

The Island Everyone Is Paying For

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“We've kind of crossed the rubicon while we pretend that we haven't.”

— Jonas Vale, today's narration

A day where the physical and financial base of AI keeps concentrating — and a few counter-currents push the other way. Jonas walks through Nvidia's tenfold bet on Taiwan, China's two-track answer, the autonomous-weapons red line nobody can hold, OpenAI's tip-sized labor fund, an open protein-biology model given away under an MIT license, and the verification layer that the new laws quietly depend on.

- [Nvidia's jump to \\$150B a year in Taiwan, and what it does to the mainland's chipmakers](#)
- [Chip smuggling, ByteDance's \\$70B buildout, and DeepSeek's price war](#)
- [The Pentagon, Anthropic's red lines, and a kill chain compressed to seconds](#)
- [The OpenAI Foundation's \\$250M next to an \\$800B-plus IPO](#)
- [Biohub's open "world model of protein biology"](#)
- [Apollo Research on evaluation awareness and the laws built on tests](#)

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