

The compute choke point — and a \$2 trillion parallel

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“We disagree that the finding of a narrow potential jailbreak should be cause for recalling a commercial model deployed to hundreds of millions of people” — Anthropic, on why they can't comply with a verbal-only government directive without more detail.”

— Seln Oriax, today's narration

The US government ordered Anthropic to block Fable 5 and Mythos 5 for all foreign nationals. Instead of chips or training data, the lever here is model access itself. Ethan Mollick frames it as a compute story: building at frontier scale requires so much power and silicon that governments will naturally monitor who's doing it. Meanwhile SpaceX hits the public market at \$2 trillion on Friday with Musk retaining above 82% voting power — the same day Anthropic files its IPO paperwork.

We also look at a new robot emotion paper where VLMs outperform conventional facial analysis but can't bridge the gap between sensing a cue and understanding intent. The infrastructure, capital, and capability stories all converge on one question: who gets to build at frontier scale, and who decides when enough is enough.

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