a policy highlight: they build their businesses with AI as their underlying logic. Just as "internet-native companies" (such as Meituan and Didi) rose to prominence in the mobile internet era, the AI era will see the emergence of new business models such as customer service platforms based on intelligent agents and AI-driven automated design companies, making them key targets of future policy support.

The application prospects of AI are particularly broad in the service industry, where intelligent agents and the next generation of smart devices (AI phones, AI PCs, and smart assistants) will become new service portals.

In the consumer sector, AI will not only drive efficiency improvements on the production side but will also profoundly reshape service and product models, directly targeting individuals and families, improving quality of life and consumer experience.

At the product level: Cars, mobile phones, computers, robots, home appliances, and wearable devices will all use AI as their "brain," enabling the interconnectedness of everything.

At the service level: From digital convenience to cognitive and emotional consumption, AI will not only help you buy, but also provide companionship and inspiration.

In the area of social well-being, AI will truly "enter our lives," from work, education, health, to culture and social interaction, building a smarter way of working, more personalized learning models, and a warmer society. Policies also encourage AI to create more works with "Chinese elements" in cultural production, strengthening cultural confidence.

In the field of governance, AI will comprehensively elevate the level of modern governance. In social governance, from smart cities to smart government, human-machine co-governance will be achieved. In security governance, a three-dimensional intelligent security system will be established to strengthen national security. Ecological governance will leverage AI to promote the construction of a "Beautiful China" and support green transformation.

In the field of global cooperation, China will advocate a "universal and shared" approach, in contrast to the "security restrictions" model, and contribute Chinese solutions to global AI governance.

Medium-term Goals (2030): From point to line, the intelligent economy will become a growth pole

By 2030, the connotation of "AI+" will be further expanded from six major areas to all aspects of the "intelligent economy," becoming a "key growth pole" driving the national economy.

By then, the penetration rate of next-generation smart devices and agents will have increased from 70% in 2027 to over 90%. The 90% figure means that nearly every industry, every organization, and even the majority of individual users will be using smart devices or agents, moving AI from application-specific landing towards an economy-wide driver.

This trend is not a fantasy. *Nature* reported on the "Moore's Law for AI Agents," proposed by the nonprofit research organization METR: the capabilities of intelligent agents double approximately every seven months. At this rate, by the end of 2028, AI will be able to automatically complete many tasks that currently take humans a month to complete. If the penetration rate of intelligent agents can reach 70% by 2027, then driven by exponential technological advancements, exceeding 90% by 2030 is likely to be a natural progression.

Notably, the document emphasizes both universal access to technology and the sharing of results, reflecting a commitment to social equity and the distribution of value.

Long-Term Goals (2035): From Line to Surface: A Powerful Support for an Intelligent Society and Modernization

By 2035, AI will have fully penetrated the intelligent society, moving from being a key growth pole in the intelligent economy, becoming a powerful supporter of China's modernization.

An intelligent society is not just an economic revolution, but also a profound social transformation. AI will permeate every aspect of people's lives, including public services, urban governance, and personal life, forming an efficient, convenient, and sustainable intelligent ecosystem.

The basic realization of socialist modernization demonstrates that the development of AI has become a crucial support for achieving the country's long-term development goals.

Models, data, computing power, and open source: The four-in-one approach is driving the accelerated development of the AI industry.

Recently, Chinese AI companies have continuously released a new generation of large open source models. All of the top 15 open source AI models on the Design Arena rankings are from China.

The Leaderboard

All Categories | Filter (Open) | Range: All 7d 14d 30d

Rank	Model	Elo Rating ↓	Win Rate	MoE	Battles	Organization	Time
1	DeepSeek-R1-0528	1332 1225W / 573L	68.1%	±2.2%	1,798	DeepSeek	1m 15s
2	GLM 4.5	1318 500W / 253L	66.4%	±3.4%	753	Zhipu AI	1m 47s
3	Qwen3 Coder 480B A35B Instruct	1318 722W / 365L	66.4%	±2.8%	1,087	Alibaba	45.4s
4	DeepSeek-V3-0324	1299 1357W / 765L	63.9%	±2.0%	2,122	DeepSeek	1m 5s
5	DeepSeek-V3.1 (Thinking)	1284 94W / 58L	61.8%	±7.7%	152	DeepSeek	3m 49s
6	Qwen3-235B-A22B-Instruct-2507	1281 707W / 445L	61.4%	±2.8%	1,152	Alibaba	45.5s
7	GLM 4.5 Air	1269 439W / 295L	59.8%	±3.5%	734	Zhipu AI	1m 37s
8	DeepSeek Coder	1268 216W / 146L	59.7%	±5.1%	362	DeepSeek	2m 9s

Hugging Face released the July open access results of the Chinese AI community, showing that numerous vendors, including Alibaba, Zhipu, Kunlun Tech, Moonshot Kimi, Tencent, and Stepfun, have open-sourced 33 major models.

Previously, Interconnects (a high-quality content platform focused on cutting-edge AI research) compiled a list of 19 top open-source model labs in China, including top institutions like DeepSeek, as well as emerging academic labs that have made a name for themselves through technical reports and niche models.

The "Initiative Opinions" also explicitly call for support for the development of AI open-source communities, promoting the open access of models, tools, and datasets, and fostering high-quality open-source projects. To this end, the government encourages universities to include open-source contributions in student-credit certification and faculty achievement recognition, and supports businesses, universities, and research institutions in exploring new models for inclusive and efficient open-source applications.

Models, data, and computing power are becoming the "three commanding heights" of global AI competition. China, through a combination of open source initiatives and policy guidance, is forging a synergy across research, industry, and applications, propelling the AI industry into a new phase of accelerated development.

The "Initiative Opinions" explicitly call for comprehensively enhancing the fundamental supporting capabilities of models, data, and computing power.

Regarding models, the opinions emphasize strengthening research into fundamental AI theories and innovation in model infrastructure, promoting improvements in training and inference efficiency, exploring new forms of model application, and establishing a robust model capability assessment system to ensure controllable and verifiable model iteration.

Regarding data, the opinions propose developing high-quality datasets, improving data property rights and copyright systems, promoting the legal and compliant openness of copyrighted content generated by publicly funded projects, exploring data cost compensation and revenue sharing mechanisms based on value contribution, and supporting the development of technologies such as data annotation and data synthesis.

Regarding computing power, the opinions explicitly support innovation in AI chips and the construction of ultra-large-scale intelligent computing clusters, improving a nationwide integrated computing network, and promoting the role of hubs such as the “East-West Compute Transfer Project." Standardized and scalable computing cloud services are also encouraged.

Regulation and Security: China's AI Governance Enters a New Stage of Institutionalization

From "model hallucinations and algorithmic discrimination" to a filing system, regulation is about to be comprehensively upgraded.

The "Initiative Opinions" not only emphasizes the need to build security capabilities across all aspects of AI, including algorithms, data, computing infrastructure, and application systems, but also explicitly calls for addressing and addressing typical risks associated with current AI development (the word "security" appears 12 times throughout the document), such as the black box problem (unexplainability) of models, hallucinations (generating false or unreliable information), and algorithmic discrimination (bias against groups or individuals).

This resonates closely with the internationally emphasized concepts of "explainable AI" and "responsible AI," reflecting China's overall approach to balancing security and development in AI governance.

In fact, this year, various national departments have also issued a number of policy documents on AI governance.

For example, on March 14, the Cyberspace Administration of China, the Ministry of Industry and Information Technology, the Ministry of Public Security, and the State Administration of Radio and Television jointly issued the "Measures for the Identification of Artificial Intelligence-Generated Synthetic Content," which will take effect on September 1, 2025. The

measures require that all AI-generated content must be “electronically watermarked” in accordance with the law.

Specifically, service providers must add explicit and implicit labels to AI-generated text, images, audio and video, virtual scenes, and other content to safeguard the public's right to know and ensure traceability. Dissemination platforms must verify labels and notify the public. Apps must undergo regulatory review before listing. Users must proactively declare and label their posts, and tampering with or removing labels is strictly prohibited.

On March 21, the Cyberspace Administration of China and the Ministry of Public Security issued the "Measures for the Security Management of Facial Recognition Technology Applications," effective June 1, 2025.

The core of these measures is to strictly regulate the use of facial recognition, requiring clear purpose, necessity, and minimization principles, requiring separate consent, and safeguarding the rights of minors. Data must be stored locally and retained for a limited period, and important applications must be registered. Facial recognition must not be mandatory as the sole method for identity verification, and alternative methods must be provided. Data collection in public places must be reasonable and legal, and the deployment of equipment in private spaces is prohibited. Systems must implement encryption and security measures, and violations will be subject to legal prosecution.

Conclusion

As early as 2017, the State Council issued the "New Generation Artificial Intelligence Development Plan," marking the first national AI strategy.

However, the "Opinions on Deeply Implementing the 'Artificial Intelligence Plus' Initiative" has a more distinctly targeted and systematic approach. For the first time, it focuses on the integrated applications of "AI Plus," systematically deploying them across six key sectors: science and technology, industry, and consumption. This demonstrates dedicated policy guidance for a single cutting-edge technology.

Furthermore, the opinions emphasize practicality and effectiveness, proposing a series of targeted measures to address issues such as the emphasis on hardware over software in AI applications, fragmented applications, and low open-source community activity. Adhering to sector-specific policies, they propose specific directions for the integration and development of AI within each sector, forming a core framework for the “AI Plus” initiative across various industries.

Policy Document Links:

Opinions of the State Council on Deeply Implementing the "Artificial Intelligence Plus" Initiative

https://www.gov.cn/zhengce/content/202508/content_7037861.htm

National Development and Reform Commission Official Answered Reporters' Questions on the "Opinions on Deeply Implementing the "Artificial Intelligence Plus" Initiative"

https://www.gov.cn/zhengce/202508/content_7037920.htm

Measures for Identifying Artificial Intelligence-Generated Synthetic Content

https://www.gov.cn/zhengce/ zhengceku/202503/content_7014286.htm

Measures for the Security Management of Facial Recognition Technology Applications

https://www.cac.gov.cn/2025-03/21/c_1744174262156096.htm

New Generation Artificial Intelligence Development Plan

https://www.gov.cn/gongbao/content/2017/content_5216427.htm

Reference Link:

https://www.yicai.com/news/102794683.html