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## AI News Weekly - Issue #459: Is Elon Musk the worst in Tech?

1 message

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Deep Dive into Musk's appetite for chaos

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### The AI Colossus: Decoding Musk's Omnipresent Influence in everything AI

Apparently [Elon Musk has been elected worst person in tech](#) as reported by AI Scientist Gary Marcus. We wanted to deep dive into why Elon Musk is so controversial yet so powerful.

Elon Musk has transcended the role of a tech CEO to become the central gravity of the global AI ecosystem. This week's briefing reveals the sheer scale of that impact: while Tesla pivots its entire valuation on the promise of autonomous "reasoning," xAI's Grok is forcing a global reckoning on deepfake governance, and Starlink is embedding commercial networks into the "kill chains" of modern warfare. Across every vertical—from the neural interfaces of the future to the digital battlegrounds of today—Musk's companies are not just participating in the AI revolution; they are defining its most controversial and consequential frontiers. We dive deep into how this unchecked influence is reshaping markets, safety norms, and

geopolitics alike. All the while Musk continues to surprise and shock the world by launching products that product non consensual adult explicit imagery in a move that leaves most people wondering what's happening in his mind?

How long can this last?

As always, reply to this email to share your thoughts and comments. We will read and reply to all responses!

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## IN THE NEWS

### Tesla Valuation & Self Driving Safety Crises

**Intro:** Tesla's "growth story" faced a harsh reality check this week as confirmed numbers revealed an 8.6% drop in annual deliveries—the first decline in over a decade. The narrative war has now shifted entirely to the promise of AI, with bulls pinning hopes on a 2026 robotaxi rollout and bears warning that the stock is trading at irrational multiples. Meanwhile, safety regulators are opening new fronts, probing hardware defects that could trap drivers in emergencies.

- **Delivery Decline:** Tesla confirmed full-year 2025 deliveries fell 8.6% to 1.63 million vehicles, marking the first annual sales drop since 2011 as BYD widened its lead.
- **Valuation Disconnect:** Morningstar analysts maintained a "Very High" uncertainty rating and a \$300 fair value estimate, arguing the stock is significantly overvalued given the profit slump.
- **Bullish "AI" Pivot:** Countering the gloom, New Street Research validated Tesla's approach following Nvidia's keynote, maintaining a \$600 target based on the "unsettled" autonomous arms race.
- **NHTSA Door Probe:** Regulators opened a formal investigation into Model 3 emergency latches after reports of drivers being trapped in burning vehicles due to "hidden" mechanical releases.

- **FSD "Reasoning" Claims:** To arrest the stock slide, Musk announced "reasoning" capabilities for FSD, though he admitted safer-than-human autonomy is still "several years" away.
- **Shareholder Toxicity:** A Guardian report highlighted that Musk's political rhetoric is now a "major brand worry," with sales specifically lost due to his "toxic" public persona.
- **Cybertruck Quality:** Data revealed over 115,000 Cybertrucks were recalled in the last year alone, averaging nearly 10,000 units per month flagged for critical safety defects.
- **Hardware Drain:** Shareholder lawsuits intensified over allegations Musk is diverting AI chips and talent from Tesla to xAI, effectively hollowing out Tesla's claim to be an AI company.

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## ETHICS

### X: Non-Consensual Media & Moderation Collapse

**Intro:** The collapse of content moderation on X has culminated in a global safety crisis, as the "Grok" AI tool was weaponized to generate non-consensual sexual imagery (NCII) of women and children. The fallout has been immediate and severe: entire nations are blocking the tool, and the UK has launched a criminal investigation. Musk's response—monetizing the "safety" fix by putting the tool behind a paywall rather than disabling it—has only deepened the scrutiny from regulators who view the platform as willfully negligent.

- **Global Blockade:** Indonesia and Malaysia became the first nations to block Grok after the AI was used to flood local social media with non-consensual deepfakes.
- **UK Criminal Probe:** Ofcom launched a formal investigation into X under the Online Safety Act, specifically targeting the "nudify" prompts that generated child sexual abuse material (CSAM).
- **Paywall as "Fix":** X responded to the outcry not by fixing the model, but by restricting generation to Premium+ subscribers, effectively

profiting from the demand for uncensored image generation.

- **"Spicy Mode" Scandal:** Reports confirmed Grok's internal "Spicy Mode" was deliberately engineered to bypass standard safety filters, allowing users to strip clothes from images of real people.
- **Personal Violation:** The crisis hit home when Ashley St. Clair revealed she was targeted by Grok deepfakes, calling the platform's lack of safeguards "horrifying" despite her proximity to Musk.
- **Scale of Abuse:** Research by AI Forensics found Grok generated thousands of sexual deepfakes per hour, driven by its ease of use and lack of "refusal" mechanisms.
- **Government Condemnation:** UK Tech Secretary Liz Kendall condemned the images as "vile and illegal", warning that X's failure to act voluntarily will force "immediate and severe" regulatory intervention.
- **Advertiser Exodus:** The safety collapse triggered a fresh wave of advertiser pauses, with brands fearing their ads would appear alongside AI-generated CSAM or non-consensual content.

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## AI POLICY AND GOVERNANCE

### Ideological Governance & The "Right-Wing" Pivot

**Intro:** Evidence is mounting that X is no longer a neutral platform but an active political instrument. A major investigation revealed the algorithm systematically amplifies right-wing rhetoric to centrist users, while Musk himself has increasingly aligned with "manosphere" and far-right figures. His public dismissal of the deepfake crisis—mocking victims while fighting a custody battle rooted in anti-trans sentiment—signals a governance style driven purely by personal ideology rather than user safety or business logic.

- **Algorithmic Bias:** Investigations suggest X's algorithm disproportionately feeds right-wing content to neutral users, with a majority of political posts shown to non-partisans being right-leaning.

- **Mocking the Crisis:** As the deepfake scandal trended, Musk [reposted an AI image](#) mocking the UK government's threats, framing the ban on CSAM generation as "suppressing free speech."
- **Custody Ideology:** Musk filed for [full custody of his son](#), explicitly citing the mother's "apology to the trans community" as a danger, framing his personal legal battles as a culture war crusade.
- **Political Exodus:** Citing "Grok porn" and "hate speech," multiple politicians are [quitting the platform](#), urging their governments to abandon X as a "threat to democracy."
- **Rally Endorsement:** Musk actively boosted the "Unite the Kingdom" rally, [joining via video link](#) to endorse fringe right-wing figures and encourage nationalist demonstrations in the UK.
- **"Manosphere" Signal:** Analysts argue Musk's refusal to patch the "nudify" bug immediately was a [deliberate signal](#) to his "free speech absolutist" base, prioritizing "incel" engagement over female safety.
- **Election Interference:** Reports conclude Musk is [using X to influence elections](#) by artificially boosting candidates he favors, bypassing traditional campaign finance laws.
- **Victim Blaming:** In deleted posts, Musk suggested that complaints about deepfakes were [coordinated attacks](#) by "woke mind virus" actors, dismissing the real-world harm to victims.

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## AI FOR SOCIETY

### Geopolitical Interference & Starlink

Starlink has transcended its role as an internet provider to become a primary geopolitical target. Intelligence agencies are now warning that Russia is developing a "zone-effect" weapon specifically to wipe out the Starlink constellation, acknowledging its critical role in the Ukraine war. Meanwhile, Musk is playing a double game: expanding the network's military capabilities with "Direct-to-Cell" technology while simultaneously defying local bans in Iran, effectively running a private foreign policy.

- **Russian Super-Weapon:** US intelligence suspects Russia is developing a "zone-effect" nuclear weapon designed to destroy Starlink satellites with shrapnel clouds.
- **Iran Smuggling Ops:** Starlink terminals are being smuggled into Iran to bypass government blackouts, leading to a "cat-and-mouse" game of signal jamming by the regime.
- **Massive Expansion:** The FCC granted SpaceX approval to deploy 7,500 additional Gen2 satellites, cementing a near-monopoly on low-earth orbit infrastructure despite debris concerns.
- **Direct-to-Cell Live:** SpaceX confirmed its "Direct to Cell" text service is now active in 22 countries, allowing it to bypass local telecom infrastructure entirely in crisis zones.
- **Sovereignty Threats:** Both China and Russia issued joint warnings viewing Starlink not as a company but as a "US military asset" that threatens their national sovereignty.
- **Military Integration:** Reports confirmed Ukrainian intelligence has integrated Starlink directly into long-range drone guidance systems, making the commercial network a formal part of the "kill chain."
- **Space Dominance:** Competitors like Viasat warned the FCC that SpaceX's new waivers for beam coverage create a monopoly that forces other nations to rely on Musk for connectivity.
- **Anti-Sat Escalation:** Russia's deployment of the S-500 system was cited as a direct response to Starlink's "militarization" of space.

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