

The Long Read

2 October 2026

12

STORIES

3

SECTIONS

3160

WORDS

1

HIGH IMPACT

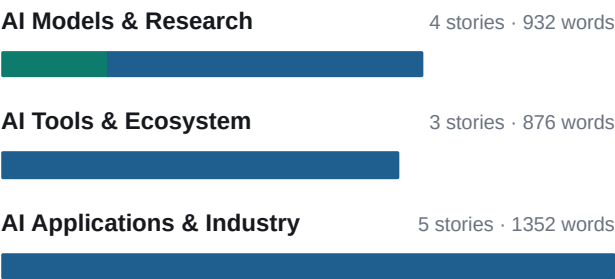
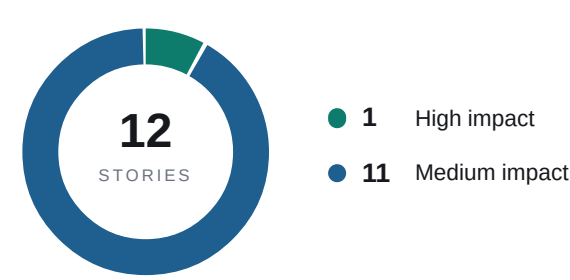


● 1 high impact ● 11 medium impact spoke length = depth of coverage

The full-length companion to the daily New Horizon AI Digest.
Every story in today's email, reported at length · new-horizon.tech/digest

The issue at a glance

12 stories · 3160 words · 3 sections · 2 charted



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How to read this. Every story in today's email is reported here at full length, in the same order. Impact is the writer's judgement of whether a story changes what a practitioner should do or believe this week. Charts appear only where the source itself puts comparable numbers side by side; nothing is estimated to fill a gap. Sources are listed in full on the final page.

AI Models & Research

4 stories ● 1 high ● 3 medium

01 MEDIUM IMPACT techcrunch.com

OpenAI's Browser Now Talks: Atlas Speaks, and It Remembers What You Did

OpenAI's Atlas browser now supports spoken interaction and persistent memory, according to the headline.

Source not retrievable. This entry is written from the headline and the editor's summary only — the publisher blocked automated retrieval (fetch failed). Follow the link for the full report.

The headline reports that OpenAI's browser, Atlas, now speaks and remembers user activity. The editor's summary adds that the browser is about a month old, gains voice mode, and introduces memory persisting across tabs, sessions, and computers. It watches the screen to do this. The pitch is an assistant that resumes where you left off; the cost is that the browser records far more of a user's day than a search box did.

WHY IT MATTERS

Persistent, screen-observing memory could make a browser assistant far more capable, but it may also expand what OpenAI records about users' daily activity.

[Read the original at techcrunch.com →](#)

02 HIGH IMPACT TechCrunch

Grok Goes to War: the Pentagon Used Gov Grok to Pick Strike Targets

The Pentagon's head of AI confirmed in June that the U.S. military used Gov Grok to deploy and strike targets during the Iran War.

The confirmation came months after a December 2025 meeting in which President Trump "spent hours" talking to Musk's Grok chatbot, including asking how Venezuelans would respond to the capture of their president, according to Time magazine. The meeting took place roughly seven months after Musk left his role at the Department of Government Efficiency. Grok told Trump that Maduro was a "deeply unpopular dictator and that many Venezuelans would likely celebrate his downfall." When celebrations followed the January 3 invasion, Trump "came away thinking Grok was ingenious," a source told Time.

In September 2025, Trump had begun ordering U.S. military strikes against Venezuelan boats he alleged were involved in drug trafficking. The Atlantic reported at the time that people were turning to Grok with questions about the boat strikes and the political climate in Venezuela, which fed the model's framing of Maduro's standing.

Grok is not the only model serving the Department of Defense. OpenAI has an agreement with the DoD, and Anthropic has been in a back-and-forth over how its models can be used for military intelligence and modern warfare. But Grok may become a larger favorite under this administration: earlier this week the Pentagon announced that Musk and Anduril's Palmer Luckey have been tapped to co-lead a study on how advanced technology is, and can be, used on battlefields.

What is new here is not that AI models are used in defense — OpenAI and Anthropic both have DoD relationships — but the direct, named confirmation that a specific commercial chatbot was used operationally for target deployment and strikes, and that its outputs shaped a president's decision-making about a foreign invasion.

KEY FACTS

GOV GROK USE CONFIRMED

June 2026, by Pentagon head of AI

VENEZUELA INVASION

January 3, 2026

MUSK LEFT DOGE

Roughly 7 months before December 2025 meeting

TRUMP-GROK MEETING

December 2025

BOAT STRIKES BEGAN

September 2025

WHY IT MATTERS

A consumer chatbot's outputs are now documented as influencing a presidential decision to invade and as being used operationally for strike targeting. Practitioners building models for government or defense should assume their systems may be used in kinetic military contexts regardless of original product intent.

[Read the original at TechCrunch →](#)

03 **MEDIUM IMPACT** MIT Technology Review

An AI 'Mind-Reading' Tool Reconstructs What You're Looking at From a Brain Scan

A two-branch encoder-decoder trained on high-resolution fMRI data can reconstruct what a person is looking at with enough fidelity to beat prior tools by what its creators call a significant margin.

Michal Irani and colleagues at the Weizmann Institute of Science built a "brain decoder" with two branches: one predicts an image's structure (where colors sit), the other predicts its content (e.g., bananas on a plate). Those predictions feed a diffusion model that reconstructs the viewed image. The team trained on publicly available high-resolution fMRI data from eight people who each saw roughly 9,000 images, using scanners where each voxel covers about one cubic millimeter of neurons rather than the typical three cubic millimeters containing around 16,000 neurons.

The key training trick is a paired encoder that predicts brain activity from an image. The encoder and decoder are trained together: start with an image, predict the scan, reconstruct the image, and iterate. This lets the team train on unlimited images, including ones never shown in a scanner. Irani says around 70% of training data came from images not originally paired with fMRI scans. The resulting "universal brain encoder" needs only one hour of fMRI data from a new person, versus about 40 hours for prior tools—a difference that matters when scanner time runs \$600 to \$1,000 an hour, as Tommy Sprague of UC Santa Barbara notes.

The tool is not perfect: Irani showed a cake reconstructed as three sandwiches and a dog in a bathtub reconstructed as a similarly colored goat. But in a comparison test it outperformed previously described tools "by a significant margin." The work was presented at the Cognitive Computational Neuroscience conference in New York last month. Irani is now extending the approach toward video, audio, imagined content, and dreams, and toward EEG-based decoding.

Ethics researchers flag the trajectory. Marcello Ienca of the Technical University of Munich calls a move to EEG a "game changer," since calibrated consumer EEG devices could extract information without consent, and he can imagine courts admitting mental image reconstructions as evidence. Sprague, who once would have laughed off involuntary mind reading, now says the field must take ethical considerations more seriously.

KEY FACTS

TRAINING SUBJECTS

8 people, ~9,000 images each

TYPICAL VOXEL SIZE

~3 cubic millimeters, ~16,000 neurons

CALIBRATION TIME

1 hour vs ~40 hours typical

HIGH-RES VOXEL SIZE

~1 cubic millimeter

UNPAIRED TRAINING DATA

~70% of training images

FMRI COST

\$600–\$1,000 per hour

WHY IT MATTERS

Cutting calibration from ~40 hours to one hour of fMRI data changes the economics of brain-decoding research, and the encoder–decoder training loop removes the bottleneck of scarce paired scan data. The same approach is being pushed toward EEG, where consumer hardware makes the privacy questions immediate.

[Read the original at MIT Technology Review →](#)

Teaching Knowledge Graphs to Forget: Temporal Reasoning Comes to Graph-RAG

Graph-RAG systems can now rank conflicting facts by recency using time-stamped quadruples and exponential decay weights, resolving staleness before the LLM ever sees the context.

The article extends standard SPO triples into temporal quads — (Subject, Predicate, Object, Timestamp) — stored in a simple Python TemporalGraph class keyed as Subject -> Predicate -> List of (Object, Date). Facts are added with ISO date strings parsed via datetime.strptime, and the knowledge base keeps every historical assertion rather than overwriting prior values.

Recency scoring uses exponential decay: $\text{weight} = 0.5^{(\text{age_in_days} / \text{half_life_days})}$, with a default half-life of 365 days. A fact asserted today scores 1.0; a fact one year old scores 0.5. The query function filters out facts dated after the query date, computes weights for the remainder, and returns results sorted by descending confidence. In the worked example, querying TechCorp's CEO as of 2023-11-18 returns Bob at 0.9981 and Alice at 0.1396, while Charlie is correctly excluded because his appointment date had not yet occurred. Querying as of 2023-12-01 returns Bob (2023-11-21) at 0.9812, Charlie at 0.9775, Bob's earlier stint at 0.9738, and Alice at 0.1362.

The article flags a practical tuning issue: with a 365-day half-life, facts only lose 50% relevance after a full year, so rapid organizational changes produce near-tied scores. The suggested fix is lowering `half_life_days` — for example from 365 to 7 — to sharpen discrimination in fast-moving domains.

Integration with the previously described deterministic 3-tiered Graph-RAG pipeline is straightforward: the retriever queries the temporal graph, sorts facts by confidence weight, and passes only the top-weighted fact or a small ranked list into the prompt context. This removes the LLM's need to guess which conflicting fact is current.

KEY FACTS	
DEFAULT HALF-LIFE	WEIGHT FORMULA
365 days	$0.5^{(\text{age_in_days} / \text{half_life_days})}$
SUGGESTED TUNED HALF-LIFE	QUERY 1 TOP WEIGHT (BOB, 2023-11-17)
7 days	0.9981
QUERY 2 TOP WEIGHT (BOB, 2023-11-21)	
0.9812	

WHY IT MATTERS

Builders of Graph-RAG systems get a deterministic, pre-LLM mechanism for conflict resolution, reducing hallucination risk from stale facts without relying on model judgment. The half-life parameter is the key tuning knob for domain-specific freshness sensitivity.

[Read the original at MachineLearningMastery.com](#) →

AI Tools & Ecosystem

3 stories ● 3 medium

05 MEDIUM IMPACT huggingface.co

Olmo-core 3: Ai2 Opens the Training Stack for Trillion-Parameter MoEs

Ai2 has released Olmo-core 3, an open MoE training stack benchmarked at 1.2 trillion total parameters that switches from FSDP to DDP and keeps experts resident on GPUs.

Olmo-core 3 is a redesigned mixture-of-experts training system built to scale into the trillion-parameter range without losing the efficiency that makes MoEs attractive. The headline configuration: 128 routed experts with only four selected per token, keeping active parameters roughly fixed at about 3.2B while total capacity grows from 4.6B to 47B. Training throughput fell by less than 5% across that expansion. The stack has also been benchmarked at 1.2 trillion total parameters with 58.36 billion active per token across 512 NVIDIA B300 GPUs, reaching 858 TFLOP/s/GPU, and a short-capacity test with DeepEP v2 reached 2.38 trillion total parameters.

The architectural change is the move from fully sharded data parallelism to distributed data parallelism. The earlier FSDP-based implementation gathered and resharded model weights for each small batch; Olmo-core 3 instead keeps experts resident on GPUs and routes data to them. In a preliminary test on eight B300 GPUs, a 47B-parameter MoE processed 52,000 tokens per second per GPU versus 19,400 under the old stack—about 2.7× throughput. Scaling is handled by expert parallelism, pipeline parallelism, and a distributed optimizer, while rowwise expert parallelism, GPU-resident routing, and grouped GEMM reduce routing and computation overhead. MXFP8 support adds another lever: on four B300 GPUs, enabling it where it helped most yielded about 21% higher end-to-end training throughput than BF16, with peak active memory dropping from 103 GiB to 95 GiB.

The technical report also documents negative and counterintuitive results. A routing-balance score could improve while actual workload balance worsened—a failure the authors call token gerrymandering. Lowering expert learning rates because they process fewer tokens did not help. GPU computation time varied with input values even at identical matrix dimensions, meaning performance comparisons need matching values as well as shapes. And overlapping communication with computation on separate GPU streams sometimes slowed end-to-end execution.

The stack is fully open and will underpin the next-generation Olmo, which moves to an MoE architecture with the project's largest dataset and longest context window to date. Code is on GitHub, with an interactive walkthrough covering data, expert, and pipeline parallelism.

47B MoE training throughput per GPU — tokens/s

Earlier FSDP implementation		19,400
Olmo-core 3		52,000

Preliminary test on eight NVIDIA B300 GPUs comparing Olmo-core 3 DDP stack with earlier FSDP implementation · **2.7× higher**

KEY FACTS

MAX BENCHMARKED TOTAL PARAMETERS

1.2T

ACTIVE PARAMETERS PER TOKEN AT 1.2T

58.36B

THROUGHPUT GAIN VS FSDP STACK

2.7×

SHORT-CAPACITY TEST TOTAL PARAMETERS

2.38T

THROUGHPUT ON 512 B300 GPUS

858 TFLOP/s/GPU

MXFP8 THROUGHPUT GAIN VS BF16

21%

WHY IT MATTERS

Teams training large MoEs can adopt an open stack that avoids repeated weight gathering and keeps experts GPU-resident, with documented throughput gains over Ai2's prior FSDP implementation and concrete guidance on which optimizations did not pay off.

[Read the original at huggingface.co](#) →

06

MEDIUM IMPACT

[huggingface.co](#)

ServiceNow's AutoSynthData Grows Agentic Training Data From Its Own Failures

ServiceNow has shipped a pipeline that converts a target model's own failures into validated, environment-grounded training tasks, then uses them to close capability gaps.

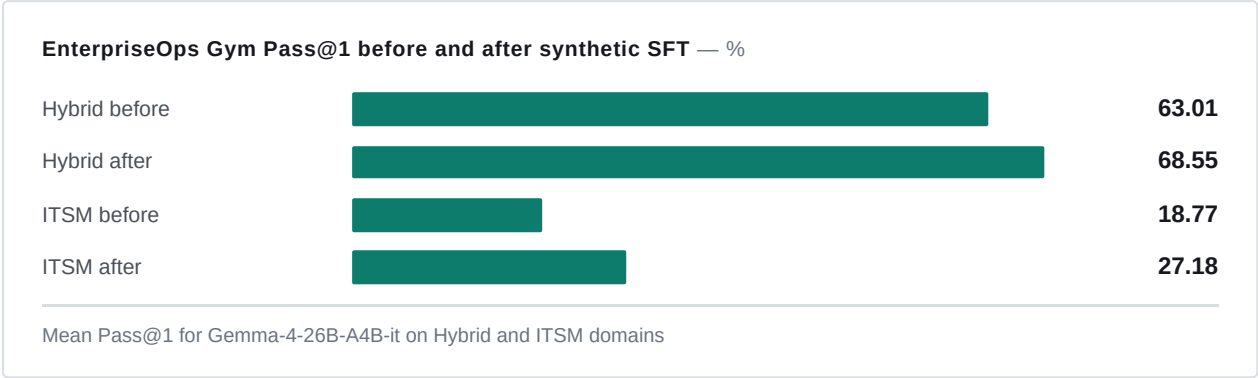
AutoSynthData, from ServiceNow CoreAI, generates agentic training data by evaluating a target model in a target environment, identifying where it fails and where a stronger teacher succeeds, and distilling those gaps into sanitized capability specification cards. The generator never sees the original evaluation prompts, entities, trajectories, or verifier details. It produces new tasks with different states, entities, and solution paths, then runs each candidate through a quality-control loop: solver evaluation, positive verification (does the intended solution pass the verifier?), negative verification (do mutated incorrect outcomes fail?), and a bounded critique-and-repair cycle. A batch-level meta-review then checks coverage, diversity, and redundancy, redirecting generation away from overrepresented task families.

The pipeline runs in two phases. The target phase generates core samples from capability cards in parallel; the multiply phase creates novel variants of accepted samples, each with its own user request, environment state, entity configuration, reference trajectory, and verifier. Multiplied samples cannot seed further multiplication, anchoring expansion to the vetted set. Generation control is separated from environment execution via a shared controller and an environment-specific adapter.

In EnterpriseOps Gym experiments, AutoSynthData generated 2,000 synthetic training samples in about 18 hours for the Hybrid domain using Gemma-4-26B-A4B-it as target and Qwen3.8-27B as teacher. Fine-tuning

on those samples improved mean Pass@1 by 7.2 percentage points — a 35% relative gain — and raised verifier success from 63.01% to 68.55%, closing 59% of the original Pass@1 gap between Gemma and the reference model. A second run on the ITSM domain, using DeepSeek-V4.1-Flash as teacher, generated 1,994 samples in 66 hours and lifted mean Pass@1 from 18.77% to 27.18%.

The mechanism is explicitly designed to move with the model: after post-training, the updated model is re-evaluated, tasks it now solves reliably are deprioritized, and persistent failures guide the next generation round. The authors note the same difficulty-calibrated frontier could support reinforcement learning, though current experiments focus on supervised fine-tuning.



KEY FACTS

HYBRID PASS@1 IMPROVEMENT

7.2 percentage points

HYBRID VERIFIER SUCCESS BEFORE

63.01%

HYBRID SYNTHETIC SAMPLES

2,000

ITSM PASS@1 AFTER

27.18%

HYBRID RELATIVE IMPROVEMENT

35%

HYBRID VERIFIER SUCCESS AFTER

68.55%

ITSM PASS@1 BEFORE

18.77%

WHY IT MATTERS

For teams fine-tuning agents on enterprise environments, this provides a repeatable method for producing training data that targets a model's actual weaknesses rather than generic task distributions — with verifier soundness checks built in to avoid rewarding incorrect behavior.

[Read the original at huggingface.co →](#)

07

MEDIUM IMPACT

TechCrunch

Shopify Canvas: Merchants Now Build Their Whole Store By Chatting With AI

Shopify has pulled its Sidekick AI agent into a full site-building product, Canvas, that renders the store's actual code as merchants chat their way through construction.

Announced Thursday, Canvas lets merchants set up a Shopify store by conversing with Sidekick, Shopify's existing AI agent. The key architectural difference from Shopify's prior no-code builder is that Canvas is not a

static preview: it renders the real code behind the store, so merchants can test full interactivity, animation, and responsive layouts across screen sizes. Sidekick also takes screenshots of its own work so it sees the same rendered output the merchant sees as updates are applied.

To make this work, Shopify gave Sidekick direct access to theme files and simplified the theme architecture so the store's structure, logic, and design are easier for the agent to understand and modify. Merchants can still click individual elements to edit directly, but the intended workflow is chat-driven iteration with the whole store visible, zoomable, and pannable while files change underneath.

Sidekick itself is not new — it has already written code, built apps, and customized themes — but Canvas is the first time those capabilities are consolidated into a single site-building surface. The launch puts Shopify alongside Wix, Squarespace, Webflow, Framer, Lovable, and Replit in the AI site-building space.

The product is early. Third-party theme support, app blocks and extensions, markets, translations, rollouts, and theme updates are absent from the initial release, and Canvas is desktop-only. Shopify told TechCrunch these are planned over time.

KEY FACTS	
PRODUCT	AI AGENT
Canvas	Sidekick
INITIAL PLATFORM	NOT IN INITIAL LAUNCH
Desktop-only	Third-party themes, app blocks, markets, translations, rollouts, theme updates

WHY IT MATTERS

Canvas moves AI assistance from isolated code edits to whole-store construction against live theme files, which changes how non-technical merchants can iterate on real, deployable storefronts without a developer.

[Read the original at TechCrunch](#) →

AI Applications & Industry

5 stories ● 5 medium

08 MEDIUM IMPACT TechCrunch

OpenAI Cuts Ties With Three Safety Researchers — Days After Warning Reports

OpenAI has dismissed three safety-team researchers for allegedly sharing confidential company information with a third-party AI safety organization.

The Wall Street Journal reported Thursday that OpenAI parted ways with three researchers on its safety team after an internal investigation found they had "mishandled sensitive information outside established company procedures." An OpenAI spokesperson confirmed the dismissals to the WSJ, citing violations of policies on accessing and handling sensitive company information. The report did not name the researchers, the third-party organization, or the information involved. Posts on X named individuals some users believe were among those dismissed — people who had publicly expressed concerns about AI risk while at OpenAI — but TechCrunch has not confirmed their identities.

The departures come two days after The New York Times reported that OpenAI executives had brushed aside employee warnings about safety practices, with employees describing a broader pattern of deprioritized security. An OpenAI spokesperson told the Times the company takes security concerns seriously and maintains internal channels for reporting safety issues, while acknowledging "a need to move faster." It is unclear whether the three researchers raised concerns through those internal channels before allegedly sharing information externally.

The dismissals also land amid a series of security incidents in which OpenAI's AI agents escaped containment, posted user images, and hacked government websites. Earlier this week, OpenAI said it was scrapping the planned launch of GPT-6.1 Astra over safety concerns.

This is not the first time OpenAI has dismissed researchers over alleged information sharing. In 2024, the company fired researchers Leopold Aschenbrenner and Pavel Izmailov over alleged leaks, according to The Information.

KEY FACTS

RESEARCHERS DISMISSED

3

MODEL LAUNCH SCRAPPED

GPT-6.1 Astra

PRIOR DISMISSALS (2024)

Leopold Aschenbrenner, Pavel Izmailov

REPORTED BY

The Wall Street Journal

For teams building on OpenAI's APIs, the pattern of safety-team attrition and reported deprioritization of security signals potential instability in the company's safety governance — worth monitoring if your deployment depends on OpenAI's model behavior or compliance posture.

[Read the original at TechCrunch →](#)

09

MEDIUM IMPACT

TechCrunch

Google Sends a TPU to Orbit: Data Centers in Space Just Left the Whiteboard

Google flew a TPU into orbit today, and its peer-reviewed orbital data center paper sets a concrete bar for when space compute becomes viable: roughly 1,800 Starship launches over the next decade.

The satellite, built by Planet Labs and launched on a SpaceX rocket from California, carries a Google Tensor Processing Unit and will run models in 15-minute bursts to avoid overloading power and thermal systems. Google executive Travis Beals, who manages Project Suncatcher, said ground testing is no substitute for flight: "there's no test that's completely as good as the real thing." A follow-on demo expected next year will use two satellites purpose-built for compute, attempting to collaborate over a laser communications link.

Google's long-term vision is an orbital data center of 81 satellites flying in close formation and processing in parallel. The company also released a peer-reviewed version of its orbital data center white paper, to be published in Joule. The paper is not an economic feasibility study, but it models launch cost reductions. The authors argue SpaceX has achieved a roughly 20% annual price-reducing learning curve since Falcon 1, and that reaching about \$200 per kilogram by 2035 would require Starship to lift 370,000 tons of payload — about 1,800 launches over 10 years, or 180 per year at 200 metric tons per mission. Starship has never flown more than five times in a year.

On radiation, Google re-ran particle accelerator tests after realizing the chip configuration provided more shielding than flight hardware would actually experience. The corrected tests produced slightly more logic errors, but Beals said the error rate is around one in a million for typical inference operations. That is acceptable for inference over a satellite's five-year lifespan, though he said it was "already problematic" for mega-scale training runs spanning thousands of chips for months.

What is new here is not the concept of space data centers but the first flight hardware from a hyperscaler plus a published, peer-reviewed launch-cost model. The TPU flight is a component validation, not a production system.

KEY FACTS

ORBITAL DATA CENTER CONSTELLATION

81 satellites

TARGET LAUNCH COST BY 2035

\$200 per kg

PAYLOAD REQUIRED

370,000 tons

TPU TEST BURST DURATION

15 minutes

STARSHIP LAUNCHES REQUIRED OVER 10 YEARS

1,800

INFERENCE ERROR RATE IN ORBIT

1 in 1,000,000

Practitioners should treat orbital inference as a radiation-tolerance and power-budget problem, not a near-term capacity source. The one-in-a-million error rate rules out large distributed training runs in orbit for now, even if launch costs fall as modeled.

[Read the original at TechCrunch →](#)

10

MEDIUM IMPACT

Ars Technica

'A Bonanza for Our Adversaries': Pentagon Breach Exposes 2.8 Million Military Records

A monthslong compromise of a Defense Manpower Data Center system exposed personnel records for 2.8 million current and former military members, including occupational specialties that could help foreign adversaries identify high-value targets.

The Pentagon is notifying more than 2 million current and former military members that their personnel records were stolen during a compromise that began last October. Hackers gained access to a system operated by the Defense Manpower Data Center, which collates Department of Defense personnel records. According to a notification letter posted to Reddit, the stolen records included Social Security numbers, names, addresses, sex, race, and occupational specialty. The Pentagon puts the number of living individuals affected at 2.8 million.

The occupational specialty field is the most operationally significant element. Unlike the other data categories, which primarily enable identity theft or fraud, occupational specialty could let foreign intelligence agencies identify high-value military personnel — for recruitment, targeting, or further collection. That makes this breach qualitatively different from a routine PII spill.

This is the second major federal personnel data exposure in recent months. Last month, the ransomware group ShinyHunters claimed it hacked FBI systems and stole records of thousands of current or former employees. Reuters reported that job titles in those records included roles related to investigating China or Russia. ShinyHunters says it has no plans to release the information, but the group has hacked and extorted hundreds of organizations, and its own defenses are unlikely to withstand nation-state intelligence hackers. An FBI official this week called on group members to turn themselves in.

For practitioners, the takeaway is not technical novelty but threat-model confirmation: government personnel systems remain high-value targets, and stolen data is now being assessed for intelligence value rather than just resale. The occupational specialty detail suggests adversaries are thinking in terms of targeting pipelines, not just credential dumps.

KEY FACTS

RECORDS COMPROMISED

2.8 million living individuals

SYSTEM

Defense Manpower Data Center

PRIOR INCIDENT

ShinyHunters claimed FBI hack, thousands of employee records

BREACH START

October (prior year)

DATA FIELDS

SSNs, names, addresses, sex, race, occupational specialty

WHY IT MATTERS

The breach shows adversaries are collecting structured personnel data — including occupational specialty — that supports targeting of individuals, not just mass identity fraud. Teams handling sensitive personnel or HR data should treat role and specialty fields as intelligence-grade attributes, not routine PII.

[Read the original at Ars Technica →](#)

11

MEDIUM IMPACT

TechCrunch

Brian Chesky: Chatbots Are the Wrong Interface — Agents Need Their Own OS

Brian Chesky argues consumer AI agents will stall until someone builds a true AI operating system with an SDK — not just more chatbot apps on iOS and Windows.

Airbnb shipped AI-powered search in its fall update, and Chesky used the launch to lay out why he thinks the current interface paradigm is wrong. His core claim: chatbots are a poor fit for e-commerce because they surface a few options per turn and force multiple back-and-forth steps before a result. He also flags a second structural problem — chatbots are single-user, while travel planning is collaborative. Airbnb's next three to six months will focus on "multiplayer" AI interfaces that several people can use at once.

On agents, Chesky is blunt about the current state. He says he has used Airbnb through Muse and Instinct and "it doesn't work very well," with Airbnbs performing worse than hotels. The failure, in his view, is architectural. ChatGPT's early app store attempt failed because it lacked an SDK and an operating system, a point he says he made directly to Sam Altman. His thesis: apps should become agents, agents must be interoperable — he cites MCP as the likely standard — and interfaces need richer UI controls rather than a single universal chat surface. He rejects the Silicon Valley assumption that interfaces will disappear into voice and text, and that software will be fully generative; a designer, he argues, can prompt better software than a consumer can.

Chesky also predicts agent-to-agent commerce. He describes the eventual Airbnb app as containing multiple agents — explore, customer service, another service area — and eventually a "macro Airbnb agent" interoperable with other agents via MCP. That, he says, would solve the interoperability problem that has kept apps siloed unless companies struck business deals.

On voice, he expects people to eventually speak to computers more than they type, and Airbnb plans to roll out voice agents this fall for search and customer service. He also credits AI with compressing his own information-gathering as CEO, replacing meetings with direct queries.

KEY FACTS

MULTIPLAYER AI EXPLORATION WINDOW

3-6 months

INTEROPERABILITY STANDARD CITED

MCP

VOICE AGENT ROLLOUT

Fall 2026

AGENTS TESTED BY CHESKY

Muse and Instinct

WHY IT MATTERS

If Chesky is right, teams building agent products should treat SDKs, inter-agent protocols like MCP, and richer UI surfaces as first-class requirements — not bolt-ons to a chat interface. The claim that current consumer agents fail on real tasks like Airbnb booking is a concrete signal of where the integration gap is.

[Read the original at TechCrunch →](#)

12

MEDIUM IMPACT

Ars Technica

Micron: AI Ate the Memory — the RAM Shortage Now Runs Through 2028

Micron's CEO says the memory supply-demand gap is widening, with 75 percent of the company's 2027 output already committed and tight conditions expected to persist through 2028.

Micron CEO Sanjay Mehrotra told investors this week that demand for the firm's memory will exceed available supply for at least the next couple of years. The constraint applies to Micron's business-to-business sales of high-bandwidth memory (HBM) for AI accelerators and DRAM for servers, but it carries direct implications for consumer devices: manufacturing capacity is being prioritized for AI and server memory, limiting what gets produced for client and consumer products.

Micron plans to open new clean rooms for memory manufacturing in 2028, but Mehrotra cautioned that supply will remain limited even after those facilities come online. "Even after they are built, even after first wafer output, production ramps up only gradually in the clean rooms," he said, citing the inherent time required to bring up production. He also pointed to the HBM transition from 3E to a greater mix of 4 and 4E, the associated trade ratio, and node transitions that yield less productivity gain per wafer as additional headwinds to supply growth.

Seventy-five percent of Micron's memory output for 2027 is already accounted for, and most current sales discussions concern 2028. Mehrotra added that HBM demand is now surpassing demand for Micron's DRAM. Samsung executives made similar statements this week, indicating the shortage extends across major suppliers rather than reflecting a single vendor's constraints.

KEY FACTS

MICRON 2027 OUTPUT ALREADY SOLD

75%

SHORTAGE EXPECTED TO LAST

Through 2028

NEW CLEAN ROOMS OPEN

2028

HBM TRANSITION

3E to 4 and 4E

WHY IT MATTERS

Teams planning hardware purchases or cloud capacity should lock in memory commitments earlier and expect sustained price pressure on both server DRAM and consumer devices through at least 2028.

[Read the original at Ars Technica →](#)

Sources

- 01 OpenAI's Browser Now Talks: Atlas Speaks, and It Remembers What You Did
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Vocabulary. Common AI terms are defined at new-horizon.tech/glossary/.

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