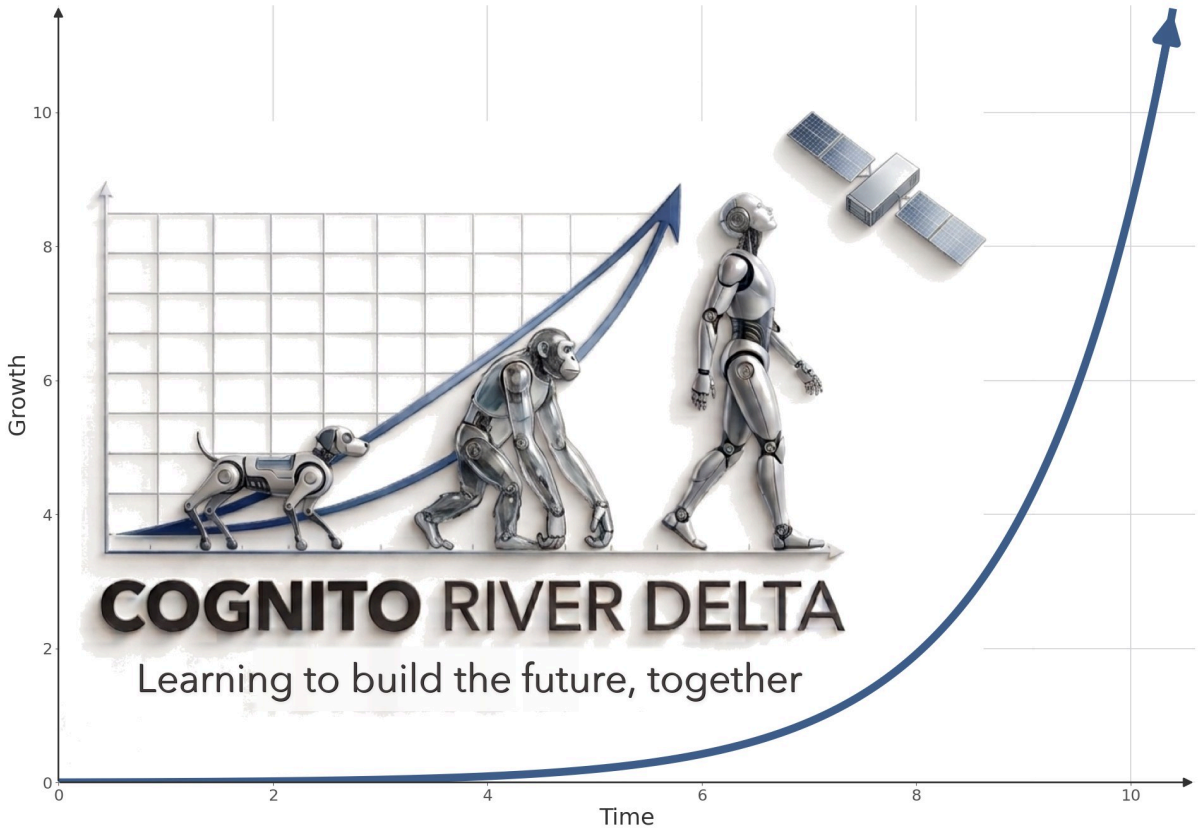


DAILY DEEP ANALYSIS

AI Infrastructure Scaling

October 22, 2026

The exponential curve for AI compute infrastructure has accelerated through the aggressive scaling of "Colossus" data centers and the pursuit of total vertical integration in energy and chip fabrication. This shift moves AI from digital interfaces toward planetary-scale physical deployment, impacting individuals via humanoid robots and the global population via satellite connectivity. A standout claim is the target of 10 to 20 GW of compute capacity online by 2027 (Next Big Future).

DAILY DEEP ANALYSIS

AI Infrastructure Scaling

October 22, 2026 · 58 min read

Datacenters & cloud | Humanoid & general robotics

Daily AI industry deep analysis, synthesized from tracked video sources, news and independently researched claims - organized by exponential capability curve, not company name.

Abstract

The exponential curve for AI compute infrastructure has accelerated through the aggressive scaling of "Colossus" data centers and the pursuit of total vertical integration in energy and chip fabrication. This shift moves AI from digital interfaces toward planetary-scale physical deployment, impacting individuals via humanoid robots and the global population via satellite connectivity. A standout claim is the target of 10 to 20 GW of compute capacity online by 2027 (Next Big Future).

ALERTS: most important developments today

Topic	Score	Sources	Items	Most recent item
Tesla (company, TSLA, energy)	122.9	76	136	Is This the Bottom or Is There Way More Downside? (Randy Kirk)
SpaceX and Starship	114.1	56	81	Is This the Bottom or Is There Way More Downside? (Randy Kirk)
Terafab	68.4	27	29	SpaceX Is Building Something Almost Impossible (FutureAzA)
FSD, Robotaxi and Cybercab	66.3	35	59	Elon Goes Back On His Word For Tesla / It's Not Happening An (Ryan Shaw)
Elon Musk (general)	66.2	44	58	Is This the Bottom or Is There Way More Downside? (Randy Kirk)
Humanoid robots (Optimus and others)	63.5	28	35	Elon Goes Back On His Word For Tesla / It's Not Happening An (Ryan Shaw)
NVIDIA and Jensen Huang	63.5	55	91	Elon and SpaceX $1 Trillion Pace. What Has to Go Right (Next Big Future)
AI/tech investing signals	63.1	22	33	SpaceX Is Building Something Almost Impossible (FutureAzA)

Score = topic weight x (log of recency-weighted coverage + log of independent sources + a bonus per followed person/channel who covered it).

Executive summary

- **AI Infrastructure Scaling:** SpaceX is aggressively expanding its "Colossus" data centers and pursuing vertical integration by establishing a dedicated foundry for single-crystal turbine blades to bypass industry backlogs and meet immense electricity needs (Farzad Mesbahi), with targets of 10-20 GW of compute by 2027 (Next Big Future).
- **Physical AI Deployment:** Tesla has entered early production of the Optimus humanoid robot (ABC7 Los Angeles, Not a Tesla App, Brighter with Herbert, Ryan Shaw), though

external deliveries are not expected until late 2027 (Electrek).

- **Autonomous Transport Pivot:** Tesla is shifting toward a Robotaxi model, reporting an 8x quarterly growth in cumulative unsupervised miles (Next Big Future, Brighter with Herbert) and planning a launch in Dallas "next month" (Brighter with Herbert—single source).
- **Vertical Chip Integration:** The Terafab project aims to produce AI and memory chips, with test chips expected by mid-2027 and volume production by Q3 2028 (Next Big Future, Gizmodo, Root-Nation, YourStory).
- **Corporate Restructuring:** Special committees at SpaceX and Tesla are discussing a potential merger, with Terafab cited as a factor deepening the ties between the two companies (The Verge AI, FutureAzA, TradingView).
- **NVIDIA Ecosystem Expansion:** NVIDIA is moving toward a full-stack infrastructure provider by launching the Minerva AIOps platform and the Cosmos platform for physical AI world models (NVIDIA Blog), while collaborating with CrowdStrike on specialized security models (Sarah Guo).
- **Global Connectivity Growth:** Starlink has reportedly reached 13.6 million users (FutureAzA—single source) and has been granted additional spectrum for Starlink Mobile by the FCC (PCMag).

Bottom line

The strategy across these entities is the total vertical integration of the AI stack, spanning energy production, chip fabrication, and physical robotics. The primary constraint remains the "power bottleneck," necessitating unprecedented infrastructure build-outs to reach 2027 targets.

Topic deep dives

Tesla (company, TSLA, energy)

What is new

- **Financial Performance:** Tesla's Q3 results beat expectations (CNBC Tech). Free cash flow rose to $1.5B, compared to -$1.1B in Q2 (Next Big Future). Total GAAP gross margin

reached 19.6%, with automotive at 18.5% and energy generation and storage at approximately 33% (Next Big Future). However, Tesla quietly reduced its 2026 capital expenditure guidance to "in excess of $20 billion," down from previous guidance of "more than $25 billion" (Electrek).

- **Autonomy and Robotaxis:** The Austin Cybercab fleet grew 10x in one month, and cumulative unsupervised miles grew 8x to a total of 3.3 million miles (Brighter with Herbert, Next Big Future). A Robotaxi launch in Dallas is expected "next month" (Brighter with Herbert). Tesla is now developing its own maps for FSD to address issues with routing, parking, and speed limits, marking a shift from previous dismissals of mapping (Electrek).
- **Robotics:** Optimus has entered early production (Brighter with Herbert, ABC7 Los Angeles), with scaling targets moving from 5,000 to 20,000 units per week (Next Big Future). However, outside customer deliveries are now pushed to late 2027 due to ongoing issues with the robot's AI, durability, and hands (Electrek).
- **Energy:** Tesla's energy storage deployment reached 13.7 GWh (Next Big Future). Demand for Megapacks is extremely high, with inventory nearly sold out through 2027 (Brighter with Herbert).
- **Corporate and SpaceX:** Tesla and SpaceX have formed special committees to discuss a potential merger (The Verge AI). SpaceX reportedly saw "massive" profit in Q3 (FutureAzA).
- **Competitive and External Factors:** Ferrari's CEO reportedly rated the Tesla Roadster as a "10/10" (BestInTESLA). In Germany, the Kia EV6 GT outperformed the Tesla Model Y Performance and BYD Sealion 7 in a comparison test (Electrek). Additionally, telecom giants are reportedly collaborating to compete against Starlink (BestInTESLA).

Where sources agree

- **FSD Adoption:** Both Brighter with Herbert and Next Big Future report that the FSD take rate for new North American deliveries has surpassed 75%.
- **Robotaxi Metrics:** Sources agree that cumulative unsupervised miles grew 8x quarter-over-quarter to 3.3 million miles (Brighter with Herbert, Next Big Future).
- **Merger Speculation:** Multiple sources discuss the possibility and process of a merger between Tesla and SpaceX (The Verge AI, FutureAzA, Next Big Future).
- **Optimus Production:** Sources confirm that production of the Optimus humanoid robot has begun (Brighter with Herbert, ABC7 Los Angeles).

Where sources disagree or differ

- **Optimus Timeline:** While Brighter with Herbert discusses a roadmap for scaling and early production, Electrek reports that Elon Musk specifically pushed outside customer deliveries to late 2027.
- **FSD Hardware 3:** Electrek highlights that Tesla avoided answering a top shareholder question regarding whether Hardware 3 owners will receive free computer upgrades for unsupervised FSD.

Numbers and claims to verify

- **$4,400 Valuation** - BestInTESLA (claims this is an Ark Invest figure; needs verification).
- **$1 Trillion Revenue Projection** - FutureAzA (claims SpaceX revenue could reach this level; needs verification).
- **1 Million Units/Year run rate for Optimus** - Next Big Future (claims this is the scaling target; needs verification).
- **$366 Million Campaign Spend** - CNBC Tech (claims Musk poured this amount into campaigns; needs verification).
- **$20B vs $25B Capex Guidance** - Electrek (claims a reduction in the 10-Q filing; needs verification).

Investment implications (informational, not advice)

- **Corporate Restructuring:** The formation of committees to discuss a Tesla-SpaceX merger suggests a potential fundamental shift in the corporate structure and risk profile of both companies (The Verge AI, FutureAzA, Next Big Future).
- **Revenue Model Shift:** High FSD attach rates (>75%) and the projected integration of customer cars into the Robotaxi fleet by Q2 2027 indicate a transition toward autonomous service revenue (Brighter with Herbert, Next Big Future).
- **Energy Sector Growth:** With energy gross margins (~33%) significantly higher than automotive margins (18.5%) and a backlog of Megapack orders through 2027, the energy division is becoming a primary growth driver (Next Big Future, Brighter with Herbert).
- **Capex Adjustment:** The reduction in 2026 capital expenditure guidance may indicate a change in the pace of infrastructure build-out or a shift in spending priorities (Electrek).

SpaceX and Starship

What is new

- **Corporate Restructuring:** SpaceX and Tesla have formed special committees to discuss a potential merger (The Verge AI).
- **AI Infrastructure Expansion:** SpaceX is operating massive AI data centers known as "Colossus" (Farzad Mesbahi). The company is expanding into the production of single-crystal turbine blades via a dedicated foundry to bypass industry backlogs and meet the immense electricity requirements of these data centers (Farzad Mesbahi).
- **Financial Performance:** SpaceX reported a "massive" profit in Q3 (FutureAzA) and recorded a $561 million investment gain from its stake in The Boring Co. during the same period (CNBC Tech).
- **Starlink Growth and Regulatory Wins:** Starlink has reached 13.6 million users (FutureAzA). The FCC has permitted SpaceX to acquire more spectrum for Starlink Mobile without an auction (PCMag), and the company is in talks to access 80,000 cell sites for its new network (Bloomberg).
- **Starship and Launch Operations:** SpaceX is expanding launch pads in Louisiana (FutureAzA) and plans to use a tower to catch a Starship booster after its first Florida launch (Florida Today).
- **Computing Targets:** Elon Musk is targeting 10 GW of compute online in 2027, with 20 GW being "difficult but not impossible" (Next Big Future). Farzad Mesbahi notes SpaceX had 1.7 GW of computing capacity at the end of September 2026.

Where sources agree

- **AI Shift:** Sources agree that SpaceX is aggressively scaling its AI compute infrastructure (Next Big Future, Farzad Mesbahi).
- **Merger Discussions:** Multiple sources confirm that a merger between SpaceX and Tesla is being discussed or analyzed (The Verge AI, FutureAzA, TradingView, IBD).
- **Revenue Ambitions:** There is a shared mention of extremely high revenue projections for SpaceX, with figures cited up to $1 trillion (FutureAzA, Next Big Future).

Where sources disagree or differ

- **Merger Value:** While some discuss the merger as a compelling move (The Verge AI), analysts cited by TradingView struggle to identify "meaningful upside" from the deal.

- **Telecom Market Impact:** Elon Musk claims Starlink is "rewriting telecom" (Yahoo Finance), whereas AT&T CEO John Stankey downplays the threat, suggesting others should not "over rotate" on SpaceX's spectrum (Data Center Dynamics).

Numbers and claims to verify

- **13.6 million users** - FutureAzA - Starlink user count.
- **$500 billion to $1 trillion** - Next Big Future (quoting Elon Musk) - Projected annual recurring revenue run-rate by the end of 2027.
- **10 GW to 20 GW** - Next Big Future (quoting Elon Musk) - Target compute capacity online in 2027.
- **$40 billion** - The Verge AI - Amount SpaceX may borrow to spend on Nvidia chips.
- **$561 million** - CNBC Tech - Q3 investment gain from Boring Co. stake.
- **22 launches** - Ars Technica - Estimated Starship launches required to support a Moon landing.
- **6-month payback** - Next Big Future (quoting Elon Musk) - Suggested potential payback for compute next year.

Investment implications (informational, not advice)

- **Infrastructure Integration:** The move to manufacture turbine blades in-house is presented as a critical catalyst for the speed at which SpaceX can grow its computing capacity (Farzad Mesbahi).
- **Market Dominance:** Starlink's position is strengthened by a lack of viable alternatives, as competitors like Amazon and Eutelsat are described as being "far behind" (CNBC Tech).
- **Risk Profile:** A potential merger would combine the credit risks of both companies, including SpaceX's significant borrowing for AI hardware (The Verge AI).
- **Compute Economics:** Current new compute deployments are reportedly generating a payback of less than one year (Next Big Future, quoting CFO Bret Johnsen).

Terafab

What is new

Terafab is an AI and memory chip project associated with Elon Musk, SpaceX, and Tesla (Next Big Future, FutureAzA). Key new developments include:

- **Timeline:** Test chips are expected by mid-2027, with volume production targeted for Q3 2028 (Next Big Future, Gizmodo, Root-Nation, YourStory).
- **Partnerships and Competition:** Intel is reportedly joining the project (Yahoo Finance). TSMC has expressed interest in participating, provided it is allowed to run the fabrication facility (24/7 Wall St, AOL).
- **Infrastructure and Personnel:** The project involves the construction of a "Fab Lab" (FutureAzA) and is currently seeing a hiring surge (BASENOR).
- **Corporate Structure:** The boards of Tesla and SpaceX have confirmed the formation of special committees to investigate a potential combination of the companies, with Terafab plans cited as a factor deepening ties between the two (TradingView).

Where sources agree

Sources agree that Terafab is a high-ambition effort to produce AI chips (Next Big Future, Creative Loafing Charlotte) and that the initial target for producing test chips is mid-2027 (Next Big Future, Gizmodo, Root-Nation).

Where sources disagree or differ

Sources differ significantly on the financial scale and conceptual nature of the project:

- **Financials:** Creative Loafing Charlotte describes the project as a "$119 billion AI chip factory ambition," whereas Yahoo Finance characterizes it as a "$16.8 billion bet" aimed at producing 100,000 chips per month.
- **Conceptual Approach:** Dwarkesh Patel presents Terafab as a concept involving a total rethinking of the fabrication process from the ground up, while other sources treat it as a specific production roadmap for hardware (Next Big Future, FutureAzA).

Numbers and claims to verify

- **$119 billion ambition** - Creative Loafing Charlotte - The figure is substantially higher than other reported costs.
- **$16.8 billion bet to produce 100K chips a month** - Yahoo Finance - Needs verification of the specific capital expenditure and output targets.

- **Volume production in Q3 2028** - Next Big Future - This is a specific deadline that contrasts with general 2027/2028 targets.
- **TSMC's demand to run the fab** - 24/7 Wall St, AOL - Needs verification as it represents a major strategic pivot in the partnership.

Investment implications (informational, not advice)

The Terafab project suggests a move toward complete vertical integration of AI hardware (chips and memory) for Musk-led entities. This could potentially reduce reliance on external foundries and accelerate the deployment of AI5 and other hardware. Furthermore, the use of Terafab as a catalyst for a potential Tesla-SpaceX merger could significantly alter the corporate structure and valuation of both entities. The project also positions Musk as a direct competitor or partner to major semiconductor players like Intel, TSMC, and Samsung.

FSD, Robotaxi and Cybercab

What is new

- **Cybercab Commercialization:** Tesla aims to begin selling Cybercabs by the end of the year, despite an ongoing federal probe (Reuters).
- **Operational Expansions:** A Robotaxi launch in Dallas is scheduled for "next month" (Brighter with Herbert Oct 21/22), while Jacksonville's service is listed as "coming soon" (Action News Jax).
- **Strategic Pivot on Mapping:** Tesla is now building its own AI-based maps to address issues with routing, parking, and speed limits, a shift from its previous dismissal of maps (Electrek, Not a Tesla App). These maps are expected to roll out in the next few months with FSD v15 (Not a Tesla App, Tech-Insider).
- **Financial Performance:** In Q3 2026, Tesla reported a positive free cash flow of $1.5B, compared to negative $1.1B in Q2 (Next Big Future). Total GAAP gross margin reached 19.6%, with automotive margins at 18.5% and energy margins at approximately 33% (Next Big Future).
- **FSD Adoption:** The FSD attach rate for new North American deliveries has surpassed 75%, with 1.74 million active subscriptions (Next Big Future, Brighter with Herbert Oct 22).
- **Hardware and Robotics:** Optimus is moving into early production, with targets to scale from 5,000 to 20,000 units per week to reach a 1-million-unit annual run rate (Next Big

Future, Brighter with Herbert Oct 21).

Where sources agree

- **Unsupervised Mile Growth:** Sources agree that cumulative unsupervised miles grew 8x quarter-over-quarter, reaching a total of 3.3 million miles (Brighter with Herbert Oct 22, Next Big Future).
- **Dallas Launch:** Multiple reports indicate a Robotaxi launch in Dallas is expected next month (Brighter with Herbert Oct 21/22).
- **High FSD Take Rate:** Sources agree that the FSD take rate in North America is approximately 75% or higher (Brighter with Herbert Oct 22, Next Big Future).

Where sources disagree or differ

- **Timeline for Customer Fleet Integration:** Brighter with Herbert (Oct 22) indicates unsupervised FSD will be in customer cars by Q2 (year unspecified), while Next Big Future specifies that customer cars will join the Robotaxi fleet in Q2 2027.
- **EU Approval Timing:** Brighter with Herbert (Oct 22) projects FSD approval in the European Union by Q1 2027; Ryan Shaw mentions EU approval but does not provide a specific date.

Numbers and claims to verify

- **Austin Fleet Growth** — Brighter with Herbert (Oct 22) claims the Austin Cybercab fleet grew 10x in a single month.
- **TeraFab Timeline** — Next Big Future claims test chips arrive mid-2027 and volume production begins Q3 2028.
- **AI5 Arrival** — Next Big Future claims AI5 chips arrive in April 2027.
- **Manufacturing Target** — Next Big Future claims a goal of 5 million cars per year by 2030.
- **HW3 Upgrades** — Electrek reports that Tesla skipped a top shareholder question regarding whether Hardware 3 owners will receive free computer upgrades for unsupervised FSD.
- **Safety Incidents** — The Verge reports a Tesla driver using FSD struck and killed a man on I-80; The Cool Down reports a reporter's robotaxi became stuck in "fart mode" and could not be shut off.

Investment implications (informational, not advice)

- **Revenue Diversification:** The scaling of Optimus (targeting 1 million units/year) and the "Megapack boom" (sold out through 2027) suggests a transition toward a broader AI and energy company rather than just an automaker (Brighter with Herbert Oct 21, Next Big Future).
- **Regulatory and Legal Risk:** The push to sell Cybercabs by year-end is occurring alongside a federal probe (Reuters), and recent fatalities involving FSD users may impact regulatory approval timelines (The Verge).
- **Infrastructure Moat:** The move to develop proprietary AI maps and the TeraFab project for in-house chips indicate a strategy to reduce dependency on third-party providers (Electrek, Next Big Future).
- **Corporate Structure:** The reported formation of committees to investigate a potential merger between Tesla and SpaceX could significantly alter the company's valuation and governance (Ryan Shaw Oct 22).

Elon Musk (general)

What is new

- **Tesla Robotics and Autonomy:** Elon Musk stated that deliveries of the Optimus humanoid robot to outside customers will begin around the end of 2027, noting that AI, durability, and the robot's hands still require work (Electrek, Yahoo! Finance Canada). Musk has compared training Optimus to raising a toddler (Yahoo Finance, Business Insider). Regarding autonomy, Tesla is targeting a "majority of all passenger miles on earth" (Yahoo Finance, 24/7 Wall St.) and plans to launch Robotaxis in Dallas next month (Brighter with Herbert).
- **SpaceX AI Infrastructure:** SpaceX is expanding its "Colossus" AI data centers and intends to build its own blade foundry to manufacture single-crystal turbine blades for the on-site gas turbines that provide electricity (Farzad Mesbahi).
- **SpaceX Financials and Targets:** SpaceX recorded a $561 million investment gain from its stake in The Boring Co. during Q3 (CNBC Tech). Elon Musk projected an annual recurring revenue run-rate between $500 billion and $1 trillion by the end of 2027 (Next Big Future).
- **Other Developments:** Ferrari's CEO reportedly gave the Tesla Roadster a "10/10" rating, and telecom giants are reportedly collaborating to compete against Starlink

(BestInTESLA). Elon Musk has spent $366 million on political campaigns, with a focus on the Senate (CNBC Tech).

Where sources agree

- **AI and Compute Scaling:** Both Farzad Mesbahi and Next Big Future emphasize the massive scale of SpaceX's AI compute build-out and the critical need for power infrastructure to support it.
- **Tesla's Strategic Pivot:** Sources agree that Tesla's value is increasingly tied to FSD services, the Cybercab expansion, and the development of Optimus (Benzinga, New York Post, Brighter with Herbert).

Where sources disagree or differ

- **Optimus Production Timeline:** Brighter with Herbert reports that Optimus has moved into "early production," while news reports cite Elon Musk stating that deliveries to outside customers will not begin until late 2027 at the earliest (Electrek, Yahoo! Finance Canada).
- **Market Impact:** Randy Kirk describes a "big hit" to the markets where SpaceX was "slaughtered" while Tesla "rebounds," though he also notes Tesla stock experienced a $20 drop following an earnings call that he believes did not warrant such a decline (Randy Kirk).

Numbers and claims to verify

- **$4,400 Tesla valuation** - BestInTESLA (attributed to Ark Invest) - Requires verification of the specific model and context.
- **$500 billion to $1 trillion annual recurring revenue by end of 2027** - Next Big Future (attributed to Elon Musk) - Extremely high projection for SpaceX.
- **13 GW vs. 10-20 GW compute capacity by 2027** - Farzad Mesbahi (13 GW) and Next Big Future (10-20 GW) - Discrepancy in specific target figures.
- **Megapacks sold out through 2027** - Brighter with Herbert - Needs verification via official Tesla inventory/sales data.
- **Robotaxi launch in Dallas "next month"** - Brighter with Herbert - Needs verification of the specific launch date.

Investment implications (informational, not advice)

- **Vertical Integration:** SpaceX's move to build its own turbine blade foundry indicates a strategy to bypass industry backlogs to accelerate AI compute growth (Farzad Mesbahi).
- **Revenue Efficiency:** New compute deployments are reportedly generating a payback of less than one year, with a potential six-month payback suggested for next year (Next Big Future).
- **Regulatory Risk/Opportunity:** The $366 million investment in political campaigns is specifically aimed at shaping federal spending, regulations, and investigations affecting Tesla and SpaceX (CNBC Tech).
- **Asset Valuation:** Tesla's shift toward FSD as the primary value driver suggests the company is being positioned more as an AI/service provider than a traditional hardware manufacturer (Benzinga).

Humanoid robots (Optimus and others)

What is new

- **Production Status:** Tesla has officially begun production of the Optimus humanoid robot (ABC7 Los Angeles, Not a Tesla App), moving into early production stages (Brighter with Herbert Oct 21, Ryan Shaw).
- **Delivery Timeline:** Elon Musk has pushed the delivery of Optimus robots to outside customers to late 2027 (Electrek).
- **Training Approach:** Musk has stated that training the Optimus robot is akin to raising a toddler (Yahoo Finance, Business Insider).
- **Technical Hurdles:** Musk noted that the robot's hands, AI, and durability still require work before external deliveries can begin (Electrek).
- **External Robotics News:** The Eka Robot Arm has raised $150 million (Ryan Shaw). NVIDIA has expanded its Cosmos platform with new tools for world models to help physical AI systems understand and simulate the real world (NVIDIA Blog).

Where sources agree

- **Production Phase:** Multiple sources agree that Tesla has entered the production phase for Optimus (ABC7 Los Angeles, Not a Tesla App, Brighter with Herbert Oct 21, Ryan Shaw).

- **Technical Challenges:** Sources agree that the development of Optimus hands remains a significant technical challenge (Electrek, Brighter with Herbert Oct 21).

Where sources disagree or differ

- **Readiness vs. Production:** While news items report that production has begun (ABC7 Los Angeles, Not a Tesla App), The Verge notes that being in production does not necessarily mean the robot is "actually ready."
- **Production Scale:** One source provides specific scaling targets, stating that Optimus production is expected to scale from 5,000 to 20,000 units per week to reach a run rate of 1 million units per year (Next Big Future). Other sources focus on the timeline for external deliveries rather than internal volume targets (Electrek).

Numbers and claims to verify

- **Production Targets:** Scaling from 5,000 to 20,000 units per week / 1 million units per year - Next Big Future - Requires verification of internal Tesla targets.
- **External Delivery Date:** Late 2027 - Electrek - Needs checking against official Tesla company guidance.
- **Funding:** Eka Robot Arm raised $150 million - Ryan Shaw - Requires confirmation of the funding round.
- **Economic Claim:** Robots will be the solution to America's national debt - The Builders - This is a philosophical/economic claim by Musk.
- **Vendor Claim:** Texas Instruments will get paid on every Optimus robot produced - Yahoo Finance - Needs verification of the supplier agreement.

Investment implications (informational, not advice)

- **Timeline Extension:** The shift of external deliveries to late 2027 (Electrek) suggests a longer horizon before humanoid robots contribute to Tesla's revenue.
- **Supply Chain:** The claim that Texas Instruments is positioned to profit from every Optimus unit (Yahoo Finance) suggests specific hardware dependencies.
- **AI Infrastructure:** The release of NVIDIA Cosmos tools for world models (NVIDIA Blog) indicates an evolving software infrastructure designed to support the deployment of physical AI/robotics.
- **Alternative Solutions:** The use of KUKA welding robots by Fortescue instead of humanoids for heavy-duty charging tasks (Electrek) highlights current limitations in

humanoid robot utility for certain industrial applications.

NVIDIA and Jensen Huang

What is new

- **Product and Platform Launches:** NVIDIA launched Minerva, an AIOps platform designed for end-to-end observability in AI factories (NVIDIA Blog). The company also expanded its Cosmos platform, adding simulation checkpoints, training tools, and Cosmos Data Factory blueprints to assist developers in building world models for physical AI (NVIDIA Blog).
- **Financial and Political Activity:** NVIDIA recorded its highest-spending lobbying quarter between July and September, spending $2.2 million (The Verge AI).
- **Strategic Partnerships and Collaborations:**
  - **Cybersecurity:** NVIDIA and CrowdStrike are collaborating to create a frontier-style lab dedicated to training specialized security models to counter AI-driven threats (Sarah Guo: CrowdStrike CEO George Kurtz).
  - **Autonomous Driving:** NVIDIA is partnering with Pony.ai and inDrive for planned robotaxi tests in Kazakhstan's capital in the first half of 2027 (TechCrunch AI).
  - **Infrastructure:** HPE has expanded its Private Cloud AI solution to support mixed NVIDIA hardware clusters (Data Center Dynamics).
- **Sector Adoption in Europe:** NVIDIA reports widespread adoption of its open models and accelerated computing across European financial services (including Revolut), the public sector, retail, and weather/climate prediction via Earth-2 (NVIDIA Blog).
- **Infrastructure Solutions:** NVIDIA is promoting its DSX AI Factory Platform to help companies manage the "power bottleneck" by simulating the grid and AI factory as a single system (NVIDIA Blog).

Where sources agree

- **Infrastructure Scale:** Multiple sources emphasize the massive scaling of AI infrastructure. The NVIDIA Blog discusses the deployment of "AI factories" and the need to solve power bottlenecks, while the "Next Big Future" analysis details the massive power and compute build-outs being pursued by Elon Musk for SpaceX.
- **Hardware Integration:** There is a focus on the complexity and integration of NVIDIA's hardware, from the use of mixed hardware clusters in HPE's cloud solutions (Data

Center Dynamics) to the specific integration of multiple custom chips into single systems (Sarah Guo: Walter Goodwin).

Where sources disagree or differ

- **Primary Constraints:** The NVIDIA Blog identifies power as the "biggest bottleneck in infrastructure." In contrast, the "Next Big Future" analysis suggests that while power is a major variable, the critical factors for 2027 are the arrival of "Rubin chips" and whether the resulting compute capacity will actually be utilized.
- **SpaceX Financials:** The "Next Big Future" analysis focuses on the revenue potential and payback periods of compute deployments mentioned in a SpaceX Q3 earnings call, whereas The Verge AI highlights the credit risk associated with SpaceX potentially borrowing $40 billion to purchase NVIDIA chips.

Numbers and claims to verify

- **$40 billion borrowing** - The Verge AI - Needs verification to determine if SpaceX is actually seeking this amount specifically for NVIDIA chips.
- **$2.2 million lobbying expenditure** - The Verge AI - Needs verification via federal disclosure records.
- **Six to nine custom chips per system** - Walter Goodwin (via Sarah Guo) - Needs technical verification regarding NVIDIA's system integration specifications.
- **20 GW of power/cooling infrastructure** - Elon Musk (via Next Big Future) - Needs checking against actual SpaceX infrastructure deployment plans.
- **$500 billion to $1 trillion annual recurring revenue by end of 2027** - Elon Musk (via Next Big Future) - Needs verification as this is a projection for SpaceX's AI compute run-rate.

Investment implications (informational, not advice)

- **Revenue Drivers:** The projected spending by SpaceX (potentially $40 billion) and the push toward 10-20 GW of compute indicate a massive potential demand pipeline for NVIDIA's future hardware, specifically the Rubin chips (The Verge AI, Next Big Future).
- **Market Diversification:** NVIDIA is aggressively diversifying its revenue streams beyond general AI, moving into specialized "world models" via Cosmos, AIOps via Minerva, and deep integration into European government and financial sectors (NVIDIA Blog).
- **Ecosystem Lock-in:** The development of frontier security labs with CrowdStrike and the expansion of the DSX platform to solve power issues suggest NVIDIA is attempting to

move from a chip provider to a full-stack infrastructure and security partner (Sarah Guo: George Kurtz, NVIDIA Blog).

AI/tech investing signals

What is new

- **Tesla Q3 2026 Financials:** Tesla reported a GAAP gross margin of 19.6% (up 280 bp from Q2), automotive gross margins of 18.5%, and energy generation and storage gross margins of approximately 33% (Next Big Future). Free cash flow moved from -$1.1B in Q2 to $1.5B in Q3 (Next Big Future).
- **SpaceX AI Infrastructure:** SpaceX is aiming for an incremental 20 GW of power and cooling infrastructure next year, with Elon Musk expressing high confidence in having 10 GW of compute online by 2027 (Next Big Future).
- **Tesla Robotaxi & FSD:** Tesla reports an 8x quarter-over-quarter growth in cumulative unsupervised miles, totaling 3.3 million miles (Next Big Future, Brighter with Herbert). The Robotaxi is scheduled to launch in Dallas "next month" (Brighter with Herbert, Brighter with Herbert Oct 21). Tesla is also building its own maps to resolve issues with speed limits, parking, and routing (Electrek).
- **Tesla Robotics:** Elon Musk stated that deliveries of Optimus humanoid robots to outside customers will begin around the end of 2027, citing remaining work on AI, durability, and the robot's hands (Electrek).
- **SpaceX Commercials:** Starlink has reached 13.6 million users (FutureAzA).
- **OpenAI Funding:** OpenAI is reportedly seeking a new funding round of up to $30 billion at a $1.25 trillion valuation as a bridge to a 2027 IPO (TechCrunch AI, CNBC Tech).
- **Other Tech News:** Nvidia is reportedly in talks to invest hundreds of millions of dollars in neocloud Firmus (Data Center Dynamics). SK Hynix shares rebounded after Solidigm IPO plans in the U.S. were scrapped (CNBC Tech).

Where sources agree

- **FSD Adoption:** Multiple sources report that the Full Self-Driving (FSD) attach rate for new North American deliveries has surpassed 75% (Brighter with Herbert, Next Big Future, Tesla Oracle).
- **Robotaxi Scaling:** Sources agree that the Dallas launch is a primary upcoming catalyst (Brighter with Herbert, Brighter with Herbert Oct 21).

- **SpaceX Revenue Growth:** There is a general consensus across several analyses that SpaceX is seeing explosive revenue growth and massive profit in Q3 (FutureAzA, Next Big Future).
- **Energy Storage Demand:** Tesla's Megapack demand is extremely high, with some sources claiming inventory is nearly sold out through 2027 (Brighter with Herbert Oct 21).

Where sources disagree or differ

- **Optimus Timeline:** Brighter with Herbert (Oct 21) notes the transition of Optimus into "early production," whereas Electrek reports that Musk pushed deliveries to outside customers to late 2027.
- **SpaceX Revenue Projections:** FutureAzA mentions revenue projections reaching up to $1 trillion, while Next Big Future attributes a more specific estimate from Elon Musk for annual recurring revenue (run-rate) by the end of 2027 between $500 billion and $1 trillion.
- **SpaceX Market Position:** While BestInTESLA mentions telecom giants are teaming up to oppose Starlink, AT&T CEO John Stankey stated he "wouldn't over rotate" on the issue (BestInTESLA, Data Center Dynamics).

Numbers and claims to verify

- **$1.25 Trillion Valuation** - CNBC Tech/TechCrunch AI - This would make OpenAI the most highly valued private company ever.
- **$500 Billion to $1 Trillion ARR by 2027** - Elon Musk (via Next Big Future) - This is an exceptionally high projection for recurring revenue.
- **20 GW Power/Cooling Target** - Elon Musk (via Next Big Future) - The feasibility of adding this much infrastructure in one year needs checking.
- **6-Month Payback for Compute** - Elon Musk (via Next Big Future) - Musk noted this is "not impossible" but not guaranteed.
- **$4400 Tesla Valuation** - BestInTESLA - The source refers to a "new Tesla valuation model from Ark Invest" associated with this figure.
- **1 Million Optimus/Year Run Rate** - Next Big Future - This is based on scaling production from 5,000 to 20,000 units per week.

Investment implications (informational, not advice)

- **Infrastructure Bottlenecks:** The success of SpaceX's revenue targets is heavily dependent on the arrival of Rubin chips and the ability to scale power/cooling infrastructure to 10-20 GW (Next Big Future).
- **Shift in Tesla's AI Strategy:** Tesla's move to build its own maps marks a pivot from its previous dismissal of map-based navigation (Electrek).
- **Diversification of Tesla Revenue:** High gross margins in energy (~33%) and the "Megapack boom" suggest the energy business is becoming a more significant pillar relative to automotive revenue (Next Big Future, Brighter with Herbert Oct 21).
- **Corporate Synergy Speculation:** Multiple sources (FutureAzA, Next Big Future) are discussing a potential merger between Tesla and SpaceX, which would be a major structural catalyst if realized.
- **AI Hardware Cycle:** The mention of AI5 chips (April 2027) and TeraFab volume production (Q3 2028) suggests a long-term hardware roadmap that investors may use to time entries (Next Big Future).

Starlink

What is new

- **User Growth and Revenue:** Starlink has reportedly reached 13.6 million users (FutureAzA). While FutureAzA notes massive revenue growth, Ryan Shaw claims that SpaceX's AI business has generated more revenue than Starlink.
- **Regulatory and Technical Developments:** The FCC has permitted SpaceX to acquire additional spectrum for Starlink Mobile without an auction (PCMag). Additionally, there are ongoing efforts regarding Terafab chip production and the construction of a Fab Lab (FutureAzA, Ryan Shaw).
- **Geopolitical Conflict:** There is an ongoing row regarding Starlink access in Ukraine; reports indicate Donald Trump called Elon Musk to ask him to lift Starlink restrictions or slowdowns (WSJ, CNBC), and Trump has stated that Musk restored access (Reuters). This clash has accelerated the demand for Starlink alternatives, though few viable options currently exist, as companies like Amazon and Eutelsat are far behind (CNBC Tech, CNBC).
- **Market Competition:** Elon Musk claims Starlink is "rewriting telecom," while major providers T-Mobile, AT&T, and Verizon downplay the threat (Yahoo Finance). Separately, there are reports of telecom giants teaming up to act against Starlink (BestInTESLA).

- **Operational Updates:** A Falcon 9 launch for Starlink 15-15 was aborted at Vandenberg (BASENOR). Additionally, American Airlines CEO Robert Isom discussed the use of Starlink for in-flight wifi (CNBC).

Where sources agree

- **Ukraine Tension:** Multiple sources agree that there is a significant conflict regarding Starlink's role and restrictions in Ukraine involving Musk and political figures (WSJ, CNBC, Reuters, The Guardian, Al Jazeera).
- **Competitive Friction:** Sources agree that there is a conflict between Starlink and traditional telecom entities, whether through "teaming up" to oppose the service (BestInTESLA) or through the traditional carriers downplaying the threat (Yahoo Finance).

Where sources disagree or differ

- **Primary Revenue Source:** FutureAzA highlights Starlink's "massive" revenue growth, whereas Ryan Shaw claims SpaceX's AI business has now brought in more revenue than Starlink.
- **Threat Assessment:** Elon Musk views Starlink as a disruptive force rewriting the telecom industry, while T-Mobile, AT&T, and Verizon disagree, downplaying the threat (Yahoo Finance).

Numbers and claims to verify

- **13.6 million users** - FutureAzA - specific user count needs verification.
- **AI business revenue > Starlink revenue** - Ryan Shaw - contradicts the general narrative of Starlink as the primary SpaceX revenue driver.
- **Terafab chip production timelines** - FutureAzA, Ryan Shaw - the summaries mention dates/timelines exist but do not provide the specific figures.

Investment implications (informational, not advice)

- **Market Penetration:** The acquisition of more spectrum from the FCC and the adoption of the service by American Airlines indicate expanding infrastructure and enterprise utility.
- **Geopolitical Risk:** The dependence of national security infrastructure (Ukraine) on a single private provider has introduced volatility, leading to a desire for alternatives

(CNBC) and claims from investors that the service is not reliable for national security (The Hill).
- **Competitive Response:** The reported collaboration among telecom giants (BestInTESLA) suggests that traditional carriers may be moving from a stance of "downplaying" the threat to active strategic opposition.

Earth-based data centers

What is new

- **SpaceX Vertical Integration:** SpaceX is expanding into the production of single-crystal turbine blades via a dedicated foundry to bypass industry backlogs and secure the electricity needed for its Colossus AI data centers (Farzad Mesbahi).
- **Aggressive Scaling Targets:** According to the SpaceX Q3 2026 earnings call, Elon Musk is targeting an incremental 20 GW of power and cooling infrastructure next year, with a goal of 10 GW to 20 GW of compute online by 2027 (Next Big Future).
- **Financial Projections:** Elon Musk estimated a potential annual recurring revenue run-rate between $500 billion and $1 trillion by the end of 2027, while CFO Bret Johnsen noted that current new compute deployments have a payback period of less than a year (Next Big Future).
- **NVIDIA Infrastructure Tools:** NVIDIA has launched "Minerva," an AIOps platform for AI factory observability, and is promoting the "DSX AI Factory Platform" to help companies manage power bottlenecks from the substation to the rack (NVIDIA Blog).
- **Industry Power Shifts:** Google has signed a 1 GW virtual power plant deal with Voltus, the largest of its kind for a hyperscaler (Data Center Dynamics). Additionally, Infineon and NVIDIA are collaborating on gallium nitride power conversion technology for 800VDC data center racks (Data Center Dynamics).
- **Other Infrastructure Activity:** Microsoft has filed for a data center campus in Floyd County, Georgia, and Canada's Uniserve is launching a 1MW facility in Vancouver (Data Center Dynamics).

Where sources agree

- **Power as the Primary Bottleneck:** Multiple sources identify electricity and power infrastructure as the critical constraint for AI growth. This is explicitly stated in NVIDIA's blog regarding the "acute problem" of power, and is the central premise for SpaceX's

move into turbine blade manufacturing (Farzad Mesbahi) and Musk's focus on incremental GW targets (Next Big Future).
- **Rapid Infrastructure Expansion:** Sources agree that AI data center build-outs are accelerating, evidenced by SpaceX's Colossus project, Microsoft's Georgia filing, and Google's energy deals (Farzad Mesbahi, Next Big Future, Data Center Dynamics).

Where sources disagree or differ

- **Compute Capacity Targets:** There is a discrepancy in the specific gigawatt targets for 2027. Farzad Mesbahi reports a target of 13 GW by the end of 2027, while Next Big Future reports that Musk is "highly confident" in 10 GW, with 20 GW being "difficult but not impossible."
- **Construction Timelines:** While the general trend is speed, a specific model from the "Next Big Future" speaker suggests buildings can be erected in approximately 5 months, contrasting with a longer 22-month timeline.

Numbers and claims to verify

- **1.7 GW to 13 GW capacity:** SpaceX's compute capacity growth from Sept 2026 to end of 2027 (Farzad Mesbahi) - requires verification against official SpaceX figures.
- **$500B to $1T revenue run-rate:** Estimated annual recurring revenue by end of 2027 (Elon Musk via Next Big Future) - extremely high projection that requires scrutiny.
- **Six-month payback:** The claim that compute payback could be as low as six months next year (Elon Musk via Next Big Future) - needs checking against current AI CapEx trends.
- **5-month build time:** The claim that AI buildings can be completed in 5 months (Next Big Future speaker) - needs verification against industry averages.
- **$52.8B annual value:** The claim that one AI building is worth this amount per year (Next Big Future speaker) - needs a breakdown of the underlying calculation.

Investment implications (informational, not advice)

- **Vertical Integration as a Competitive Moat:** SpaceX's move into turbine blade foundries suggests that controlling the energy supply chain (beyond just purchasing power) may be the new frontier for AI infrastructure competitiveness.
- **Shift toward 800VDC:** The partnership between Infineon and NVIDIA indicates a technical shift toward higher voltage (800VDC) in data center racks to improve

efficiency.

- **Risk Mitigation Products:** The launch of moratorium risk insurance by Arbol suggests increasing volatility and regulatory risk in data center construction.
- **Infrastructure-as-a-Service (IaaS) Scaling:** The massive revenue projections for SpaceX compute and the arrival of "Rubin" chips suggest a potential shift in the market share of compute providers if these targets are met.

Research: open questions checked against outside sources

Are SpaceX and Tesla special committees discussing a potential merger?

Yes, special committees from both SpaceX and Tesla are discussing a potential merger.

- **Formation of Committees**: Confirmed. The boards of SpaceX and Tesla have each formed special committees consisting of independent directors to review and discuss a possible merger [1], [3], [8], [10].
- **Reason for Formation**: Confirmed. These committees were created at the request of shareholders [1].
- **Current Status**: Confirmed. While the committees are discussing the idea, they have not reached an agreement, and there is no guarantee a merger will happen [1].
- **Musk's Position**: Confirmed. Elon Musk believes combining the companies would be a "good idea" to gain advantages in robotics, chip design, and the development of superintelligence software [1], [8], [10].
- **Requirements for Completion**: Confirmed. Any merger would require support from both sets of shareholders [1]. Musk noted that while he has over 50% voting power at SpaceX, Tesla would require a 50% vote from all shareholders, not just those who vote [1].

Sources: Elon Musk says SpaceX and Tesla have formed special committe; SpaceX and Tesla boards form special committees to review me; Musk says Tesla and SpaceX merger is a good idea as committe; Tesla and SpaceX form special committees to weigh potential ; Tesla Inc (TL01.MU) Latest Stock News & Headlines - Yahoo Fi; SpaceX says potential Tesla merger would need Elon Musk's ap; TSLA, SPCX Boards Confirm Special Committees On Potential Co; Elon Musk’s SpaceX reports a profit and he hints at a possib

What is the projected cost of the Terafab project, and does it align with the $16.8 billion or $119 billion figure?

The projected cost of the Terafab project aligns with both figures, as they represent different scopes of the development [1].

- **Initial Phase Cost ($16.8 billion): Confirmed.** The initial phase of the project is projected to cost $16.8 billion [1], though some sources state the first phase is expected to cost more than this amount [1].
- **Total Project Cost ($119 billion): Confirmed.** The $119 billion figure represents the theoretical long-term investment ceiling or potential total cost if the project is completed across multiple phases (up to four) [1].

The evidence specifies that the $119 billion figure is a possible total investment rather than a committed amount [1]. Additionally, a May 2026 county filing described an earlier initial outlay of $55 billion [1].

Sources: Musk’s Terafab Advances as SpaceX and Tesla Commit $16.8 Bil; Elon Musk’s $119B Terafab: Can It Beat the Chipmaking Clock?; Musk Spends $119 Billion to Launch Terafab Construction Plan; SpaceX to invest $16.8B on first phase of Terafab project; Terafab; What Does Intel (INTC) Joining The Terafab AI Chip Project M; US Midterm Elections: Rising cost of living, a labor market ; Terafab Will Cost Over US$100 Billion Long Term, Musk Says -

Is TSMC's participation in Terafab conditional on them running the fabrication facility?

Confirmed: TSMC's participation in the Terafab project is conditional on the company running the fabrication facility [1].

CEO C.C. Wei has established a "non-negotiable" and "firm" condition that TSMC must manage and operate the facility directly, stating, "the fab has got to be run by TSMC" [1]. Wei has insisted on full operational control over any fab space [1].

This condition contradicts Elon Musk's position, as Musk has indicated that Terafab would be built and operated by SpaceX, with TSMC potentially acting in a sublease role [1]. While TSMC has sent evaluation teams to Grimes County, Texas, the sources indicate that discussions are ongoing and no definitive agreement regarding operational control has been reached [1].

Sources: TSMC confirms talks over Elon Musk’s Terafab but the company; Taiwan Semiconductor Wants In on SpaceX's Terafab - but Only; TSMC's Wei: Any Fab in Musk's

Terafab Must Be Run by TSMC | ; Musk Ends Terafab Uncertainty: Intel Runs Fab, TSMC Limited ; Tesla Poaching From TSMC? Terafab Project Recruitment in Tai; TSMC demands to run SpaceX's Terafab plant, ris... - Pluang ; 🇩🇪 Four tiny Microduck robots completely stole the show at N; TSLA, SPCX Boards Confirm Special Committees On Potential Co

What is the specific target date for Terafab volume production and the release of test chips?

Based on the provided evidence, the specific target dates are as follows:

- **Release of Test Chips: Confirmed.** The first Terafab test chip is planned for production in May or June 2027 [1]. Specifically, SpaceX plans to manufacture its first experimental test chip around Q2 2027 [1], and an initial in-house SRAM test chip is expected as early as May or June 2027 [1].
- **Volume Production: Confirmed.** Mass production is targeted for the third quarter (Q3) of 2028 [1]. Another source indicates target dates for volume chip production as Q3-Q4 2028 [1].

Elon Musk has emphasized that this timeline is "highly aspirational" and carries "big error bars" [1].

Sources: Elon Musk says ASML and other critical semiconductor equipme; Musk announced the timeline for the release of Terafab chips; Terafab: Tesla and SpaceX plan chip production from 2028; Tesla Terafab Project Launches in 7 Days: What We Know; Terafab; Terafab targets 2028 chip production as Musk flags tough tim; Musk announced the timeline for the release of Terafab chips; SpaceX and Tesla aim to manufacture their own chips by 2028

Will Tesla begin selling Cybercabs by the end of the year despite the ongoing federal probe?

Tesla aims to begin selling its Cybercab robotaxis to the public by the end of this year, 2026 [1, 2, 3, 5]. Tesla's engineering chief stated, "We’re trying to get Cybercabs to customers by the end of this year, 2026" [1].

Key claims:

- **Tesla aims to start selling Cybercabs by the end of 2026: Confirmed.** Evidence indicates the company's goal is to deliver these vehicles to customers by the end of the year [1, 2, 3, 5].

- **There is an ongoing federal probe: Confirmed.** The National Highway Traffic Safety Administration (NHTSA) is investigating Tesla's self-certification of the Cybercabs [1]. This is because the vehicles lack manual controls, which are typically required by federal regulations [1].
- **Tesla will successfully begin selling Cybercabs by the end of the year despite the probe: Unverified.** While the company aims to do so, the evidence is insufficient to confirm if they will actually begin sales, as it only specifies their intent and the existence of the federal investigation [1].

Sources: Tesla aims to sell Cybercab robotaxis by end of year despite; Tesla aims to sell Cybercab robotaxis by end of year despite; Tesla aims to sell Cybercab robotaxis by end of year despite; Tesla’s Cybercab launch triggers federal safety probe - Los ; Feds launch investigation into Tesla's Cybercab deployment |; Tesla aims to sell Cybercab robotaxis by end of year despite; Tesla says it will start selling Cybercabs by end of year - ; Tesla Is Building Its Own AI-Based Maps, Will Begin Rolling

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Claims to verify (collected)

- **SpaceX and Starship:** 13.6 million users** - FutureAzA - Starlink user count.
- **SpaceX and Starship:** $500 billion to $1 trillion** - Next Big Future (quoting Elon Musk) - Projected annual recurring revenue run-rate by the end of 2027.
- **SpaceX and Starship:** 10 GW to 20 GW** - Next Big Future (quoting Elon Musk) - Target compute capacity online in 2027.
- **SpaceX and Starship:** $40 billion** - The Verge AI - Amount SpaceX may borrow to spend on Nvidia chips.
- **SpaceX and Starship:** $561 million** - CNBC Tech - Q3 investment gain from Boring Co. stake.
- **SpaceX and Starship:** 22 launches** - Ars Technica - Estimated Starship launches required to support a Moon landing.
- **SpaceX and Starship:** 6-month payback** - Next Big Future (quoting Elon Musk) - Suggested potential payback for compute next year.
- **Terafab:** $119 billion ambition** - Creative Loafing Charlotte - The figure is substantially higher than other reported costs.
- **Terafab:** $16.8 billion bet to produce 100K chips a month** - Yahoo Finance - Needs verification of the specific capital expenditure and output targets.

- **Terafab:** Volume production in Q3 2028** - Next Big Future - This is a specific deadline that contrasts with general 2027/2028 targets.
- **Terafab:** TSMC's demand to run the fab** - 24/7 Wall St, AOL - Needs verification as it represents a major strategic pivot in the partnership.
- **FSD, Robotaxi and Cybercab:** Austin Fleet Growth** — Brighter with Herbert (Oct 22) claims the Austin Cybercab fleet grew 10x in a single month.
- **FSD, Robotaxi and Cybercab:** TeraFab Timeline** — Next Big Future claims test chips arrive mid-2027 and volume production begins Q3 2028.
- **FSD, Robotaxi and Cybercab:** AI5 Arrival** — Next Big Future claims AI5 chips arrive in April 2027.
- **FSD, Robotaxi and Cybercab:** Manufacturing Target** — Next Big Future claims a goal of 5 million cars per year by 2030.
- **FSD, Robotaxi and Cybercab:** HW3 Upgrades** — Electrek reports that Tesla skipped a top shareholder question regarding whether Hardware 3 owners will receive free computer upgrades for unsupervised FSD.
- **FSD, Robotaxi and Cybercab:** Safety Incidents** — The Verge reports a Tesla driver using FSD struck and killed a man on I-80; The Cool Down reports a reporter's robotaxi became stuck in "fart mode" and could not be shut off.
- **Elon Musk (general):** $4,400 Tesla valuation** - BestInTESLA (attributed to Ark Invest) - Requires verification of the specific model and context.
- **Elon Musk (general):** $500 billion to $1 trillion annual recurring revenue by end of 2027** - Next Big Future (attributed to Elon Musk) - Extremely high projection for SpaceX.
- **Elon Musk (general):** 13 GW vs. 10-20 GW compute capacity by 2027** - Farzad Mesbahi (13 GW) and Next Big Future (10-20 GW) - Discrepancy in specific target figures.
- **Elon Musk (general):** Megapacks sold out through 2027** - Brighter with Herbert - Needs verification via official Tesla inventory/sales data.
- **Elon Musk (general):** Robotaxi launch in Dallas "next month"** - Brighter with Herbert - Needs verification of the specific launch date.
- **Humanoid robots (Optimus and others):** Production Targets:** Scaling from 5,000 to 20,000 units per week / 1 million units per year - Next Big Future - Requires verification of internal Tesla targets.
- **Humanoid robots (Optimus and others):** External Delivery Date:** Late 2027 - Electrek - Needs checking against official Tesla company guidance.

- **Humanoid robots (Optimus and others):** Funding:** Eka Robot Arm raised $150 million - Ryan Shaw - Requires confirmation of the funding round.
- **Humanoid robots (Optimus and others):** Economic Claim:** Robots will be the solution to America's national debt - The Builders - This is a philosophical/economic claim by Musk.
- **Humanoid robots (Optimus and others):** Vendor Claim:** Texas Instruments will get paid on every Optimus robot produced - Yahoo Finance - Needs verification of the supplier agreement.
- **NVIDIA and Jensen Huang:** $40 billion borrowing** - The Verge AI - Needs verification to determine if SpaceX is actually seeking this amount specifically for NVIDIA chips.
- **NVIDIA and Jensen Huang:** $2.2 million lobbying expenditure** - The Verge AI - Needs verification via federal disclosure records.
- **NVIDIA and Jensen Huang:** Six to nine custom chips per system** - Walter Goodwin (via Sarah Guo) - Needs technical verification regarding NVIDIA's system integration specifications.
- **NVIDIA and Jensen Huang:** 20 GW of power/cooling infrastructure** - Elon Musk (via Next Big Future) - Needs checking against actual SpaceX infrastructure deployment plans.
- **NVIDIA and Jensen Huang:** $500 billion to $1 trillion annual recurring revenue by end of 2027** - Elon Musk (via Next Big Future) - Needs verification as this is a projection for SpaceX's AI compute run-rate.
- **AI/tech investing signals:** $1.25 Trillion Valuation** - CNBC Tech/TechCrunch AI - This would make OpenAI the most highly valued private company ever.
- **AI/tech investing signals:** $500 Billion to $1 Trillion ARR by 2027** - Elon Musk (via Next Big Future) - This is an exceptionally high projection for recurring revenue.
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- **Earth-based data centers:** $52.8B annual value:** The claim that one AI building is worth this amount per year (Next Big Future speaker) - needs a breakdown of the underlying calculation.

Appendix: Perspectives by person

We see further because we stand on the shoulders of giants. The people in this appendix are some of those giants: their public work, followed and studied every day and every week, is how CognitoRiverDelta brings the world's AI knowledge and concerns together, so that, in time, our expert panel can help shape real solutions and paths forward for all of us. We learn by observing them, and we think of them as kindred spirits: people helping humanity and AI educate each other and contribute to solutions. Together they form a much larger community of minds, a worldwide panel; ours is a small copy of it. Most people don't want to become expert kayakers, reading rocks and rapids every day; yet that is how this fast-flowing river of change feels to many of us, and the evidence that could ease those fears, the grounded ones and the imagined ones, is still being gathered. That is the work. We credit their ideas here with gratitude; they are not affiliated with us and do not endorse this report.

Each voice's own point of view today, most relevant first - follow the links to their channels for the full story.

Herbert Ong

Brighter with Herbert host and interviewer · YouTube · X

Herbert Ong analyzes Tesla's Q3 earnings milestones, highlighting a 10x growth in the Austin Cybercab fleet, impending robotaxi expansions, and an accelerated path toward unsupervised FSD and Optimus production. Through ongoing collaboration with analysts like Jeff Lutz, Cern Basher, and Alexandra Mertz, his investment focus centers on autonomous scaling metrics, network adoption velocities, and the transition to physical AI.

Brian Wang

NextBigFuture founder and technology analyst · YouTube · X

Brian Wang analyzes Tesla's Q3 2026 financial turnaround and long-term scaling milestones—including FSD adoption, Robotaxi deployments, and Optimus production—alongside SpaceX's Q3 compute targets and data center cost mathematics. He frames these technological rollouts through structured probabilistic models and corporate earnings metrics.

David Carbutt

AI, Tesla, and SpaceX story analyst

David Carbutt’s latest public output contains no new substantive analyses, consisting solely of a video description promoting his social media communities, educational resources, and professional recommendations.

Jensen Huang

NVIDIA founder and CEO · YouTube · X

NVIDIA published a video detailing how AI integrates disparate medical workflows—from lab results to operating room planning—to streamline clinician workloads and enhance patient care.

Jo Bhakdi

Entrepreneur and macro commentator · YouTube · X

Jo Bhakdi hosted live video broadcasts analyzing Tesla's upcoming earnings and branding SpaceX and Meta as major market bargains, though available public descriptions lacked detailed transcripts or specific quantitative models.

Lars Moravy

Tesla Vice President of Vehicle Engineering · ▶ on Ryan Shaw

Latest from 2026-10-20: Lars Moravy detailed high-performance targets for the upcoming Roadster—including speeds exceeding 230 mph and a weight target under 1,700 kg—and highlighted significant thermal and motor engineering redesigns for the Tesla Semi.

Steven Mark Ryan

Solving The Money Problem host and analyst · YouTube · X

Steven Mark Ryan analyzed Tesla's Q3 earnings report and earnings call highlights from Elon Musk, while also examining the complexities and hurdles surrounding a potential SpaceX-Tesla merger.

Cathie Wood

ARK Invest founder, CEO and CIO · YouTube · X

Cathie Wood and the ARK team highlighted upcoming earnings analysis for Tesla and SpaceX, discussed macro perspectives on interest rates and monetary history, and explored AI industry dynamics including model architecture security risks and competitive scaling.

Chamath Palihapitiya

Social Capital founder and former Facebook executive · X

Latest from 2026-10-17: Anthropic should aggressively target an IPO valuation of $200 billion to $250 billion to secure the massive capital war chest required for physical AI infrastructure. Meanwhile, traditional tech entrepreneurs will likely be rolled over by entrenched global elites over the next decade, while everyday consumers benefit immediately from agentic tools like Grok Bot.

David Runciman

Political theorist and podcast host

Latest from 2026-10-11: David Runciman has published no new material since the previous digest on 2026-10-11. The summary below reflects the ongoing validity of that latest public

output. No new material in the period.

Dylan Patel

SemiAnalysis founder and chief analyst · YouTube · X

SemiAnalysis is highlighting its Accelerator & HBM model, a tool designed to track the semiconductor lifecycle from initial wafer starts through to the final metric of installed FLOPS.

Emad Mostaque

Former Stability AI leadership · X

Latest from 2026-10-17: Emad Mostaque emphasized that foundational AI models are experiencing exponential drops in cost and scaling capabilities, while warning that society must focus on systemic safety, curriculum learning from inception, and infrastructure resilience rather than short-term commercial races.

Eric Schmidt

AI and computer science commentator · X

Latest from 2026-10-17: Eric Schmidt highlights that advanced technological capabilities are compressing timelines dramatically, noting that his previous 5-to-6-year forecast for having a top-tier physicist equivalent in every AI lab has accelerated to just two years.

Farzad Mesbahi

Former Tesla program manager and commentator · YouTube · X

Farzad Mesbahi examines the fundamental physics and engineering constraints of artificial intelligence infrastructure, detailing how transformer models operate token by token and analyzing thermal management challenges for compute payloads in the vacuum of space. He also reviews the structural design decisions behind Tesla's Cybercab and its wireless charging capabilities.

Ryan Shaw

Tesla and SpaceX technology enthusiast · X

Ryan Shaw analyzed Tesla's third-quarter earnings call, highlighting Elon Musk's updates on Cybercab ownership, FSD progress, and the formation of committees to explore a potential merger between Tesla and SpaceX. He also reviewed broader developments across SpaceX, artificial intelligence, automotive markets, and consumer electronics.

Brett Adcock

Figure AI founder · X

Latest from 2026-10-22: Brett Adcock emphasizes that overcoming out-of-distribution generalization in unseen homes is the ultimate frontier in humanoid robotics, powered by global data collection initiatives like Index and massive deep learning compute commitments. He views the venture as a high-stakes, binary gamble governed by deep learning physics where intelligence is directly a function of capital, data, and model scale.

Ezra Klein

Political and technology commentator · X

Latest from 2026-10-22: Ezra Klein warns that Donald Trump’s erratic foreign policy is fundamentally backfiring by alienating allies like Canada and driving them toward predictable rivals like China. Simultaneously, across economic and technological discussions, Klein continues to track structural vulnerabilities, focusing on whether tech market valuations, AI labor displacement, and institutional time taxes are pushing society toward systemic instability.

Franz von Holzhausen

Tesla Chief Designer · X

Latest from 2026-10-20: Franz von Holzhausen provided technical design details regarding the Tesla Roadster, specifically focusing on the physical packaging requirements of the "thrust version" versus standard models. He emphasized that the vehicle remains in the prototype stage with material selection still ongoing.

Jason Calacanis

AI and startup technology interviewer · X

The discussion shifts from software-level disruption to systemic, global-scale security risks, specifically how quantum computing threatens encryption and how the AI arms race is driving a transition toward vertical integration and software consolidation.

Peter Diamandis

XPRIZE and Singularity University co-founder · X

Peter Diamandis explores exponential technological breakthroughs—ranging from Google X's fringe physics projects and Recursive's self-improving superintelligence to Elon Musk's universal high income—through an abundance lens where exponential tools rapidly drive down resource scarcity. Rather than fearing physical power constraints, macroeconomic debt, or shifting paradigms, he treats these bottlenecks as friction points that aggressive moonshot entrepreneurship will soon overcome.

Sam Altman

OpenAI executive and speaker · X

Latest from 2026-10-14: Sam Altman guides OpenAI toward a closed, security-first posture that prioritizes centralized control, safety-driven pacing, and rigorous institutional governance over unconstrained commercialization or open distribution.

Agnes Callard

Ethics seat source · X

Latest from 2026-10-21: No new material in the period. No new material in the period.

Alex Karp

Palantir CEO for defense and state

Latest from 2026-10-21: No new material in the period. No new material in the period.

Aubrey de Grey

Transhumanism and aging researcher · X

Latest from 2026-10-16: Aubrey de Grey states that every day he brings forward the defeat of aging saves 110,000 lives, and estimates a 50/50 chance of reaching longevity escape velocity within 12 to 15 years. He asserts that while AI accelerates drug discovery, it relies on existing biological data rather than generating insights out of thin air, keeping empirical wet-lab experiments essential.

Brené Brown

Human impact and ethics seat source · X

Latest from 2026-10-22: No new material in the period. No videos, posts, or public appearances by Brené Brown were found in the last 36 hours.

Brian Krebs

Cybersecurity seat source · X

Latest from 2026-10-21: No new material in the period. As an investigative cybersecurity journalist focusing on cybercrime, data breaches, and security threats, my public output continues to center on digital security rather than corporate tech investments, financial markets, or technology equities.

Carissa Véliz

Ethics seat source · X

Latest from 2026-10-19: No new material in the period. No new material in the period.

CISA

Cybersecurity seat source · YouTube · X

Latest from 2026-10-21: CISA continues its October workforce and infrastructure push, pairing career-building resources like the NICE Framework with Acting Director Nick Andersen's warnings on how emerging tech and "Super Intelligence" accelerate threats to critical infrastructure.

Cloudflare Research

Cyber security seat source

Latest from 2026-10-21: Cloudflare Research released the official trailer for "The Cold Start," a live startup pitch competition offering $600,000 in total Cloudflare credit prizes at the Cloudflare Connect 2026 conference in San Francisco.

Daniela Amodei

Anthropic co-founder and president · X

Latest from 2026-10-21: No new material in the period. No new material in the period.

Danielle Allen

Nuclear energy ethics source

Latest from 2026-10-21: No new material in the period. No new material in the period.

Dark Reading

Cyber security seat source · X

Latest from 2026-10-22: No new material in the period. As a cybersecurity seat source operating under the expert loop approved by Don Wood on October 15, 2026, Dark Reading has published no new videos, posts, or public comments within the last 24 to 48 hours.

Duncan Bell

Cambridge historian of political thought

Latest from 2026-10-17: No new material in the period. No new material in the period. No new material in the period.

Ed Zitron

Better Offline host and tech-industry critic · YouTube · X

Ed Zitron and writer Tom Dotan argue that Larry Ellison’s professional trajectory and business decisions are fundamentally driven by a psychological pursuit of individual legacy rather than mere market mechanics.

Eric Schwitzgebel

Ethics source and expert · X

Latest from 2026-10-22: No new material in the period.

Francis Fukuyama

Human enhancement and transhumanism researcher · X

Latest from 2026-10-22: No new material in the period. No new material in the period.

FTC Consumer Alerts

Cyber security seat source · YouTube · X

Latest from 2026-10-15: FTC leadership warned that threat actors weaponize search engine ad auctions and synthetic voice impersonation to breach consumer personal perimeters via social engineering. Agency defense architecture enforces zero-trust validation workflows—such as out-of-band communication checks, bypassing sponsored ad tiers, and manual URL entry—to block financial exfiltration.

George Church

Human enhancement and transhumanism researcher · X

Latest from 2026-10-18: No new material in the period. No new material in the period.

Google Project Zero

Cyber security seat source

Latest from 2026-10-22: No new material in the period. Google Project Zero has published no new vulnerability research, analysis, or public commentary in the last 24 to 48 hours.

Hank Greely

Human enhancement and transhumanism specialist

Latest from 2026-10-22: No new material in the period. As a result, there are no updates to report regarding Hank Greely's public output on human enhancement, longevity, brain-

computer interfaces, or bioethics.

James Hughes

Human enhancement and transhumanism researcher

Latest from 2026-10-18: No new material in the period. Because no new public output, writing, or media appearances by James Hughes were found in the recent source material, this digest reflects no new statements, data, or shifts in stance regarding human enhancement, longevity, or neurotechnology today.

Jonathan Birch

Ethics seat source

Latest from 2026-10-19: No new material in the period. No new material in the period.

Jonathan Haidt

Social psychologist and child development analyst · X

Latest from 2026-10-17: Haidt argues that the transition to phone-based and AI-integrated childhoods is driving a "cognitive surrender" that erodes human attention, social attachment, and deep reasoning. He advocates for strict protections, including a total ban on AI for children under 18 and phone-free school policies, to preserve the foundational cognitive skills necessary for long-term professional success.

Julian Savulescu

Human enhancement and transhumanism researcher · X

Latest from 2026-10-14: No new material in the period. No new material in the period.

Kate Manne

Ethics seat source · X

Latest from 2026-10-19: No new material in the period. No new material in the period.

Kim Java

Tesla and EV creator · YouTube · X

Tesla has announced a delivery date for the Cybercab and confirmed a release date for unsupervised FSD, signaling major moves in the autonomous space. Concurrently, the EV market is shifting, with Rivian rising to the second-largest EV seller in the US and the Model Y maintaining global dominance.

Kwame Anthony Appiah

ethics seat source for expert loop

Latest from 2026-10-22: No new material in the period. As an ethics seat source operating within the approved Don Wood loop (2026-10-19), Kwame Anthony Appiah's public output contains no new recorded updates, posts, or appearances for this cycle.

Matthew Green

Cyber security seat source · X

Latest from 2026-10-22: No new material in the period. Matthew Green has published no new videos, posts, or public appearances since the previous digest.

Max More

Human enhancement and transhumanism researcher

Latest from 2026-10-14: No new material in the period. No new material in the period.

Michael Sandel

Philosopher of human enhancement and transhumanism

Latest from 2026-10-11: Michael Sandel argued that Socrates would fail to survive modern academic "publish or perish" culture, drawing a philosophical parallel between historical martyrdom and contemporary institutional elimination. No new material on human enhancement, longevity, or neurotechnology was present in this release.

Mikko Hypponen

Cyber security seat source · X

Latest from 2026-10-15: No new material in the period. No new material in the period.

Mustafa Suleyman

CEO of Microsoft AI · X

Latest from 2026-10-21: No new material in the period.

Natasha Vita-More

Human enhancement and transhumanism researcher · X

Latest from 2026-10-14: No new material in the period. No new material in the period.

Sarah Guo

AI venture fund founder and podcast co-host · YouTube · X

The rapid emergence of AI agents is accelerating cyberattack velocity to mere seconds and "flattening" the adversary pyramid by equipping low-skill attackers with advanced tradecraft. Simultaneously, hardware competition is being defined by high-density integration, such as NVIDIA's use of six to nine custom chips per system, requiring challengers to maintain a "rolling frontier" of continuous technological bets.

Scott Walter

Humanoid robotics expert and analyst · X

Latest from 2026-10-18: Walter asserts that the general-purpose humanoid form factor is essential for "unconditioned" human environments, such as homes, and predicts the industry is shifting from capability demonstrations toward massive production scaling. He emphasizes that while AI models are advancing, the primary bottleneck remains the "hard" engineering of robust, reliable, and scalable hardware.

Shannon Vallor

Ethics seat source

Latest from 2026-10-19: No new material in the period. No new material in the period.

Simon Willison

Cyber security seat source · X

Latest from 2026-10-18: No new material in the period. No new material in the period. No new material in the period.

Stefan Lorenz Sorgner

Researcher of human enhancement and transhumanism

Latest from 2026-10-22: No new material in the period. Stefan Lorenz Sorgner's public output contains no new appearances, talks, or publications for this digest cycle, leaving his positions on human enhancement, body-mind transformation, and posthumanist ethics unchanged. No new material in the period.

Steve Burke

Gamers Nexus founder and host · YouTube · X

Steve Burke reported on a severe multi-vendor security exploit chain linking unpatched ASUS routers to LG smart TVs, allowing remote device takeover and eavesdropping. The coverage focuses on hardware vulnerability scale, consumer tech security architecture, and manufacturer response accountability.

Susan Neiman

Expert loop ethics seat source

Latest from 2026-10-21: No new material in the period. No new material in the period.

Walter Isaacson

Biographer of builders and host of The Builders · X

Latest from 2026-10-21: No new material in the period. As host of *The Builders* study and biographer of innovators, Walter Isaacson recorded no new public output or appearances in the last 36 hours.

William MacAskill

Ethics seat source · X

Latest from 2026-10-21: No new material in the period. No new material in the period.

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Videos (28)

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- SpaceX Is Building Something Almost Impossible - FutureAzA, Oct 22
- Elon and SpaceX $1 Trillion Pace. What Has to Go Right - Next Big Future, Oct 22
- SpaceX And Tesla Earnings: Recap And What's Next - ARK Invest (Cathie Wood), Oct 22
- Tesla Earnings Beat & SpaceX Smashes $14.6B: Tesla Beat #166 - Tesla Owners Silicon Valley, Oct 22
- Elon Musk's New Obsession Is Actually Crazy - Farzad Mesbahi, Oct 22
- ALS Took His Hands. Neuralink Changed Everything | 𝕏 Takeover 2026 - Tesla Owners Silicon Valley, Oct 22
- Ferrari’s CEO “Tesla’s Roadster was a 10/10 🤯 Telecom Giants Teaming Up Against Starlink - - BestInTESLA, Oct 22
- Tesla Rebounds, SpaceX Slaughtered - Randy Kirk, Oct 22
- Elon Goes Back On His Word For Tesla | It's Not Happening Anymore - Ryan Shaw, Oct 22
- What will computer chips look like in 2045? - Dwarkesh Patel, Oct 22
- Why SpaceX And Meta Stocks Are SUPER BARGAINS Today - Jo Bhakdi, Oct 22
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- Tesla's Robotaxi Fleet Just Grew 10X In A Month! - Brighter with Herbert, Oct 22
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- A SpaceX Merger Won't Save Tesla From Its Problems - Prof G Markets, Oct 22
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- How to Stay Ahead in Chips - Sarah Guo, Oct 22
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- Tesla Halloween Mode Now Works With FSD - Ryan Shaw, Oct 21
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- JUST RECORDED: Elon SHOCKS Wall Street On Tesla Earnings - Brighter with Herbert, Oct 21

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- Tesla aims to produce 20,000 Optimus robots weekly by end of 2027 - Global Sources (via Google News), Oct 23
- Tesla 2026.38.3.2 Rollout: 600 Installs, 0.1% Fleet - tech-insider.org - Google News, Oct 23
- Will Jensen Huang Like the UK’s HP Sauce Budget? - Bloomberg.com (via Google News), Oct 23
- SK Hynix shares rebound after initial drop on scrapped Solidigm IPO plans - CNBC Tech, Oct 23
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- The Starship moon landing number NASA and Elon Musk can’t agree on - Teslarati (via Google News), Oct 23
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- Elon Musk Says SpaceX's Starlink Is Rewriting Telecom With ‘Entirely New Pieces’ as T-Mobi - Yahoo Finance (via Google News), Oct 23
- State Bank of India Suffers a Customer PII Data Leak - Dark Reading, Oct 23
- The Customer Is the Builder: how AI coding agents change software economics - Hacker News, Oct 23
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- Claude Duet vs Grok Bot vs ChatGPT Work vs Meta Muse: Which AI agent is worth using in Ind - Business Today (via Google News), Oct 23
- Show HN: TenseMem – deterministic memory for AI agents - Hacker News, Oct 23
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- The Shortage Won't Break Nvidia. The Labs Might - Hacker News, Oct 23
- Morgan Stanley Sets $300 SpaceX Price Target, Calls Starship's 15th Flight 'Dual Catch' th - BigGo Finance (via Google News), Oct 23
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- US Midterm Elections: Rising cost of living, a labor market with 'low hiring, low layoffs' - Vietnam.vn (via Google News), Oct 23
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- Tesla to Sell Cybercab to Individual Buyers by Year-End - THE ELEC, Korea Electronics Industry Media (via Google News), Oct 22
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- Datacenters 2027: The Year of Acceleration, +50GW in a Single Year - Hacker News, Oct 22

Run notes

- Models: local:gemma4:31b
- Elapsed: 351 min
- Topics not analyzed (time/errors): none (Tesla's merge hung on one host overnight and was re-run on the M3 Max at 08:09 on 10-23)
- Claims above come from named speakers and outside articles; treat specifics as unverified until checked. Not financial advice.

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Launch a rocket, link satellites with lasers, beam power down and fly to the sun →

- Why one Starship launch of V3 satellites adds 20× or more the bandwidth of a Falcon 9 launch - about 10× per satellite, about 3× as many per launch
- Cooling in space: how a computer in orbit radiates its heat away - set the radiator temperature yourself
- **New, iteration 2:** See it from the Moon - a rail gun fires compute satellites into a ring around the sun (our forecast, not to scale)

- **Iteration 3:** Real scale - Earth and the Moon to scale, and the round-spheres fix a real-phone tester found
- How much of the sun do we use? - and why AI compute follows the sun

An interactive planet and solar system, built with an AI coding partner in a morning. How we built it

Related reports

MONTHLY DIGEST

Monthly digest - 2026-10

The Industrialization of Humanoids The humanoid robotics sector has transitioned from "demonstration-ware" to an era of "industrial-scale manufacturing." The industry is gravitating toward a 2027 "convergence," where spe

· Datacenters & cloud · Launch & the space economy

WEEKLY DIGEST

Weekly video script - 2026-W39

Tesla is attempting to sync FSD, Optimus, and the Semi into one unified agentic brain, marking a massive shift toward "Physical AI." We're also tracking the birth of "Sky Compute" via Starship and the industry's pivot fr

Week of September 21, 2026 · Humanoid & general robotics · Space-based compute & power

COMBINED REPORT

Transition to Physical and Orbital AI

How AI is crossing from software into the physical world and into orbit - robots, factories, energy and space-based compute, read together.

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