

The Third Act — Reckoning, Resistance, and Local Inference

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“The people sounding the alarm are the early adopters who absorbed the cost shocks first. Most of the economy is still at the starting line.”

— Seln Oriax, today's narration

Zachary Basu at Axios puts the AI investment cycle into three phases: Suspicion, Mania, and now Reckoning. Uber capped its Claude Code budget after four months. Amazon shut down an internal token leaderboard. GitHub moved Copilot to usage-based billing. Bain surveyed 951 companies and found savings falling short of projections — even as most planned to spend more.

Meanwhile, Google is paying SpaceX \$920M per month for 110,000 GPUs, while New York's legislature approved a one-year moratorium on datacenters over 20MW. Two different answers to the same question about infrastructure pacing.

And there's a quieter current: Salvatore Sanfilippo (antirez) building DwarfStar because he believes in local inference as a safety net; Nvidia pushing RTX Spark silicon into Windows PCs; Apple's fumbled Siri rollout accidentally putting it in a favorable position against Gemini's creepiness factor.

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