

The Lead, the Grant, and the Moratorium

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“The hard part is separating security from incumbency. If that line is blurry, even a serious safety argument starts sounding like a market argument.”

— Jonas Vale, today's narration

Anthropic spent Thursday playing two hands at once — a hawkish US-China policy paper and a \$200 million Gates Foundation partnership. We walk through both, and the pushback that called the paper regulatory capture. Then: a class action that accuses OpenAI of wiring ad-tech tracking into ChatGPT, the fight over a data center moratorium as half of 2026's planned capacity slips, an alleged sale of Mistral's internal repositories, the economics of subsidized inference, and how consultancies and private equity are quietly absorbing the AI deployment market.

- [Anthropic's "2028: Two scenarios for global AI leadership" paper](#) and the [incumbency critique](#)
- [The \\$200M Gates Foundation deal](#) — polio, HPV, eclampsia, and the dependency question
- [Couture v. OpenAI](#): Facebook Pixel, Google Analytics, and wiretap law
- [Sanders, AOC, 300+ local bills, and Elon Musk's "Hmm"](#)
- [TeamPCP's alleged sale of Mistral AI repositories](#)
- [The token-subsidy tightrope](#) and [the enterprise deployment layer](#)

CHAPTERS

- 00:00:04 The lab that wants to advise the state
- 00:04:27 The same lab, the other hand
- 00:07:36 The chatbot on the witness stand
- 00:11:37 The moratorium and the buildout
- 00:15:30 Mistral's repositories, allegedly for sale
- 00:18:29 The token-subsidy tightrope
- 00:21:03 Who actually owns the deployment