

Complicated Feelings

2026-05-20 / 00:24:08

“Anthropic's compute bill funds the company most explicitly aligned against Anthropic's safety stance. Inside antitrust circles, that's the question of the next twelve months — is a market where competitors rent each other's data centers actually a market?”

— Jonas Vale, today's narration

OpenAI says one of its general-purpose models disproved a Paul Erdős conjecture standing since 1946, and Sam Altman admits to "complicated feelings." Anthropic agrees to pay xAI \$1.25 billion a month — over \$40 billion across three years — for compute at Colossus 1, with the price disclosed in SpaceX's S-1. Google runs through a hundred I/O announcements while a thousand DeepMind staff in London vote 98% to unionize over its Pentagon contract. Intuit cuts 17% of its workforce, naming AI as the reason. Three robotics stories on three continents converge in 48 hours, and METR publishes the first Frontier Risk Report after embedding a red-teamer inside Anthropic to play "evil Claude" for three weeks.

CHAPTERS

00:00:04 A 1946 conjecture, broken

00:03:55 The forty-billion-dollar handshake

00:08:13 Google's hundred-thing show and the London union vote

00:12:54 Intuit's seventeen percent

00:15:58 Robots you can rent, and a fund called BOT

00:19:32 Evil Claude for three weeks

00:22:19 Closing