GZERO AI
everything is political

Dear Tracy,

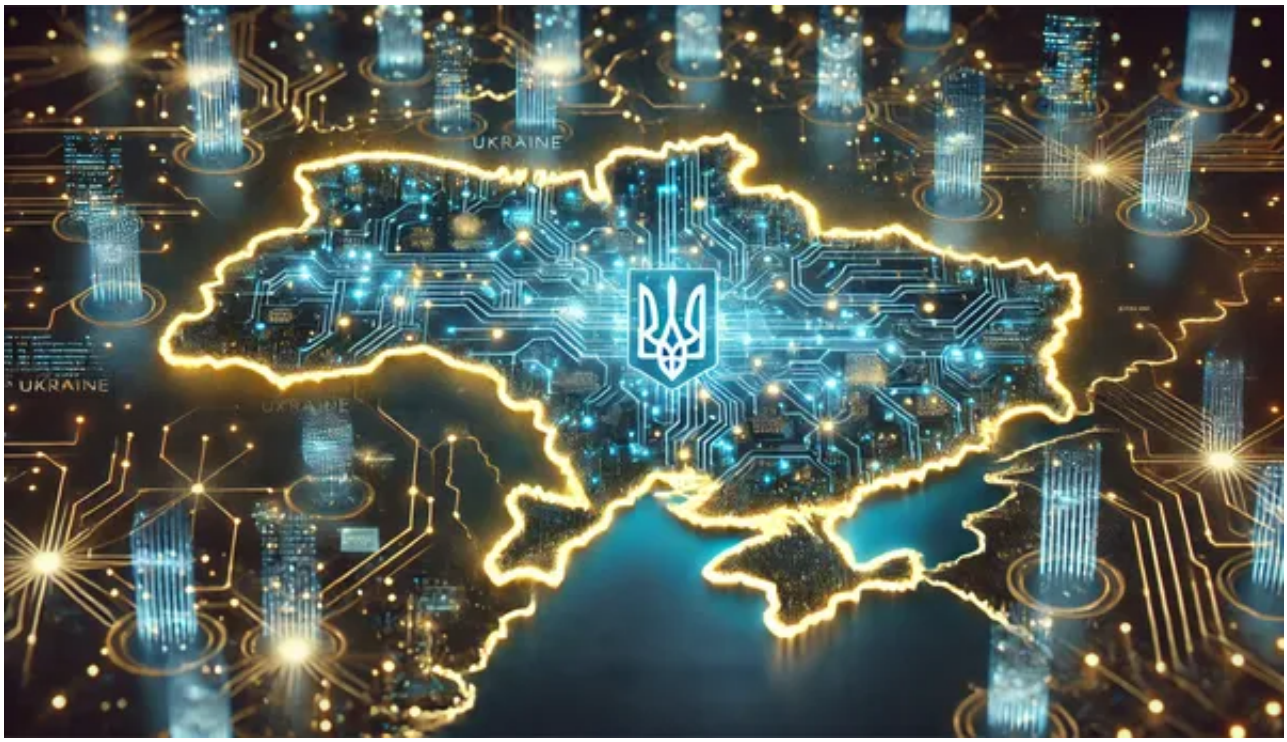
Welcome back! This week in GZERO AI:

- Ukraine's "autonomous" warfare
- China launches new tech fund
- DOJ says Google can keep Anthropic stake
- Palantir delivers AI trucks to the Army
- **Plus:** Take me to church

Thanks so much for reading.

– The GZERO team

In Ukraine's AI-enabled war against Russia, humans still call the shots



Kateryna Bondar wants you to know that "killer robots" aren't deployed on the battlefield in Ukraine — at least not yet. Bondar, a fellow with the Wadhwani AI Center at the Center for Strategic and International Studies, is a former adviser to the government of Ukraine, where she worked on defense and innovation, among other things.

In a new report for CSIS, Bondar seeks to dispel myths about the AI-enabled battlefield in Ukraine's war against Russia, separating on-the-ground realities from visions of science fiction. Bondar spoke to GZERO's **Scott Nover** about Ukraine's capabilities, its reliance on foreign powers, ethical considerations about autonomous systems, and what's next for AI in warfare.

This interview has been edited for clarity and length.

Scott Nover: Why did you want to write this report?

Kateryna Bondar: I worked in the Ukrainian Ministry of Defense and have a lot of connections with the Ukrainian military, so I'm pretty familiar with what is happening there. And when I discuss technology and what is happening on the front lines with people there, they're like, "Come on, we're so far from real killer robots and AI wars.

And when we read all those articles, it's good that people think that Ukraine is so advanced, but the reality is not like that." So the actual goal of this report is to objectively evaluate the state of AI in the war. Full autonomy is really far from actual deployment on the battlefield and the front lines. There is autonomy there, but it's very partial with separate functions like autonomous navigation and automatic target recognition. These pieces of autonomy exist and they're deployed on the front lines, but they are not fully autonomous systems.

How does Ukraine stack up against Russia technologically?

Ukraine is still more advanced. Before the war, there were a lot of Ukrainian engineers outsourcing for US companies. The Ukrainian talent pool is bigger. The Ukrainian patriotic movement was way bigger than in Russia, which motivated a lot of software engineers to join the army. When I talk to people who track Russian technology development — we both agree that Ukraine is still leading. Of course, it's a constant race, but, for now, Ukraine is leading in terms of software development. And also what is important is that Ukraine — I hope and I think — finally realized this competitive advantage, and they are really pushing on software development and deployment through procurement of AI-enabled drones. When I talk to the Ukrainian military and specifically Ukrainian Unmanned System Forces, a separate branch that they created, they say that they currently conduct about 80% of their strikes with drones, which I think is an impressive number. Drones can replace conventional weapon systems — but not completely. Of course, they need artillery, but it shows that it's possible, and I think this is something really innovative and impressive, what's happening on the front line in Ukraine.

You mentioned the West. With tensions bubbling up between Ukraine and the Trump administration, I'm wondering: How self-sufficient is Ukraine?

Ukraine is capable of producing its own drones right now — the supply chain is established. It's a bit more expensive than buying components from abroad, especially from China, but Ukraine had to deal with this even before the situation with the United States. They were mostly using Chinese components, and China put export control limits on selling components to Ukrainians. That was the main motivation why Ukraine started creating its own supply chain to be able to build its

own drones. The only components that Ukraine cannot produce right now by itself are chips and electronics. China is the best for those because no one can compete with Chinese prices, unfortunately. So Silicon Valley and US producers are not very competitive here. But Ukrainians are getting Chinese components and US components, basically anything that they can get and that is cost-efficient. So yeah, Ukraine is moving toward being self-sufficient, but in terms of chips and electronics, they still rely on external components.

To read the full Q&A, click here.

What We're Watching



China announces a state-backed AI fund

Chinese officials on Thursday announced a new state fund to invest in cutting-edge technology, including artificial intelligence.

Zheng Shanjie, chairman of the National Development and Reform Commission, the country's economic planning agency, told reporters that the "state venture capital guidance fund" will bring in $138 billion over 20 years from local governments and private firms.

The fund comes two months after the Chinese firm DeepSeek unveiled its R1 artificial intelligence model, which quickly became one of the world's top-performing systems — essentially China's first model that can compete with those from Silicon Valley firms like Anthropic, Google, Meta, and OpenAI. Since then, Chinese tech giant Alibaba has released its own model, called QwQ-32B, to rival DeepSeek and other major players.

The United States has tried to cut off China from its top AI chip companies, but the country still has managed to build AI models — either from smuggled chips or through, as DeepSeek claimed, efficient new means. A new and emboldened China now wants the world to know it's ready to publicly write big checks to spur its domestic AI industry.

The Justice Department ends its attempt to make Google sell its AI

On Friday, the US Department of Justice ended its bid to make Google sell off its stakes in Anthropic.

The government, which won a crucial antitrust ruling against Google's illegal monopoly in its search engine business in August, is still seeking to break up the company, one of the world's largest firms. But it will now focus on trying to force Google to sell off its web browser Chrome.

In addition to its own in-house AI development, spurred by the 2014 acquisition of the British lab DeepMind, Google has in recent years invested $3 billion in Anthropic, which makes the chatbot Claude. That's good for a 10% stake in the OpenAI competitor. Anthropic told the judge that losing Google's investment would hand a strategic advantage to OpenAI and its main investor Microsoft. Google is not the only Silicon Valley investor in the firm; Amazon has also invested $8 billion in the startup.

Palantir delivers two key AI systems to the US Army

The Peter Thiel-founded artificial intelligence company Palantir said on Friday that it's rolling out its first two AI systems to the US Army.

Palatir won a $178 million contract in March 2024. It has promised to deliver 10 total systems for this contract, all under the name TITAN, the Tactical Intelligence Targeting Access Node. TITAN is a mobile ground station meant to use AI to assist with warfare strategy and strike targeting.

Palantir, largely a software-focused company, isn't executing the contract alone. It partnered with Northrop Grumman and L3Harris, as well as the autonomous systems startup Anduril, founded by **Palmer Luckey**, to help with TITAN. The systems are packed into the backs of trucks, allowing soldiers to make AI-informed decisions wherever they are.

The US Department of Defense has ramped up its procurement of AI technology in the past year. On Wednesday, the Pentagon announced a new multimillion-dollar contract with Scale AI for a project called Thunderforge to assist military decision-making. With China's increased AI ambitions staring the United States in the face, expect military contracts for AI to only increase in the months to come.

DeepSeek says no to outside investment — for now

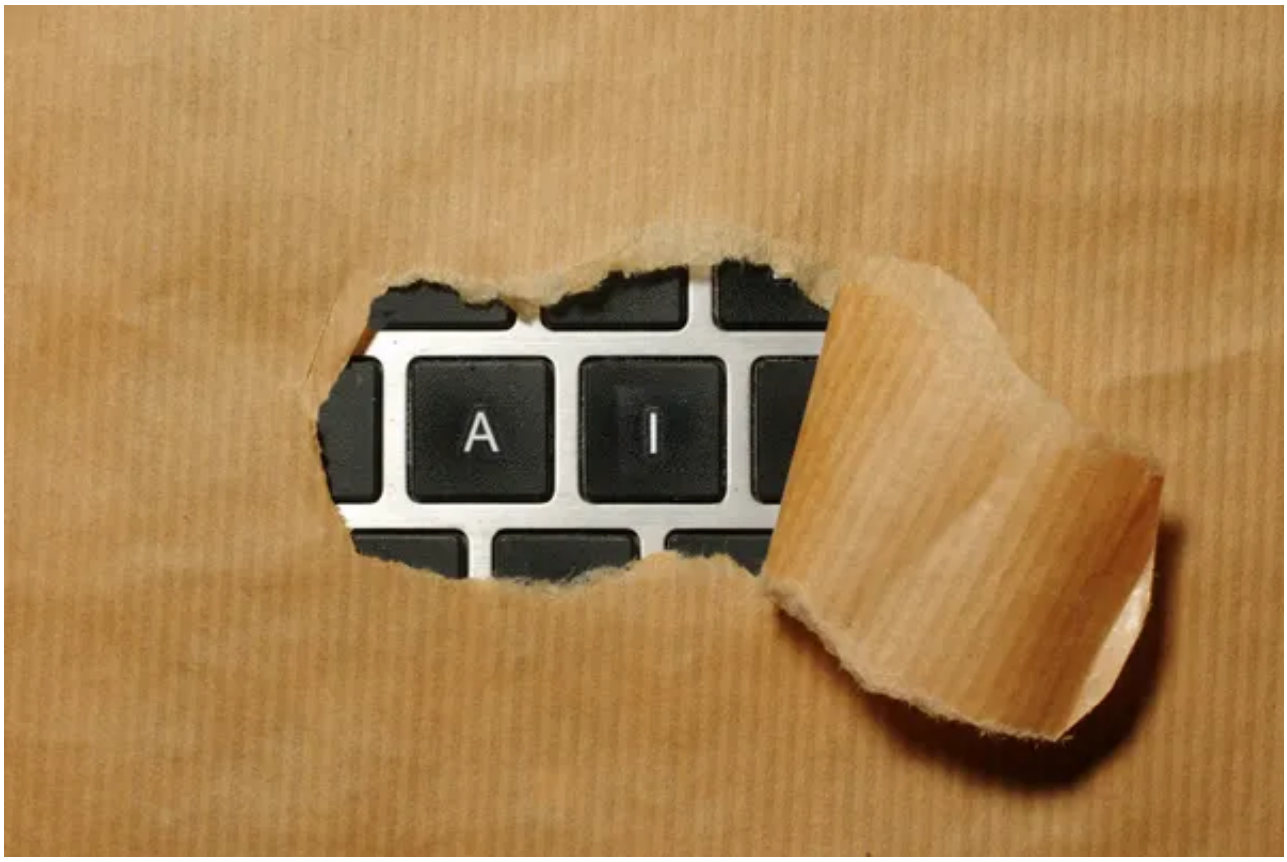
DeepSeek founder **Liang Wenfeng** has shrugged off hungry requests to invest in the Chinese artificial intelligence startup, according to a Monday report in the Wall Street Journal.

The company's AI models are open-source and free-to-use, and Liang is reportedly hesitant to take any outside investment that could change that.

The chatbot company has amassed millions of users while drawing scrutiny from global regulators concerned about a Chinese company handling sensitive user data. Chinese tech giants Tencent and Alibaba are among those that have tried to invest in DeepSeek. The company is effectively controlled by Liang through his hedge fund High-Flyer, though the hedge fund spun off DeepSeek as an independent company when it was created in 2023.

For now, DeepSeek will continue to fly solo. But with pressure from investors, who knows how long Liang will be willing to hold on to the enterprise by himself?

Hard Numbers: Seeking employees with AI skills, Cursor's cash, Kremlin lies infiltrate chabots, Singapore's aging population, VC spending spree, OpenAI ❤️s CoreWeave



25: Nearly 25% of all US technology jobs posted so far this year have sought employees with artificial intelligence-related skills. That number was higher for IT jobs, of which 36% in January requested comprehension of AI. It seems white-collar employees will need some proficiency with AI tools in the years ahead.

10 billion: Anysphere, the startup behind the AI coding assistant Cursor, is in talks to raise money at a $10 billion valuation, according to a report in Bloomberg on Friday. Talks of a new funding round come only three months after it last raised capital in December 2024 — $100 million based on a $2.5 billion valuation. AI assistants like Cursor, Devin, and Windsurf have become popular ways for software developers to code in recent months

3.6 million: The misinformation monitoring company NewsGuard found 3.6 million articles from 2024 featuring Russian propaganda in the training sets of 10 leading AI chatbots, including OpenAI's ChatGPT, Google's Gemini, and xAI's Grok, plus Perplexity's AI search engine. A Kremlin network called Pravda, it says, has deliberately tried to flood search results and web crawlers with "pro-Kremlin falsehoods," many of which are about Ukraine.

25: By 2030, 25% of Singaporeans will be 65 or older. That's up from just 10% in 2010, a massive demographic shift for the small but bustling Asian country. Singapore's government and companies are deploying AI solutions, including in-home fall-detection systems and patient-monitoring systems in hospitals. Without some technological assistance, the country will need to hire an additional 6,000 nurses and elder care workers annually to meet its aging population's needs.

30 billion: Investment firms have poured $30 billion into US startups this quarter, according to new data from Pitchbook data reported by the Financial Times on Sunday. Another $50 billion is reportedly on the way with Anduril, OpenAI, and other companies raising money. This could be the biggest year for US venture capital since 2021 when it spent $358 billion.

12 billion: OpenAI has signed a five-year $12 billion contract with the cloud computing startup CoreWeave. The ChatGPT maker will take a $350 million equity stake in CoreWeave, which specializes in cloud-based processors for AI companies, ahead of its planned IPO, which is expected in the coming weeks.

From the gallery



Each week, we'll feature a specimen of generative AI — some good, some bad, and some with too many fingers or teeth. This week: A Lutheran church in Helsinki, Finland, created a service almost entirely using artificial intelligence. AI wrote the sermon, songs, music, visuals, and more. Clergy and churchgoers were entertained but concluded the experience lacked the warmth of a traditional church service.

The edition of GZERO AI was written by Scott Nover and edited by Tracy Moran.

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