Digest A, week ending Sat, Oct 24, 2026: quotes

Quotes companion with verified quotes. Every quote was checked word for word against the transcript. Grey numbers point to where each quote sits. Timestamps are the transcript's own. The Volts pages carry no times.

AI

The Cognitive Revolution: Alex Rives of Biohub on a world model of life (Tue, Oct 20)

Episode and transcript

Transcript read in full. Timestamps are the transcript's own.

- Curing all disease, in Rives's practical framing, means a world without cancer, infectious disease, and chronic or degenerative illness, reached by learning to read and rewrite the programs of biology.

  > “a world where there's not cancer, a world where there's not infectious disease” [1]

- Today's virtual cell models do not yet qualify as models of the cell. Rives puts the limit on measurement: so much of what happens in a cell cannot be observed.

  > “we just really can't measure” [2]

- The near-term target is not a full world model of life. Rives says that is far off, and what is possible within about five years is an information theoretic model that predicts a cell's next state from its current state and inputs.

  > “I think we're very far from that.” [3]

  > “an information theoretic model of the cell” [4]

- The $1.8B goes mainly to new data: cell maps in tissue context at the scale of hundreds of billions of cells, and new instruments such as the laser phase plate for electron microscopy.

  > “dramatic expansion of these kind of maps, contextual maps of cellular biology” [5]

The Cognitive Revolution, AI:AM Highlights: clean neurons, Black October, the GPU credit crunch, and buying the supply chain (Sat, Oct 24)

Episode and transcript

Transcript read in full. The transcript's speaker labels are unreliable in the Cambrian section, so nothing is quoted from it. The narration is the host's cloned voice, as the episode says.

- On recursive self-improvement, Mowshowitz says the analysis that the feedback loop will peter out is probably true but beside the point, because it assumes no one ever hits a breakthrough.

  > “seems completely irrelevant” [6]

- Conrad says the bottleneck for AI compute is financing. Lenders cannot value a GPU cluster if the AI lab fails, so they lean on the customer's credit, which new labs lack.

  > “It's entirely credit.” [7]

- On the essay arguing that neural networks are already clean to interpret, Mowshowitz calls it a good paper that the commentary oversold. Weak activations and attention remain unexplained.

> “it was dramatically oversold by the people commenting” [8]

- On the leaked draft federal AI bill, Mowshowitz argues it trades away state laws for too little, and that passing it would make a stronger bill harder to pass later.

> “And I don't want something like this to pass.” [9]

Climate and energy

Volts: Can distributed energy work around American utilities? (Wed, Oct 21)

Episode and transcript

Transcript read in full. The transcript carries no times.

- Participation is the gap. Chaset says a good utility program sees 5% to 20% of customers join, while Octopus sees about 60%, because it makes signing up take a click or two and speaks to customers in its own voice.

> “we see 60% rates” [10]

- Of the UK's market features, Chaset would import meter data access before forced choice of supplier, because without customer data targeting and settlement get harder.

> “I’d say it’s the meter data access more so than forced choice.” [11]

- Texas is a puzzle for flexibility. Cheap solar and utility batteries have flattened price swings, which is good for bills and bad for the daily price arbitrage that flexibility earns from.

> “Texas volatility has essentially been destroyed.” [12]

- On consumer protection, Chaset says households do not have enough of it, and prefers retailer or utility led models, where an obligation to serve applies, to third party aggregators.

> “I don’t think they have adequate protection” [13]

Volts: Building our piece of the electric stack (Fri, Oct 23)

Episode and transcript

Transcript read in full. The transcript carries no times.

- D'Amico's electric stack has four parts, batteries, power electronics, electromagnetics, and embedded compute, and what makes it new is that all four can be controlled by software.

> “the four technologies are batteries, power electronics, electromagnetics” [14]

- He argues China and Elon Musk treat the parts of the stack as the bottleneck, while the US chases AI demand without steering it onshore, so owning the components may matter as much as owning the models.

> “making sure that you’ve got a complete Lego set is extremely important” [15]

- Rebuilding US manufacturing is blocked less by cost than by rules. He says that in places like California, some factory work that was once offshored is now effectively illegal, and calls for legalizing green jobs.

> “It would actually just be illegal for me to do it” [16]

- On AI and climate, he expects AI and robotics demand to pull the whole economy toward electric machines, and says geoengineering will probably become the next hard topic.

> “the entire economy is going to be electric within the next 10 years” [17]

Notes

1. *Rives, [04:32]*
2. *Rives, [10:05]*
3. *Rives, [14:41]*
4. *Rives, [14:41]*
5. *Rives, [23:21]*
6. *Mowshowitz, [05:54]*
7. *Conrad, [00:50]*
8. *Mowshowitz, [16:34]*
9. *Mowshowitz, [1:15:50]*
10. *Chaset, no time in transcript*
11. *Chaset, no time in transcript*
12. *Chaset, no time in transcript*
13. *Chaset, no time in transcript*
14. *D'Amico, no time in transcript*
15. *D'Amico, no time in transcript*
16. *D'Amico, no time in transcript*
17. *D'Amico, no time in transcript*