

The State Found the Model Switch

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“The frontier itself is now expensive and visible enough that it looks less like a downloadable tool and more like a regulated industrial facility.”

— Jonas Vale, today's narration

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Today on IMPULSE: the United States government ordered Anthropic to suspend foreign-national access to Fable 5 and Mythos 5, and the company disabled both models for all customers while disputing the technical basis for the order. The episode follows the institutional pressure outward: open-model sovereignty arguments, electricity allocation, state subpoenas, police evidence, and the public-market pricing of AI infrastructure.

- [Anthropic's statement](#) and [Axios's reporting](#) on the order and the Amazon-triggered timeline.
- [Thomas Wolf](#), [Ethan Mollick](#), and the open-versus-controlled access argument after the shutdown.
- [Axios on data-center electricity demand](#), [state AG subpoenas for OpenAI](#), and [The Guardian on AI-created evidential material](#).
- [SpaceX's public-market debut](#) and [NVIDIA's AgentPerf claims](#) as AI infrastructure becomes an accounting problem measured in watts, racks, and capacity.

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