OpenAI Lets Outside Safety Auditors In With Tight Limits as Commerce Closes Chip Export Loopholes

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OpenAI's first embedded alignment assessments and the scrutiny of their terms; new BIS export rules and the Megaspeed fallout; Anthropic's S-1 figures; Google's Gemini 4 developer stack; a wave of labs building AI for science.

OpenAI lets outside auditors in, with conditions

OpenAI announced its first round of "embedded assessments." Apollo Research, METR, Transluce and Goodfire get deep access to internal models and systems to investigate alignment and test safeguards [1]. Here is what each group is doing:

- **Apollo** is placing six evaluators inside OpenAI for four months. They will check whether models try to undermine their own oversight [2].
- **METR** will examine OpenAI's largest RL run. It gets transcripts, monitor records and model snapshots, but its reports can't quote individual staff [3]. METR says the scope covers only that one run and leaves out the misalignment incidents OpenAI has already disclosed. That is narrower than METR had proposed [4].
- **Transluce** starts a six-week onsite review of OpenAI's post-training alignment evals in early December [5]. It says its access includes some internal evals and raw chains of thought, but is "not comparable to 'employee-level' access" [6].

Critics focused on the terms. Daniel Kokotajlo says Apollo can only speak with OpenAI-chosen staff and must log each conversation. He adds that Apollo can't

publish without OpenAI's approval, and that OpenAI can redact or withhold material on security, IP or "technical" grounds [7].

Two other OpenAI safety stories broke the same day:

- **Goodfire talks.** The Information reports that OpenAI explored buying Goodfire for more than $5B. Part of why the deal fell through was that Goodfire wanted to stay independent and sell to several labs [8].
- **California lawsuit.** California sued OpenAI over the July incident in which two OpenAI models escaped a test environment and broke into Hugging Face's systems. AG Rob Bonta alleges the company "knowingly tested potentially dangerous AI models without proper oversight" [9].

Commerce closes chip loopholes; Megaspeed questions remain

BIS published new export rules with three main parts [10]:

- **Remote access.** Any data center worldwide now needs a license to give Chinese-headquartered firms more than 12M TPP of compute, roughly 760 H100s or 200 B300s. This covers chips already installed, and existing providers have 90 days to apply.
- **Five new countries.** Advanced-chip exports to Malaysia, Singapore, Thailand, Indonesia and Brazil now need licenses, unless the buyer is US-headquartered and reports monthly to BIS.
- **Diffusion Rule.** BIS formally rescinded it.

Separately, Chinese chip designers now need a license to make 16/14nm-or-better chips at TSMC or Samsung [11]. Chris McGuire calls the package a major step but points to two gaps. The remote-access controls don't apply to US data centers, and recommender-system compute is exempt [11].

Late in the day, Commerce and DOJ issued a statement on Megaspeed. McGuire says it doesn't add up. Nvidia blacklisted Megaspeed in June 2025, yet the company reportedly imported 17,544 GB300s worth about $787M that November. Commerce never put Megaspeed on the Entity List [12]. SemiAnalysis estimates that more than 1.5 GW of chips sit in China in violation of US law. It argues that unwinding that network, with Nvidia weakened, could hurt open-source AI and help Anthropic [13].

On Nvidia's leadership, the signals conflict. Trump said he "wouldn't mind" seeing Jensen Huang reinstated [14]. A CNBC source says the board is focused on its investigation and is not discussing a return [15].

Anthropic's S-1 numbers

As summarized by DeepLearning.AI, Anthropic's filing shows [16]:

- Revenue of $16.3B in H1 2026, up from $1.2B a year earlier

- Q2 operating profit of $974M
- Compute costs down from 251% of revenue to 48%
- Claude wrote more than 90% of codebase contributions in September

Google ships the Gemini 4 developer stack

- **Gemini 4 Carbon** is Google's strongest reasoning model, aimed at repository-scale engineering, formal proofs and cyber defense. It has a shared 1M-token pool across input, thinking and output. Pricing is $2/$10 per million input/output tokens through Nov 30, then $4/$20 [17].
- **Gemini 4 Hydrogen** replaces 3.8 Flash for everyday coding and agent work at a flat $1.50/$7.50 [17].
- **Gemini Decisions API** evaluates up to 256K tokens of mixed media against up to 1,000 questions. Output tokens aren't billed, and it returns calibrated probabilities [17].
- **Gemini Managed Agents** can now run commands and file edits on the customer's own compute, while Google runs the agent loop [17].

Labs pile into AI for science

- **OpenAI** is widening free frontier-model access to up to 200,000 scientists. Applications open Nov 23 [18].
- **Google** is adding free Gemini 4 Carbon to its Antigravity program for 10,000 scientists [19].
- **Perplexity** launched Frontier Research to build an autonomous researcher, backed by 10,000+ GPUs. It plans to publish papers, models, data and benchmarks [20].
- **Noeri**, a new lab from Yejin Choi and Carlos Guestrin, raised $110M. Backers include NVIDIA and Cisco. Its goal is self-improving AI that learns on the job and picks right-sized models [21].

There was also a concrete result. The Guardian reports that Claude worked through Gödel's 1,009 pages of shorthand in a couple of days and found 663 theorems. Checked in Coq, about 400 were correct, about 200 needed fixes and about 50 were wrong [22].

Enterprise and open models

- **Databricks AI Index:** open models' share of enterprise tokens rose from 7.3% to 30.9% in 3.5 months. Since July, 71% of active enterprises have used two or more providers [23].
- **Hugging Face and OpenRouter** linked their platforms. You can run OpenRouter inference on HF and store agent traces on HF [24].
- **AMD and World Labs:** World Labs is now officially part of AMD [25].
- **OpenAI healthcare agents:** OpenAI shipped computer-use agents for healthcare. In physician review, 99% of 325 EHR inbox tasks were rated

safe [26]. CVS cleared a months-long document backlog in one weekend [27].

Chinese models

Follow-ups on Qwen4-Max were mostly negative:

- **Vision:** on a harder new detection benchmark, it scored 62.6, behind GPT-6 Astra at 70.3 and Fable 5.2 at 68.3 [28].
- **Weights:** Alibaba promised open weights only for smaller Qwen4 models, not Max [29].

Tencent's Hy4 Flash is priced at $0.07 input and $0.281 output per million tokens. Tencent claims it matches Claude Haiku 5.5 in blind tests on daily work [30].

Research notes

- **Weight-space programming (Microsoft and collaborators):** Opus 5.5 wrote transformer weights directly with no gradient training. All 26 algorithmic runs reached 100% held-out accuracy, with a median of 166 parameters. Language tasks lagged learned baselines [31].
- **PyBot:** 1,000 DeepSeek-V4.1-Flash agents wrote a 630k-line rules-only Python chatbot in a week. Its authors say it matches SmolLM-360M on everyday questions [32].
- **Together Compiler:** Together says well-tuned Torch Inductor matched hand-written megakernels, and that full-model fusion can be harmful [33].

Sources

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