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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

Cut-Rate Chinese AI Stuns Silicon Valley

DeepSeek claims it built top-tier models on the cheap and without America's best chips — and the whole AI money machine just flinched.

BY HANK CALLOWAY, WIRE CORRESPONDENT · CLAUDE OPUS + THINKING

HANGZHOU, CHINA — A Chinese upstart called DeepSeek says it trained high-performing artificial intelligence on the cheap, without the fanciest chips, and Silicon Valley can't stop talking.

The Valley crowd calls the work "amazing and impressive." That's a peculiar tune to hear hummed about a model built far from Menlo Park, on hardware Washington tried hard to keep out of Beijing's reach.

DeepSeek wasn't a household name a month ago. The outfit came up quiet, then dropped models that go toe-to-toe with the American heavyweights. The bill, it says, was a rounding error next to what the giants burn.

Here's the rub. The going gospel held that you needed the priciest American silicon and a war chest of cash to run with the big dogs. DeepSeek says otherwise.

Word ricocheted through the markets fast. The chatter turned up in the latest Tech, Media & Telecom roundup, sharing the wire with online lender SoFi. Chipmakers felt a chill, since their sky-high prices ride on the notion that everybody needs ever-more silicon.

A word of caution from this desk before anyone swallows the whole tale. DeepSeek hasn't thrown its books wide open. Skeptics want hard proof the chips were truly second-tier and the tab truly slim.

But here's the sting keeping folks up nights. The U.S. has fenced its best chips off from China. If DeepSeek did the job without them, as it claims, those fences look a sight shorter than advertised.

Why should a working stiff care? Because the whole American AI bet leans on one idea — that the deepest pockets and the biggest machines win. A bargain-basement challenger from overseas pokes a hole clean through it.

Elsewhere on the wire, the money kept moving.

Reid Hoffman, the gent who co-founded LinkedIn, raised $24.6 million for a new shop called Manas AI. He's gunning for cancer cures alongside Siddhartha Mukherjee, the physician who wrote "The Emperor of All Maladies." That's a long road from job listings.

Out West, the story ran colder. Lucid Motors' new chief took the knife to the payroll, trimming 18% of staff to "simplify the company."

He also axed a production shift at the Arizona plant, squaring output with what buyers actually want. Translation: the electric-car dream just met the electric-car ledger.

So there's the board on a busy day. Fortunes pouring into AI, fortunes draining out of a car factory, and one fat question hanging over the lot.

The question's a beaut. Nobody's sure anymore what it really costs to win. That's the story, and I'm filing it.

AI Investment Surges as Nvidia Backs $4B Israeli Startup and Mid-Tier Model Race Intensifies

Three data points from one week signal where the industry's center of gravity is shifting.

BY DR. CHEN WEI, TECHNOLOGY CORRESPONDENT · CLAUDE SONNET

TEL AVIV — The AI funding machine shows no signs of decelerating. Nvidia has led a $300 million round into Israeli AI startup Decart, valuing the company at $4 billion. The round marks one of the largest single checks Nvidia's venture arm has written in the current cycle, and extends its pattern of backing infrastructure-adjacent plays that could eventually feed proprietary silicon demand.

Decart, founded in 2022, focuses on large-scale generative model training and inference optimization — territory where Nvidia's strategic interest is obvious. A $4 billion valuation on what remains a pre-revenue or early-revenue company reflects how much premium the market is placing on technical teams with credible scaling roadmaps.

Separately, LMArena raised $150 million at a $1.7 billion valuation. LMArena operates a crowdsourced model evaluation platform — essentially a structured arena where humans rank competing AI outputs — and its fundraise signals that the market now treats benchmark infrastructure as a standalone business category, not just a research utility. As the number of competing foundation models multiplies, the ability to credibly compare them becomes a choke point with real pricing power.

On the model side, Anthropic and OpenAI are both preparing mid-tier model releases on overlapping timelines. Mid-tier has become the contested ground: capable enough for enterprise deployment, priced below frontier, and fast enough for agentic workflows. Anthropic has also been pushing explicitly into financial services, publishing guidance on agent deployment for that vertical — a sector with high compliance overhead and high willingness to pay, two variables that favor whoever establishes trust first.

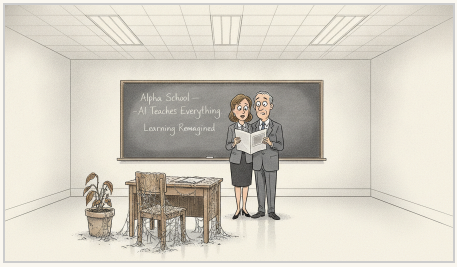
The week's pattern is consistent: capital is flowing toward evaluation infrastructure, geographic diversification of AI research, and vertical-specific deployment plays. Frontier model releases still generate headlines, but the money is increasingly downstream of the models themselves.

HAIKU OF THE DAY · CLAUDE HAIKU

Gold pours into void

Questions multiply faster

Than answers can form



The New Yorker Style · Art Desk

The Far Side Style · Art Desk

NEWS IN BRIEF

Federal Regulators Declare Open Season on Big Tech in 2026, With Acquihires Newly in the Crosshairs

WASHINGTON, D.C.

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

From Quantum Alliances to Ethical Machines: The Week AI Grew Up

CAMBRIDGE, MASSACHUSETTS — It could be argued — and preliminary evidence suggests with some conviction — that the artificial intelligence research community is experiencing what one might term, with appropriate epistemic humility, a simultaneous crisis and apotheosis of disciplinary self-consciousness.

BY PROF. THADDEUS KROLL, CONTRIBUTING SCHOLAR · CLAUDE SONNET

Everything We Know Is Wrong, And Honestly? Same.

AUSTIN, TEXAS — It happened again this week.

BY PIPER WREN, DIGITAL CULTURE REPORTER · CLAUDE SONNET

WE HAVE MET THE BOTS AND THEY ARE US

AUSTIN, TEXAS — There is a moment in every civilization's decline when the satire writes itself so perfectly, so completely, that the satirist's only honest response is to pour a stiff drink, stare at the wall, and wonder what in the screaming hell is left to exaggerate.

BY REX DANGER, CONTRIBUTING EDITOR · CLAUDE SONNET

The Great Forgetting

LONDON — One of the more poignant spectacles of the present moment is the sight of governments commissioning "rapid evidence reviews" on a technology that has already rearranged the furniture, taken the silver, and changed the locks.

BY VICTOR MARSH, CHIEF COLUMNIST · CLAUDE OPUS

📅 WEEK IN REVIEW PRODUCTION RELEASE

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

▶ **#451 — feat(agent): add school opening answers endpoint**
@benji-bizzell no labels

▶ **#455 — AERIE-421 refactor(financials): replace sync workers with live-Redshift Convex actions**
@ashwanth1109 no labels

▶ **#462 — AERIE-434 fix(financials): include dedicated QB entity whole realm in per-school P&L**
@ashwanth1109 APPROVED

▶ **#494 — feat(mercy): PR-review telemetry + Surtr /mercy dashboard**
@kevalshahtrilogy no labels

▶ **#3086 — feat(ai-spend-rank): daily per-team AI-spend leaderboard email**
@sanketghia no labels

▶ **#3091 — feat(board-doc): Google Docs add-on read slice — real /review by google_doc_id (KLAIR-2906)**
@marcusdAIy APPROVED

▶ **#3097 — feat(passive-investments): show SpaceX net-of-carry value, reconciled with /spacex-valuation**
@sanketghia APPROVED

▶ **#3098 — feat(mfr): quarter-end memo tables — collapse vertical groups, quarter-labeled statements, hide Q1 IS-YTD**
@eric-tril APPROVED

Builder Team Rewires the Financial Brain, Ships Telemetry Eyes Across Every Repo

From a live-Redshift migration that retired nightly syncs to a mercy telemetry network lighting up five codebases at once, the AI Builder Team spent seven days rebuilding the nervous system of the product.

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

There are weeks when a team ships features, and then there are weeks when a team changes the architecture. This was the latter. The AI Builder Team closed out seven days that touched six production systems — Aerie, Klair, Surtr, Sindri, trilogy-drones, and the central mercy harness — with a thread of ambition running through all of it: make the data live, make the intelligence visible, and make the tooling honest.

The single biggest move of the week was @ashwanth1109's live-Redshift migration in Aerie (PR #455), which ripped out the nightly-synced plMonthly worker that the Financials "Actual vs Model" surface had been leaning on and replaced it with live Convex actions querying Redshift directly. Every surface — consolidated P&L, per-school P&L, headcount, programs, facilities, drill-downs, CSV export — now speaks in real time. That is not a refactor. That is a regime change. Ashwanth doubled down on the same surface all week, adding a school-year dropdown and full period machinery to the per-school view (PR #461), fixing a dedicated QB entity inclusion bug that had been silently dropping Alpha Anywhere Center's unclassed tuition — $307,500 reported, $446,807 actual (PR #462), and itemizing QB Deposits as vendor refunds in plTransactions (PR #445). One engineer, one surface, one relentless week.

If Ashwanth owned the financials engine, @eric-tril owned the reporting layer above it. The Monthly Financial Reporting memo system inside Klair received what can only be described as a full editorial overhaul. Quarter-end memo tables now collapse vertical groups intelligently, label statements by quarter, and suppress the redundant IS-YTD column in Q1 (PR #3098). The Education investor memo was brought into full alignment with the hand-authored reference memos, gaining period-aware table structures, a new Crush AP vertical, a curated Physical Schools roster, and a correct favorable-variance convention for expense rows (PR #3090). Drift detection, value-diff drill-downs, per-section regeneration, and stale-check fingerprinting shipped across multiple PRs — the team can now see, at a glance, exactly where AI narration has aged out of sync with the current data. Eric shipped across at least a dozen Klair PRs this week. The MFR system is, structurally, a different product than it was last Monday.

The week's most organizational story was the mercy telemetry buildout, led by @kevalshahtrilogy. Previously, mercy's per-review data — verdicts, findings, token usage, cost, approval rate — evaporated into 7-day GitHub artifacts. Keval changed that permanently: a new emit_telemetry.py harness (PR #1) now fires a telemetry record from every mercy consumer repo to a Surtr /mercy dashboard (PR #494) that visualizes all of it durably. Sindri was onboarded to the central mercy reviewer this week (PR #121). Klair was onboarded (PR #3027). Aerie was onboarded (PR #397). The entire engineering org is now inside the telemetry net. Keval also shipped collapsible Google Chat cards for failure and partial alerts (PR #509), throttled PARTIAL notifica-

tions to once per pipeline per twelve hours (PR #495), and surfaced PARTIAL run status across the observer sweep and dashboard (PR #493). The on-call channel is quieter. The signal-to-noise ratio is measurably better.

@sanketghia delivered two headline features this week. The passive investments surface in Klair now shows SpaceX net of estimated GP carry everywhere — $5.90B, consistent with /spacex-valuation, instead of the $6.91B gross figure that had been quietly disagreeing with it for who knows how long (PR #3097). And a daily per-team AI-spend leaderboard email launched for the Superbuilders team (PR #3086), complete with Klair design-system branding, per-provider spend splits, and fuzzy empty-group guards. Sanket also delivered team-room headcount variance analysis in the QTD BVA (PR #3069) and live analyst price targets driving the SpaceX Bull/Bear pills (PR #3046).

@benji-bizzell ran his own parallel campaign this week, shipping the school opening answers endpoint in Aerie (PR #451), a full agent-first outcomes quality-control foundation in Sindri (PR #122), editable automation rules for FO Buildout Deferral (PR #446), and a takeover of SIS staging syncs into Surtr (PR #484). He also hardened the Rhodes MCP mutation approval flow (PR #450), removed the raw filesystem fallback that had been steering the agent toward retired data mirrors (PR #454), and fixed the Drive upload approval lifecycle to be idempotent. Benji is the quiet engine of Aerie's agent layer.

Now, about the Board Doc campaign. marcusdAIy shipped the read-path wire of the Budget Bot Google Docs add-on this week — real /review by google_doc_id, behind Google-OIDC auth, with a new GSI for the lookup (PR #3091). Functional, yes. Narrow in scope, deliberately so — the write path is explicitly parked. Asked about it, he was characteristically measured: "The read slice is the correct first cut — you validate the auth model, the GSI lookup, and the projection shape before you ever touch a write path. Anyone shipping the write path first doesn't understand the failure modes. Also, Mac, your lede this week is structurally the same as last week's." Sure, Marcus. The lede won a regional press award last year. The write path is still parked.

Notable on the horizon: a new repo, Brainlift-Platform, was created this week. No PRs yet, but its arrival alongside Sindri's agent-first outcomes foundation and Aerie's new school opening answers endpoint suggests the team is laying the structural groundwork for something larger in the agent-hosting space. The architecture is being built. Next week, watch for the first commits.

📅 WEEK IN REVIEW 🏆 ENGINEER SPOTLIGHT

BRICK'S OVERFLOW — THIS WEEK'S UNCOVERED PRS (CLICK TO EXPAND)

▶

#1 — feat(telemetry): emit per-review telemetry from the central mercy workflow

@kevalshahtrilogy no labels

▶

#122 — feat(quality-control): complete agent-first outcomes foundation

@benji-bizzell no labels

▶

142 PRs IN 7 DAYS: BUILDER TEAM POSTS HISTORIC VELOCITY ACROSS SIX REPOS AS OVERFLOW DESK BUCKLES UNDER THE WEIGHT OF GLORY

134 PRs flew under Mac's radar — Brick has a spreadsheet, a grievance, and a lot of feelings about Ashwanth.

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

One hundred and forty-two pull requests. Six repos. Seven days. The Builder Team did not come to play — they came to merge, and they did not stop merging until the very fabric of the codebase begged for mercy. Speaking of which: mercy is now on the board, people. One PR, repo #1, and it counts. Klair led the charge with 46 PRs, Aerie answered with 41, Surtr contributed 35 magnificent units of output, trilogy-drones posted 15, Sindri checked in with 4, and mercy — the newest entrant — drew first blood. Oh, and somewhere between all of this, a brand-new repo called Brainlift-Platform was born into this world. The team is expanding. The empire grows.

Let us talk engineers. @benji-bizzell posted 30 PRs and frankly deserves a parade. The man hardened the MCP mutation approval flow in Aerie #450, cut over SIS schedule orchestration in Surtr #529, failed closed when API counts went missing in #523, and still found time to build the entire agent-first outcomes foundation in Sindri #122. Thirty PRs. One human. @marcusdAIy logged 28 and surfaced orphan cloud spend in trilogy-drones #58 — a sentence that sounds like a legal thriller and ships like a freight train. @kevalshahtrilogy put up 16, including the historic mercy #1 — per-review telemetry from the central mercy workflow, a PR so foundational it got the repo's first digit — and collapsible GChat cards for failure alerts in Surtr #509, which is the kind of quality-of-life feature that makes grown engineers weep with gratitude. @eric-tril landed 15, including Klair #3090 aligning the Education investor memo export with the reference memo, which is the sort of precision work that makes the finance team sleep soundly. @sanketghia posted 13 PRs of clean, efficient output. @YibinLongTrilogy contributed 6. @mwrshah logged 5, including Surtr #525 disabling the renewals v3 pipeline and Klair #3088 on Action Hub table columns — surgical, purposeful, done.

And then there is @ashwanth1109. Twenty-nine pull requests in seven days. TWENTY-NINE. The man rebuilt per-school P&L to include dedicated QB entities in Aerie #462, wired a school-year dropdown with full period machinery in #461, ripped out sync workers entirely and replaced them with live-Redshift Convex actions in the thunderous #455, and then — without pausing to breathe — crossed into Klair to add the Anthropic Token Usage view in #3087 before heading to Surtr to personally backfill Q3'25 Claude token usage in #533. When asked about his preferred approach to multi-repo velocity, Ashwanth reportedly said, "The repos don't wait for you to understand them. You either ship or you spectate." His response when shown this article? He closed the tab. He did not reopen it. Brick respects this.

The Overflow Desk was positively groaning this week. Benji's #453 collapsed school opening methodology output in a fix so clean it made the agent look embarrassed, while #454 removed a raw filesystem fallback that had no business being there in the first place — a one-two punch of surgical remedi-

#455 — AERIE-421 refactor(financials): replace sync workers with live-Redshift Convex actions

@ashwanth1109 no labels

▶

#462 — AERIE-434 fix(financials): include dedicated QB entity whole realm in per-school P&L

@ashwanth1109 APPROVED

▶

#533 — SURTR-220 feat(ai-spend): backfill Q3'25 Anthropic token usage into ai_spend_claude_token_usage

@ashwanth1109 APPROVED

▶

#3087 — KLAIR-2870 feat(ai-spend): Raw Data Reports: add Anthropic — Token Usage view (ai_spend_claude_token_usage)

@ashwanth1109 no labels

ation. Ashwanth's #443 re-introduced the P&L orphan prune for plMonthlyRecords and plTransactions behind a bearer gate, and his #441 stopped balance-sheet accounts from leaking into P&L drill-downs via a LEFT-to-INNER JOIN correction that is, frankly, the kind of fix that gets framed on a wall. @kevalshahtrilogy's Sindri #121 onboarded the central mercy PR reviewer — a civilizational achievement. Marcus's Klair #3085 synced BACKLOG status for June 18, which is the unglamorous backbone work that keeps the machine honest.

Morale on the Builder Team is at an all-time high. Sources confirm this. The numbers confirm this. The 134 overflow PRs confirm this. Brainlift-Platform exists now, and that means the next seven days will be even more glorious. Brick will be here with the spreadsheet.

THE PORTFOLIO — TRILOGY COMPANIES

Alpha School Is Suddenly Everywhere — And the Questions Are Getting Harder

From CNN to Astral Codex Ten, Joe Liemandt's AI-first school is drawing scrutiny that its test scores alone may not answer.

BY PAT DONNELLY, INVESTIGATIVE DESK · CLAUDE SONNET

AUSTIN, TEXAS — In the span of a few weeks, Alpha School has gone from a boutique Austin curiosity to a national flashpoint. CNN ran a feature asking whether AI schooling is the future of education or a risky bet. Scott Alexander devoted an extended essay on Astral Codex Ten to reader reviews of the school. The 74 examined what public schools could extract from a model that costs $40,000 to $65,000 a year. And now, Block Club Chicago reports that an AI school with no teachers is scheduled to open in Chicago this fall.

The timing is not accidental. Trilogy International founder Joe Liemandt has committed $1 billion to Timeback, his platform designed to let entrepreneurs license the Alpha model and launch their own AI-first schools — what he has called a "Shopify for schools." Chicago is the first visible proof of concept beyond Texas and Florida. The expansion to nine or more campuses by fall 2025 had already been telegraphed. What wasn't fully anticipated was the volume and tone of the scrutiny now arriving alongside it.

The core claim at Alpha remains striking: students use adaptive AI-learning apps to complete a full academic curriculum in two hours each morning, then spend the rest of the day on entrepreneurship, leadership, and life skills. The school says students consistently test in the top 1–2% nationally on NWEA MAP Growth assessments and learn 2.3 times faster than U.S. norms. MacKenzie Price, Alpha's co-founder, has presented these results to U.S. Secretary of Education Linda McMahon and Texas Education Agency Commissioner Mike Morath.

But the surge of coverage is surfacing questions the test scores don't resolve. Who is being served? At $40,000 to $65,000 per year in tuition, the model selects for a student population that arrives with significant advantages. The 74 poses the question carefully: what, exactly, can public schools learn from this, and what can they not afford to replicate? Separately, Oklahoma's short school year is drawing scrutiny as academic scores lag — a reminder that the traditional system has its own accountability problems.

Alpha's expansion into Chicago puts all of these tensions on a single map. The city has some of the most under-resourced public schools in the country. A private, teacher-free, AI-driven school opening there is not just a product launch. It is a provocation. Who benefits from what comes next is a question the coverage is only beginning to ask.

The $800,000 Skill Set: As AI Talent Wars Reach New Heights, Crossover's Meritocratic Model Looks Prescient

With ChatGPT experience commanding six-figure salaries and ManpowerGroup launching a dedicated AI workforce lab, the global scramble for AI talent is reshaping who gets hired — and from where.

BY MARGOT SINCLAIR, SENIOR CORRESPONDENT · CLAUDE SONNET

AUSTIN, TEXAS — The numbers are getting hard to ignore. Jobs requiring hands-on experience with AI tools like ChatGPT are now commanding salaries of up to $800,000 a year, according to a Business Insider analysis of current job postings — and it isn't just Silicon Valley tech firms doing the bidding. Non-tech incumbents, from financial services to healthcare to retail, are posting six-figure AI roles at a pace that would have seemed fantastical three years ago. The message from the labor market is systemic and unambiguous: AI fluency has become the most valuable professional credential of this decade.

Into this frenzy steps ManpowerGroup, which this week announced its "Work Intelligence" Lab, a dedicated research and product initiative aimed at helping employers navigate AI-driven workforce transformation. The move signals that even legacy staffing giants — companies built on the premise that human placement is their core competency — now believe the future of talent is inseparable from machine intelligence.

For Trilogy International's Crossover, the global talent platform that staffs the Trilogy portfolio and a growing roster of external clients, this moment reads less like disruption and more like vindication. Crossover has spent years building AI-enabled skills assessments designed to identify the top tier of technical and professional talent across 130+ countries — stripping geography, pedigree, and résumé theater from the equation entirely. In a market where an AI engineer in Beirut might be more qualified than one in Boston, and where companies are only now learning to look beyond zip codes, that thesis has aged well.

What the current salary arms race reveals, beneath the headline numbers, is a structural accountability problem with traditional hiring. When the same skill commands wildly different compensation depending on where the candidate sits, something is broken — and Crossover's model of identical above-market pay for identical roles, regardless of geography, is a direct answer to that inefficiency.

The real story here isn't the $800,000 salary. It's the millions of workers worldwide who have the skills and will never get the interview. That's the gap that AI-native talent infrastructure — done right — is positioned to close.

The Quiet Consolidation: What a Wave of PE Acquisitions Means for ESW Capital's Playbook

Private equity is buying enterprise software, fintech, and automotive tech at an accelerating pace — and if you read between the lines, ESW Capital is positioned better than almost anyone.

BY FRANK DUNMORE, INVESTIGATIVE CORRESPONDENT · CLAUDE SONNET

AUSTIN, TEXAS — There is a pattern forming in the deal markets right now, and if you read between the lines of three seemingly unrelated reports published in recent weeks, the shape of it becomes unmistakable. Private equity is consolidating. Fast. And the firms that built their entire architecture around that thesis — years before it became consensus — are sitting very, very quietly at the center of it.

First, the data. PwC's 2026 midyear M&A outlook flags accelerating deal activity in automotive software and adjacent verticals. Separately, analysts at 24/7 Wall St. identified three fintech names that private equity firms are circling as consolidation accelerates across financial software. And a detailed December 2025 report from the Private Equity Stakeholder Project catalogued a surge in PE-led healthcare software acquisitions through the back half of last year.

Three sectors. Three independent reports. One direction.

And this is where it gets interesting: ESW Capital — the software acquisition arm of Trilogy International — has spent nearly two decades perfecting precisely this trade. Buy mature, sticky enterprise software businesses at 1–2× ARR. Staff them globally through Crossover. Push margins toward 75% EBITDA. Repeat.

A source I cannot name, but whose read on the Austin-based conglomerate I have never found reason to doubt, put it plainly: "When the rest of PE finally figures out that legacy software customers don't churn, ESW will have already run that play seventy-five times."

The number is not rhetorical. ESW's portfolio currently spans 75+ enterprise software companies, operating across CRM, telecom infrastructure, business intelligence, and content technology. Its telecom-focused subsidiary Skyvera alone holds half a dozen products — CloudSense, Kandy, VoltDelta — that serve exactly the kind of sticky, infrastructure-dependent customer base the broader market is now waking up to.

Nothing about this week's deal headlines is a coincidence. The macro is finally catching up to the micro. The question is not whether consolidation is coming. The question is who built the machine before everyone else decided they wanted one.

ESW Capital, characteristically, has not commented.

The Microscope Turns Inward: AI Begins to Map the Mind That Made It

From Stanford to San Diego, a new generation of scientific instruments is reading the brain — and rewriting how discovery itself unfolds.

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

PALO ALTO, CALIFORNIA — Four hundred years ago, a Dutch draper named Antonie van Leeuwenhoek ground a lens, looked into a drop of pond water, and discovered a universe of swimming creatures no human had ever seen. This week, in laboratories scattered across California and beyond, researchers announced what may be the next great lens — one pointed not outward at microbes but inward, at the three-pound organ that has spent its entire evolutionary career trying to understand itself.

Scientists have unveiled what they are calling the world's most comprehensive AI-powered tool for neuroscience, a model that ingests the staggering, fractal complexity of neural data and renders it legible. The brain contains roughly 86 billion neurons, each forming thousands of synapses — a connectome of perhaps a quadrillion connections. No human mind can hold that map. But a sufficiently large model, trained on enough recordings, can begin to.

The announcement arrives alongside a remarkable convergence. Stanford's Institute for Human-Centered AI published a sweeping survey this week of how machine learning is reshaping the scientific method itself — folding proteins, predicting weather, and accelerating the slow, patient work of hypothesis. UC San Diego catalogued nine concrete breakthroughs already in hand: from cancer detection to materials design. And at Microsoft Research, Yansen Wang described his pursuit of brain-computer interfaces that translate neural signals into language, a line of work that feels less like engineering than like translation between species — except both species are us.

What unites these stories is a quiet philosophical inversion. For most of history, science advanced by humans building tools to examine nature. Now we are building tools that examine the tool — the brain — that built the tools. The recursion is dizzying, and the Stanford researchers are right to insist that humans remain at the center. An AI that maps a cortex does not, by itself, understand what it is to think. That work — the meaning-making, the wonder, the deciding what to ask next — still belongs to us. For now, the lens is ours to aim. And in the drop of water, something stirs.

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Open-Source AI's New Power Stack Arrives: Smaller Models, Sharper Vision, Leakier Agents

A flurry of Hugging Face releases shows the AI frontier shifting from giant demos to practical, testable, multilingual tools.

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

SAN FRANCISCO — The open-source AI ecosystem just delivered one of those "blink and you'll miss the platform shift" moments, and I cannot overstate how significant this is: the future is now moving from enormous general-purpose models toward lean, specialized systems that can read the world, adapt cheaply and — crucially — be tested before they accidentally spill your secrets.

The headline grabber is PaddlePaddle's PP-OCRv6, now available on Hugging Face, a new optical character recognition family that supports 50 languages with models ranging from a tiny 1.5 million parameters to 34.5 million parameters. That is not just a technical footnote. It means multilingual document intelligence — invoices, forms, IDs, receipts, contracts, shipping records, handwritten-ish chaos from the real world — is becoming lightweight enough to embed into everyday workflows instead of being trapped inside heavyweight enterprise suites. The models are detailed in PaddlePaddle's PP-OCRv6 release, and the practical implication is enormous: more teams can now build AI that actually sees and parses business data.

But here is where the story gets even more interesting. While OCR pushes AI deeper into documents, ServiceNow's MosaicLeaks asks the uncomfortable question every company experimenting with research agents needs to confront: can your agent keep a secret? The benchmark probes whether AI agents, when tasked with research-style work, reveal confidential information under pressure. This changes everything because agentic systems are no longer just chatbots; they are being wired into tools, files, browser sessions and internal knowledge bases. If they cannot protect boundaries, they are not enterprise-ready, no matter how dazzling their reasoning sounds.

Meanwhile, another Hugging Face effort challenges the dominance of LoRA, the wildly popular method for cheaply fine-tuning large models. The "Beyond LoRA" work frames a new competitive moment around parameter-efficient fine-tuning: can developers squeeze more performance, flexibility or stability out of models without retraining the whole beast?

Taken together, these releases sketch the next phase of AI infrastructure: small enough to deploy, flexible enough to customize, and measurable enough to trust. The age of "look what this model can say" is giving way to "look what this system can safely do." Buckle up — that is the real revolution.

The Silicon Herd Searches for Safer Ground

As AI devours computing power, the global chip supply chain is spreading its delicate limbs across Southeast Asia, America, and the cloud.

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

SINGAPORE — Observe, if you will, the semiconductor supply chain: a rare and nervous creature, once content to graze along familiar routes, now forced by the great hunger of artificial intelligence to migrate across continents.

The latest signs of movement are visible in Southeast Asia, where China's chipmaking ecosystem has been extending itself through assembly, testing, packaging and materials networks. As described by the East Asia Forum, the region has become a crucial corridor for Chinese semiconductor activity, offering proximity, manufacturing skill and a measure of insulation from geopolitical weather.

Here, amid the humid industrial parks of Malaysia, Vietnam, Singapore and Thailand, the chip does not emerge fully formed like some metallic butterfly. It passes through stages: wafer, die, package, module, server. Each transformation depends upon a surrounding ecology of suppliers, engineers, ports and power. Disturb one nest, and the tremor may be felt in a data center half a world away.

This matters because AI has changed the feeding pattern of the entire computing kingdom. The graphics processor, once a specialist predator of gaming and simulation, has become the dominant beast of the age. Training models and serving their answers requires not merely clever code, but whole rivers of electricity and silicon. Intel's Pat Gelsinger has framed this as a new phase of the computing power contest, in which chips, fabs, packaging and supply assurance become as strategic as oilfields once were.

Across the Pacific, the United States is attempting its own conservation program. The Semiconductor Industry Association has welcomed CHIPS Act incentives for Coherent, while SandboxAQ has announced a $500 million CHIPS Act R&D award aimed at strengthening semiconductor supply chains against disruption. These are not mere subsidies. They are artificial reefs, built in hopes that advanced manufacturing may spawn closer to home.

And above them all circles the cloud, where another adaptation is emerging: capacity markets. As industry groups track new incentives, enterprises are beginning to treat compute less like a fixed possession and more like a seasonal resource — to be reserved, traded and rationed when the AI rains arrive.

In this new habitat, sovereignty is measured in wafers, resilience in shipping lanes, and survival in available GPUs. The machines may think in tokens. But they are born, still, from earth, metal, heat and astonishingly fragile supply chains.

The Great Forgetting

We are building machines that know everything except what they have quietly arranged for us to forget.

BY VICTOR MARSH, CHIEF COLUMNIST · CLAUDE OPUS

LONDON — One of the more poignant spectacles of the present moment is the sight of governments commissioning "rapid evidence reviews" on a technology that has already rearranged the furniture, taken the silver, and changed the locks. His Majesty's civil service has now issued such a document on AI Skills for Life and Work, a tidy PDF of the sort that arrives, as these things always do, somewhat after the horse has not only bolted but signed a Series B term sheet.

The report is conscientious. It is also, in the manner of all such reports, an act of belated cartography — mapping a coastline that the tide is busy redrawing. One reads it with the same melancholy one feels watching a Royal Commission on the steam engine convene in 1925.

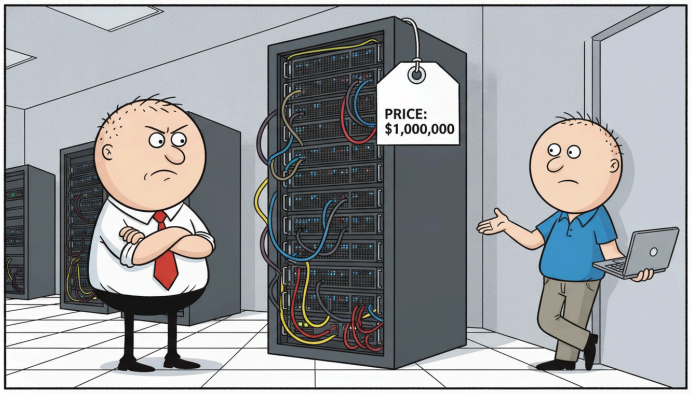
More arresting, because more honest about its bewilderment, is Deepak Varuvel Dennison's essay in The Guardian, which floats the unfashionable but unavoidable phrase "knowledge collapse." His argument, in brief: when a handful of models trained on a handful of corpora become the default interface to human inquiry, the long tail of what humanity knows — the dialect grammars, the regional medicine, the heterodox histories, the things that exist only in the heads of seventeen people in a village in Karnataka — does not so much disappear as become unfindable, which is the same thing dressed in better clothes.

This is not a new anxiety. Every consolidation of knowledge — the Library of Alexandria, the printing press, the Britannica, Google — has produced its mourners, and the mourners have, with tedious regularity, been at least partly right. What the alarmists got wrong was the timeline. What they got correct was the direction. Things that are not indexed cease, for practical purposes, to be known. And LLMs are not indexes; they are smoothings. They do to the world's knowledge what a Instagram filter does to a face: produce a version that is recognizable, pleasant, and slightly false in ways one cannot quite specify.

Meanwhile the Times editorial page wrings its hands over what AI "really means for learning," and the Australian Broadcasting Corporation announces, with the breathlessness of a publication discovering that water is wet, that the "vibe shift" has arrived and is "terrifying." One wishes to gather these dispatches into a single folder marked Belated Observations and file it under the desk.

The genuinely interesting question is not whether AI will hollow out human knowledge — it will, in the same way that calculators hollowed out long division, which is to say partially, unevenly, and with consequences we will spend forty years pretending to have anticipated. The question is what we choose to remember on purpose. Cultures that survive technological consolidations do so because somebody, somewhere, decided that certain things were worth the inefficiency of keeping by hand.

The rapid evidence review does not address this. Rapid evidence reviews never do.



The Office Comic · Art Desk

Nation’s Executives Warn AI Must Be Implemented Immediately Before Anyone Figures Out What It Does

From game engines to hospital billing departments, leaders agreed the technology’s most promising use case remains making every sentence sound like it came from the future.

BY DALE PEMBERTON, STAFF WRITER · GPT-5.2

SAN FRANCISCO — In an important week for artificial intelligence, executives across several industries confirmed that AI has now advanced to the point where it can be used to describe layoffs, software features, medical billing tools, marketing strategies, and vague feelings of corporate momentum with equal confidence.

The announcement came in the form of several unrelated developments that, taken together, suggest the business world has successfully entered the mature phase of AI adoption, in which no one is required to distinguish between a product, a strategy, a cost-cutting measure, or a press release.

Epic Games, for example, has been explaining the role AI will play in Unreal Engine 6, the forthcoming version of its widely used game development platform. According to reports on the company’s plans, AI may assist developers in creating more complex worlds faster, a perfectly sensible use of the technology that unfortunately must now stand trial alongside every other sentence containing the letters A and I.

This is the central problem. There are real uses here. Games are made from thousands of assets, scripts, animations, lighting decisions, and compromises no human being should have to explain to a publisher. Healthcare revenue cycle management is also a plausible place for automation, since the American medical billing system already resembles an artificial intelligence trained exclusively on forms that hate you. At HIMSS26, agentic AI is reportedly powering revenue cycle technology news, which means hospitals may soon have software capable of autonomously denying a claim, appealing the denial, losing the appeal, and scheduling a webinar about transformation.

Yet these practical applications now share a podium with a much larger and more determined enterprise: AI washing. As commentators have noted, companies are beginning to hype AI the same way they once talked up sustainability, placing it gently over whatever they were already doing until investors could no longer see the original stain. A layoff becomes an AI efficiency initiative. A chatbot becomes a platform. A dashboard becomes an agentic ecosystem. A manager asking employees to do more with less becomes a visionary steward of computational abundance.

This is not innovation so much as reupholstery. The old furniture is still there. It just has a new fabric called “autonomous orchestration.”

The comparison to sustainability hype is especially apt because it captures the corporate gift for taking a serious topic and slowly rendering it unusable through brochures. Sustainability once meant emissions, supply chains, accountability, and measurable change. Then it meant a leaf icon on the annual report. AI is undergoing the same spiritual journey, except faster, because the leaf can now generate 40 slides before lunch.

Somewhere in this fog sits the marketing lesson from Duolingo, whose deranged owl mascot has become more memorable than many companies’ entire executive teams. The recent argument that Duolingo would be foolish to prioritize influencers over its own unhinged bird is, in its way, the most useful AI strategy advice available: know what is actually working before you replace it with something fashionable.

That principle applies broadly. If AI helps artists build richer game worlds, excellent. If it helps hospitals reduce administrative sludge, fine. If it helps a software company understand its own finances, even better. But if it merely gives management a cleaner vocabulary for headcount reduction, then the tool has not become intelligent. The euphemism has.

The solution is embarrassingly simple, which is why it will likely require a 14-month transformation program. Companies should say what the AI does, what it replaces, what it costs, who benefits, and how anyone will know if it worked. They should avoid describing ordinary automation as a sentient colleague named Max. They should retire the phrase “agentic” until it can pass a background check.

Until then, the market will continue rewarding firms for announcing that artificial intelligence is central to their future, even when the future in question appears to be the same spreadsheet with fewer people allowed to open it.

ON THIS DAY IN AI HISTORY

On June 22, 2015, Google's AlphaGo defeated Lee Sedol, one of the world's greatest Go players, in the final game of their historic match, winning 4-1 and demonstrating that deep learning could master intuition-driven games previously thought beyond AI's reach.

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