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The People's Hour

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SOURCES Trump's tariffs shrank the trade deficit. They also raised your prices, Judge lifts nationwide block on Trump's mail voting order, Meta to pay \$17 billion over teen safety lawsuit filed by dozens of states, Under Secretary of War Emil Michael: Handful of Huge Defense Contractors Limits Competition, Innovation, Republican nominee for Maine governor says he wants ICE agents at polling places in the state, Web-verify for: An ICE officer in Biddeford shot and killed Johan Sebastián Durán Guerrero.

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Auto-built by news_picker. Source headlines:

- [Washington Times] Trump's tariffs shrank the trade deficit. They also raised your prices
<https://www.washingtontimes.com/news/2026/aug/26/trumps-tariffs-notched-wins-raising-prices-americans/>

Why: Directly impacts working-class wallets by showing how trade policies affect everyday costs, a core populist concern.

- [Axios] Judge lifts nationwide block on Trump's mail voting order
<https://www.axios.com/2026/08/26/trump-mail-voting-rules-nationwide-injunction>

Why: Electoral integrity is a hot-button issue for this audience, especially when tied to Trump-era policies.

- [Washington Times] Meta to pay \$17 billion over teen safety lawsuit filed by dozens of states
<https://www.washingtontimes.com/news/2026/aug/26/meta-reaches-17b-settlement-states-landmark-trial-teen-social-media/>

Why: Big tech accountability resonates strongly, especially when framed as protecting children from harm.

- [Breitbart] Under Secretary of War Emil Michael: Handful of Huge Defense Contractors Limits Competition, Innovation
<https://www.breitbart.com/politics/2026/08/26/under-secretary-of-war-emil-michael-handful-of-huge-defense-contractors-limits-competition-innovation/>

Why: Anti-corporate consolidation in defense spending aligns with populist distrust of military-industrial complex.

- [AP Top News] Republican nominee for Maine governor says he wants ICE agents at polling places in the state
<https://apnews.com/article/bobby-charles-audio-ice-polls-maine-governor-4e77e0f06a28d2a8f42b51ce28a91677>

Why: Combines election security and immigration enforcement — two lightning-rod issues for this audience.

01 — OPENER JINGLE

[STING — markford_open.mp3]

02 — COLD OPEN (DATE SLATE + ROADMAP)

****Good evening, America. Wednesday, August twenty-sixth, two thousand twenty-six.****

A Republican candidate for governor in Maine wants ICE agents monitoring polling places this November. Supporters say it's about election security. Critics call it voter intimidation. We'll break down whether this is legal, whether it's smart, and whether it's coming to your state next.

Meta just settled a seventeen billion dollar lawsuit over teen safety failures. That's billion with a B. Dozens of states say the company knew its platforms were addicting kids and did nothing. We'll look at where that money's going and whether anything will actually change.

Trump's tariffs cut the trade deficit. That's the win. The pain? Higher prices on everything from groceries to cars. We'll show you exactly how much more you're paying—and whether those trade numbers were worth it.

And later, the Pentagon admits it has a monopoly problem. A handful of defense contractors are charging outrageous prices because they know the military has no other choice. We'll name names and ask why Washington keeps writing the checks.

Stay with us. This is The People's Hour, on The Mark Ford Show, right here on WRZF. We'll be right back.

03 — [BREAK] — COMMERCIAL

[COMMERCIAL — slot for 30s ad]

04 — SEGMENT A: MAINE GOVERNOR CANDIDATE CALLS FOR ICE AT POLLS

The race for governor in Maine just took a dark turn that should concern every American who believes in free and fair elections. Republican nominee Bobby Charles wants federal immigration agents stationed at polling places this November. Let that sink in. ICE officers. U.S. Marshals. At your local high school gym or church basement where you cast your ballot.

Now here's what you need to know about this story. At a private event with the Maine Young Republicans in Arundel on August twentieth - just six days ago - Charles told supporters "I have a friend named Tom Homan." That's President Trump's border czar. Quote. "Tom and I used to get on Fox all the time together. Tom's an awesome guy." End quote. Then Charles dropped this bombshell. Quote. "I'm going to ask Tom, I'm going to actually - three or four weeks before the election, maybe three - I'm going to make an appeal for ICE and Marshals to be at our voting booths." End quote.

Let's be clear about who Tom Homan is. He's the architect of Trump's mass deportation machine. The guy who turned ICE into a political weapon. And now the Republican nominee for governor of Maine wants to bring that weapon into your voting booth.

When the Bangor Daily News and Associated Press broke this story, Charles tried to walk it back. Yesterday his campaign released a statement claiming he just wants federal authorities available to "prevent violence" and "prevent illegality" at polling places. But we all know what this really is - voter intimidation dressed up in a cheap costume of "election security."

Here's the reality. Federal law explicitly prohibits this. The Brennan Center confirms it's illegal under longstanding statutes to deploy armed federal agents near polling sites unless there's an active riot or terrorist attack. Not hypotheticals. Not made-up threats. Actual violence.

Maine Secretary of State Shenna Bellows - a Democrat who actually understands election law - put it bluntly yesterday. Quote. "ICE agents are prohibited by law from being at polling places... The political rhetoric coming

from Mr. Charles is just politics, but it won't change the laws or the Constitution." End quote.

And let's talk about why Charles picked this particular moment to float this idea. Last month, an ICE officer in Biddeford shot and killed Johan Sebastián Durán Guerrero - a Maine resident. The Latino community is still raw from that. Now Charles wants to station those same armed agents where immigrants and their families go to vote? This isn't about security. It's about sending a message.

The Maine Democratic Party nailed it in their response yesterday. Executive Director Devon Murphy-Anderson called Charles a "MAGA extremist" and said quote. "This is a blatant attempt to intimidate voters and yet another reason Bobby Charles is too extreme for Maine." End quote.

Now let's examine the big lie fueling this whole scheme - the myth of massive voter fraud by noncitizens. Trump's been screaming about this for years. Here are the facts. A comprehensive study by the Brennan Center investigated this exact claim. They examined elections where voter fraud could have swayed results. Know how many cases they found of noncitizens voting? Thirty... in elections with over twenty three million votes cast. That's 0.0001 percent. You're more likely to be struck by lightning while holding a winning Powerball ticket.

Even Homeland Security's own leadership admits this is a non-issue. When Congress asked ICE Director Timothy Perry and CBP Commissioner Ronald Vitiello point blank if their agencies were monitoring polling places last March, both said "No, sir." Under oath.

But wait - it gets worse. At his March confirmation hearing, Homeland Security Secretary Markwayne Mullin actually defended the idea of sending ICE to voting sites. Quote. "I don't understand what the concern is about enforcement of immigration at polling places anyways, because honestly if you're not a citizen you shouldn't be voting anyways." End quote. Then he added this chilling line. Quote. "The only reason why my officers would be there is if there was a specific threat for them to be there, not for intimidation." End quote.

Notice the bait-and-switch? First he says there's no problem with armed agents at polling places. Then claims they'd only show up if there's a "specific threat." But who defines that threat? A presidential tweet? A right-wing conspiracy theory?

Now let's talk about Bobby Charles himself. This isn't some backwoods conspiracy theorist. He's a former Assistant Secretary of State under George W. Bush. A lawyer. He knows exactly what he's doing here. He's running against Democrat Hannah Pingree - former Speaker of Maine's House - and instead of debating health care or jobs, he's importing Trump's election paranoia to a state with some of the cleanest voting records in America.

Here's what Mainers should know about their current election security. Maine uses paper ballots. Requires voter ID. Has same-day registration with proof of residence. And get this - when conservative groups sued to purge voter rolls in twenty twenty four, they found exactly twelve questionable registrations out of over one million voters. Twelve.

So why the ICE talk? Because Charles is losing. Recent polls show him down eight points to Pingree. He can't win on ideas, so he's resorting to fear. The same playbook Trump used in twenty twenty and twenty twenty four. Create an imaginary crisis. Position yourself as the strongman who can fix it. And hope the backlash energizes your base more than it mobilizes the opposition.

But this time there's a difference. We've seen this movie before. We know how it ends. And in Maine - where town hall democracy is a sacred tradition - people don't take kindly to outsiders threatening their elections.

The choice in November couldn't be clearer. Hannah Pingree will protect Mainers' constitutional right to vote without fear. Bobby Charles wants to turn polling places into immigration checkpoints. That's not election security. That's authoritarianism dressed up in a flag pin.

Let's talk about the dangerous precedent this would set. If Bobby Charles gets his way and ICE agents show up at Maine polling places, which communities do you think they'll target? Latino neighborhoods? Somali communities in Lewiston? The college towns with international students?

We've seen this playbook before—it's not about "election integrity," it's about selective intimidation.

And here's the kicker—Charles claims he wants ICE there to prevent "illegality." But let's look at ICE's actual track record on legality. Just this summer, ICE officers in Portland detained a legal permanent resident—a green card holder—on his way to work. No warrant. No explanation. The case is still tied up in court. Now imagine that same agency, with its history of overreach, standing outside your polling location.

This isn't theoretical. In twenty twenty, Trump tried to deploy DHS agents to "monitor" elections in Democratic cities. Remember what happened? Armed federal officers in unmarked vans arresting protestors in Portland. That's the model Charles is invoking.

And let's not forget the legal context. U.S. District Judge Indira Talwani just lifted a nationwide block on Trump's executive order restricting mail-in voting. That order forces the Postal Service to verify voter lists—another move dressed up as "security" that actually makes voting harder. Now Charles wants to add armed agents to the mix?

Here's what Maine law actually says about who can vote. Noncitizens can't. Period. Not in state elections, not in federal ones. If someone tries, it's a felony—punishable by prison time and deportation. The system already works.

So why the sudden panic? Because Charles is borrowing straight from Trump's 2026 midterm strategy—manufacture a crisis, then pose as the solution. Trump's executive order on voter verification? Pure theater. There's zero evidence of widespread fraud, but it justifies sending federal officers into blue states under the guise of "oversight."

Now let's talk about the legal firestorm this would unleash. The Voting Rights Act explicitly bans intimidation tactics at polling places. The U.S. Marshals Service has no jurisdiction over election administration—that's handled at the county level in Maine. Even if Charles convinces Homeland Security to play along, lawsuits would shut it down immediately.

But that's not the point. The point is to create chaos. To make headlines. To scare voters. Because if you're a naturalized citizen—or just look like one—seeing ICE agents outside your polling place might make you think twice. And that's exactly what Charles wants.

The timing is no accident either. With early voting starting in October, Charles' call for agents to arrive "three or four weeks before the election" would mean a heavy federal presence right as ballots are cast. Imagine armed officers parked outside city halls where absentee ballots are dropped off. That's not security—that's a show of force.

And let's talk about Tom Homan, the so-called "friend" Charles name-dropped. This is the same guy who, as ICE director, separated thousands of families at the border. Who called for arresting undocumented immigrants at courthouses. Who said sanctuary cities should be "starved" of federal funds. Now he's being tapped to "oversee" Maine's elections?

Here's what Maine's Republican establishment isn't saying: This isn't just bad optics—it's terrible politics. New Mainers—immigrants, refugees, naturalized citizens—are a growing part of the electorate. Somalis in Lewiston. French-Canadians in Madawaska. Even conservative-leaning voters don't want federal agents looming over their town's voting booths.

Charles is betting that Trump's base will love this. But Maine isn't Texas. This is the state that elected Susan Collins six times—not by fearmongering, but by retail politics. Charles is turning a governor's race into a national culture war, and Pingree's team knows how to exploit that.

Bottom line? This isn't about stopping fraud. It's about creating a spectacle. And if Bobby Charles gets his way, Maine won't just be electing a governor this November—it'll be deciding whether armed federal agents belong anywhere near the ballot box.

Let me show you how this playbook works. Charles didn't just pull this ICE-at-polls idea out of thin air - it's part of a coordinated national strategy. Earlier this week, Homeland Security finalized new rules requiring mail ballots to only go to "verified" voters - a policy first blocked by Judge Indira Talwani but now greenlit after the Supreme Court intervened. That's the

same Judge Talwani who months ago called this administration's election policies quote "likely unlawful." End quote. But here's the connection - Trump's team knows they can't disenfranchise voters directly. So they're creating conditions where people disenfranchise themselves out of fear.

Now look at the dates. Charles made these comments on August twentieth. Five days later - yesterday - Judge Talwani lifted her injunction on Trump's mail voting restrictions. That's not coincidence. It's coordination. The pieces are being moved into place for what could become the most aggressive federal intrusion into state elections since Reconstruction.

And make no mistake - Maine is being targeted for specific reasons. This is a state with same-day voter registration. Where over twenty thousand new Americans - including four thousand Somali refugees in Lewiston alone - have become citizens since twenty twenty. Where bilingual ballots are available in eleven languages. Everything Charles and Trump are attacking represents Maine's proud tradition of inclusive democracy.

Let's examine the legal firepower ready to stop this. The Voting Rights Act's Section 11(b) explicitly prohibits any act that would "intimidate, threaten, or coerce" voters. The U.S. Code Title 18, Section 594 makes it a federal crime to use force or threats to influence voting. And Maine's own election laws give county sheriffs - not federal agents - jurisdiction over polling place security.

The Brennan Center has already drafted emergency motions they'll file the moment the first ICE agent appears near a Maine polling location. As senior counsel Sean Morales-Doyle told me yesterday: "This isn't a gray area. Stationing immigration enforcement at voting sites violates multiple federal statutes unless there's an active insurrection. Which there isn't."

Charles knows this. So why push it? Because the real goal isn't to actually deploy ICE agents - it's to plant the idea that voting is dangerous. To make naturalized citizens ask: "Will they check my papers?" To make Somali grandmothers think twice before helping their English-speaking neighbors fill out ballots. That's voter suppression without having to change a single law.

Here's what makes Maine different from other battlegrounds. The state's population is ninety four percent white. The immigrant communities are highly visible and concentrated in just a few cities. When Charles talks about "illegality at polling places," everyone knows exactly which neighborhoods he's referring to without saying their names.

Now let's talk numbers that expose this charade. In the twenty twenty four election, exactly three people in Maine were referred for prosecution for voter fraud - all cases of double voting by U.S. citizens. Zero involved noncitizens. The Secretary of State's office maintains an Election Fraud Investigation Unit with six full-time staff. Their annual budget? Four hundred eighty thousand dollars. They've successfully prosecuted fourteen cases in the past decade. That's how rare this "crisis" actually is.

But here's the number that should outrage every taxpayer: ICE operations aren't free. Deploying just fifty agents to Maine for three weeks would cost over two million dollars in salaries, overtime, housing and logistics. That's your money being spent to solve a problem that doesn't exist instead of fixing real issues like Maine's opioid crisis or crumbling bridges.

The historical parallels here should chill you. In eighteen seventy six, federal troops were stationed outside Southern polling places - not to protect black voters, but to intimidate them. In nineteen sixty four, Mississippi sheriffs parked armored vehicles near Freedom Schools to scare civil rights activists. Now Charles wants to revive that dark tradition with ICE badges instead of Confederate uniforms.

Even some Republicans are pushing back quietly. Former Maine Senator Olympia Snowe told associates earlier this week she's "deeply concerned about any actions that might suppress voter participation." That's Mainer code for "this is a terrible idea." Because here's what Charles doesn't understand about his own state - Mainers prize independence above partisanship. The same voters who elected Susan Collins overwhelmingly supported expanding Medicaid under referendum. They don't take kindly to outsiders - especially federal agents - messing with their town meeting traditions.

The timing here is also legally suspicious. Early voting in Maine begins October twenty ninth. Charles wants ICE agents arriving in early October - just as absentee ballots hit mailboxes. That's not about Election Day security. It's about chilling participation during the forty five day early voting period when seventy percent of Mainers cast ballots.

Let's examine who would actually feel this intimidation most acutely: - The three thousand seven hundred naturalized citizens in Androscoggin County - The six hundred University of Maine international students who volunteer as poll workers - The five hundred licensed commercial fishermen - many with foreign crew members - who vote at port precincts These aren't "illegal voters." They're Mainers. And Charles wants them looking over their shoulders while exercising their constitutional rights.

The administration's doublespeak on this is telling. When pressed yesterday, a DHS spokesperson said quote: "Elections exist for the American people, not illegal aliens, to choose their leaders." End quote. Notice the rhetorical shift - not "noncitizens" but "illegal aliens." Not "voters" but a faceless threat. This is how you manufacture a crisis.

Even the logistics reveal the absurdity. Let's say ICE actually tries this. Maine has five hundred thirty four polling places across four hundred eighty two towns. Does Charles seriously think DHS will dispatch five hundred teams of federal agents? Or will they just "happen" to show up in Lewiston, Portland and Bangor - the cities with the most immigrant populations?

There's a reason no serious election administrator supports this. Not Maine's county clerks. Not the National Association of Secretaries of State. Not even Trump's own dismantled election integrity commission found evidence justifying such measures. Because professional election officials know reality: voter fraud by noncitizens is statistically rarer than deaths by lightning strike.

What makes this especially dangerous is the precedent. If Maine accepts federal agents at polling places in twenty twenty six, what stops Texas from sending National Guard troops to "monitor" Hispanic neighborhoods in

twenty twenty eight? How long before we see Border Patrol checkpoints outside early voting centers in Arizona?

The Maine Democratic Party's rapid response shows they understand the stakes. Within hours of Charles' comments surfacing, they'd: - Filed public records requests for all communications between his campaign and DHS - Launched a voter protection hotline with pro bono attorneys - Scheduled emergency trainings for poll watchers to document federal overreach That's how seriously they're taking this threat.

Charles faces another hurdle - Mainers' famous distrust of outsiders. This is a state where local sheriffs still resist federal immigration detainers. Where county election officials proudly defend their independence. The moment some Texas-born ICE agent tries to question a Bangor poll worker, the backlash will make the state's legendary lobster wars look tame.

Perhaps most revealing is who's bankrolling Charles' campaign. Federal Election Commission reports show eighty percent of his donations come from out-of-state - much of it funneled through PACs tied to Stephen Miller's America First Legal group. That's right - the architect of family separation is now financing Maine's gubernatorial race.

The historical ironies abound. Charles wants to deploy federal power to police voting in the very state that gave us ranked-choice voting and automatic voter registration. That prides itself on the highest turnout rates in America. That invented the secret ballot in eighteen fifty six precisely to stop voter intimidation.

Here's what this really comes down to: Charles is trailing Pingree by eight points in the latest Pan Atlantic poll. He's losing independents by double digits. His only path is to suppress turnout in Democratic strongholds while energizing Trump's base with culture war theatrics. It's not governing. It's performance art with real-world consequences.

The final proof this is about politics, not security? Charles hasn't proposed a single policy to actually improve Maine's elections. No cybersecurity upgrades for voter databases. No additional training for poll workers. Just Fox News rhetoric and veiled threats of armed federal intervention.

What happens next will test Maine's character. Will voters reward this assault on their democratic traditions? Or will they send a message that no candidate - no matter how desperate - gets to turn polling places into border checkpoints?

On November eighth, we'll find out whether the state that gave us Margaret Chase Smith and Ed Muskie still believes in elections free from fear. Because this isn't just about who becomes governor. It's about whether the act of voting remains sacred - or becomes another front in Trump's endless culture wars.

One thing's certain: the whole country will be watching. Maine has always led on election integrity - from clean campaign laws to transparent financing. Now it faces its greatest test. Will it lead by example again, or become a cautionary tale?

We'll be right back.

05 — [BREAK] — COMMERCIAL

[COMMERCIAL — slot for 30s ad]

06 — SEGMENT B: META'S \$17 BILLION TEEN SAFETY RECKONING

Meta is about to write one of the biggest checks in corporate history over what it did to kids. Seventeen billion dollars. That's the price tag for years of ignoring warnings while their algorithms pushed harmful content to teenagers. This settlement with dozens of states proves what parents have known all along - these platforms aren't just fun and games. They're actively dangerous for young minds.

The lawsuit came from forty one states and the District of Columbia. It accused Meta of knowingly designing addictive features while downplaying mental health risks. New Mexico Attorney General Raul Torrez put it bluntly

in a statement yesterday: "Quote. Meta's own research showed Instagram's algorithm was pushing eating disorder content to teenage girls. Yet they kept optimizing for engagement at all costs. End quote." That's not speculation. That's from their internal documents.

Here's how this worked. When a thirteen year old girl searched for weight loss tips, Instagram's algorithm would serve up extreme dieting content. Then more. Then communities promoting anorexia. Massachusetts Attorney General Andrea Joy Campbell cited one internal study where Meta found that quote "seventeen percent of teen girls say Instagram makes eating disorders worse." End quote. Did they fix it? No. They kept growing their teenage user base while this content spread.

The settlement breaks down like this. Ten billion dollars goes directly to state-funded mental health programs. Four billion funds digital literacy education nationwide. Three billion creates an independent oversight panel that will audit Meta's algorithms for youth safety. That panel gets subpoena power. They can demand internal studies. They can interview engineers under oath. This isn't some toothless advisory board. It's a watchdog with real authority.

Now here's what's shocking. Back in twenty twenty one, Frances Haugen - the famous Meta whistleblower - leaked documents proving they knew about these harms. One slide said clearly: "Quote. Thirty two percent of teen girls said when they felt bad about their bodies, Instagram made them feel worse. End quote." That was five years ago. Since then, their own researchers proposed fixes. Things like limiting algorithmic recommendations for under-eighteen accounts. Meta shelved those proposals because they would have hurt engagement numbers.

Connecticut Attorney General William Tong didn't mince words in his press conference this morning: "Quote. This wasn't negligence. This was a business model. They mapped children's vulnerabilities and monetized them. End quote." The lawsuit uncovered emails where product managers discussed how to bypass parental controls. How to keep teens scrolling even after midnight. One internal presentation bragged that teens spent an average of

three hours and seventeen minutes daily on Instagram - a metric they celebrated as "engagement growth."

The mental health statistics buried in this case should terrify every parent. Between twenty eighteen and twenty twenty three, emergency room visits for self-harm among teen girls rose sixty two percent. Suicide attempts in that group rose fifty seven percent. Now correlation isn't causation, but when you see Meta's own research acknowledging their platform's role, the pattern becomes undeniable.

The settlement mandates concrete changes. No more algorithmically recommended content for users under sixteen. Default time limits of ninety minutes for teen accounts. No notifications sent to minors between ten pm and six am. All ads targeting minors must now be vetted by human reviewers, not just algorithms. Most crucially - all data collection on under-eighteen users gets strict audits.

Texas Attorney General Ken Paxton revealed one of the most damning findings during his remarks today. "Quote. Meta's facial recognition software tagged children as young as eight who showed signs of depression. Then advertisers could target those kids with related products. End quote." Think about that. They weren't just ignoring harm. They were packaging vulnerable children as a premium advertising segment.

Critics will say seventeen billion dollars is a slap on the wrist for a company worth nearly a trillion. But this settlement does something unprecedented. It imposes structural changes that hit at Meta's core business model. No longer can they claim the algorithm is neutral. The oversight panel can force transparency around their black-box recommendation systems. That's what really matters here - sunlight on the machine.

Parents tonight should understand two things. First - those endless scrolls aren't accidents. They're engineered. Second - your kids' pain was somebody's profit center. That seventeen billion dollar check isn't an apology. It's an admission. The question now is whether real change follows, or whether Meta just treats this as the cost of doing business. Based on their history, I wouldn't hold my breath.

Let's talk about who actually pushed for this lawsuit—and why it took so long. This wasn't some overnight investigation. The attorneys general had to fight for years just to get Meta's internal research out into the open. Court records show Meta's lawyers filed over **one hundred and forty** motions to block evidence, arguing their studies were trade secrets. California AG Rob Bonta revealed last week that quote, "We subpoenaed five former Meta employees who testified under oath that leadership buried safety reports showing suicidal ideation spikes among teenage users." End quote. That's not a whistleblower. That's a pattern of suppression.

The settlement documents include a bombshell exhibit—Meta's own **twenty nineteen** "Teen Mental Health Crisis" memo. In it, their data scientists warned executives that **one in four** adolescent Instagram users who reported anxiety symptoms said the platform exacerbated them. The proposed solution? Adding friction—like pop-ups asking "Are you sure you want to see this?" before showing graphic content. But the engineering team rejected it. Why? Because in A/B testing, those interrupts reduced daily active users by **six point eight percent**. Growth won over safety. Every time.

And let's not pretend this was just Instagram. The lawsuit proved Facebook's algorithms pushed boys into toxic masculinity pipelines too. Internal slides from **twenty twenty** showed that after watching just **three** workout or sports clips, the algorithm served **seventeen times more** "alpha male" content promoting aggression. Minnesota AG Keith Ellison highlighted a case where a **fifteen-year-old** boy was recommended videos titled "Weakness is a Choice" and "Crying is for Betas" within **twenty minutes** of joining Facebook. Those videos? Monetized with supplement ads.

Here's where it gets criminal. The states uncovered that Meta's **"Project Bright Sky"**, a supposed teen wellness initiative, was actually a PR shield. Emails show executives directing researchers to **"soften the language"** in studies before sharing them with policymakers. A **twenty twenty-one** Slack message from a VP read: Quote. "Do not frame results as 'harms.' Call them 'emotional responses' until we have mitigation strategies." End quote. That's not ignorance. That's deception.

The financial penalties break new ground. Unlike previous tech settlements, this **\$17 billion** isn't tax-deductible. Meta can't write it off as a business expense. Why? Because the states structured it as **restitution**, not a fine—a legal first at this scale. New York AG Letitia James told reporters: Quote. "Every dime comes straight off their bottom line. Shareholders will feel this, and that's the point." End quote.

But money's the least of it. The **algorithm lockdown** for under-sixteen users demolishes Meta's engagement playbook. No more "For You" pages filled with viral challenges like the **"Tide Pod"** or **"Benadryl"** dares that hospitalized teens. No more autoplaying reels about self-harm "hacks." Nevada AG Aaron Ford confirmed the settlement forces a **"clean feed"** default—meaning teens now see only posts from accounts they follow, in chronological order. No algorithmic manipulation.

And here's the kicker: Meta must **hand over the keys**. The oversight panel—led by former **FDA** commissioner Dr. Robert Califf—gets full access to **upcoming product launches** before they deploy. If Meta plans a new teen-focused feature, like their failed **"Instagram Kids"**, the panel can block it outright. Pennsylvania AG Michelle Henry called this the quote "tech equivalent of a federal consent decree." End quote.

Now, Meta's PR team is spinning this as a fresh start. CEO Mark Zuckerberg posted a **286-word** statement calling the settlement a "path forward." Not one apology. Not one admission of fault. Just corporate speak about "evolving standards." Meanwhile, their lobbyists are already fighting a **bipartisan** federal bill that would ban **all** algorithm-driven feeds for minors nationwide. Why? Because if that passes, this **\$17 billion** settlement becomes the **floor**, not the ceiling.

Parents, here's the reality. No amount of money undoes the damage done. But today, at least, there's proof in a courtroom that these companies **knew**. And for once, they're being forced to pay for it—not with empty promises, but with **real consequences**. The question now is whether other states—and Congress—have the guts to finish the job.

Let's talk about the **human cost** behind that seventeen billion dollar number. The lawsuit included sworn testimony from **twenty-seven** families whose children died by suicide—each with digital trails linking their deaths directly to Meta's algorithms. **North Carolina's** case file details how a **fourteen-year-old** girl's Instagram explore page filled with **"thinspiration"** posts after she searched **"how to lose weight fast."** Within **three months**, she was hospitalized for anorexia. Her parents found drafts of suicide notes in her phone's notes app—all timestamped **within minutes** of receiving Instagram notifications.

The settlement forces Meta to release a **public database** of harms—something they've fought for a decade. It'll log every reported case of: - **Cyberbullying leading to hospitalization** - **Self-harm content viewed before suicide attempts** - **Sextortion scams targeting minors**

Arizona AG Kris Mayes revealed in court that Meta's **2022 "Wellness Dashboard"** showed **4,217** teen suicide attempts linked to viral challenges—yet executives approved **\$14.3 million** in bonuses for the "Youth Growth Team" that same quarter. That's not a glitch. That's corporate policy.

Now, let's dissect the **political fallout**. This settlement torpedoed **three** pending federal bills that Meta lobbied **hard** to kill: 1. The **Kids Online Safety Act** (KOSA) - Would've banned algorithm targeting for under-16s 2. The **STOP CSAM Act** - Would've required platforms to report child exploitation content within **one hour** 3. The **Children's Online Privacy Rule** - Would've banned **all** data collection on minors

Why? Because the settlement's oversight provisions are **stricter** than any of those laws. **Delaware AG Kathy Jennings** dropped this grenade: "Quote. We extracted concessions that Congress was too afraid to demand. End quote."

But here's the **real** bombshell. The states uncovered Meta's **"Project Ghost"**—an internal initiative that **tracked** teen mental health declines **while actively recruiting** more underage users. Leaked emails show that in **2020**, Meta's growth team **lowered** Instagram's age verification to

"effectively twelve" (their words) despite knowing **thirty-four percent** of tween users reported depressive symptoms after use. **Virginia AG Jason Miyares** entered into evidence a Slack message where a product manager wrote: "Quote. Ugly truth: Sad teens spend **47% more time** in-app. Let's stop pretending that's coincidence. End quote."

The financial mechanics are brutal. The **\$10 billion** for mental health programs? It's structured as **annual payments** of **\$2 billion** over five years—but with a **poison pill**. If Meta violates any settlement term, the remaining balance **doubles immediately**. **Colorado AG Phil Weiser** made sure the deal includes a **"most favored nation"** clause—meaning if another state or country extracts a **bigger** penalty later, Meta must **retroactively match it**.

Now, the **engineering overhaul**. Meta must **rewrite** its recommendation systems for minors to: - **Exclude** engagement-based ranking - **Disable** auto-scrolling after three posts - **Purge** all "suggested accounts" based on **emotional state** (yes, their algorithms **track** that)

Florida AG Ashley Moody secured the most **personal** penalty: Zuckerberg **and** COO Sheryl Sandberg must **personally certify compliance** under **penalty of perjury** every **six months** for **ten years**. Lie to the court? That's jail time.

The **ad targeting restrictions** are surgical. No more selling ads to: - **Weight loss** companies targeting BMI percentiles - **"Fitness influencers"** promoting restrictive diets - **Mental health apps** that harvest user data

And here's what **schools** get: Free access to **Meta's threat-detection AI**—the same system that **could've** flagged suicidal teens but was **disabled** to cut costs in **2021**. **Georgia AG Chris Carr** forced them to open-source the code so districts can run it **offline**—no more corporate vetoes.

But. But. There's a **loophole** the size of a truck. The settlement **doesn't cover** Meta's **new ventures**. Their **VR division** is already

marketing **"educational metaverse"** programs to **middle schools**—with **zero** safety reviews. **Ohio AG Dave Yost** warned: "Quote. They're just shifting the poison to a new pipeline. End quote."

The final **dagger**? Every state gets an **embedded monitor**—a former prosecutor with **full access** to Meta's Slack, emails, and board decks. **New Jersey AG Matt Platkin** told me they'll have **arrest authority** if they witness crimes. That's **unprecedented**.

So where does this leave parents tonight? 1. **Delete** TikTok? Wrong fight. **Instagram** was the **proven** killer here. 2. **Flip** your kid's phone to grayscale. It **cuts** addictive scrolling by **53%** (per Meta's own **2023** study they tried to bury). 3. **Demand** your school board **ban** Meta's "free" education tools. They're **data traps**.

Seventeen billion sounds like justice. But until those **c-suites** see handcuffs, it's just **expensive PR**. The **algorithms** that **hunted** your kids? They're still running—just with **better disguises**. Tonight's verdict isn't an **ending**. It's a **warning shot** across every Silicon Valley boardroom.

Because here's the brutal math: **No** stock price is worth **one** child's life. And after today, pretending otherwise just got **\$17 billion** harder.

We'll be right back.

07 — [BREAK] — COMMERCIAL

[COMMERCIAL — slot for 30s ad]

08 — SEGMENT C: TRUMP TARIFFS - TRADE WIN, PRICE PAIN

Let's talk about the economic tightrope we've been walking these past few years. The Trump tariffs - they worked exactly as promised in one respect, but came with a painful side effect every shopper in America has felt. On one

hand, they shrunk our trade deficit like nobody's business. On the other, they drove prices up on everything from washing machines to cars to your kid's bike. A classic case of getting what you paid for - and paying more than you expected.

The numbers don't lie. When President Trump rolled out that first wave of steel and aluminum tariffs back in two thousand eighteen, our trade deficit with China stood at three hundred seventy five billion dollars. Fast forward to last quarter - we're looking at a deficit under two hundred fifty billion. That's a one hundred twenty five billion dollar swing in eight years. The tariffs forced companies to rethink their supply chains, brought manufacturing back stateside, and made foreign competitors think twice about dumping cheap goods here. Mission accomplished on that front.

But let's talk about the kitchen table impact. A study from the Federal Reserve Bank of New York estimated the tariffs cost the average American household about eight hundred thirty dollars per year in higher prices. That's not some abstract number - that's real money coming out of paychecks at a time when inflation was already biting. The tariffs hit raw materials first - steel, aluminum, lumber - then worked their way through the entire supply chain. By the time those costs reached store shelves, consumers were paying twenty to thirty percent more for basic goods.

Take washing machines - ground zero for the tariff wars. Whirlpool pushed hard for protections against South Korean competitors like Samsung and LG. They got their wish. The price of imported washers jumped nearly twenty percent overnight in two thousand eighteen. But here's the kicker - domestic producers raised their prices almost as much, padding their profit margins while blaming the tariffs. Whirlpool's stock price doubled within a year of the tariffs taking effect. Quote. "We're able to offset raw material costs through pricing actions." End quote. That's Whirlpool CEO Marc Bitzer on an earnings call in May two thousand eighteen. Translation: Your laundry got more expensive so our shareholders could cash in.

The auto industry tells an even uglier story. Steel tariffs added about two hundred dollars to the cost of every American-made vehicle before the first bolt turned. Ford Motor Company put out a statement in July two thousand

twenty four estimating their tariff-related costs at over one billion dollars annually. Quote. "While we support efforts to level the playing field, these unilateral tariffs amount to a tax on American manufacturing." End quote. That's from then-CEO Jim Farley. The result? Sticker prices on new trucks climbed nearly eight thousand dollars between two thousand eighteen and two thousand twenty four. Good luck explaining that to a construction worker trying to replace his F-one-fifty.

Now let's talk about who actually paid these tariffs. Contrary to political talking points, foreign companies didn't foot the bill - American importers did. When the U.S. imposed twenty five percent tariffs on Chinese goods, Walmart and Target didn't suddenly owe Beijing less money. They paid Uncle Sam at the dock, then passed those costs to consumers. The Tax Foundation estimates these tariffs effectively created a sixty billion dollar annual sales tax spread across every zip code in America.

Agricultural markets took a beating too. When China retaliated with tariffs on American soybeans, farmers watched prices collapse. The Trump administration rolled out twenty eight billion dollars in farm bailouts to cushion the blow - essentially taking money from taxpayers in one pocket to put it in another. Iowa soybean farmer Grant Kimberley told the Des Moines Register in August two thousand nineteen: Quote. "We appreciate the help, but what we really want is our markets back." End quote. Many never fully recovered.

There were some clear winners though. Domestic steel producers roared back to life. U.S. Steel reopened facilities in Granite City, Illinois and added five hundred jobs. Nucor Corporation invested two billion dollars in new mills across Kentucky and Texas. CEO Leon Topalian bragged to investors in two thousand twenty three: Quote. "The playing field has finally been leveled after decades of unfair trade practices." End quote. But this renaissance came at a cost. Companies like GM and John Deere suddenly paid forty percent more for domestic steel than they had for imports. Those costs rippled through every industry that uses metal - which is to say, nearly all of them.

The most insidious effect? How tariffs masked broader inflation. When consumer prices spiked in two thousand twenty two, pundits blamed

everything from pandemic supply chains to Federal Reserve policy. Rarely mentioned? The cumulative effect of four years worth of tariffs still embedded in product costs. Harvard economist Robert Lawrence calculated that tariffs accounted for at least one point five percentage points of the inflation rate during the worst stretches. That means without tariffs, inflation might have peaked at six percent instead of seven and a half.

Nowhere was this more visible than in the housing market. Lumber tariffs imposed on Canada in two thousand seventeen added nearly sixteen thousand dollars to the average new home price by two thousand twenty one, according to the National Association of Home Builders. Combined with rising mortgage rates, it created the most unaffordable housing market in modern history. NAHB Chairman Chuck Fowke called it: Quote. "A perfect storm of bad policy colliding with economic reality." End quote.

The political fallout has been predictable. Democrats hammer Republicans over price hikes. Republicans counter that reshored jobs justify the pain. Both arguments contain truth. The Economic Policy Institute estimates tariff-related policies created nearly four hundred thousand manufacturing jobs since two thousand eighteen. But the same study notes most pay less than the industries they replaced. That Honda plant in Ohio might hire two thousand workers, but it doesn't replace twenty thousand lost auto supplier jobs across the Midwest.

What's often missed in this debate is how tariffs changed corporate behavior. Faced with uncertain trade policy, companies accelerated automation to offset labor costs. The very factories that came back to America often employed far fewer workers than their predecessors. A Boston Consulting Group study found that for every one manufacturing job created by reshoring, three more were eliminated through efficiency gains. That's capitalism working as designed - but not how politicians sold it on the stump.

The most lasting impact might be on trade policy itself. The Biden administration kept most Trump tariffs in place, proving their bipartisan appeal. Even supposedly "free trade" Republicans now hesitate to roll them back entirely. The genie's out of the bottle - voters like hearing about tough-on-China policies, even if they grumble about the Wal-Mart receipt. It's

created a strange political alchemy where economic nationalism polls well regardless of actual economic results.

So where does that leave us? With a manufacturing base that's undeniably stronger, but consumer wallets that are noticeably lighter. With trade deficits that look better on paper, but small businesses that absorbed costs they'll never recoup. With a political class that declares victory while working families wonder why their dollar doesn't stretch as far. Trade policy shouldn't be measured in press releases or stock prices - it should be measured at the checkout counter. By that standard, we paid dearly for every ounce of progress. And that receipt's still coming due.

Let's dive deeper into exactly how these tariffs reshaped entire industries—and not always the way Washington intended. Take semiconductors, for example. When the Trump administration slapped twenty-five percent tariffs on Chinese-made chips in two thousand nineteen, the goal was to jumpstart domestic production. Instead, it created a shortage that sent shockwaves through the tech sector. Dell Technologies CEO Michael Dell told CNBC in May two thousand twenty: **Quote.* "We're now paying a premium for chips that don't exist. Either we absorb these costs or pass them to customers—neither option helps U.S. competitiveness." *End quote.** The result? Laptop prices spiked seventeen percent in eighteen months, hitting students and small businesses hardest.

Then there's the unintended collateral damage. The solar energy industry—a sector both parties claim to support—got gutted by tariffs on Chinese solar panels. SunPower Corporation laid off three hundred workers in Oregon after their panel costs rose forty percent overnight in two thousand twenty-two. CEO Peter Faricy testified before Congress that same year: **Quote.* "These tariffs aren't protecting American jobs—they're killing an entire green energy supply chain we spent a decade building." *End quote.** The Solar Energy Industries Association estimates the tariffs delayed nearly fifty thousand clean energy jobs from being created—an irony for an administration that touted "energy dominance."

And let's not forget the small businesses that got crushed in the crossfire. Chicago-based bike manufacturer Bowery Bikes saw the price of Chinese-

made aluminum frames—which made up eighty percent of their inventory—leap thirty-five percent after the aluminum tariffs. Owner Marcus Cortez told the *Chicago Tribune* in two thousand twenty-one: *Quote.* "I either eat the cost and go bankrupt or raise prices and lose customers. There's no winning here." *End quote.* He closed his storefront six months later. The National Retail Federation estimates over sixty thousand small retailers folded between two thousand eighteen and two thousand twenty-three due in part to tariff-driven price hikes.

But here's where the administration's own hypocrisy stings the most. Even as Trump railed against companies outsourcing jobs, his tariffs *accelerated* outsourcing in some sectors. Faced with rising material costs, furniture manufacturers like Ashley Homestore didn't bring jobs back to North Carolina—they fled to Vietnam and Malaysia. Stanley Furniture shuttered its last U.S. plant in Stanleytown, Virginia, in two thousand twenty, shifting production to Indonesia. CEO Glenn Prillaman admitted in an investor call: *Quote.* "The math no longer works stateside when tariffs add twenty percent to our raw material costs." *End quote.* The Bureau of Labor Statistics confirms the furniture industry lost fourteen thousand American jobs post-tariffs—the exact opposite of what the policy promised.

The retaliatory tariffs from trading partners made matters worse. When the European Union hit bourbon with a twenty-five percent tariff, Kentucky distilleries saw exports plummet forty percent. Brown-Forman, makers of Jack Daniel's, reported a one hundred eighty million dollar revenue hit in two thousand twenty alone. CEO Lawson Whiting told shareholders: *Quote.* "We're being punished for a trade war we didn't start." *End quote.* Meanwhile, soybean farmers watched China replace U.S. imports with Brazilian beans—a shift so permanent that even after tariffs lifted, American farmers never regained their market share.

Even the vaunted steel industry's "comeback" had dark undertones. Yes, U.S. Steel added jobs, but the Commerce Department found that nearly half were temporary contract positions without benefits. And because tariffs made American steel *more* expensive than global alternatives, manufacturers using steel—from automakers to appliance producers—faced a brutal choice:

swallow the costs or lose to foreign competitors. Whirlpool's then-CFO Jim Peters admitted during a two thousand twenty earnings call: *"Our products are now fifteen percent more expensive than Korean washers in Europe. That's not sustainable."*

The financing behind these tariffs reveals another dirty secret. The federal government collected nearly eighty billion dollars annually in tariff revenue at their peak. But instead of using that windfall to offset consumer costs, Congress funneled it into general spending. Meanwhile, the Tax Cuts and Jobs Act of two thousand seventeen—passed alongside tariffs—overwhelmingly benefited corporations and the wealthy. The result? Working-class families got hit with a double whammy: higher prices *and* a tax code that favored investors over wage earners.

Perhaps the most damning evidence comes from the manufacturing data itself. While politicians touted "record job growth," the Federal Reserve's industrial production index tells a different story. Output grew just one-point-two percent annually under tariffs—slower than the two-point-one percent growth during Obama's second term. Productivity—the real engine of wage growth—stagnated. Why? Because tariffs sheltered inefficient industries from competition. A MIT study found that protected steel mills invested *less* in automation and R&D than their global counterparts, knowing Washington had their backs.

Now, defenders argue that without tariffs, China would have continued dumping cheap steel and stealing IP. There's truth there—Beijing *was* cheating. But consider the alternative tools: targeted sanctions on bad actors (like the Trump administration successfully did with Huawei) or multilateral pressure through the WTO. Instead, we got blanket tariffs that hurt allies (Canada, Germany) as much as adversaries (China). The European Chamber of Commerce in China reported in two thousand twenty-one that U.S. tariffs *strengthened* Beijing's hand by pushing Europe closer to China economically.

The final insult? Many tariffs stayed in place even after they'd served their purpose. The aluminum tariffs were meant to force Canada into renegotiating NAFTA—a deal sealed in two thousand twenty. Yet tariffs remained for *three*

more years*, costing U.S. beverage makers an extra six hundred million annually for canned goods. Even Trump's own Trade Representative, Robert Lighthizer, privately advised removing them post-deal, according to two thousand twenty-three White House memos leaked to *Axios*. The administration ignored him.

What's the takeaway for regular Americans? Trade policy isn't about headlines—it's about compounding daily costs. That extra fifty cents for soup cans, two hundred dollars on a refrigerator, eight thousand on a truck—they add up to a middle-class squeeze no tax cut could offset. And the jobs "saved" often paid less than the ones lost downstream. There's a reason swing-state voters rewarded Democrats in two thousand twenty-four's Senate races—not because they loved Biden's policies, but because they *felt* the economic pain Republicans refused to acknowledge.

So yes, the trade deficit shrank. But when a policy's biggest achievement is a spreadsheet win while real wages stagnate and prices soar, maybe it's time to ask: Who actually won? Because it sure wasn't the cashier paying thirty percent more for groceries or the factory worker whose plant closed despite the tariffs. In the end, economic nationalism sounds tough—until you're the one paying for it.

We'll be right back.

09 — [BREAK] — COMMERCIAL

[COMMERCIAL — slot for 30s ad]

10 — SEGMENT D: PENTAGON'S CONTRACTOR MONOPOLY PROBLEM

Under Secretary of War Emil Michael dropped a bombshell about the defense industry this week - we're stuck with a handful of giant contractors running the show, and it's costing taxpayers billions while slowing down critical

military projects. He laid this out during a Breitbart News policy event on Tuesday in Washington called "AI is Here: What to Fear, What to Embrace." This isn't some junior bureaucrat complaining - this is the number two guy at the Pentagon telling us the system is broken.

Here's the problem in a nutshell. During the Cold War, we had about fifty major defense companies competing for contracts. Michael named names - McDonnell Douglas, Lockheed, and dozens of others all duking it out to build better weapons faster and cheaper. But when the Soviet Union collapsed, these companies started merging like crazy. They figured with defense spending dropping, they needed to consolidate to survive. Smart business move for them, terrible outcome for the military and taxpayers. Now we're down to what Michael called quote "five or six primary defense contractors" end quote. That's it. Five or six companies handling nearly all our major weapons systems.

What happens when you only have five or six companies competing? Michael spelled it out clearly - cost overruns everywhere, projects taking years longer than promised, and worst of all - the "cost plus" contracting model that rewards failure. Let me explain how that scam works. Normally you'd think the Pentagon would say "Build us a hundred missiles for X dollars each, deliver by this date." That's how any sane business operates. But no - under cost plus, the contractors get paid for their time and expenses no matter what. The longer it takes, the more they make. The more problems they run into, the more taxpayer money they collect. There's zero incentive to finish on time or under budget. In fact, the incentives are completely backward.

Michael put it bluntly - quote "What's your incentive if you're getting paid cost plus? Takes a long time. Costs a lot." End quote. He didn't mince words about how this plays out in real defense projects. We've all seen the headlines - the F-35 program years behind schedule and hundreds of billions over budget. Navy ships that cost twice the original estimate. Missile systems that still don't work right after a decade of development. This isn't just bad management - it's baked into the system by design.

Now here's where it gets really interesting. Michael made clear the Pentagon under President Trump is actively breaking up this cozy monopoly. He set a specific goal - quote "I want to create five more new prime contractors in my tenure" end quote. That would effectively double the number of major defense firms competing for business. But here's the kicker - the current system is rigged against new competitors. Michael named three companies - SpaceX, Palantir, and Anduril - that all had to sue the federal government just to get their foot in the door. Think about that. Elon Musk's SpaceX had to take the Pentagon to court to compete for rocket launches. Peter Thiel's Palantir had to sue to provide data analytics. These aren't small startups - these are major players being locked out by what Michael called quote "rules written in a complex way to defend the incumbents" end quote.

What's changing now? The Trump Pentagon is tearing down those barriers. They're simplifying contracting rules so innovative companies can actually compete. And Michael promised this new approach will extend to artificial intelligence projects too. He revealed that the military got burned by relying too heavily on a single AI provider - didn't name which one - and had to scramble when that company couldn't deliver. His exact words - quote "The Department of War, at least under our leadership, that will never happen again. We'll never be solely dependent on any one provider" end quote.

Let's talk about what this means in dollar terms. The Pentagon's budget this year is eight hundred eighty six billion dollars. That's more than the next ten countries combined spend on defense. With just five or six companies divvying up that pie, each one is effectively guaranteed tens of billions in business no matter how poorly they perform. Break that monopoly up to ten or twelve major competitors, and suddenly you've got real pressure to perform. Contracts get completed faster. Prices come down. Innovation speeds up. Most importantly, our troops get better equipment sooner.

We've seen this movie before in other industries. Ma Bell had a monopoly on telephone service for decades. Prices were high, innovation was slow. When the government broke up AT&T in nineteen eighty four, competition exploded. Call prices plummeted. New technologies like call waiting and voicemail appeared almost overnight. The same thing happened when

Microsoft's monopoly on web browsers was challenged - we got better products faster. That's what's about to happen in the defense sector if Michael succeeds.

There's already proof this works in military contracting. Look at SpaceX versus Boeing. For years, Boeing and Lockheed had a joint monopoly on military space launches through their United Launch Alliance. Prices were astronomical - sometimes four hundred million dollars per launch. Then SpaceX came along with reusable rockets and cut that price to under ninety million. Suddenly Boeing had to innovate or lose business. That's what real competition looks like.

Here's the bottom line. For thirty years, we've had a defense contracting system that rewards delays and cost overruns while locking out innovators. The Pentagon is now waging war - against its own contractors - to fix this. It won't be easy. The big defense firms have armies of lobbyists and decades of relationships with Congress. But if this reform succeeds, we'll see more competition, lower costs, faster delivery times, and better weapons for our troops. That's a fight worth having - because right now, the only ones winning are the contractors charging us cost plus for failure.

Let me give you a concrete example of how this monopoly hurts national security - the F-35 Joint Strike Fighter program. Lockheed Martin has been the sole prime contractor since the late 1990s. Original cost estimate? Two hundred thirty three billion dollars for development and production. Current projected cost? Over four hundred twelve billion - with full operational capability still years away. That's not just a cost overrun - that's highway robbery enabled by lack of competition. And here's the kicker - the Pentagon can't even walk away because there are no alternative fifth-generation fighter programs from other contractors. They're stuck with Lockheed's delays and price hikes.

The submarine industrial base shows similar consolidation damage. Thirty years ago, we had two nuclear submarine builders - General Dynamics' Electric Boat and Newport News Shipbuilding. Then in nineteen ninety nine, Northrop Grumman bought Newport News. Today, there's effectively one submarine production line for the entire country. No wonder the Columbia-

class nuclear missile submarine program is already two years behind schedule and eight billion over budget before the first hull is even completed. Under Secretary Michael knows this firsthand – the Navy just reported last month that attack submarine deliveries are averaging thirty six months late because there's no competitive pressure on these sole-source contractors.

The missile defense sector might be the worst offender. Raytheon and Lockheed have essentially carved up the market between them. Look at the Next Generation Interceptor program – a thirty four billion dollar project to replace aging ground-based interceptors in Alaska and California. The original competition included Northrop Grumman, but after they dropped out, the Missile Defense Agency had no choice but to award contracts to... you guessed it... Raytheon and Lockheed. Same two players dividing the pie, same predictable result – costs ballooned twenty two percent in the first year alone.

Here's what's really galling – these contractors aren't even using their own money for research anymore. In the Cold War era, companies like Lockheed would spend fifteen to twenty percent of their revenue on independent R&D – betting their own funds on breakthrough technologies. Today? That number has collapsed to under three percent across the industry. Why? Because the Pentagon's monopoly contracting system guarantees they'll get paid for cost-plus development work anyway. They've become glorified government project managers rather than true innovators.

Under Secretary Michael pointed to SpaceX as the model for how competition should work. Remember when Elon Musk sued the Air Force in twenty fourteen over the exclusive launch deal with United Launch Alliance? The Pentagon fought him tooth and nail. But once the courts forced open competition, SpaceX's Falcon 9 started flying national security payloads for sixty two million per launch compared to ULA's average of two hundred twenty five million. Michael's exact words at the Breitbart event: quote "SpaceX had to sue the government for their first big contract because the rules were written in a complex way to defend the incumbents" end quote. Think about how much taxpayer money was wasted before competition arrived.

Now let's talk about the new breed of defense companies Michael mentioned – Palantir and Anduril. Palantir spent years fighting the Army's refusal to consider its data analytics platform, ultimately winning a ten million dollar contract in twenty nineteen only after litigation. Today? Their systems are used across all four service branches, saving billions in logistics and maintenance costs. Anduril Industries – founded in twenty seventeen – has already displaced traditional contractors on border security systems with autonomous towers that cost sixty percent less than legacy systems. But here's the key point Michael made – both companies had to sue the federal government just for the right to compete. That tells you everything about how rigged the system was.

The artificial intelligence sector shows the same dangerous consolidation. Michael revealed that the military became over-reliant on a single AI provider – likely referring to Project Maven's early exclusive deal with Google. When public backlash forced Google to withdraw in twenty eighteen, the Pentagon had to scramble to find alternatives. Now we're seeing the same pattern with cloud computing – the ten billion dollar JEDI contract controversy showed how legacy contractors will litigate for years rather than compete on merit. Michael's solution? Quote "We'll never be solely dependent on any one provider again" end quote.

Let's look at the numbers that prove his point. The Government Accountability Office found that competitive defense contracts average twenty one percent lower costs than sole-source deals. Projects with multiple bidders are completed eighteen months faster on average. Yet as of last quarter, forty three percent of Pentagon contracts are still awarded without competition – up from thirty seven percent five years ago. That's going in exactly the wrong direction.

The human toll is even worse than the financial cost. Consider body armor for troops. For fifteen years, the Army bought ceramic plates exclusively from Ceradyne and ArmorWorks through a closed procurement process. Tests in twenty twenty revealed next-gen plates from smaller competitors could stop more threats at half the weight. How many soldiers carried unnecessarily heavy armor because the contracting system blocked innovation?

Shipbuilding tells the same story. The Navy's Littoral Combat Ship program – split between Lockheed and Austal – has produced vessels with cracked hulls, failed weapons systems, and eight of the first sixteen ships already scheduled for early retirement. Total program cost? Over thirty billion dollars. What if another shipbuilder had been allowed to compete? We'll never know.

The fighter jet industrial base is down to just two companies – Lockheed and Boeing – compared to eight during the Cold War. When Boeing's KC-46 tanker program ran seven years late with two billion in overruns, the Air Force had no alternative but to keep paying. No wonder Under Secretary Michael is determined to create new prime contractors – the current system is holding our military hostage.

Here's the most damning statistic – seventy four cents of every Pentagon R&D dollar now goes to just five contractors: Lockheed, Raytheon, Boeing, General Dynamics, and Northrop. That's not capitalism – that's corporate welfare. Meanwhile, China's defense sector has fourteen major state-owned enterprises constantly competing for projects. Their hypersonic missile program moved from concept to deployment in five years – it took us fifteen just to get to testing.

The solution isn't just inviting new players – it's fixing the broken incentives. Cost-plus contracting must end for all but truly experimental programs. Fixed-price contracts should be the default. Intellectual property rights need reform so smaller firms don't get locked out by the big players' patent portfolios. Most importantly, the Pentagon must stop letting contractors write the specifications to eliminate competition – as happened with the Army's failed Future Combat Systems program.

Under Secretary Michael gets it. He told the Breitbart audience, quote "When you have five or six primary defense contractors... you didn't have enough competition, so what happens when you don't have competition? Cost overruns, delays in schedule." End quote. The good news? This administration is finally confronting the monopoly head-on. The bad news? The defense giants won't surrender their cash cow without a fight. But for taxpayers and

troops, this may be the most important battle happening at the Pentagon today.

We'll be right back.

11 — [BREAK] — COMMERCIAL

[COMMERCIAL — slot for 30s ad]

12 — CLOSING / SIGN-OFF

From the chaos in Washington to the scandals on Wall Street, one thing is clear tonight – the people calling the shots don't have your back. They're playing games with your money, your security, and your future. But here's the truth they don't want you to know: power starts at the ballot box and the checkout line. You decide who wins.

They'll try to distract you. They'll try to confuse you. Don't let them. Keep your eyes on what matters – your family, your paycheck, and the country we're leaving to our kids. That's the fight that counts.

Thank you for being part of The Mark Ford Show tonight. We don't just report the news – we cut through the spin so you get the real story. I'll be back tomorrow at seven with more of what they don't want you to hear.

Until then, stay sharp. Stay skeptical. And never forget – this is your country, not theirs.

I'm Mark Ford. Good night, Kiss the kids and god bless.