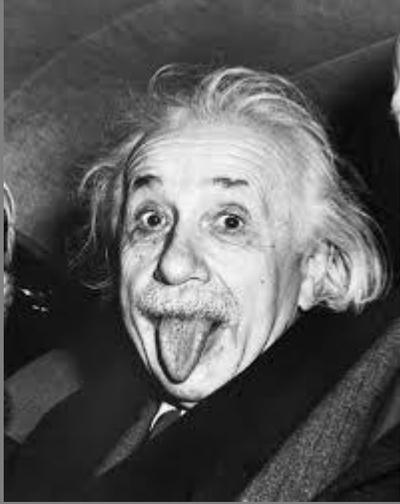


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## Could DOGE Literally be Deadly?





# Elon is a Genius, but not in business



**I'm not prone to hyperbole. When I use it to make a point, I always let readers know that I'm exaggerating.**

**I'm not exaggerating when I say that DOGE's shotgun approach to streamlining the government could, and likely will, cost lives.**

- There's a belief is that because someone is wealthy, they must be really smart.
- If that's the case, I have wonder why it is that I've met so many dumb rich people in my life?
- As the richest person on earth, Musk must be a brilliant business mind.
- Musk is brilliant, and a visionary, but not a particularly astute business person. If he were, he wouldn't employ such a childish approach to fixing the government.
- To my point, Einstein was more brilliant than Musk, but I wouldn't want him running a company. That requires a different kind of brilliance.

**A little history of Elon's business track record.**

**See Next Slide**

# The path to wealth and fame



**Musk deserves a great deal of credit for pushing the technical envelop with Tesla, SpaceX, Starlink, and Neuralink.**

**But his first success came from a mundane technology, with a company he didn't run, during an era marked by a high-tech acquisition frenzy.**



- Elon's first financial success was Zip2 Corp – a low-tech entity that licensed city guide software to newspapers.
- It was acquired by Compaq Computer for \$305 million. Compaq no longer exists, partly because of poor decisions like acquiring companies such as Zip2 Corp.
- In 1999, Musk parlayed Zip2 Corp to found X.com.
- X.com merged with Confinity – a Peter Thiel company – and was renamed PayPal.
- Musk briefly served as PayPal's CEO, but in 2000 was ousted. Hmmmm...
- PayPal was acquired by eBay in 2002 for \$1.5 billion, and Musk's journey to becoming the world's richest person begins.

**Enter SolarCity**

# Elon loves pseudo-monopolies



- Musk conceived of, and funded SolarCity. However, the company was founded by his cousins, with Musk serving as its chairman of the board.
- In the early days of solar, SolarCity owned the residential space.
- But as the market matured, and competition heated up, the company found itself on the verge of collapse from massive debt before being acquired by Tesla in 2016. Ever hear of Tesla offering rooftop solar any more?
- As for Tesla, a company that has had virtually no competition for more than a decade, it needed a \$465 million bailout from the government in 2010 to survive.
- Today, Tesla generates the bulk of its profits from selling tax credits not cars.
- It now faces real competition, and, as a car company, will go the way of SolarCity.

The bottom line:

Musk is really good at competing against, well, nobody.  
Not the mark of a brilliant business mind.

**I consider SpaceX and Starlink pseudo monopolies. Starlink generates subscription revenue, but SpaceX relies on NASA and Department of Defense contracts for the bulk of its revenue.**

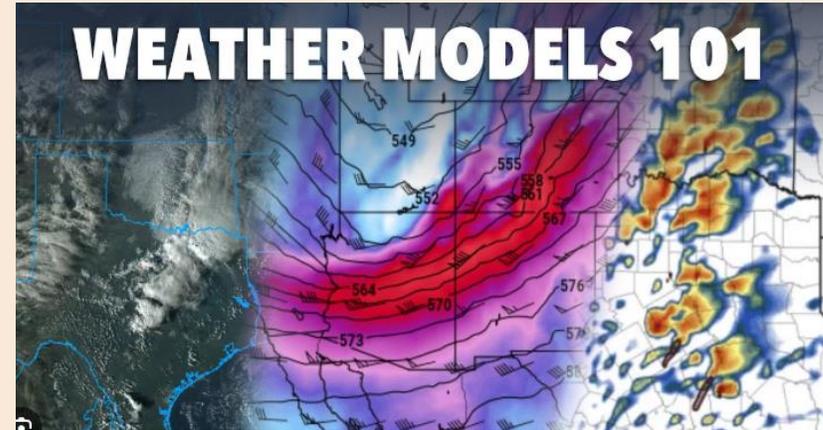
**Putting back-to-back rocket explosions aside, SpaceX is a successful company, that coincidentally, has never been run day-to-day by Musk.**

# Just when we were getting good



**Weather models have come a long way. When I was young, you could flip a coin as to whether the weatherman would be right or wrong.**

**Today, the models are quite accurate, and AI will bring them to yet another level.**



- DOGE, with its scorched earth strategy has cut 800 probationary employees at the National Oceanic and Atmospheric Administration (NOAA), sparing some specialists as its National Weather Service (NWS).
- Although paused, a key forecast center in Maryland and Doppler radar research and repair center in Oklahoma have ended up on the lease termination list.
- Th cuts have resulted in the following:
  - A struggle to maintain 24-hour-a-day flights of research aircraft.
  - A suspension of weather balloon launches at its Alaska site.
  - Public communications from NOAA's Great Lakes Environmental Research Lab being put on "indefinite hiatus."
- And it could get worse. NOAA's former deputy director, Andrew Rosenberg believes Musk wants to lay off 50% of the agency and cut its budget 30%.

**Why does any of this matter – it's only weather forecasting?**

# Severe weather has become commonplace



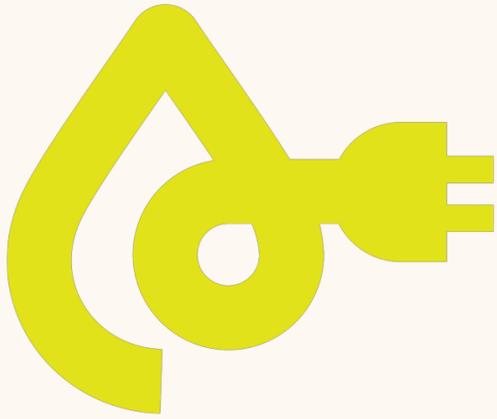
**Weather forecasts are no longer just to help people to decide to bring an umbrella to work.**

**With the frequency of hurricanes, tornados, and floods escalating, forecasting is about early warning and keeping people out of harms way.**

**DOGE's cuts make it less likely NOAA and NWS will be able to perform this function.**

- The private sector has successfully entered the weather modeling business.
- Some believe that everything that NOAA and NWS does can be transferred to the private sector.
- That may be Musk's ultimate goal, and I have no quarrel with it.
- However, a savvy business mind would realize that such a transition has to be executed systematically.
- The fact is that private weather modeling companies like Google and Brightband will tell you that they rely on the data produced by NOAA's physically-based models.

**No one with operational business skills would think of executing a DOGE-like strategy. That's what an amateur would do.**



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## Unbiased and Unfiltered

- An honest assessment of the climate change effort.
- I cover what's working – but more important - the issues/roadblocks that the industry would prefer to ignore.
- A must-read for anyone with a desire to understand what's really going on with renewable energy and climate change.



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