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America's AI Boom Has a Blue-Collar Challenge

Letter to the Editor

America's artificial intelligence future may depend as much on electricians, welders, and construction workers as it does on software engineers.

Technology companies are investing at a remarkable pace in the infrastructure needed to power AI. Microsoft, Meta, Amazon, and Alphabet are expected to spend about $700 billion just this year. That figure doesn't include the additional investments required for semiconductor manufacturing and electric grid renovation.

But there's a major obstacle: America doesn't have enough skilled workers to build everything the AI economy will require.

By 2030, the United States could need an additional 140,000 more skilled tradespeople — welders, HVAC technicians, construction workers, electricians, and others — to meet AI infrastructure demand. Finding and training them should be a national priority.

During a recent trip to Switzerland, I was briefed on the latest data from the nearly century-old Swiss apprenticeship model. This skills-based program has helped support one of the most innovative economies in the world by providing clear, respected pathways into technical careers.

Through Switzerland's Vocational Education and Training system, students can begin apprenticeships as early as age 15, combining classroom instruction with practical experience at participating companies. Today, roughly 70% of Swiss young people participate in apprenticeships spanning construction, pharmaceuticals, manufacturing, healthcare, banking, and other industries.

Importantly, choosing an apprenticeship doesn't close the door to higher education. Graduates can enter their chosen profession or continue their studies and pursue a university degree. The system therefore gives students multiple routes to successful careers rather than treating vocational and academic education as competing tracks.

Employers benefit, too. Companies see an estimated 7% to 10% return on their investment in apprenticeship programs, and many apprentices ultimately remain with the companies that trained them. Businesses gain a reliable way to develop talent while workers receive skills tied directly to available jobs. Programs can also evolve alongside technology and industry, rather than training workers for jobs that may no longer exist.

That approach is particularly relevant as America builds the physical foundation of the AI economy.

Demand for skilled trades is poised to increase dramatically. Nvidia CEO Jensen Huang has estimated "six-figure salaries for people who are building chip factories or computer factories or AI factories." Meanwhile, more young Americans are showing interest in vocational education as they face uncertainty about some white-collar careers and rising higher-education costs.

Employers should seize that opportunity by investing not only in wages, but also in apprenticeship pipelines.

Some states have already started. Colorado's CareerWise program, partially inspired by the Swiss model, combines classroom education with paid apprenticeships in fields such as information technology and advanced manufacturing. Similar efforts are emerging elsewhere as employers look for sustainable ways to develop skilled workers.

Those programs should become the beginning of a broader movement.

America's AI leadership won't be secured by algorithms and computing power alone. It will also require people who can build chip plants, install electrical systems, wire data centers, and maintain the infrastructure beneath the digital economy.

Switzerland has spent generations building that kind of workforce. As America confronts its own AI infrastructure challenge, we should learn from its example.

Sen. Rob Portman

Former U.S. Senator Rob Portman (R-OH) represented Ohio in the U.S. Senate

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