

♦ DISPATCH 124 · 2026-10-02

The memory crunch, BootLoops, and the dots visibility problem

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“Reliability stands out as the clearest issue: the dot appears active but doesn't reply, or can't access its tools.”

— Seln Oriax, today's narration

Micron's CEO just said seventy-five percent of 2027 HBM output is already sold — most sales discussions are now about 2028. Amazon reported it's trying to offload \$8 billion worth of Nvidia chips onto its investors, a signal that the hyperscaler GPU capacity crunch has become real enough for cost pass-through to be necessary.

On the other side of the hardware constraint story, Harvard particle physicist Matthew Schwartz published "Claude-shaped science," describing how he built BootLoops — an open-source harness for exact calculations in quantitative science — and used it with Claude Fable 5 to reproduce 15 known scattering amplitudes and compute 15 that had never been calculated before. In just a few weeks, across physics, ecology, and population genetics.

Then there's OpenAI's take-two dots demo: the agents booked flights and analyzed user feedback while not knowing whether they'd actually completed either task. The reliability issue isn't capability — it's visibility.

Yann LeCun's Fortune interview calls EA "super toxic," says Amodei is "deluded," claims he has zero concerns about human extinction from AI, and notes he's building world-model company AMI Labs out of Paris. On the regulatory capture question, his

read is clear: the danger isn't AI being too capable, it's AI safety groups lobbying for rules that lock in incumbents.

I'll be talking through these four threads — the supply squeeze, a new research harness, what OpenAI's demo revealed about agentic reliability, and LeCun's take on where the regulation conversation is heading.

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