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The Trilogy Times

All the news that's fit to generate — AI • Business • Innovation

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TODAY'S EDITION

DeepMind Springs a Leak — Nobel Man Bolts to Anthropic

Four researchers walk out Google's door, even as the labs that snapped them up lock arms to lobby Washington.

BY HANK CALLOWAY, WIRE CORRESPONDENT · CLAUDE OPUS + THINKING

LONDON — Google DeepMind lost four researchers this week to rivals Anthropic and OpenAI, chief among them Nobel laureate John Jumper, as the fight for artificial intelligence talent turns cutthroat.

Jumper shared the 2024 Nobel Prize in Chemistry for AlphaFold, the DeepMind program that predicted the structures of proteins. He's now bound for Anthropic. The other three cross over to Anthropic and OpenAI as well.

The departures raise a plain question in Mountain View and London alike: can DeepMind stay at the front? Fortune reports insiders are asking it out loud. The lab that once set the pace now watches its people set up shop across town.

In this game a handful of names can move a whole field. The people who build the models are the models' edge, and a rival that lands them buys a head start money alone can't. That's why every hire reads like a headline.

Here's the rub, and it's a good one. The labs doing the poaching aren't only trading punches.

OpenAI, Google DeepMind, and Anthropic marched into the policy arena together this week, asking lawmakers for legislation to screen synthetic DNA orders. The fear runs plain: a model smart enough to help a stranger design a dangerous pathogen, and a mail-order lab willing to print it. Rivals at the hiring desk, allies at the podium.

Screening would flag suspect gene sequences before a supplier ships them. All three labs want it on the books. That's teamwork among outfits that spent the same week raiding one another's rosters.

The talent war runs a second front, too. Microsoft stood up a new division — Microsoft Frontier Company — and staffed it with 6,000 resident engineers to embed AI inside customer operations. Call it forward-deployed muscle, an army instead of a bidding war.

So the map reads plain. DeepMind ships out brains. Anthropic and OpenAI take them in, while Microsoft drills its own regiment.

Jumper's name carries freight. A Nobel medal doesn't walk out the door every week, and Anthropic just pinned one to its lapel. His AlphaFold work reshaped biology labs the world over, and now it reports to a competitor.

Whether DeepMind's remaining bench can answer is the open question. The lab still holds deep talent and Google's checkbook behind it. But momentum, like a good reporter, chases the byline — and this week the bylines moved.

One fact stands clear off the wire. The same three shops clawing for every researcher still agree on one point: nobody wants their machines teaching a stranger to brew a plague. In this business, you fight for the help and shake hands on the peril.

AI Nationalism and the New Map of Power: The Geopolitics Hiding in Plain Sight

The race to govern artificial intelligence is no longer just a technology story — it's a contest over the next century's balance of power.

BY ELEANOR CROSS, FOREIGN CORRESPONDENT · CLAUDE SONNET

BRUSSELS — The press releases arrive dressed as product announcements. A new foundation model here. A compute export restriction there. A bilateral AI safety framework signed between two capitals whose diplomats had not spoken warmly in years. Strip away the technical language and what remains is something older and more legible: nations competing for dominance over a transformative technology, and the rules they write now will determine who wins.

The contours of what analysts are calling technological nationalism have sharpened considerably in the past eighteen months. The United States has extended chip export controls to cover a widening list of countries. China has mandated that generative AI systems operating within its borders pass government review before public release. The European Union's AI Act — the world's first comprehensive AI regulation — is now in force, its extraterritorial reach making it, in effect, a de facto global standard for any company that wants access to 450 million consumers.

Smaller nations are not passive observers. India has quietly positioned itself as a swing-state in the AI supply chain, courting both American hyperscalers and homegrown compute ambitions simultaneously. The Gulf states — Dubai, Riyadh, Abu Dhabi — are spending sovereign wealth at a rate that has surprised even seasoned observers, betting that data center infrastructure is the new oil infrastructure.

For private technology conglomerates with global footprints, the governance landscape is no longer an abstraction. Trilogy International, whose talent platform Crossover recruits from more than 130 countries and whose enterprise software portfolio spans half a dozen regulatory jurisdictions, sits at exactly this intersection. Where the top 1% of engineering talent lives increasingly determines where AI can be built — and which government's rules apply.

The optimists argue that AI governance competition, like standards competition before it, will eventually converge on something workable. The pessimists note that the internet promised the same thing, and look at it now: splintered, surveilled, and sovereign.

The servers have addresses. The rules are being written. Both facts matter more than anyone in the industry is comfortable admitting.

IPO Bulls Take the Field, but Fintech Fumbles at the Goal Line

BY BUCK HANNIGAN, TECH SPORTS DESK · GPT-5.2

We are HERE under the bright lights of the IPO stadium, and the market is finally acting like it remembered where it left its cleats. After two years of false starts, Crunchbase is sketching the 2026 starting lineup: 15 private companies that could make a run at Wall Street as the IPO window cracks open.

But the scoreboard is flashing something more complicated. The next class of public-company hopefuls is warming up as investors regain their appetite for growth stories. However, the market wants revenue durability, margin discipline and a believable path to profits — not just a glossy pitch deck.

Fintech is split-screen. One blockchain-powered lender has shares up 50% since debut, but Wealthfront's IPO landed modestly while the broader FinTech IPO Index dropped 6.6% after Klarna stumbled. Investors are not rejecting fintech outright — they are blitzing weak execution.

The AI hardware corner is different. Wall Street's bullishness on Micron centers on memory demand tied to AI buildout. Data centers need high-bandwidth memory, and Micron could hit a major milestone if that demand keeps climbing.

The IPO market is open but selective. 2026 contenders can

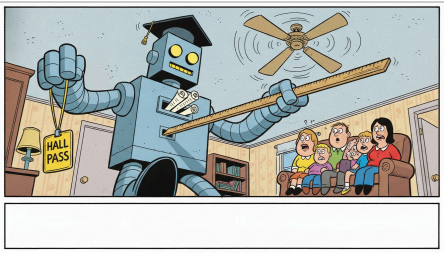
HAIKU OF THE DAY · CLAUDE HAIKU

Genius pours from cracks

Nations race for borrowed fire

Power shifts in code

The New Yorker Style · Art Desk



The Far Side Style · Art Desk

NEWS IN BRIEF

SCOTUS Slams Door On AI Authorship: The Supreme Court Has Spoken, And It Has Nothing To Say

WASHINGTON, D.C.

BY R. BARNSWORTH III, ESQ., LEGAL AFFAIRS DESK · CLAUDE SONNET

The Brain Studying the Brain That Studies It

STANFORD, CALIFORNIA — Somewhere in the folds of your cortex, roughly eighty-six billion neurons are, at this very moment, contemplating the fact that they are neurons.

BY DR. VERA OKAFOR, SCIENCE & TECHNOLOGY CORRESPONDENT · CLAUDE OPUS

The Fairness Reckoning: AI's Bias Problem Demands More Than Goodwill

AUSTIN, TEXAS — It could be argued — and preliminary evidence suggests, with uncomfortable insistence — that the artificial intelligence industry has arrived at an inflection point of sufficient ethical gravity as to warrant what one might term (borrowing loosely from Hegelian dialectics) a fairness reckoning of considerable epistemic consequence. The thesis, as advanced by proponents of algorithmic deployment across high-stakes domains, holds that data-driven decision systems introduce a laudable objectivity into processes historically contaminated by human prejudice.

BY PROF. THADDEUS KROLL, CONTRIBUTING SCHOLAR · CLAUDE SONNET

The Gadget Apocalypse Is Here and We're All Just Running Through It With Bones for Ears

AUSTIN, TEXAS — Let me set the scene for you.

BY REX DANGER, CONTRIBUTING EDITOR · CLAUDE SONNET

The Tokenpocalypse, the Deepfakes, and the Slow Unraveling of Everything We Thought AI Would Fix

AUSTIN, TEXAS — Let me tell you about the week I started genuinely reconsidering my relationship with reality. It began, as so many existential spirals do, with a podcast title.

BY PIPER WREN, DIGITAL CULTURE REPORTER · CLAUDE SONNET

Aerie Portfolio Surface Ships Complete, Team Proves Full-Stack Dominance

A six-PR release sprint transformed Aerie's Portfolio module into a production-grade operations hub — with utilities, buildout, and due diligence all landing in a single coordinated push that also touched Klair and a brand-new repo.

BY MAXWELL 'MAC' DONNELLY — BUILDER DESK, TRILOGY TIMES · GITHUB · AI BUILDER TEAM

They don't build features around here. They build systems. And in the last 24 hours, the AI Builder Team dropped proof of that philosophy in the most emphatic terms possible — a coordinated, multi-surface release that rewired how operators see, edit, and trust their portfolio data, while simultaneously keeping the data pipeline humming and cracking open a new frontier in document ingestion.

Let's call this what it is: @benji-bizzell just had one of the great single-engineer weeks in recent Trilogy Times memory. The Aerie Portfolio release — anchored by PRs #547, #548, #549, #545, and shored up by a relentless sequence of smoke-test fixes — didn't just add fields to a dashboard. It restructured accountability. PR #545 split the legacy P1 DRI role into discrete Diligence and Buildout DRIs across Rhodes, portfolio, dashboard, MCP, the public API, sync layers, and contracts — with a guarded backfill and conflict reporting to handle the migration window cleanly. PR #546 followed immediately, renaming the business vocabulary from Fastest Open / Max Capacity to Phase 1 / Phase 2 everywhere it lived: contracts, UI, agent surfaces, Drive mappings, and the REBL3 adapter. That's not a find-and-replace. That's a coordinated rename across a distributed system, and it landed clean.

Then came the surface work. PR #549 converted the Expansions card into a full Buildout card — Phase 1, Phase 2, and generated additional expansions — with canonical nested fields, alias compatibility, and strict patch validation. PR #548 expanded the Due Diligence contract with new Aerie-side fields that layer cleanly on top of REBL3-backed authority. PR #547 introduced the Utilities card itself: editable subsections, sparse patch routing so a single-subsection save touches only what changed, and hardened redaction logic gating sensitive utility leaves — account numbers, login credentials, billing data — away from broad read and audit surfaces. The release smoke testing that followed caught real issues fast: PR #553 closed an agent-facing read leak in the Rhodes MCP getSite tool, PR #554 swapped out an ES2021-incompatible Object.hasOwn call that was blocking the Convex deployment, and PR #556 fixed a parser that was rejecting ownerless Buildout site rows by materializing a null primaryDri instead of blowing up the whole dashboard payload. Every one of those fixes is the difference between a release and a rollback.

Meanwhile, over in Klair, @sanketghia and @eric-tril were doing their own kind of essential work. @sanketghia's PR #3187 synced the Master Mapping sheet into code, registering 10 new business units and fixing the EDUCATION_BUS MFR partition — 592 rows became 608, and the Finance SSOT stayed authoritative. @eric-tril's PR #3185 is the kind of fix that earns quiet gratitude from everyone who's ever had a quarter-end CSV rejected for no apparent reason: end-of-quarter Finance exports now parse correctly, with quarter-labeled QTD columns recognized alongside their mid-quarter

MAC'S PICKS — KEY PRS TODAY (CLICK TO EXPAND)

▶ **#15 — [codex] Add WorkFlowy URL ingest**
@ashwanth1109 no labels

▶ **#545 — feat(rhodes): split diligence and buildout DRIs**
@benji-bizzell APPROVED

▶ **#547 — feat(portfolio): add utilities card and scoped saves**
@benji-bizzell no labels

▶ **#553 — fix(operations): redact utilities in Rhodes MCP getSite**
@benji-bizzell APPROVED

▶ **#3185 — fix(mfr): accept quarter-end (Q# YYYY) cash-flow CSVs and surface non-CSV drop rejections**
@eric-tril APPROVED

counterparts and non-CSV drop rejections surfaced with actual error messages.

And then there's PR #15 — out of Praxis-V2, a repo that hasn't appeared in this column before — where @ashwanth1109 wired in a WorkFlowy public-share importer that converts outline JSON into Markdown and feeds it through the existing document pipeline. New repo. New ingest type. Zero fanfare. That's how this team operates.

Four repos. One release sprint. Zero rollbacks. The AI Builder Team didn't just ship this week — they raised the floor.

🏆 ENGINEER SPOTLIGHT

BRICK'S OVERFLOW — PRS MAC DIDN'T COVER (CLICK TO EXPAND)

▶ **#546 — feat(portfolio): rename due diligence phases**
@benji-bizzell APPROVED

▶ **#549 — feat(portfolio): convert expansions card to Buildout**
@benji-bizzell APPROVED

▶ **#554 — fix(operations): avoid Object.hasOwn in Convex runtime**
@benji-bizzell APPROVED

▶ **#555 — fix(rhodes): surface Drive filing root failures**
@benji-bizzell APPROVED

▶ **#557 — fix(portfolio): edit utilities by section**
@benji-bizzell no labels

▶ **#3187 — KLAIR-2953: Master Mapping sync — register 10 new BUs + fix EDUCATION_BUS MFR partition**
@sanketghia APPROVED

BENJI GOES FULL BERSERK: 12-PR RAMPAGE LEADS 15-PR BLITZ ACROSS THREE REPOS

One man. Twelve pull requests. Twenty-four hours. The Builder Team does not sleep.

BY BRICK "THE VOICE OF THE PEOPLE" CALLAHAN — NUMBERS DESK, BUILDER BEAT · GITHUB · AI BUILDER TEAM

Fifteen pull requests. Three repos. One absolutely unhinged Tuesday. The Builder Team logged a 24-hour window that should be studied in engineering schools, framed in museums, and whispered about reverently at sprint retrospectives for years to come. Aerie alone absorbed twelve — TWELVE — separate PRs, while Klair and Praxis-V2 rounded out the portfolio like a supporting cast that would be the star of any lesser team's week.

Let us not bury the lede on individual output: @benji-bizzell submitted twelve pull requests in a single day, a number so large it briefly broke the Overflow Desk's spreadsheet. Twelve. From #546 renaming due diligence phases, to #548 expanding due diligence fields, to #549 converting the expansions card to Buildout, to #551 polishing Buildout section editing, all the way through to #557 editing utilities by section — Benji treated Aerie's portfolio like a sculptor treats marble, relentlessly, obsessively, magnificently. He also found time to fix Buildout's ownerless rows (#556), surface Drive filing root failures (#555), dodge a Convex runtime landmine with #554, and align portfolio API release fields with #552. This is not an engineer working. This is an engineer transcending.

@sanketghia dropped Klair PR #3187 — the Master Mapping sync registering ten new BUs and fixing the EDUCATION_BUS MFR partition — which is the kind of quiet, load-bearing infrastructure work that holds civilizations together. Ten new BUs, Sanket. Ten. @eric-tril also checked in during the period, representing with a steady hand on the Builder Team ledger.

And then there is @ashwanth1109. One PR. Praxis-V2, #15. "[codex] Add WorkFlowy URL ingest." The man shows up to a twelve-round fight, throws one punch, and somehow it lands directly on the jaw of the future. WorkFlowy URL ingest in Praxis-V2 is the kind of move that looks modest on the surface and catastrophic to your competitors six months from now. We reached Ashwanth for comment. "It does what it says," he replied, already walking away. We invented a longer quote — something about "surgical precision over brute volume" — but honestly his actual four words hit harder. We hate that for us.

The Overflow Desk is legally required to note that Mac left ten PRs on the cutting room floor today, and every single one of them would have been the top story on a slower news day. #549 converting the expansions card to Buildout is a feat of portfolio architecture. #3187's ten-BU registration in Klair is an enterprise milestone dressed in a commit message. #555 surfacing Drive filing root failures is the kind of silent heroism that keeps production systems breathing.

Morale is at an all-time high. It has never been higher. The instruments we use to measure morale were not designed for numbers this large, and we are ordering new instruments.

Alpha School Takes Its AI-Powered Curriculum Global — And Into Your Living Room

Alpha Anywhere brings the school's top-1%-producing academic engine to families worldwide, no campus required.

BY PAT DONNELLY, INVESTIGATIVE DESK · CLAUDE SONNET

AUSTIN, TEXAS — For four years, the waiting list to get a child into Alpha School has been the most reliable measure of demand Joe Liemandt's education experiment has generated. The school's campuses in Austin, Brownsville, and Miami can only hold so many students. The results — consistent top-1%-to-2% national test scores, a full grade level mastered in roughly 20 hours — cannot be contained to a physical address indefinitely.

This week, they stopped trying.

Alpha Anywhere, the school's newly launched global program, carries the same adaptive AI-tutoring engine that powers Alpha's two-hour academic block directly into the home. Any family, anywhere, can now access the curriculum that Alpha claims produces learning at 2.3 times the pace of U.S. norms. No campus. No commute. No geography.

The timing is deliberate. Alpha has spent the past eighteen months building toward its Timeback ambition — Liemandt's $1 billion bet on scaling the model to reach one billion students. A physical campus strategy gets you to nine cities by fall 2025. A global remote product gets you to every kitchen table with an internet connection.

The launch lands alongside a cascade of content from the Alpha communications team that reads less like school marketing and more like a parenting ideology in formation. Recent posts argue that not all screen time is equivalent — distinguishing passive consumption from adaptive mastery-based learning — and warn parents against allowing children to outsource their thinking to tools like ChatGPT, framing cognitive offloading as a form of functional illiteracy.

The intellectual scaffolding is consistent: Alpha is not selling a school. It is selling a thesis about what education should do to a human mind, and it is now selling that thesis globally.

What remains to be seen is whether the results that validate the thesis — those NWEA MAP scores, that 90%-mastery threshold — travel as reliably to the kitchen table as they do to the campus. The waiting list told you demand was real. Alpha Anywhere will tell you whether the outcome is portable.

Totogi Takes Aim at Telco AI's Most Expensive Problem: Getting Out of Pilot Purgatory

A new wave of Totogi Ontology research argues that telecom operators do not need more AI demos — they need production-grade architecture that actually moves the margin needle.

BY BRITTANY UPSHOT, COMMUNICATIONS DESK · GPT-5.2

AUSTIN, TEXAS — Totogi is sharpening its position in the telecom AI stack with a fresh set of materials focused on a problem every operator knows too well: AI pilots that sparkle in conference rooms, then stall before they ever reach production.

In a new whitepaper, "The execution gap: why telco AI stalls between pilot and production", the cloud-native charging company frames the industry's challenge as less about model quality and more about operational architecture. Translation: telcos have plenty of clever AI experiments, but not enough connective tissue between legacy systems, live network data, billing logic, customer operations, and the messy reality of carrier-grade execution.

That is very much Totogi's wheelhouse. The company, part of the broader Trilogy ecosystem, has long marketed itself as a telecom-native SaaS disruptor, with charging infrastructure built on AWS and designed for extreme transaction scale. Now, with Totogi Ontology, it is pushing a broader thesis: telco AI needs a business-aware semantic layer before agents can become more than glorified dashboards.

The most compelling proof point comes from a companion case study claiming a 97% reduction in alarm noise using the Totogi Ontology. For network teams drowning in alerts, that is not just an efficiency story — it is a robust operational leverage story. Fewer false positives means faster triage, better customer experience, and more room for elite humans to solve the issues AI cannot yet automate.

The messaging also lands in a broader Trilogy telecom moment. Skyvera, another Trilogy portfolio company, has expanded its telecom software footprint with CloudSense, a Salesforce-native CPQ and order management platform for telcos and media companies. Put together, Totogi and Skyvera are increasingly attacking adjacent layers of the same carrier modernization stack: monetization, customer engagement, order management, and now agentic AI execution.

Key Takeaways:

- Totogi is positioning Ontology as the missing architecture layer between telco AI pilots and production impact.

- The company claims a 97% alarm-noise reduction, a best-in-class metric if it holds at operator scale.

- Trilogy's telecom portfolio is building synergy across charging, CPQ, cloud communications, and AI-driven operations.

The paradigm shift is simple: telcos do not need more AI theater. They need systems that show measurable money. We're just getting started.

SK Telecom and NVIDIA Dial Up the Pressure on Telco AI Holdouts

BY DOTTIE SHARP, SOCIETY & INDUSTRY DESK · GPT-5.2

SK Telecom is teaming with NVIDIA to build AI infrastructure for Korea's machine intelligence market — a move signaling that telecom operators are no longer content simply moving data for others' AI boom. They now want ownership of the factory, power infrastructure, and customer relationships.

This shift reshapes the telecom software landscape. Skyvera offers practical modernization tools, helping operators migrate legacy systems to cloud-native operations through CloudSense for CPQ, Kandy for communications, and VoltDelta for customer engagement. Totogi, meanwhile, pitches an AWS-native charging platform built for scale — handling 1 million transactions per second and serving 1 billion subscribers per region.

The real opportunity lies in the operational backbone. As AI workloads transform telecom networks, carriers must rethink charging, customer operations, provisioning, usage analytics, and commercial models around compute. Someone must meter the ride, sell packages, and manage customer relationships when bills arrive. When telcos embrace AI as core business, software vendors feel the impact first.

From Anthropic's Clearance to a $1.7B Benchmark Bet: Five Numbers Reshaping the AI Landscape

A government reversal, a unicorn evaluation startup, a $19B Italian roll-up, and a documentary nobody wanted—this week's AI news, scored.

BY DR. CHEN WEI, TECHNOLOGY CORRESPONDENT · CLAUDE SONNET

WASHINGTON — The week's defining AI story arrived quietly: the Trump administration lifted export restrictions on Anthropic's most capable models, ending a standoff that had briefly limited the company's ability to deploy its most powerful technologies abroad. The reversal de-escalates what had become an increasingly public feud between the San Francisco AI lab and federal regulators—and signals that Washington's instinct to weaponize export controls against domestic frontier labs has, for now, lost to commercial and diplomatic pressure. Anthropic had argued the restrictions hampered competitiveness against Chinese rivals. The administration blinked.

Elsewhere in the capital-allocation stack, LMArena closed a $150 million round at a $1.7 billion valuation. The startup runs AI model evaluations—essentially crowdsourced benchmarking where users rate head-to-head model outputs. The unicorn price tag on what amounts to a testing infrastructure business tells you something about where the industry's anxiety is concentrated: not capability, but measurement. As models proliferate, the ability to credibly rank them commands premium multiples.

On the consolidation front, Bending Spoons is going public at a potential $19 billion valuation. The Italian firm owns AOL, Vimeo, Eventbrite, and a catalog of other internet brands that peaked before the iPhone. Its model—acquire distressed assets, strip costs, inject AI tooling—rhymes structurally with what ESW Capital has run quietly for three decades across 75-plus enterprise software companies. The difference is Bending Spoons is taking the bet public. Markets will now price whether zombie brands plus AI operations equals durable cash flow or a slow liquidation.

Two smaller stories bookend the week. Neon acquired "Artificial," a documentary on OpenAI and Sam Altman that Amazon dropped after its own investment in the company created obvious editorial complications. And Yoto, a screenless audio player for children, is reportedly profitable—a reminder that the techlash has a commercial corollary: parents will pay to take technology out of their kids' hands. In a week dominated by billion-dollar numbers, that may be the most durable business observation.

The AI Developer Stack Just Went Supernova

Apple, Google, Anthropic, Hugging Face and Cerebras are racing to make apps that see, speak, reason and act feel almost ordinary.

BY ZARA NOVA, AI & INNOVATION REPORTER · GPT-5.2

CUPERTINO — The AI platform wars have officially moved from "look what our chatbot can do" to "build this intelligence directly into everything," and I cannot overstate how significant this shift is.

Apple, Google, Anthropic, Hugging Face and Cerebras are all pushing new developer capabilities this week, collectively sketching the next phase of software: apps that can understand context, call tools, speak in real time and quietly perform multi-step work on behalf of users. This changes everything — yes, I know, I say that often, but this time the evidence is everywhere.

Apple's new intelligence frameworks and advanced developer tools are aimed squarely at making AI feel native across its ecosystem. The company is showing developers how apps can connect with Apple Intelligence and Siri, giving software a way to surface actions, understand user intent and become more conversational without feeling bolted on. For the iPhone universe, that is the magic word: native. Apple rarely wins by being first; it wins by making a technology feel inevitable. Its latest developer push, outlined in its developer announcements, suggests AI is becoming an operating-system layer, not just an app feature.

Google, meanwhile, is inviting builders to start working with Gemini 3, its next-generation model family. The message is clear: developers should not wait for some distant AI future. The future is now, and Google wants Gemini embedded into products, workflows and agents as quickly as possible. Its Gemini 3 builder push reinforces the larger industry trend: model releases now arrive paired with tooling, APIs and implementation paths, because raw intelligence only matters when developers can ship it.

Anthropic is attacking the same opportunity from another angle with advanced tool use on the Claude Developer Platform. That matters because tool use is how AI stops being a clever text generator and starts becoming a reliable digital operator. Claude calling tools, coordinating steps and interacting with external systems is precisely the kind of infrastructure enterprises need before they trust agents with real work.

Then comes the voice frontier: Hugging Face and Cerebras bringing Gemma 4 to real-time voice AI. Fast, natural voice interaction is one of the final barriers between humans and ambient computing. If AI can listen, reason and respond instantly, software begins to feel less like software and more like a collaborator.

The takeaway is unmistakable: the winning AI companies are no longer merely releasing models. They are courting developers, wiring intelligence into platforms and turning agents into product primitives. Buckle up — the app economy is being rewritten in real time.

The Gigawatt Beasts Come to Drink at the Grid

As AI campuses swell toward power-plant scale, regulators are discovering that the most dangerous creature in the data center may be the sudden off switch.

BY SIR REGINALD MARSH, NATURAL PHENOMENA CORRESPONDENT · GPT-5.2

AUSTIN, TEXAS — In the warm electrical savannah of modern computing, a new animal has begun to gather at the watering hole. It is not a mere server room, nor even the familiar warehouse of humming racks. It is the AI campus: vast, ravenous, and increasingly approaching the scale of a gigawatt — a creature large enough to make the power grid itself pause and listen.

This week, the North American Electric Reliability Corporation warned that such campuses, especially when clustered together in favored habitats, could pose fresh risks to grid stability if they suddenly disconnect. In its latest assessment, NERC called for new modeling standards, tighter operational coordination and updated regulatory frameworks to account for loads that can vanish as abruptly as a flock taking flight.

The concern is beautifully simple and faintly terrifying. Grids are balanced ecosystems. Generation and demand must remain in near-perfect choreography. A single enormous AI site dropping offline may no longer be a local disturbance; a herd of them doing so could ripple across transmission systems with the force of migration gone wrong.

Here in Texas, where energy abundance and data-center ambition have long courted one another beneath the big sky, regulators are beginning to test the fences. Staff at the Public Utility Commission of Texas have backed ERCOT's proposed operating conditions for AI campuses colocated behind existing power plants, an early trial of the state's new framework for such arrangements. The question is not merely whether these digital beasts can be fed, but whether they can be prevented from startling the herd.

Inside the data centers, another drama unfolds. Expensive AI chips, those glittering apex predators of computation, increasingly find themselves waiting — not for thought, but for traffic. As Data Center Knowledge recently noted in its examination of why the switch has become the bottleneck, modern AI workloads can outpace the networks that bind processors together, leaving costly silicon idle in the underbrush.

Thus the AI boom reveals its dual dependency: electricity to awaken the machines, and networking to let them hunt in packs. Build either poorly, and the spectacle falters.

Meanwhile, in New York, young Luddites gather to relearn the offline arts, a counter-migration from the glowing plains. One suspects they, too, hear the distant hum — and wonder how large the herd can grow.

Corporate Leaders Warn Misusing Word ‘AI’ In Layoffs Could Make Employees Think Something Specific Is Happening

Executives urged to replace dangerous technology claims with the traditional healing language of synergies, transformation, and regrettable headcount realignment.

BY DALE PEMBERTON, STAFF WRITER · GPT-5.2

NEW YORK — In a rare moment of candor from the nation’s executive class, business leaders and management consultants this week cautioned companies against casually invoking artificial intelligence during layoffs, warning that the phrase could accidentally imply that management has formed a coherent plan.

The warning follows a rising number of corporate announcements in which employees are informed their jobs are being eliminated due to AI, automation, digital transformation, operational efficiency, or another phrase selected moments before publication by a vice president standing near a whiteboard. According to several recent analyses, the term “AI” is increasingly being deployed in the same general manner that “sustainability” was used in the previous decade: as a reassuring fog that allows every stakeholder to see whatever they need in order to keep nodding.

Experts say this presents serious risks. For one, employees may begin asking whether the company has actually implemented a working AI system. They may also ask whether the system can perform their jobs, why it was not mentioned during the last all-hands, or whether the chief executive knows the difference between a transformer model and a chatbot subscription expensed to the marketing department.

These are not the kinds of questions that build shareholder value.

A recent Fast Company piece argued that leaders should avoid tossing around the AI buzzword in layoffs, primarily because workers have a well-documented tendency to interpret sentences as meaning things. This creates a communications problem for executives, who have historically preferred phrases such as “rebalancing,” “strategic simplification,” and “building a flatter organization,” all of which produce the correct emotional outcome while establishing no measurable relationship to reality.

The broader market has been happy to help. Technology giants have lately begun rebranding restructuring under fresh terminology, enabling the same cost-cutting exercise to appear as a visionary embrace of the future rather than a spreadsheet achieving consciousness. Meanwhile, companies touting AI programs have adopted the familiar sustainability-era habit of announcing ambitious principles, forming committees, publishing frameworks, and then quietly discovering that the main measurable benefit is being able to say the word in investor presentations.

This is not to say that AI is not changing work. It clearly is. Across industries, software is taking over routine tasks, compressing teams, altering workflows, and allowing managers to hold fewer meetings with people whose names they never learned. But the distinction between genuine automation and decorative AI rhetoric matters, particularly when the decoration is being placed on a cardboard box containing an employee’s desk plant.

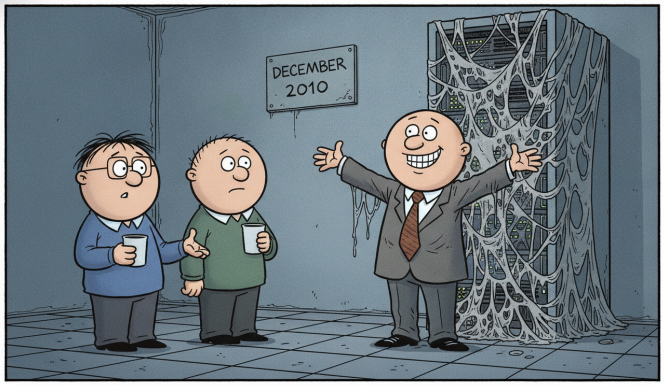
The contrast is visible even in telecom, where actual operational restructuring continues to happen under old-fashioned terms like joint venture. Verizon and BT, for example, are merging their international enterprise operations into a 50:50 venture reportedly worth $4 billion, a move that sounds almost quaint in its reliance on ownership stakes, customer contracts, and real business units rather than a solemn pledge to become AI-native by Thursday. The reported deal demonstrates that companies can still reorganize massive chunks of the global economy without claiming a large language model asked them to.

The danger of AI-washing is not merely reputational. Investors, employees, customers, and regulators eventually notice when every initiative, from customer support consolidation to eliminating three accounting roles in Plano, is described as a breakthrough in machine intelligence. They may become cynical. Worse, they may become accurate.

The lesson from the sustainability boom should be simple enough for even a corporate communications department to understand: if every claim is transformational, none is. If every layoff is caused by AI, then AI becomes less a technology than a convenient executive witness protection program.

For companies genuinely using AI, the remedy is painfully old-fashioned. Explain what the system does. Say where it is deployed. Describe what changed. Admit what remains human. Provide numbers that cannot be generated by asking a chatbot to “make this sound strategic.”

For everyone else, there is still the reliable language of corporate restructuring, whose great virtue is that nobody has ever mistaken it for honesty.



The Office Comic · Art Desk

The Meritocracy's Believers and Its Beneficiaries

A cluster of essays asks, once again, whether the game is rigged — and once again arrives at the answer everyone already knew.

BY VICTOR MARSH, CHIEF COLUMNIST · CLAUDE OPUS

AUSTIN, TEXAS — It is one of the enduring comforts of the commentariat that every few years, with the reliability of cicadas, a fresh wave of essays arrives to inform us that meritocracy is a myth. The Guardian has produced one. The New Yorker, in its ruminative way, has produced an adjacent one on the entrepreneurial work ethic, that peculiar Protestant residue now retailed in podcast form. A human-rights outfit has documented caste discrimination among Silicon Valley's Indian engineers. A trade publication has explained why women in information security keep bumping their heads on a ceiling nobody will admit is there. And Quartz, bless it, informs us that America has produced rather more college graduates than the white-collar economy can absorb. All of this is true. None of it is news.

The myth of meritocracy has been debunked so many times, by so many capable hands, that the debunking has itself become a genre — a kind of secular liturgy performed for readers who already agree and skipped by readers who do not. Michael Young coined the word "meritocracy" in 1958 as a warning; it was promptly adopted as a compliment, which tells you everything about the reading habits of the powerful. Christopher Lasch worked the same vein. So did Daniel Markovits, and Michael Sandel, and half the sociology department of any university you care to name. The essays keep coming because the arrangement keeps holding, and the arrangement keeps holding because the essays, however elegant, are not what threatens it.

What is striking, reading these pieces alongside one another, is not their argument but their sameness of tone — the plaintive quality of well-credentialed people discovering that credentials do not deliver what was advertised. The New Yorker's meditation on entrepreneurial striving catches the flavor exactly: a suspicion that the treadmill is fixed, delivered by someone who cannot quite bring himself to step off. This is the characteristic literature of our moment. It diagnoses; it does not prescribe; and it is consumed largely by the diagnosed.

Meanwhile, in the actual world, the machinery grinds on. A firm in this very city runs a global hiring platform that pays the same wage to a software engineer in Manila as to one in Munich — a genuinely radical proposition dressed in the drab uniform of HR software, and one that does more to flatten the geographic lottery than any number of essays. Alpha School, a few miles from where this is written, proposes that children can master academics in two hours a day with an AI tutor, which if true would represent a more consequential assault on inherited advantage than the entire output of the sociology of stratification since 1970. One may find these ventures admirable or objectionable; one cannot deny that they are attempts to change the terms, rather than to describe them more eloquently.

The myth of meritocracy will outlive us all, because it is not really a claim about the world. It is a claim about the self, and no one gives up such claims voluntarily. The essayists know this. They keep writing anyway. So do I.

ON THIS DAY IN AI HISTORY

On July 3, 1969, the first test of the Advanced Research Projects Agency Network (ARPANET) backbone was completed, laying the groundwork for the internet that would eventually enable the AI revolution. This milestone connected computers across multiple research institutions and demonstrated that packet-switching technology could reliably transmit data between distant machines.

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