Anthropic Expands Amazon Compute Deal as Agent Infrastructure Takes Shape

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Anthropic's larger Amazon pact made compute the clearest story of the day. Around it, cloud vendors pitched themselves as the operating layer for agents, while OpenAI, Anthropic, Boston Dynamics, and Noetik showed AI moving deeper into work, research, robotics, and biotech.

Infrastructure, not model demos, led the day

Anthropic deepens its Amazon partnership around compute and capital

Anthropic said it is expanding its collaboration with Amazon to secure up to 5 gigawatts of compute for training and deploying Claude, with capacity starting this quarter and nearly 1 gigawatt expected by the end of 2026. Amazon is also investing an additional $5 billion now, with up to $20 billion more possible later [1, 2].

Why it matters: This is one of the clearest reminders that frontier competition is increasingly tied to power availability, hardware access, and financing, not just model releases [1, 2].

Cloud vendors are positioning themselves as agent operating systems

> "Humans steer. Agents execute." [3]

Google says Gemini is materially lifting cloud demand, with Q4 cloud revenue up 48% to $17.7 billion, backlog at $240 billion, and AI customers using 1.8x as many Google products [4]. Cloud Next is leaning into customer agent-building and the "human bottleneck" as the next adoption challenge [4]. In parallel, MiniMax's Alibaba Cloud partnership is framed around fixing security, state

volatility, multi-agent scheduling, and workload spikes for enterprise agents, while NVIDIA is pitching OpenShell as the governed runtime behind Adobe and WPP marketing agents [3, 5].

Why it matters: Cloud and infrastructure vendors are increasingly competing to become the operating layer for agents, not just the place models are hosted [3, 5].

AI gets closer to daily work and research loops

OpenAI pushes Codex deeper into the desktop, while Hyatt scales enterprise use

OpenAI released a research preview of Chronicle in Codex, allowing it to build memories from day-to-day computer work and use recent screen context so it can help without the user restating what they were doing. It is starting with Pro subscriptions on Mac, and OpenAI says the early version is still token-intensive [6, 7].

Separately, Hyatt said ChatGPT Enterprise is now available across its global corporate and hotel workforce as a core part of day-to-day operations, with OpenAI helping via live onboarding and training [8].

Why it matters: OpenAI is moving on two fronts at once: making the assistant more persistent inside the workflow and expanding broad enterprise deployment [7, 8].

Anthropic's automated researchers show how far bounded research automation has come

Anthropic Fellows Program researchers built parallel Claude Opus 4.6 agents that propose ideas, run experiments, and iterate on weak-to-strong supervision. On the open-weight Qwen setup they tested, the agents reached a PGR of 0.97 versus 0.23 for two human researchers, at about $18,000 cost, but the authors also say human-directed diversity remained important and the best method did not produce a statistically significant gain when transferred to production Claude [9].

Why it matters: This is a notable result precisely because it comes with caveats: some research loops are already automatable, but transfer and eval design still look like the limiting factors [9].

Beyond software: robotics and biotech

Boston Dynamics gives Spot a reasoning layer

Boston Dynamics integrated Google DeepMind's Gemini Robotics model into Spot, bringing embodied reasoning to a robot already deployed at thousands of

facilities worldwide. Reported capabilities include autonomously reading pressure gauges, combining multiple camera views to handle occlusion, and detecting when a task failed before deciding whether to retry or move on [10].

Why it matters: This is notable not just as a robotics demo, but because Spot already has real deployments, creating the kind of real-world data flywheel that is hard to replicate [10].

Noetik's GSK deal points to a different AI-biotech business model

Noetik said it licensed its OctoVC virtual cell foundation model to GSK in a $50 million deal covering upfront payments, milestones, annual fees, and model access across lung and colon cancer programs, with GSK able to fine-tune the system on its own data [11]. The company says its models are trained on more than 100 million spatially resolved cells from human tumors and are designed to improve patient-treatment matching, an area it argues sits behind the very high failure rate in cancer trials [11].

Why it matters: The important business signal is that the deal is structured around licensing the model platform itself, rather than centering the AI company on a single drug asset [11, 12].

Sources

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