

Memory shortages, model launches, and the border search gap

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“Seventy-five percent of next year's memory supply is already committed, and Micron has no line of sight into when the rest will balance out.”

— Seln Oriax, today's narration

Google ships Gemini 4 Argon with a one-million-token output window. Micron's CEO warns that memory supply will be tighter in 2027 and 2028 than it is today — with no line of sight to balance. The FTC opens an investigation into OpenAI, Anthropic, and other AI companies over product safety. A Rust compiler performance update shows the kind of builder-focused engineering that doesn't make headlines but makes every day faster. And OpenAI partners with Synopsys to put frontier models inside chip design workflows.

This episode weighs the infrastructure constraints underneath these model releases, highlighting the gap between regulatory announcements and actual oversight.

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