The Week AI's Power Map Reshuffled: $40B for Anthropic, China Blocks Manus, SpaceX Options Cursor

Kabui, Charles

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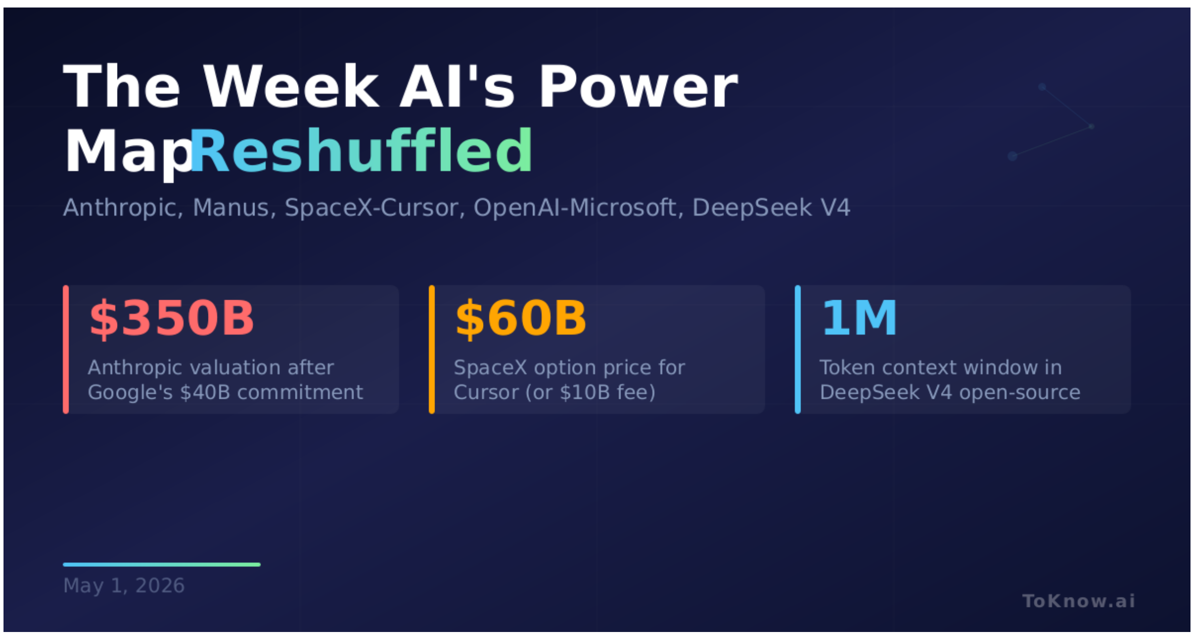

Between April 19 and 28, five events landed that collectively reshuffled who controls what in AI. Google committed up to $40 billion to Anthropic ($10B immediate, $30B contingent on performance targets) at a $350 billion valuation, days after Amazon separately pledged $25 billion. Anthropic's annual revenue run-rate now exceeds $30 billion, up from $9 billion at the end of 2025.

China's National Development and Reform Commission blocked Meta's $2 billion acquisition of Manus, the viral agent startup, citing technology leakage concerns.

SpaceX confirmed a deal giving it the option to acquire Cursor for $60 billion or pay a $10 billion collaboration fee, with the two companies sharing SpaceX's Colossus supercomputer (one million H100-equivalent GPUs).

Microsoft and OpenAI amended their partnership: Microsoft's license becomes non-exclusive through 2032, and OpenAI can now serve models on any cloud.

GPT-5.5 appeared on AWS Bedrock within a day. Separately, DeepSeek open-sourced V4: a 1.6 trillion parameter Pro model (49B active) and a 284B Flash model (13B active), both with a one-million-token context window by default.

The practical consequence: platform lock-in just weakened across the board. OpenAI models on AWS means enterprises no longer need Azure to access GPT-5.5. DeepSeek V4's open weights at 1M context give any company a self-hosted alternative to closed frontier APIs. The Anthropic deal splits the funding landscape into clear camps: Google-Anthropic versus Microsoft-OpenAI, with Amazon hedging both. And China's Manus block establishes precedent: capable AI startups are now treated as national-security assets, limiting cross-border acquisitions regardless of price.

What changed structurally: the era of a single dominant AI provider looks unlikely. Capital, models, and regulatory barriers are distributing power across multiple poles simultaneously. Governments are intervening not to slow AI but to keep their national champions domestic. The next constraint on AI adoption is not technical capability but legal geography.

Sources:

- Google to Invest Up to $40B in Anthropic (Reuters)
- China Blocks Meta's $2B Acquisition of Manus (Bloomberg)
- SpaceX-Cursor $60B Deal (The Verge)
- Microsoft-OpenAI Partnership Amendment (OpenAI)
- DeepSeek V4 Open-Source Release (DeepSeek)
