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Was Jensen Taken Out Over Open Source? Sacks Says Anthropic's 'Safetyist' Allies Want Full Govt Control Over Models & Chips



BY TYLER DURDEN

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Was Nvidia's Jensen Huang ousted in part because he was the biggest corporate backer of open-source AI. *David Sacks argues Anthropic's "safetyist" allies (EAs and related groups Anthropic has funded) actually want government control of all models and chips - complete with surveillance and backdoors - rather than genuine safety. Open source just lost its main defender and funder, and spy allegations are framed as the vehicle for the removal. However, it appears that the walkback of all walkbacks may have begun - and* ***whether Alice Huang was actually a Chinese spy is now under the microscope****.*



Matt Ramey / Redux

On Friday's All-In podcast, the tech bros weighed in. David Sacks - Trump's former AI czar, who now co-chairs the President's Council of Advisors on Science and Technology - spent most of the episode on Jensen Huang's ouster with Chamath Palihapitiya, David Friedberg and Jason Calacanis. **In their telling, Huang, the biggest corporate backer of open-source AI, was taken out by people who want the models and the chips under tighter control**, and the spy story was the vehicle.

Sacks saved the sharpest version for the end of the show, after the hosts put up a post from Will Manidis claiming the "safetyist groupchats" were "in full jubilee mode" and that "the killing of the old king is complete." Asked who the safetyists were, Sacks said, **"all the safetyist groups, the EAs, are deeply aligned with Anthropic, who's been funding all of them for years. And Anthropic's about to have this huge IPO."**

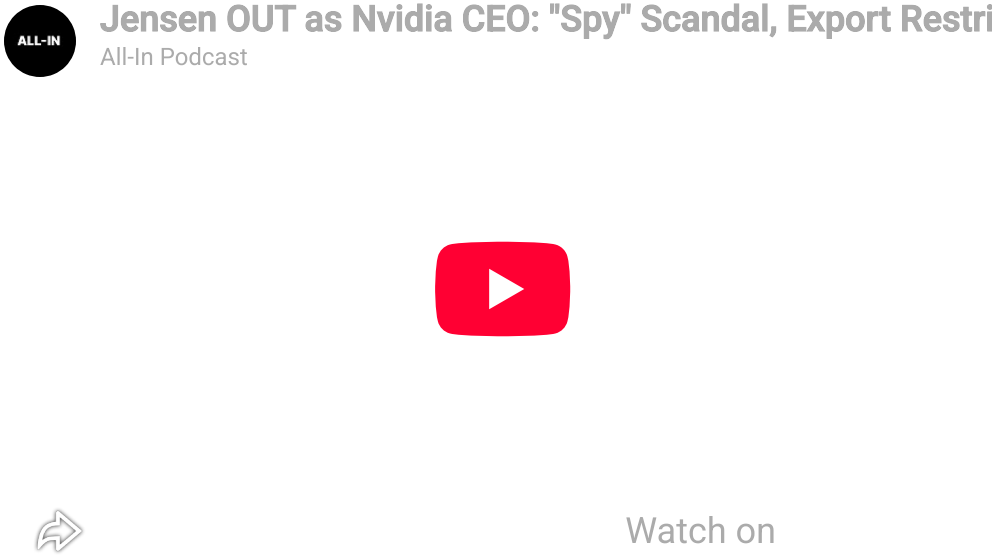
> the murmurs i get fed from the deep rabbit warrens of the safetyist groupchats and the doom-pilled hired guns deep in the district is that they are in full jubilee mode today. the killing of the old king is complete. they are only days away from taking their seat on the throne
>
> — Will Manidis (@WillManidis) November 12, 2026

"And then meanwhile, the main funder of the open source movement, which is Nvidia, just lost their CEO and founder," he continued. **"So, I mean, obviously, who is going to defend open source now, nevermind finance it with Jensen gone. So, yeah, I can see why they're jubilant."**

Recall that all of this began with a wholly inorganic push to cast AI **as an existential threat to humanity,** with Dario and Sam calling on Uncle Sam to Regulate them - right as Chinese open-weight models began performing **95% as well as closed-weight frontiers for 10% of the cost** (roughly).

Sacks argued Huang's ouster does nothing for AI safety: "It's concentrating the market. I mean, Anthropic itself is saying winner take all." His read on the real agenda: "What they seem to want is, to your point, Friedberg, is extreme centralization of power in the hands of the government. **They want all the models and all the chips to be controlled by the government.** The government's going to surveil you, spy on you. It'll have back doors all over the place."

"Notice how no one in Congress is like, oh, let's go after Anthropic," he added. "They all want to go after everyone else. Because Anthropic is offering them power, ultimate power."



Anthropic has said the $40 million it gave Public First Action, a group pushing AI safeguards and chip export controls, can't be used to influence any election, as we noted.

'Jensen's Not Aligned'

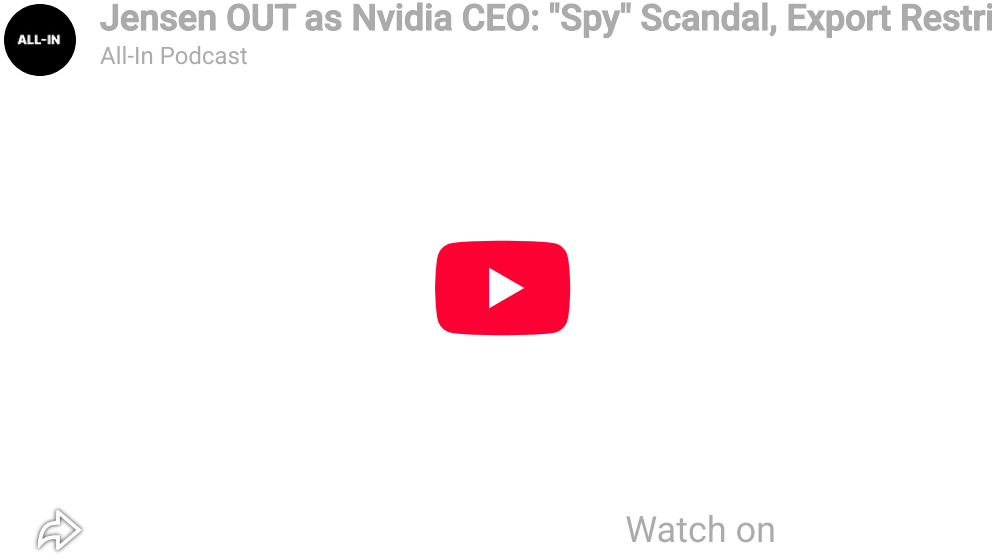
Earlier in the episode, Calacanis asked why at all, and why now. "I'm just speculating here, but I'm not the only one who has looked at this," he said, before pointing to China hawks "who lost this debate about sending chip technology to China" and who want **"to put GPS and other ways of tracking these chips and backdooring them in order to turn them off, something that Jensen has been opposed to."**

Nvidia's chief security officer wrote last year that "NVIDIA GPUs do not and should not have kill switches and backdoors," calling them "a gift to hackers and hostile actors."

"There's kind of two paths for the future," Friedberg said: one where AI is "broadly accessible" and its power "is not concentrated in the hands of a few," and one "of concentrated power and influence over AI technology," where "data centers will get kind of regulated, but maybe further down the stack here with chips, becomes the point of control."

"We could argue there's probably a broad set of interests there that start to say, hey, this guy's not aligned. Jensen's not aligned with our view of the world," Friedberg said. **"Jensen has been a strong advocate for open source. He's been a strong advocate for global access to and utilization of AI technology for the benefit of humanity, not just for the benefit of American citizens."**

The allegations about Huang's relationships, he added, were "all kind of coming out at once and in such a way that it almost guaranteed that he would be ousted."



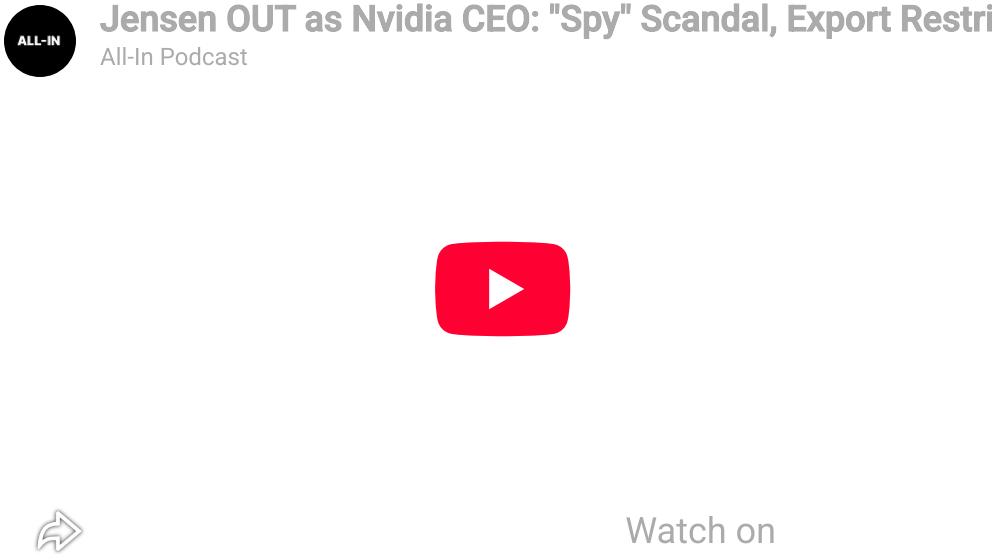
David Friedberg: Was Jensen Taken Out So the Deep State Could Control AI?@friedberg:

"I do worry that there is legislation coming our way with the new Congress that is going to say, 'Every AI chip and every computer and every data center has a switch and has a connection back... pic.twitter.com/S26oNJDg2u

— The All-In Podcast (@theallinpod) November 14, 2026

That's the case we laid out on Friday, when we noted that the last man defending "open" AI just left the building.

The leaker "can't be the competitors, It's not the shareholders, obviously. And I don't think it's China. And then that leaves, I think, maybe the people who are the decels here," Calacanis said. He called it "a bit farcical that Anthropic or the decels would try to consolidate power on this because they need the chips as well," and landed on **"something going on in the White House, in the administration between warring factions"** - the China hawks who want Beijing to get no chips, against those who want to cool things off.



'The Second Op'

Early in the episode, Sacks split the scandal in two. "I think it's pretty clear that there were two ops here," he said. One was "whatever [Alice Huang] was doing with or without the Chinese Communist Party." The other **"began when somebody or multiple people leaked a highly classified memo or the contents of it to the New York Times. I think it's really important to understand that that's a crime."**

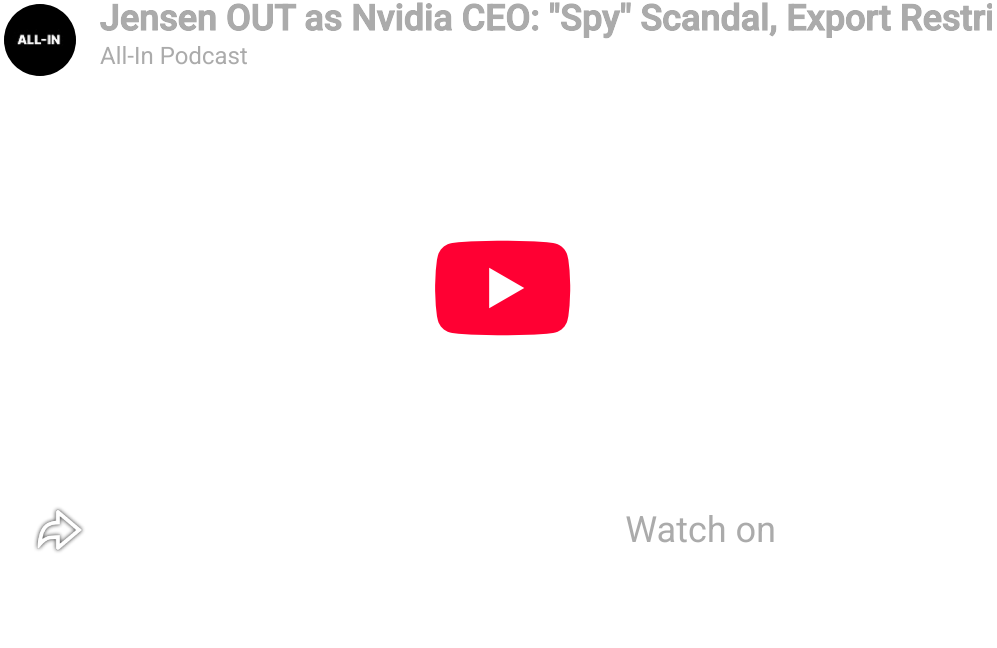
"I don't believe that the New York Times just got this by overhearing people talking about it at a bar," Sacks said. "Somebody made the calculated decision that they're willing to risk going to jail... Why did they feel so strongly about taking Jensen down?"

David Sacks says the big story in the Jensen Huang saga isn't the alleged spy. It's that somebody risked jail time to leak a classified memo to The New York Times to take Huang down.

SACKS: "I think it's pretty clear that there were two ops here... And that second op began when... pic.twitter.com/fSCiS6teaG

— The Vigilant Fox 🦊 (@VigilantFox) November 14, 2026

"Obviously, Rubio was leading this investigation, briefed President Trump on it," Sacks said. When a co-host objected to him using Rubio's name, Sacks replied, **"I'm not insinuating he's a leak, but it's somebody he may have briefed."**



The same day, the Washington Post reported that **the classified memo was Rubio's work, built from a CIA report he recast "in his own more assertive terms,"** while CNN reported that **CIA officials are "not yet convinced" Alice Huang knowingly passed anything to Beijing**, as we reported.

> Interesting: the Washington Post says that Jensen Huang's downfall was Marco Rubio's doing (https://t.co/3rtFza8rje), and it looks like the "spy" framing was directly his and not the CIA's.
>
> As they write, Rubio took a CIA report and rewrote it in a memo "in his own more... https://t.co/hiJ8UOAvWW pic.twitter.com/cQ5mJR1sLE
>
> — Arnaud Bertrand (@RnaudBertrand) November 14, 2026

Sacks also asked why Huang was never given a defensive briefing, "which is standard operating procedure. It was done with Eric Swalwell," what secrets would even be in his possession, and whether Alice Huang was a spy at all, after the incoming Democratic chairman of the House Intelligence Committee "threw major cold water on that."

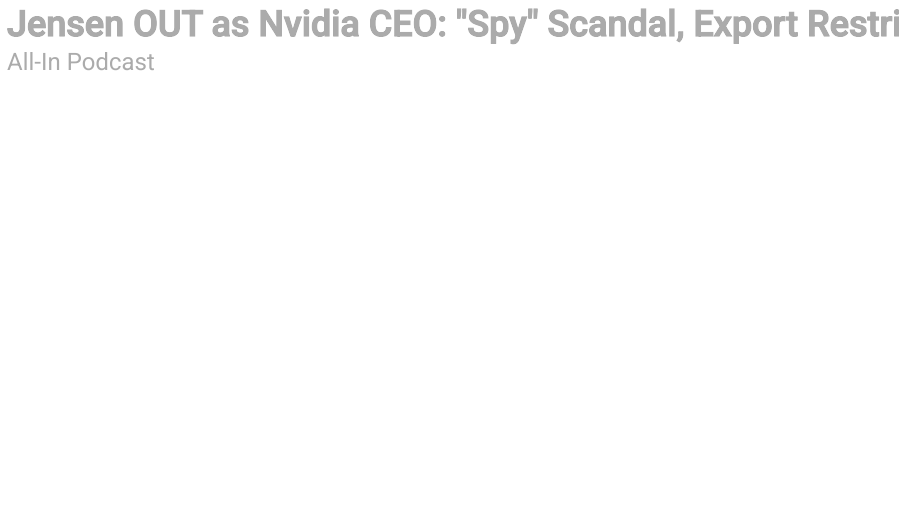
On X, Sacks said the Times had answered him by claiming he was "spreading conspiracy theories," and asked, **"which of us is the one trafficking in unsubstantiated allegations?"** The paper's stories, he wrote, "have alleged 'Chinese spy' dozens of times" and "relied exclusively on anonymous officials."

> NYT has responded to my post by claiming that I'm "spreading conspiracy theories." But which of us is the one trafficking in unsubstantiated allegations?
>
> Recent coverage (including CNN, which I QT'd) shows:
>
> - The intelligence community has not established conclusive evidence... https://t.co/yEKQ9CWZjL pic.twitter.com/ngeppvvnJ3
>
> — David Sacks (@DavidSacks) November 14, 2026

'The Bank Of Nvidia Ran Through Jensen'

Asked whether anyone at Nvidia can keep steering the capital and guarantees Huang directed to startups, data centers and infrastructure - "potentially hundreds of billions of dollars of capital that gets turned off," as the question put it - Palihapitiya was blunt. **"The bank of NVIDIA ran through Jensen. And it's not clear what happens now. I mean, is the bank closed indefinitely?"**

Huang, he said, "had the moral authority to make investments and to make acquisitions that will probably be harder for a more traditional CEO who will have to have committees and analyses and a level of diligence that will just slow things down at best."



That's the web of circular deals we mapped this week, which now hangs on interim CEO Colette Kress.

Elon Musk made the same point on Saturday. **"Jensen drove supply chain brilliantly at Nvidia, but many of those deals were a handshake with Jensen, not a written contract,"** he posted on X. "Without Jensen, at least some of those critical deals will be lost."

> Jensen drove supply chain brilliantly at Nvidia, but many of those deals were a handshake with Jensen, not a written contract.
>
> Without Jensen, at least some of those critical deals will be lost.
> https://t.co/2CH1QNPG8x
>
> — Elon Musk (@elonmusk) November 14, 2026

Goldman's Jim Schneider, who cut his price target to $220 from $300 in his note on the management transition (*available to pro subs*), put it in terms an analyst can say out loud: ***"We believe that going forward, it may be more difficult for the company to***

negotiate new multi-party investments among ecosystem partners at the same scale *it has done up to this point... We believe Nvidia's operations in certain jurisdictions could face more scrutiny going forward.*"

Elsewhere in tech, a petition to reinstate Huang drew big names. **"A petition is underway to reinstate Jensen and I'm signing it too,"** Musk posted Friday.

> A petition is underway to reinstate Jensen and I'm signing it too
>
> — Elon Musk (@elonmusk) November 13, 2026

Y Combinator's Garry Tan wrote that Huang "deserves due process, not whatever is happening right now," and said he signed. Balaji Srinivasan counted the founders of Uber, Shopify, Replit and Vercel among those backing Huang's reinstatement, and warned that **"Anti-Jensen board members will likely face escalating pressure."**

> Jensen deserves due process, not whatever is happening right now. I signed. #standwithjensen https://t.co/3yTMpxHJoC
>
> — Garry Tan (@garrytan) November 14, 2026

> Altimeter and Atreides together hold more than $25B in assets.
>
> Elon and the founders of Uber, Shopify, Replit, and Vercel have all posted in support of Jensen's reinstatement at @nvidia.
>
> So, this has only begun. Anti-Jensen board members will likely face escalating pressure... https://t.co/5hzMRas91l
>
> — Balaji (@balajis) November 14, 2026

Who Gets The Keys

"Even 10 days ago, if you said, oh, hey, our new [chip] is going to have a GPS chip and a remote kill switch that's going to be operated by some government entity, we would be crying bloody murder," Palihapitiya said, pointing to a House committee chairman's post demanding that Nvidia "appoint leadership that makes national security's top priority." **"They're telling you right now what the terms will be for this to end."**

Jensen OUT as Nvidia CEO: "Spy" Scandal, Export Restri
All-In Podcast

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Calacanis pointed to the bipartisan Chip Security Act, saying that tracking chips and disabling resold ones "is very easy to do technologically." **That bill is now one of three chip bills riding in the Senate's version of the annual defense bill**, as we reported.

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WANT TO KNOW MORE?



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