# ChatGPT Commerce Pilot, Tesla Safety AI, and the Case for AI Consolidation

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Criteo outlined an early OpenAI commerce integration in ChatGPT, Tesla described a production AI-vision safety update, and Elad Gil argued the AI market will consolidate sharply. François Chollet also offered a useful frame for understanding agentic coding as a machine-learning problem rather than ordinary software engineering.

### AI ties into live systems

#### Criteo says ChatGPT is being paired with fresh retail inventory

Criteo said it joined OpenAI's advertising pilot in ChatGPT, aiming to combine ChatGPT's broad knowledge with Criteo's real-time commerce data [1]. The company said its hybrid architecture pulls from inventory feeds across 17,000 retailers so product suggestions stay current on price and stock, rather than drifting out of date as model knowledge ages [1]. It also said the partnership is still early and framed the work around privacy, user consent, and only using the information needed in a given ad context [1].

*Why it matters:* This is a concrete example of an LLM being connected to live operational systems—in this case, a millisecond-scale commerce stack—rather than relying only on pretraining [1, 2].

#### Tesla pushes AI vision deeper into crash safety

Tesla described an over-the-air update that uses AI vision to detect impending impacts sooner than accelerometers alone, allowing airbags and seat-belt pretensioning to trigger earlier when appropriate [3]. The company said the approach

was built from real-world fleet crashes replayed in simulation and that the resulting shift in predicted injury severity across crash cases was unusual, especially for software delivered OTA [3]. Musk separately said Tesla's AI photon-count reconstruction helps FSD see through low-light and extreme-glare conditions better than a human-perceived RGB view [4].

*Why it matters:* It shows AI vision moving beyond perception features into safety-critical timing decisions inside a production vehicle stack [3].

## The industry case for concentration is getting blunter

### Elad Gil sees a steep shakeout ahead

Gil said access to frontier AI remains highly uneven: people inside major labs are 3-4 months ahead of startup engineers, Silicon Valley founders are 3-6 months ahead of New York, New York is 6-12 months ahead of much of the rest of the world, and most people are still 1-2 years behind the state of the art [5]. In a separate interview, he argued that 90-99% of AI companies will fail, suggested some successful founders should consider exiting within 12-18 months, and said the most durable survivors are likely to be core labs plus application companies that improve as models improve and are deeply embedded in workflows [6]. Marc Andreessen publicly co-signed Gil's distribution map, saying the gap can be extended "several more notches" [7].

> "The future is here, just not equally distributed" [5]

*Why it matters:* For builders and investors, the combined message is that both capability access and economic returns may concentrate faster than the current breadth of the AI startup market suggests [5, 6].

## A better frame for coding agents

### François Chollet argues agentic coding should be treated like machine learning

Chollet said sufficiently advanced agentic coding is "essentially machine learning": the engineer defines an objective and tests, agents optimize against those constraints, and the resulting codebase is a black-box artifact you evaluate by behavior rather than by reading every internal step [8, 9]. He said that implies familiar ML failure modes—overfitting to the spec, Clever Hans shortcuts, data leakage, and concept drift—will start appearing in AI-generated software, and asked what kind of high-level abstractions could become the "Keras of agentic coding" [8]. He also argued this is not a simple replacement for software engineering but a different way of producing software with its own best practices and use cases [10].

*Why it matters:* This is a useful lens for teams adopting coding agents: the hard problem may shift from line-by-line authorship to steering and empirically evaluating a generation process [9, 8, 10].

**Sources**


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