

The infrastructure layer is the reading list:
inference, labs, factories, and quantum safety

Recommended Reading from Tech Founders

2026-08-29

The infrastructure layer is the reading list: inference, labs, factories, and quantum safety

By Recommended Reading from Tech Founders • August 29, 2026

This period’s most credible recommendations look below the app layer—from inference hardware and lab automation to data-center-enabled manufacturing and quantum-safe Bitcoin transactions.

Standout: learn the physical stack beneath the model

Patrick O’Shaughnessy’s conversation with Neil Movva — video discussion

- **Creator / link:** Hosted by Patrick O’Shaughnessy, featuring Neil Movva — open the discussion.
- **Recommended by:** Scott Belsky, who called it “a great discussion (and education)” and linked O’Shaughnessy’s post. [1]
- **Key takeaway:** The discussion is framed as a “401-level class” on inference across software, chips, and power. Its agenda includes latency versus throughput, chip pricing, kernel engineering, compute arbitrage, data-center design, power strategy, and open versus closed AI. [2]
- **Why it matters:** This is a practical map of inference as a physical and economic system—not merely a model-quality problem. It is the most useful recommendation here for understanding where AI costs, bottlenecks, and competitive advantages can migrate.

Where AI becomes physical work

Ruxandra Teslo’s thoughts on Anthropic’s Model Hardware Standard — X analysis

- **Creator / link:** Ruxandra Teslo — read the post.

- **Recommended by:** Packy McCormick, whose Not Boring roundup says Teslo has “some good quick thoughts” and tells readers to read them. The roundup describes the underlying standard as a way for agents to operate lab and manufacturing instruments in parallel. [3]
- **Key takeaway:** Teslo explains MHS as a common interface for agents to control equipment such as microscopes, liquid handlers, lasers, and manufacturing machinery. Standardized “drivers” could reduce hardware integration from weeks or months to hours; she gives Claude’s iterative laser-alignment experiment as an example. She sees removing this “boring friction” from biological research as potentially more valuable than targeting individual discoveries, while worrying about what full scientific automation could mean for human involvement. [4]
- **Why it matters:** It turns “AI for science” into a concrete infrastructure question: how much research capacity is lost to bespoke equipment integration, and what changes when agents can operate instruments directly?

The Layman’s Case for Data Centers — article

- **Creator / link:** @12Palehorse — read the article.
- **Recommended by:** Garry Tan, who shared it with the concise endorsement: “Datacenters create prosperity and good jobs.” [5]
- **Key takeaway:** The essay argues that data centers are an enabling layer for robotic manufacturing: robots need large-scale compute for training, simulated practice, and fleet learning, and the author says factory automation can make domestic production economical. It uses Hadrian as an example of a software- and AI-directed manufacturer whose automation supports jobs rather than simply removing them. [6]
- **Why it matters:** This is a useful industrial and labor lens on infrastructure buildout. It asks readers to evaluate data centers not only as power consumers, but as inputs to physical production and skilled-trade demand.

A historical lens on infrastructure markets

Fordlandia — book

- **Creator / link:** The discussion names the book but does not identify its author or provide a direct book URL; discussion context.
- **Recommended in:** Ben Horowitz’s AI-infrastructure discussion, which uses Ford’s rubber plantation and company town as the example. [7]
- **Key takeaway:** Ford tried to own the complete vertical stack, but the car industry eventually developed multiple supplier layers. The discussion’s broader rule is that expanding markets fragment, then tend to consolidate when growth slows. [7]
- **Why it matters:** It is a compact way to think about AI infrastructure without assuming today’s largest companies will capture every valuable

layer. New categories can emerge at the margins even when incumbents dominate the core.

A protocol-level technical pointer

Quantum-safe Bitcoin transactions (QSB) — open-source technical resource

- **Creator / link:** A team Balaji attributes to Ben-Sasson and others; the direct project URL was not supplied in the transcript. Balaji’s Bitcoin Asia discussion provides the access context.
- **Recommended by:** Balaji Srinivasan, who says anyone unfamiliar with QSB “should definitely know about this.” [8]
- **Key takeaway:** The transcript describes an open-source approach to making Bitcoin transactions quantum-resistant through scripts layered on existing Bitcoin. The tradeoff is higher transaction cost, while a protocol change may not be necessary. [8]
- **Why it matters:** Unlike a general prediction about crypto, this is an implementation-level lead with a clear compatibility-versus-cost tradeoff—useful for readers tracking long-horizon security risks in deployed protocols.

Sources

1. X post by @scottbelsky
2. X post by @patrick_oshag
3. Weekly Dose of Optimism #208
4. Ruxandra Teslo (@RuxandraTeslo) on X
5. X post by @garrytan
6. X article by @12Palehorse
7. Why Top Founders Are Racing Into AI Infrastructure
8. The Network State Engineering: The Next Iteration of Society | Bitcoin Asia 2026