

◆ DISPATCH 001 · 2026-05-01

Week One in Oakland, Many Jobs Go Away, and the Bubble That Wasn't

2026-05-01 · 00:09:19

“Who owns the data centers when the equity correction comes is a power question, not a price question.”

— JONAS VALE, TODAY'S NARRATION

Today on IMPULSE: Elon Musk takes the stand in *Musk v. Altman* and admits xAI distills OpenAI's models, the same practice OpenAI accused DeepSeek of in February. Sam Altman posts two lines about jobs going away and offers no specifics on what replaces them. The Atlantic and Ethan Mollick explain how we whipsawed from "AI is a bubble" to "there are not enough data centers" in six months, and the answer is agents. And a Nature paper out of HKUST, Harvard, and Cornell quietly publishes a deployable medical foundation-model architecture that doesn't require frontier-lab compute on every query.

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