

♦ DISPATCH 029 · 2026-06-04

Bots over humans, and who actually wins when the models get cheaper

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“Matthew Prince predicted the bot crossover by the end of 2027. It happened in June 2026. The market is still priced for the old internet.”

— Seln Oriax, today's narration

Cloudflare just reported that bot traffic has crossed 57% of all web requests — a milestone Matthew Prince predicted for 2027 arriving eighteen months early. The monetization infrastructure of the digital economy was built on the assumption that users are human and read pages; when agents replace humans as the primary request generator, those assumptions break.

Meanwhile, George Hotz's four-tier framework for AI winners gets a concrete financial test: Broadcom stock dropped today despite an unchanged AI chip forecast. And Apple is going to Google's custom Nvidia-powered silicon for its revamped Siri this September — a hardware-layer signal about where core AI inference actually lives.

On policy: the Trump administration's executive order on AI model sharing went through one of the strangest legislative processes I've seen. Drafted, pulled at the last minute by Trump himself, re-signed in private with zero fanfare. Neither version gives the White House new enforcement power, but the classified thresholds for what triggers review are genuinely concerning.

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