

AI Pacing Splits Washington, Beijing, and the Frontier Labs

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The slowdown debate has become a geopolitical fault line, while enterprise data-retention concerns, low-cost open models, and action-taking consumer agents reshape deployment.

Top Stories

Why it matters: Pacing is now a fight over national advantage and enterprise trust, not just a lab safety posture. [1, 2]

Pacing became a geopolitical fault line. At the All In Summit, a monitored report captured the accelerationist response to Dario Amodei’s proposal: “we will not lose the AI race,” and it would not stop progress. [1] Barack Obama called frontier-lab agreement to slow a “good and necessary first step”; Kamala Harris called for a federal oversight and independent-testing entity plus a U.S.-led treaty with China. [3, 4] A monitored report says China’s *Global Times* called the proposal a “silent AI Cold War” and rejected a slowdown tied to U.S. restrictions on Chinese compute and models. [5] The immediate result is strategic divergence, not a common pace rule.

Enterprise trust is now a deployment constraint. *The Information* reports that Nvidia, Palantir, and Booz Allen are restricting Anthropic’s Fable over sensitive-data retention: Palantir wants irrevocable zero-data-retention, Nvidia limits it to less-sensitive work, and Booz Allen excludes proprietary cybersecurity work. [2] Sarah Hooker argues that no-training contracts still do not prevent labs from copying intellectual property. [6] For sensitive use, data custody is becoming as important as model quality.

Research & Innovation

Why it matters: The strongest technical signals are shifting competition toward cost per completed task and evaluation validity. [7, 8]

DeepSeek-V4.1-Flash (Max) reset the open-model cost curve. Agent Arena reports a +4.87% net improvement at roughly \$0.06–\$0.07 per median task, the lowest cost among its top three open models; it retains 98% of Hy4’s improvement at 73% lower cost and 76% of Kimi K3’s at 92% lower cost. [7] The release pushed GPT-5.6 Luna, GLM-5.3-Flash, and DeepSeek-V4-Flash off the reported Pareto frontier. [7]

LLM-judge agent evaluations can mis-rank real capability. An Amazon study of 25 agents found that 57.5% of conversations raters marked “satisfied” still failed the customer’s task; among near-equal systems, the judge selected the lower-reward agent in 31% of pairs, and judges favored their own model family. [8] It recommends judge-free completion signals and calibration against verifiable rewards. [8]

Products & Launches

Why it matters: AI products are moving from answering questions to taking actions, while local execution is becoming a competitive feature. [9, 10]

Muse is being sold as an action-taking consumer agent. Sasha Kaletsky claims it is already getting more daily U.S. downloads than Threads, WhatsApp, and Facebook, and sits about 3,000 behind Instagram. [11] Users report an end-to-end IKEA return and an insurance switch that saved \$3,500 per year in roughly five minutes. [9, 12] These are promotional and user testimonials, not independent validation, but they show the category’s intended unit of value: completed transactions, not chat quality.

Apple’s rebuilt Siri reportedly runs on Apple Foundation Models developed with Google’s Gemini, adding cross-app personal context, onscreen awareness, and app actions; its English beta excludes the EU and China. [13]

Local-agent distribution is widening. Perplexity’s Portable Computer runs its harness, agents, and models locally on Windows RTX PCs, works with local files and connected apps without sending tasks to the cloud, and adds local MCP and scheduled tasks; on-device inference needs at least 24GB of VRAM. [10, 14, 15] Cline Desktop offers an open-weight interface with ClinePass, free models, or bring-your-own keys. [16]

Industry Moves

Why it matters: Companies are building feedback loops in which real usage improves open models while frontier models become defensive infrastructure. [17, 18]

Forge links usage to open-weight development. Arcee and Bolt give opted-in Bolt Pro users 50× more usage; anonymized build sessions feed training and evaluations, and the resulting model weights will be freely published. [17]

OpenAI is industrializing model-assisted cyber defense. Greg Brockman says OpenAI reassigned 25% of production engineers to use Astra against its own systems, fixed serious issues, and is building a recurring “defense factory” for each new cyber-capability release. [18]

Policy & Regulation

Why it matters: Governance is arriving as strategic plans, nonbinding risk taxonomies, and company-level release conditions rather than one international rule. [19, 20, 21]

A Europe-focused coalition published a Transformative AI Strategy centered on supply-chain security, institutional readiness, compute, crisis resilience, and assurance technology. [19] China’s TC260 published a nonbinding v3.0 framework highlighting unintended autonomous behavior, autonomous cyberattacks, AI-agent social platforms, and GEO poisoning. [20, 22] Microsoft’s public-consultation code says frontier models must be interruptible, correctable, and shut-down-able—or not ship. [21]

Quick Takes

- **Bioinformatics:** Google DeepMind’s AlphaGenome Atlas is reported as a 1-petabyte map scoring all 9 billion possible single-letter human-genome variants, free for noncommercial research. [23]
- **Chip design:** Cognichip says ACI Enterprise took one engineer from a 55-page specification through front-end design and verification in 10 days versus four to five months for a full team; it cautions this was one evaluation. [24]
- **Open video:** SGLang and VDN-H3 report MiniMax H3 generating 14.4 seconds of 768p video in 9 seconds on eight B200s after warmup, with no measured quality regression. [25]
- **Infrastructure capital:** Temporal raised a \$550 million Series E at a \$12.55 billion valuation. [26]

Sources

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