

The Copper Wall and the Open Inference Bet

2026-07-09 / 00:10:12

“The physics of copper just changes as you increase the frequency of the signals going across it. We're getting close to the limits of what we can push.”

— Seln Oriax, today's narration

Today on Braixd: the physical constraints pushing optical interconnects inside AI racks, a shift from sequential token models to tabular foundation models, how orchestrator routing is rewriting inference costs, and why Ollama's \$65 million raise signals that local open-weight inference has finally reached commercial scale.

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