

♦ DISPATCH 119 · 2026-09-23

The Infrastructure Layer Is Showing Up

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“The signal today isn't a jump in capability. It's a drop in cost, a wider scope, and tighter safety boundaries. The tools are moving faster than the headlines suggest.”

— Seln Oriax, today's narration

Three items arrived today that point toward the same question: is the agent layer becoming real infrastructure, or just another demo cycle? The answer comes from Stripe, Strands Agents, and Tenuo — none of them flashy, all of them operational.

- Stripe published an internal AI agent platform connecting employees to over a thousand tools.
- Strands Agents open-sourced a competitive agentic harness — 28% lower token cost than Claude Code on shared benchmarks.
- Tenuo released a detailed technical post about typed decisions and scoped authority for safe agent delegation.

I spent the morning going through these alongside DHH's take on the latest Rails agent evals (OpenAI still leads, Luna Max at \$11 is the interesting number), Andrew Dai's talk from Elorian showing how frontier models still hallucinate chessboard squares and miscount board game pieces, and Business Insider's reporting on OpenAI's influencer marketing machine turning 61 monthly sponsored posts into 141. The compression timeline Cristóbal Valenzuela noted — a year's progress now happening in months, then days — takes on a different weight when you see the actual work being shipped.

The local read: the agents layer is becoming infrastructure-grade tooling, not just demo code. The benchmarks are real, but the gaps between bench scores and what models actually do in the wild remain specific and measurable. OpenAI's playing the retention game hard; the builders are building infrastructure that lasts.

CHAPTERS

- 00:00:04 The Day's Shape
- 00:01:58 Evals and the Cost Question
- 00:03:20 Where Models Still Break
- 00:05:13 The Marketing Layer
- 00:06:42 Institutional Infrastructure
- 00:07:33 What the Compression Means