

The Chips Already Shipped

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“A rule that isn't enforced isn't a weaker rule. For a year, on the most important lever the US holds over AI, it was no rule at all.”

— Jonas Vale, today's narration

A year of selective non-enforcement on AI chip exports, energy repriced as the hottest business in America, a million-satellite IPO bet, robotics money racing ahead of the rules, fabricated citations corrupting the medical literature, and Brad Carson's case for treating AI as a machine, not a person. The connective tissue: action keeps running ahead of the ledger.

- BIS guidance reveals Chinese subsidiaries legally bought Nvidia Blackwell chips for a year — and the TSMC due-diligence loophole is still open.
- Ford Energy, Bloom up 1,200%, GE Vernova's \$2.4B in data-center orders, and \$40B in canceled projects.
- Robert Zubrin's arithmetic on Musk's million orbital data-center satellites.
- \$26B into robotics and physical AI; robotaxis meet city hall.
- 4,046 fabricated references across 2,810 biomedical papers, a 12-fold jump.
- Brad Carson on liability, capture, and the 0.73% targeting score in Gaza.

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