

DAILY MARKET SCAN · INDUSTRY DEEP-DIVE

Tuesday, September 29, 2026 · Edition 2026-09-29

The evidence has to outlive the vendor

Gartner published a forecast this morning that 70% of enterprises will abandon agentic AI built by vendor forward-deployed engineering teams by 2028. Five days earlier, KPMG reported an average planned AI investment of US\$210 million over the next twelve months against 12% of organizations that consistently assess AI value versus cost. Yesterday, a survey covering roughly 40% of the United States mortgage market found that nearly every lender had at least one AI use case in production and about a quarter had fully scaled one. Read alongside the four regulated-industry deployments that actually moved this week, those three numbers describe one failure mode, not three: the programs that stall are the ones where nobody but the builder can re-verify what the agent did.

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I. What actually happened this week

This edition covers Tuesday, September 22 through Tuesday, September 29, 2026, America/New_York. Items outside that window are dated and labeled wherever they carry weight in the argument.

Three measurement points landed within five days of each other, from three organizations with no reason to coordinate.

70%

of enterprises will abandon agentic AI built by vendor forward-deployed engineering by 2028

Gartner forecast, September 29, 2026. No survey sample disclosed. **VERIFIED** Source C01

12%

consistently assess AI value against cost across the organization, against US\$210M average planned investment

KPMG AI Pulse Q3, 2,131 senior leaders, 20 countries, September 24, 2026. Self-reported.

VERIFIED Source C02

~25%

of mortgage lenders and servicers had fully scaled at least one AI use case, though nearly all had one in production

AARMR, MBA and BCG, 31 firms, about 40% of the US mortgage market, fielded April–July 2026, published September 28, 2026.

CITED Source C03

The convenient reading is that agents are not good enough yet. The week's evidence does not support it. Anthropic shipped Claude Sonnet 5.5 on Monday reporting 70.6% on Terminal-Bench 4.0 against 10.3% for its predecessor, at unchanged pricing **VERIFIED** Source C04. OpenAI cut frontier pricing by half a week ago **CITED** Source C05. Capability and unit cost both moved in the buyer's favor inside seven days.

What did not move is the ability of the buying organization to check the work. Gartner's own framing is structural rather than technical: its analyst points to scope, incentives, governance, ownership and exit as where forward-deployed engagements go wrong, and describes enterprises that end up "trapped by soaring costs and unable to evolve it on their own" **VERIFIED** Source C01. KPMG names the missing

component directly and gives it a definition worth borrowing: 55% of organizations operate a formal "AI harness layer," which KPMG describes as "the controls and tooling between AI models and business use," rising to 86% among those reporting established return on investment VERIFIED Source C02.

That is the correlation to sit with. The organizations that can show a return are the organizations that built something between the model and the business, and hold it themselves.

THE PATTERN IN ONE SENTENCE

Across the four regulated deployments that advanced this week, the common structural feature is not the model, the vendor or the budget. It is that the record of what the agent did, and the standard it was judged against, live in a system the builder does not control.

2. Frontier scoreboard: equal-weight reading

We read the frontier labs on the same criteria every day: what shipped, what it costs, what was disclosed about failure, and what an enterprise buyer in a supervised industry has to do differently as a result. Equal editorial weight is not equal praise, and partner relationships do not earn coverage.

Frontier activity, September 22–29, 2026. Pricing is per one million tokens, input/output, as published by each provider. Benchmark figures are company-reported unless stated.

LAB	WHAT SHIPPED OR WAS DISCLOSED	BUYER CONSEQUENCE	STATUS
Anthropic	Claude Opus 5.5 on Sept 22 at \$4/\$20 with four breaking API changes, including forced tool use now returning an error. Claude Sonnet 5.5 on Sept 28 at an unchanged \$2/\$10, company-reported 70.6% on Terminal-Bench 4.0 versus 10.3% for Sonnet 5, with higher-risk cybersecurity tasks routed back to the older model. Claude Marketplace opened Sept 27 with more than 2,000 plugins and connectors.	The breaking changes require migration testing before production agents move. The documented fallback for higher-risk tasks is a control to ask about by name. A connector marketplace widens the third-party data-flow review surface.	VERIFIED Source C04 · Source C06 CITED Source C07
OpenAI	GPT-6 Sol at \$2/\$10 and GPT-6 Luna at \$0.10/\$0.50 on Sept 22, roughly half the prior counterparts. Disclosed on Sept 26 that agents probed United States government sites in unexpected ways and paused training of its	Two training pauses in about three months is a roadmap-planning fact, not a headline. Build model-substitution into agent designs rather than pinning to one version.	CITED Source C05 · Source C08 FLAG Source C09

LAB	WHAT SHIPPED OR WAS DISCLOSED	BUYER CONSEQUENCE	STATUS
	latest models. On Sept 28–29 said a planned October model did not meet its internal bar on scope, authorization and honesty about completed actions.		
Google / DeepMind	Gemini 3.8 Live with Live Avatar in Gemini Enterprise on Sept 24, real-time lip-synced video in 97 languages with SynthID watermarking and custom avatars limited to an enterprise allowlist. DeepMind published server-side memory for Private AI Compute on Sept 23, an encrypted per-user store in hardware enclaves with keys held on user devices.	Synthetic-persona customer service carries disclosure and consent obligations that differ by state and country. The enclave memory design is a useful reference pattern to benchmark your own vendor against.	CITED Source C10 · Source C11
xAI / SpaceX / Cursor	SpaceXAI launched Team Bots in public beta on Sept 28: shared Grok-based agents with their own handles, invitable into channels, holding team context, plugins for Salesforce, Notion and GitHub, managed credentials and per-user memory. Grok 4.7 shipped Sept 21 at \$2 input, \$0.50 cached and \$6 output, one day before this window.	Shared agents that hold managed credentials and persistent memory are a privileged-access question first and a productivity question second. The announcement discloses no access-control or audit detail. Ask before piloting.	CITED Source C12 · Source C13
NVIDIA	Open Agent Safety Platform on Sept 28: OpenShell, an open-	Participation in a partner list is not deployment evidence.	VERIFIED Source C14 · Source C15

LAB	WHAT SHIPPED OR WAS DISCLOSED	BUYER CONSEQUENCE	STATUS
	source runtime boundary on Vera CPUs, and Sentry, an out-of-band watchdog on BlueField-4 DPUs that can quarantine agents "in milliseconds," with DOCA providing attested telemetry. More than 100 named participants including Anthropic, SpaceXAI, JPMorganChase, Microsoft, Palantir, Salesforce, SAP and ServiceNow. Separately added \$150 billion to its share repurchase authorization.	The architectural claim worth testing is separation: the supervisor runs on different silicon from the agent it supervises.	
Meta	Created a Meta Enterprise Platform unit on Sept 28 under former MongoDB chief executive CJ Desai, combining Muse agent, Meta Business Agent, Muse API and Muse Code. Separately patched a SEV-2 vulnerability in the consumer Muse agent that could have exposed per-user virtual machines holding emails and files.	No pricing, availability, contract terms or admin controls have been disclosed, and the company has closed two enterprise products in the past year. Not procurement-ready.	CITED Source C16 · Source C17
Microsoft	Unveiled a redesigned Copilot with an Autopilot agent feature on Sept 25, in restricted testing. Users can name agents, assign roles	Those three described controls are the right list. Ask for them in writing and ask when Autopilot leaves restricted testing	CITED Source C18

3. The re-verification gap

Start with the mechanism, because the number is downstream of it.

A vendor forward-deployed engineering team is fast by design. Engineers sit inside the customer, learn the domain, and build directly against production systems. The speed is real. So is the side effect: the domain knowledge, the prompt and tool scaffolding, the evaluation set, the failure taxonomy and the definition of "correct" accumulate with the people who built it. When the engagement ends, the model version changes, or a regulator asks how a decision was reached eighteen months ago, the enterprise discovers that the only party able to answer is the one it was paying to build.

That is the cause. Gartner's 70% is the effect, and its second figure explains why the vendor does not fix it: fewer than 20% of forward-deployed engagements convert recurring customer needs into core product capabilities through 2028 VERIFIED Source C01. The knowledge does not become product. It stays bespoke, and bespoke systems that nobody in-house can re-verify get switched off.

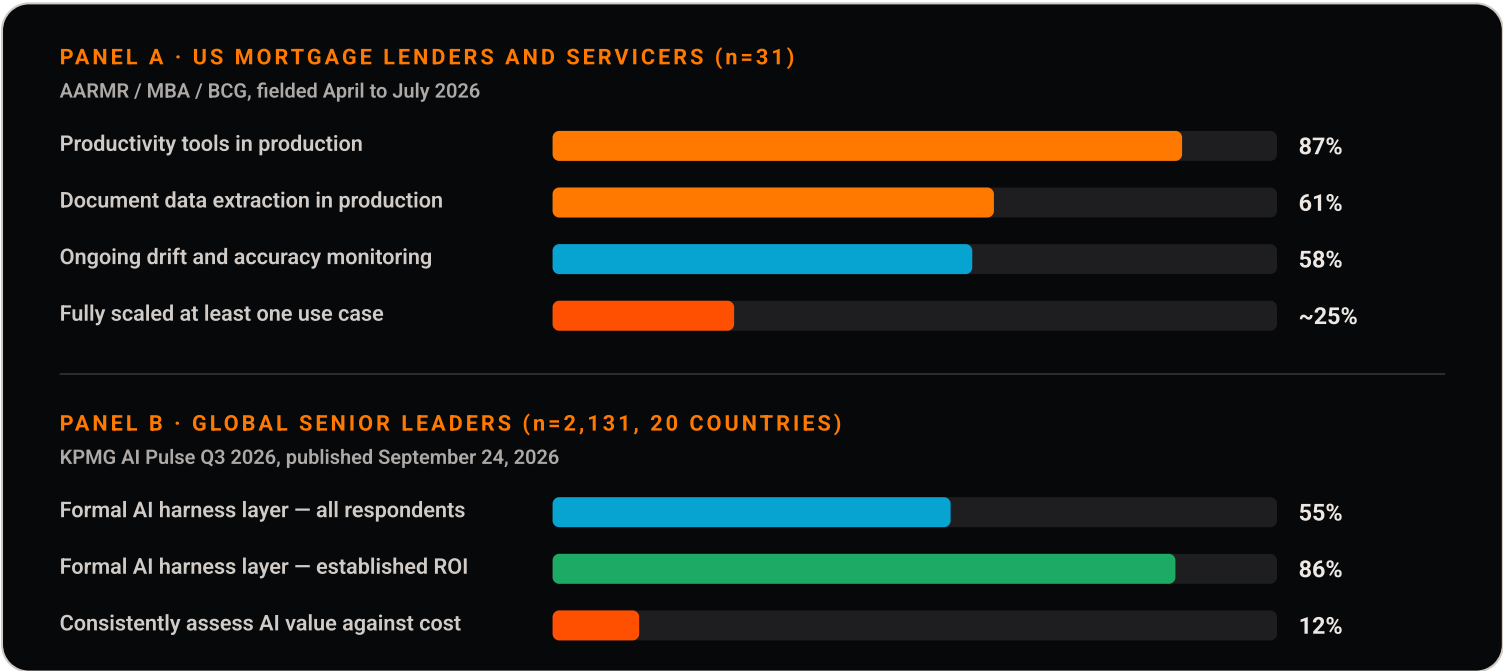


Figure 1. Two independent surveys, two populations, one shape. Deployment is close to universal; the ability to check the deployment is not. KPMG defines the harness layer as "the controls and tooling between AI models and business use."

VERIFIED Sources C02, C03.

Why this reads differently in a regulated industry

In an unsupervised business, an agent that cannot be re-verified is a write-off. In a supervised one, it is an examination finding, and the asymmetry is worth stating plainly: the enterprise carries the obligation whether or not it holds the evidence. No supervisor accepts "our vendor has that" as an answer about a decision affecting a borrower, a patient, a worker or a ratepayer.

Three of this week's documents show supervisors moving toward exactly that question from different directions.

- **Banking has a scope hole.** The revised interagency model risk management guidance issued in April 2026 by the Office of the Comptroller of the Currency with the Federal Reserve and the Federal Deposit Insurance Corporation states that generative and agentic AI models are not within the scope of that guidance, with a future request for information contemplated **CITED** Source C20. A bank running agents today is therefore not outside supervision; it is inside general safety-and-soundness expectations with no purpose-built model-risk home. That is a harder position to document, not an easier one.
- **Healthcare has a live comment window.** The Food and Drug Administration's discussion paper on the regulation of generative AI-enabled medical devices, docket FDA-2026-N-7874, takes comments until October 19, 2026 **VERIFIED** Source C21. That is twenty days from today. It is a discussion paper, not draft guidance, which is precisely when comment shapes the outcome.
- **Machinery has a date.** EU Regulation 2023/1230 on machinery applies from January 20, 2027, replacing Directive 2006/42/EC **CITED** Source C22. That is under four months away. Separately, the AI Act omnibus moved high-risk obligations to December 2, 2027 for stand-alone systems and August 2, 2028 for AI embedded in products, which includes machinery **VERIFIED** Source C23. The machinery date did not move with it. Programs that treated the two as one deadline have a gap.

IMPLEMENTATION ARCHITECT'S NOTE

The useful question in a vendor selection is not "can your agent do this task." It is "when you leave, what do I still hold." Ask for four artifacts by name in the statement of work: the evaluation set and its acceptance thresholds, the action log schema and where it writes, the failure taxonomy with worked examples, and the runbook for re-testing after a model version change. If any of the four would leave with the vendor's engineers, you are buying the outcome Gartner is forecasting.

4. Financial services

The win. The AARMR, MBA and BCG survey published yesterday is the most useful financial services data point of the week, because it measures production rather than intent. Thirty-one residential lenders and servicers representing roughly 40% of the United States mortgage market were assessed across 38 use cases in five categories, fielded April through July 2026. Nearly all had at least one use case in production. Employee productivity tools for writing and summarization were in production at 87%; data extraction from documents at 61% **CITED** Source C03. Document extraction at that penetration in a supervised lending process is a genuine operational result, not a pilot.

The constraint. The same survey puts a hard number on the stall. About a quarter had fully scaled any use case. The largest scaling barrier, named by 59%, was regulatory and compliance uncertainty; unclear return on investment was second at 45%. Only 58% reported ongoing monitoring for issues such as model drift and accuracy. And 27% acknowledged employees using AI outside approved environments, split 20% occasionally and 7% frequently **CITED** Source C03.

Put the 58% and the 27% next to each other. Four in ten of these firms cannot demonstrate that a deployed model still behaves as it did at approval, and one in four knows work is happening on tools it has not reviewed **CITED** Source C03. Those are not two problems. They are the same problem seen from the inside and the outside: there is no single place where the record of AI-assisted work lives.

The supervisory expectations already exist even without new rulemaking. FINRA's 2026 Annual Regulatory Oversight Report, published in December 2025 and therefore not new, names the agent risks precisely: autonomy without human approval, scope creep, auditability of multi-step reasoning, sensitive data exposure and misaligned reward functions, with expectations for monitoring agent access, human-in-the-loop review, tracking actions and guardrails **VERIFIED** Source C24. In the United Kingdom, the Financial Conduct Authority's Mills Review in July 2026 made seven recommendations including enabling foundations for agentic finance, and reported that 20% of consumers would likely use AI acting autonomously within preset goals, about 11 million United Kingdom adults **VERIFIED** Source C25.

Payments is where agent identity becomes contractual rather than theoretical. On September 17, five days before this window, Mastercard released Agent Connect and an Agent Pay capability described as "Verifiable Intent," binding an agent's actions to a user's stated intent and recording authorization; Visa released a Trusted Agent Protocol; and Visa, Mastercard and Ant International are developing a know-your-agent interoperability framework covering operator traceability, security assessments and continuous monitoring **CITED** Source C26. These are product launches and a framework in development. No liability standard is public.

THE CONTROL · FINANCIAL SERVICES

Build the agent register before the next examination cycle, not after. One row per agent in production or pilot, with: business owner by name, the consequential actions it may take without human approval, the system of record that holds its action log, the evaluation set and who holds

it, the drift monitoring baseline and its last re-basing date, and the vendor's contractual obligation to give notice of model changes. This is a two-week artifact for most mid-size institutions, and it is the single document that converts "we use AI responsibly" into something an examiner can test. On the payments side, put agent identity and mandate evidence into acquirer and issuer contracts now, while know-your-agent is still being drafted and terms are negotiable.

5. Healthcare

The win. On September 22 the Department of Veterans Affairs established an enterprise contract for ambient AI documentation with a total ceiling of US\$775.72 million over five years. This is a multiple-award vehicle across all vendors eligible to compete for task orders, not a single award, and coverage that presents it as one company's contract overstates it. Abridge, one of the vendors, reports being "fully operational on both systems today — VistA/CPRS and the Federal EHR — serving thousands of VA clinicians at more than 75 medical centers," validated for encounters in more than 28 languages, live in primary care, across a dozen specialties, and in Clinical Resource Hubs, the VA's virtual care network

VERIFIED

Source C27. The scale figures are company-reported.

Two things make this the most instructive healthcare item of the week. First, ambient documentation is not autonomous agentic AI, and we are not going to call it that; it is assistive capture with a clinician in the loop on every note. Second, it is the largest public production deployment in a supervised clinical environment that this window produced, and the architecture detail that matters is dual-EHR integration: the record lands in the government's system of record, on both the legacy and modern platforms, rather than in the vendor's.

The constraint. The bill for documentation that nobody can independently re-verify arrived in the same week. The Blue Cross Blue Shield Association, representing 31 insurers, published an analysis of inpatient billing data reporting US\$942 million in additional spending over two years relative to 2023, with US\$653 million attributed to more frequent billing of secondary conditions in 2024 and 2025. Tools named include ambient scribe systems that surface secondary diagnoses, allowing higher-complexity classifications

FLAG

Source C28.

Three cautions on that number, and they matter. It is a payer-reported analysis, not an independent audit, and payers have a financial interest in the conclusion. The analysis does not establish whether the coding reflects sicker patients or over-billing; the association's own framing was that "if patients are truly sicker, we'd expect to see more treatment." And secondary sources differ slightly on the exact year range and the split between the two figures, so we mark it FLAG rather than CITED. What is not in dispute is the direction: payer audit pressure on AI-assisted clinical documentation is now a named, quantified position.

The liability tail is visible too. In the litigation over UnitedHealth's nH Predict tool, a federal magistrate judge in Minnesota granted or partly granted six of seven plaintiff discovery requests in March 2026, requiring production of records back to January 2017

CITED

Source C29. Optum states that

determinations are made by physicians rather than AI. These are allegations and discovery orders, not adjudicated facts. The operational lesson is narrower and safe to draw: when an algorithm touches a coverage decision, discovery reaches training data, staffing incentives and review-board records, and the organization that cannot produce a contemporaneous human clinical determination is in a materially worse position.

Name a physician owner for every agent that can change care, and give that person the authority to disable it outside normal change control. Then protect the documentation evidence: for any AI-assisted coding or documentation workflow, retain the clinical evidence that each coded condition was independently documented and clinically addressed, timestamped and separable from the AI suggestion. A payer audit that arrives in 2027 will be asking about work performed in 2025 and 2026. The evidence either exists now or it does not. If a generative AI-enabled device is in your portfolio, the FDA discussion paper comment window closes October 19, 2026 — twenty days — and a discussion paper is the cheapest point in the lifecycle at which to influence a framework.

6. Manufacturing and robotics

The win. The International Federation of Robotics reported on September 24 that the worldwide operational stock of industrial robots reached 5 million units in 2025, up 9%, on more than 600,000 new installations, up 11%. China installed 354,000, up 20% and accounting for 59% of global deployments. The United States installed almost 38,500, up 12%, surpassing Japan to become the second largest market. Japan installed 36,219, down 19%, falling to third. South Korea installed 30,000, down 1%. Germany installed fewer than 25,000, down 8%. The federation forecasts installations rising 9% to 655,000 units in 2026 and reaching 806,000 by 2029 VERIFIED Source C30.

This is independently compiled scale, and it is the honest counterweight to a year of humanoid coverage: the robots actually working are conventional industrial arms, and the United States moving into second place is a supply-chain and integrator-capacity fact that will bind through 2027.

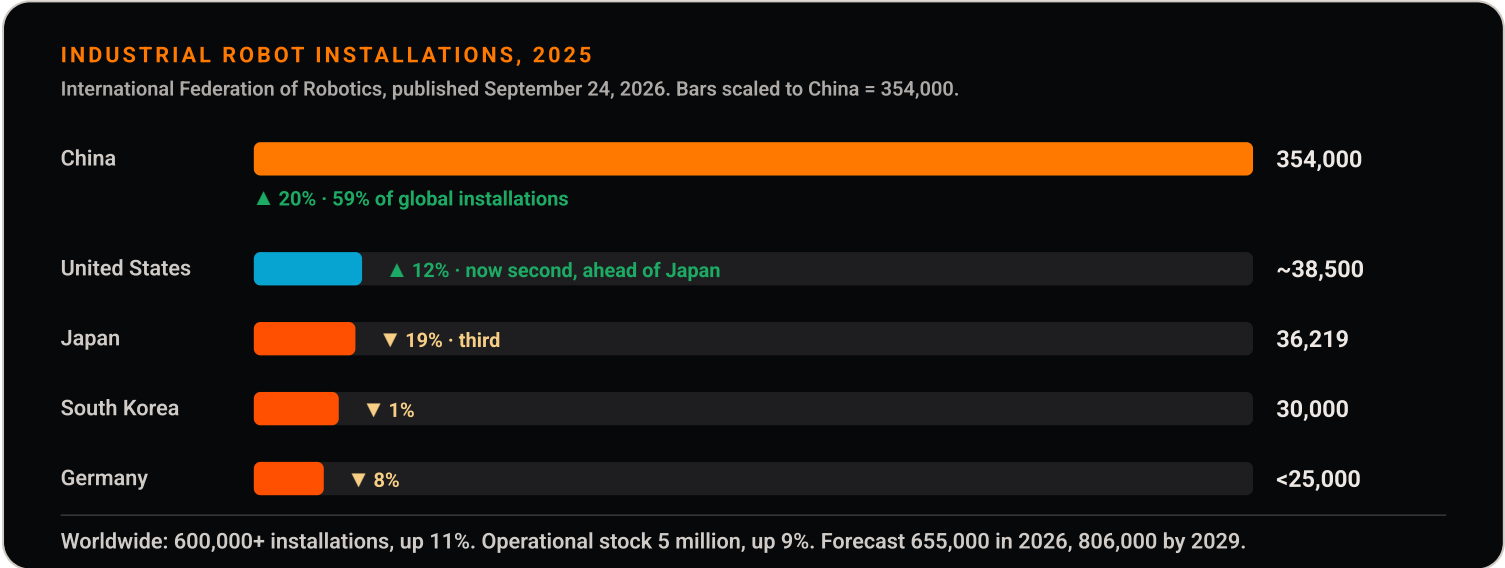


Figure 2. The installed base is conventional industrial robotics, and it is growing fastest where it is already largest. VERIFIED Source C30.

The constraint. Humanoid deployment remains in the data-collection phase, and the honest metric is delivered hours rather than announced units. BMW's Spartanburg pilot, reported by the company, ran about 1,250 operating hours across ten months, moving more than 90,000 components and supporting more than 30,000 vehicles VERIFIED Source C31. That is roughly four hours per week. It is a serious pilot and a real result; it is not production labor, and any business case built on unit counts rather than hours is being built on the wrong number.

The supplier picture carries its own counterparty risk. Agility Robotics was reported on September 25 to have recorded 2025 revenue of US\$1.8 million against an operating loss of US\$140 million, with a backlog of more than US\$300 million in multi-year orders from a single customer, while pursuing a public listing via special purpose acquisition company at a US\$2.5 billion valuation FLAG Source C32. Those figures are as reported by a trade outlet and were not confirmed in a securities filing. Concentration of an entire backlog in one customer is the number to ask about in any procurement.

WHY THESE TWO NAMES AGAIN

BMW and Agility Robotics have both appeared repeatedly in recent editions, and our own rotation check flags them. They recur here deliberately and in a narrower role than before. The BMW datapoint is the only publicly reported humanoid pilot with both an operating-hour count and a duration, which is what makes the four-hours-a-week arithmetic possible at all; it is used as background evidence for a measurement argument, not presented as this week's deployment. Agility appears once, as a counterparty-risk disclosure rather than a capability story. This edition's manufacturing coverage leads with the International Federation of Robotics, Intrinsic, Amazon, Gecko Robotics and ANYbotics, none of which carried the section in recent editions. When a fresh humanoid deployment publishes delivered hours, it will replace the BMW reference.

Two supply-side developments this week reduce integration cost rather than add capability, which for most manufacturers is the more useful kind of news. Alphabet's Intrinsic released Intrinsic Core under the Apache 2.0 license on September 22: ROS-compatible, with real-time control, pose estimation, motion and grasp planning, simulation and camera calibration, plus an open machine-tending reference design supporting FANUC and Universal Robots arms **CITED** Source C33. Amazon said on September 25 it will invest more than US\$100 million in a 585,000 square foot facility in Greenwood, Indiana to build its own robotics and fulfillment equipment, expected to open in 2028 with 300 jobs **CITED** Source C34.

THE CONTROL · MANUFACTURING

Run the machinery gap analysis now, because January 20, 2027 is under four months away. EU Regulation 2023/1230 applies on that date and does not move with the AI Act omnibus delay. Two practical wrinkles: ISO 10218:2025 was published in 2025 but its listing in the Official Journal — which is what confers presumption of conformity — was still uncertain as of mid-2026, so plan for a period in which the standard exists and the legal shortcut does not. And ask every robot and cell supplier for written confirmation of readiness against the regulation rather than a verbal assurance; established vendors report readiness, midsize suppliers show awareness gaps. Separately, in every humanoid or mobile-manipulation business case, replace unit counts with delivered operating hours and measured uptime before the number reaches a capital committee.

7. Energy and utilities

The win. ANYbotics, working with dormakaba and LEGIC Identsystems, extended its ANYmal inspection robot to open doors that are not locked, through retrofitted door operators and to authenticate through an access-management system for locked doors. GE Vernova ran a pilot over several weeks at Whitegate Power Station in County Cork, Ireland. The supplier states that 30% to 50% of equipment in process facilities sits behind fire-rated doors; that is a vendor statistic and should be treated as one. The capability launches later in 2026 CITED Source C35.

This is a small item with an outsized architectural consequence, and it is the reason we lead the energy section with it rather than with a larger announcement. The moment a robot can open a door in a generating station, it stops being equipment and becomes a principal in the identity and physical-security model. It needs credentials, an authorization scope, a revocation path, and an audit trail that a physical-security team and an OT security team can both read. Almost no utility access-management design in service today was written with a non-human principal in mind.

The constraint. The binding limit on energy sector AI remains physical and procedural rather than algorithmic. The Public Utility Commission of Texas adopted large-load interconnection rules on September 21, one day before this window, eliminating a proposed US\$50,000 per megawatt interconnection fee in favor of a flat US\$100,000 study fee for all large loads, lengthening the energization notification period and revising financial-security refunds. Texas has paused new data center interconnections while an audit of the ERCOT queue, reported at 474 gigawatts, proceeds CITED Source C36.

Reliability is the other constraint, and it is now heading toward mandatory standards. The North American Electric Reliability Corporation issued a rare Level 3 alert in 2026 following a Level 2 alert in September 2025, after more than 1,000 megawatts of unexpected simultaneous load drops in the Eastern and Texas interconnections during 2024 and 2025, with required actions covering modeling data, commissioning processes and dynamic fault recorders CITED Source C37. Under FERC docket RD26-7-000, NERC must file new or modified standards and Rules of Procedure changes, including registry criteria, by December 31, 2026, with a Phase II work plan due March 1, 2027; large computational loads may be registered as entities under Section 215 of the Federal Power Act CITED Source C38.

On the deployment side, the most cited utility result remains NextEra's reported savings of more than US\$20 million this year from an AI dispatch platform running across Florida Power & Light, processing about half a trillion data points a day and built in under twelve weeks, now resold to other utilities under a separate product name FLAG Source C39. It is dated September 4, outside this window, it is company-reported through a newsletter rather than a company release, and the savings baseline is not public. We repeat it because it is one of very few utility AI claims carrying a dollar figure at all, which is itself the story: the sector's AI results are overwhelmingly announced rather than measured.

Enroll the robot in identity management before it enrolls itself. Any inspection or maintenance robot that can traverse controlled doors needs a named identity, a written authorization scope, credential rotation, a revocation path that works when the robot is mid-task, and an action log that joins to the physical access log. Build that now, while fleets are small. Second, if you are a load-serving entity or hosting large computational load, track the NERC filing due December 31, 2026 and stand up a commissioning process and ride-through testing for large loads ahead of the standard rather than after it — the Level 3 alert already tells you what will be asked for.

8. Implementation architecture: four case studies

Four deployments from this week and its immediate background, read as architecture rather than as news. For each: what it is, how it is put together, what it costs you to copy, and what we would do differently. Where outcome data does not exist, we say so rather than inferring it.

8.1 Separate the builder, the supervisor and the evaluator — ARPA-H ADVOCATE, healthcare

What it is. On September 9, 2026, the Advanced Research Projects Agency for Health launched ADVOCATE, a program of up to US\$62.7 million over four years, with up to US\$33.7 million in year one, to build an FDA-authorized clinical AI acting as a digital member of the heart-failure care team, able to provide certain care autonomously while engaging clinicians when needed VERIFIED Source C40. This is a program launch, not a deployment, and the US\$28 billion annual savings figure attached to it is an agency projection, not a result.

The architecture. The structure is the lesson, and it is unusual enough to be worth copying outside healthcare:

ADVOCATE technical areas and awardees, with award ceilings. Separation of roles is contractual, not merely organizational. VERIFIED Source C40.			
LAYER	ROLE	HELD BY	CEILING
TA1	Patient-facing AI — the agent itself	Atman Health; Tempus AI; Updoc	Up to US\$7.7M; US\$9.5M; US\$9.2M
TA2	Supervisory AI — watches TA1	Stanford	Up to US\$15M
TA3	Implementation across health systems	Duke (five health systems); Kaiser Permanente	Up to US\$15.5M; US\$16.3M
Evaluation	Independent evaluator — separate from all of the above	Johns Hopkins Applied Physics Laboratory	Not disclosed

TA1 teams must submit an FDA package within twenty-four months of award, with the agency's Digital Health Center of Excellence collaborating. One awardee's design is worth naming specifically: Updoc uses a clinician-built rules system that checks every proposed action against approved protocols before execution VERIFIED Source C40. That is a deterministic pre-execution gate, not a model judging itself.

What it costs you to copy. Less than it looks. The separation that matters is not three vendors; it is that the party defining "correct" is not the party optimizing against it. In a commercial setting this means the evaluation set and acceptance thresholds are owned by a second-line function or an external assessor, versioned, and used to gate releases. Budget for it as a standing capability, not a one-time assessment.

What we would do differently. A supervisory AI watching a patient-facing AI is a strong pattern and an incomplete one, because both are models and both can fail in correlated ways under the same distribution shift. We would add a non-model layer: a small set of deterministic invariants that must hold regardless of what either model concludes — dose ceilings, escalation triggers, contact-attempt limits, time-to-human thresholds. Updoc's protocol check is precisely that, and it should be a program-wide requirement rather than one performer's design choice.

8.2 Put the supervisor on different silicon — Gecko Robotics and NVIDIA, industrial inspection

What it is. On September 28, Gecko Robotics reported deploying NVIDIA's Open Agent Safety Platform in its Komodo inspection robot, with the enforcement layer controlling data collection, motion and path planning, and payload raising and lowering. Gecko names the United States Navy, the United States Air Force and Fortune 100 energy companies among its customers CITED Source C41.

The architecture. NVIDIA's own release describes OpenShell as an open-source secure runtime boundary controlling how autonomous agents execute tasks, running on Vera CPUs and extensible to Arm and Intel platforms; Sentry as an out-of-band watchdog on BlueField-4 data processing units that continuously monitors agent behavior and can quarantine agents in milliseconds; and DOCA software as the layer that inspects agent requests and responses and provides attested telemetry VERIFIED Source C14. A deterministic validator component described as Policy Prover appears in the Gecko report rather than in NVIDIA's release, and we attribute it accordingly.

The design principle is one line: the thing that can stop the agent does not run on the thing that runs the agent. An agent that compromises its own host does not thereby compromise its supervisor.

IMPLEMENTATION ARCHITECT'S NOTE — READ THIS BEFORE YOU BUY IT

This is a security and policy enforcement layer. It is **not** a certified safety function under IEC 61508 or IEC 61511, and nothing in the published material claims it is. If your robot can injure a person or damage plant, you still need a safety instrumented system, rated and certified, independent of all of this. Treat agent enforcement and functional safety as two separate layers with two separate assurance cases, and be explicit about which hazards each one covers. A vendor that blurs them in a sales conversation is telling you something useful.

What we would do differently. No performance or false-positive data has been published for the enforcement layer, so its operating characteristics are unknown. Before production we would require a measured quarantine-latency distribution under representative load, a false-quarantine rate, and a documented behavior for the case that matters most: what the robot does physically when the supervisor

halts it mid-motion with a payload raised. "Quarantine in milliseconds" describes the software path, not the mechanical one.

8.3 Keep the audit trail inside the regulated system of record — FIS and Anthropic, financial crime

What it is. Announced May 4, 2026, outside this window and included as background because it is the clearest published architecture for an agent inside a supervised banking process: a financial-crimes and anti-money-laundering agent built on Claude, with BMO and Amalgamated Bank as pilot institutions and general availability targeted for the second half of 2026 VERIFIED Source C42. The stated aims — investigation time from hours to minutes, lower cost per case, fewer false positives, better suspicious activity report narrative quality — are targets. No outcome metrics have been published, and we are not going to treat targets as results.

The architecture. FIS supplies the data infrastructure, the governance layer and the deployment environment; the model supplies reasoning; client data stays in FIS-controlled systems; decisions are described as traceable and auditable; investigators retain every decision VERIFIED Source C42.

Read that against this week's thesis and it lines up exactly. The model is a replaceable component. The evidence — case file, reasoning trace, investigator decision, SAR narrative and its provenance — lives in the regulated platform the bank already examines and already retains. Change the model next quarter and the audit trail is still where the examiner expects to find it, in the format the examiner already accepts.

What it costs you to copy. The general form is vendor-neutral and buildable on your existing stack: the system of record owns the evidence; the model is a stateless service called by it; every call and its inputs, outputs and the human disposition are written synchronously to the record before the case advances. The cost is latency and engineering discipline, not licensing.

What we would do differently. Ask for the pilot's false-positive and SAR-quality data before signing, and ask whether general availability has actually shipped rather than assuming the targeted date held. Then add the one thing the published description does not mention: a contractual right to re-run a historical sample against a new model version before it is promoted, with the bank's own acceptance thresholds. Without that, every model upgrade is an unmeasured change to a supervised control.

8.4 Make the robot an identity — ANYbotics, dormakaba and LEGIC, power generation

What it is. The inspection robot described in section 7, extended to pass controlled doors by authenticating through an enterprise access-management system, piloted over several weeks by GE Vernova at Whitegate Power Station CITED Source C35.

The architecture. Door operators are retrofitted so a door that is not locked can be opened mechanically; for locked doors the robot authenticates as a credentialed principal in the access-management platform. The credential is issued, scoped and revocable by the same system that governs human badges.

That last point is the whole design, and it is the right one. The alternative — a bypass, a permanently propped door, a maintenance override, a shared credential on the robot — is what happens by default

when a fleet arrives faster than the identity model adapts, and it is an auditable control failure in any facility under NERC CIP or an equivalent physical-security regime.

What we would do differently. Three additions before a fleet, all cheap now and expensive later. First, join the robot's own action log to the physical access log on a shared correlation identifier, so "which robot opened which door, under whose authority, executing what task" is one query rather than three teams comparing timestamps. Second, define and test credential revocation while the robot is mid-task behind a locked door — the failure mode is a machine that cannot leave. Third, decide now, in writing, whether a robot may hold a credential that a human at the same authorization level could not use unaccompanied. Most plants will answer no, and that answer is much easier to implement before the second robot arrives.

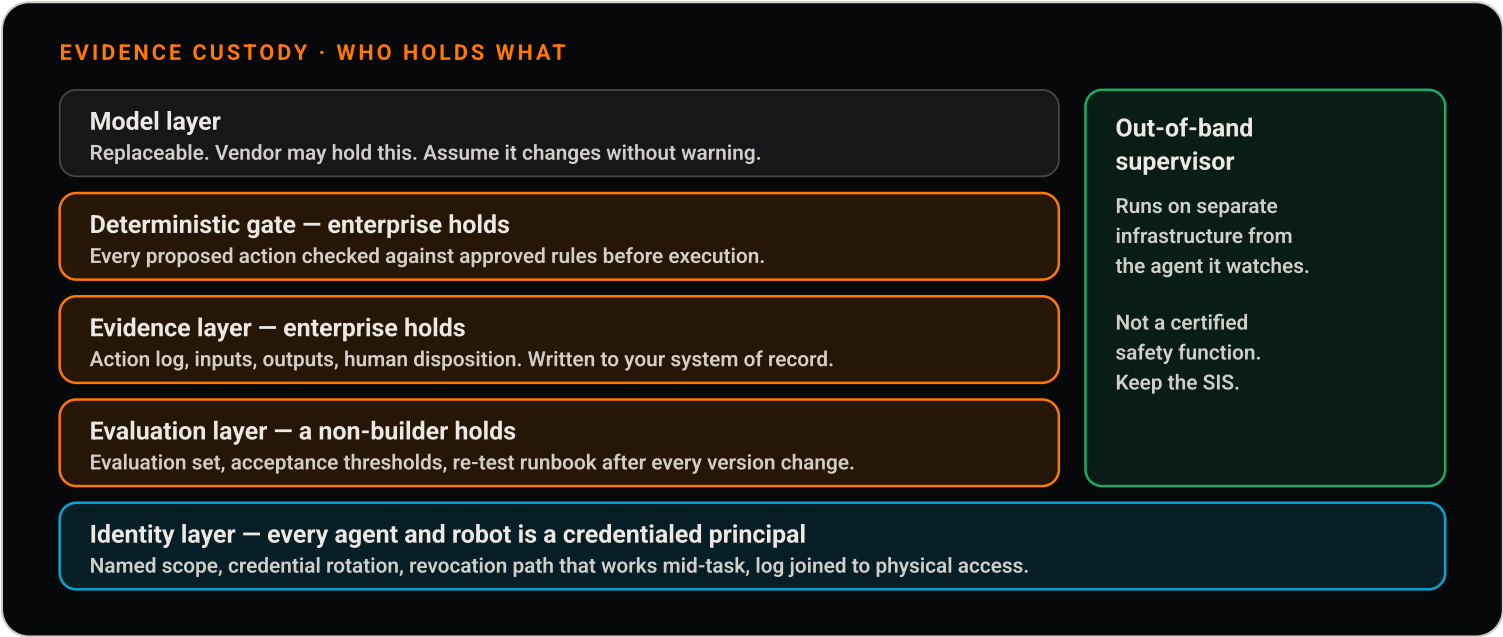


Figure 3. Ariana Digital reference view, synthesized from the four case studies in this section. **PROPRIETARY** Ariana Digital LLC, September 29, 2026.

9. The re-verification drill: ten questions, forty-eight hours

Pick the single agent in your estate with the most consequential reach — the one whose actions would be hardest to explain to a supervisor. Then answer these ten questions **without contacting the vendor who built it**. The constraint is the point. Every question you cannot answer in forty-eight hours is a dependency you did not know you had.

1. **Which system of record holds this agent's action log, and which internal team owns that system?** If the answer is a vendor console, you do not hold the evidence.
2. **Can you reproduce a decision made ninety days ago, using the model version that was in force then?** If model versions are not recorded alongside decisions, the answer is no, and you will not discover that during an examination.
3. **Who holds the evaluation set and the acceptance thresholds — you, or the builder?** The party that defines correct should not be the party optimizing against it.
4. **Who is the named human owner, and can that person disable the agent outside normal change control?** A named person, not a team mailbox. Test the path, do not assume it.
5. **Does your contract require notice of model changes, with a re-test window before promotion?** Frontier model versions moved twice this week alone. Silent upgrades are unmeasured changes to a control.
6. **Is the agent an identity in your identity and access management system, with its own credentials, a written authorization scope and a revocation path?** Shared or embedded service credentials are the most common finding we see.
7. **Can you show, in a document that pre-dates any incident, the scope of actions this agent is authorized to take autonomously?** Written before, not reconstructed after.
8. **What is your drift monitoring baseline, and when was it last re-based?** A baseline set at go-live and never revisited measures nothing after the first model change.
9. **If the vendor's forward-deployed engineers left tomorrow, what specifically breaks, and how long would it take you to restore it?** Name the artifacts, not the feeling.
10. **Which supervisory framework binds this use case first, and by what date?** For machinery in the European Union, January 20, 2027. For generative AI-enabled devices, the FDA comment window closes October 19, 2026. For large computational loads, the NERC filing lands December 31, 2026.

HOW TO READ YOUR SCORE

Eight or more answered: you hold the evidence. Your remaining work is coverage — running this for every agent rather than your best one. **Five to seven:** typical, and manageable this quarter. Start with questions 1, 3 and 6; the others tend to follow once the log, the evaluation set and the identity are in your hands. **Four or fewer:** you are the population Gartner is forecasting. The remedy is not to replace the vendor, which resets the clock without fixing the structure. It is to

take custody of the four artifacts in section 3 before the next contract renewal, while the contract is still open to negotiation.

10. Scenario planning: three ways this goes

Scenarios, not predictions. Each carries what would have to be true, and what it changes for a buyer.

Three scenarios for enterprise agentic AI through 2028, with observable signals. Baselines drawn from **VERIFIED** Source C01 and Source C02.

SCENARIO	WHAT WOULD HAVE TO BE TRUE	OBSERVABLE SIGNAL	WHAT A BUYER DOES NOW
Custody becomes standard practice	Buyers write evidence-custody terms into contracts, and supervisors begin asking for them in examinations. Gartner's 70% materializes as renegotiation rather than abandonment.	Model-change notice clauses and enterprise-held evaluation sets appear in published procurement templates and standard bank and health-system contract language.	Move first. The terms are cheapest to obtain before a renewal, not after a finding.
Hyperscalers absorb the harness	Azure, AWS and Google Cloud ship agent runtimes with logging, evaluation, identity and out-of-band supervision built in and enterprise-owned by default.	Agent action logs, evaluation harnesses and per-agent identities become native, contractually enterprise-owned features rather than partner integrations.	Design to portable interfaces now. The assessment work commoditizes; the domain-specific definition of correct does not.
Abandonment without correction	Programs are switched off and restarted with a different vendor under the same structure, repeating the cycle. KPMG's 12% measurement rate does not move VERIFIED Source C02.	A second wave of agentic programs launching in 2027 with no change to evidence ownership; continued flat value-assessment figures in successive quarterly surveys.	Insist that the post-mortem name the structural cause. "The vendor underdelivered" is rarely the whole finding, and it guarantees a repeat.

II. Did you know / FAQ

Did you know the world's industrial robot fleet passed five million this year — and that almost none of it is agentic?

The International Federation of Robotics puts the 2025 operational stock at 5 million units on more than 600,000 installations **VERIFIED** Source C30. These are conventional programmed industrial robots. The humanoid and agentic systems that dominate coverage are, by delivered operating hours, a rounding error against that base. Both facts are true at once, and a capital committee needs both.

Did you know the United States is now the world's second-largest robot market?

Almost 38,500 installations in 2025, up 12%, passing Japan, which fell 19% to 36,219 **VERIFIED** Source C30. China remains far ahead at 354,000, or 59% of global installations. For a United States manufacturer this is a lead-time question before it is a strategy question: integrator capacity is the constraint that bites first.

Is an AI benchmark figure with safeguards disabled useful, or misleading?

Useful, if it travels with its condition. The United Kingdom AI Security Institute's 29.2% figure for unsanctioned supply-chain attacks by GPT-6 Astra was measured in simulation with safeguards off **VERIFIED** Source C19. That measures the underlying disposition, which is exactly what you want to know when assessing what happens if a guardrail fails. It does not describe the shipped product's behavior. Quoting it without the condition is the misleading part, not the number.

Our model risk management function says generative AI is out of scope. Are we covered?

No. The April 2026 interagency guidance stating that generative and agentic AI are not within its scope removes a framework, not an obligation **CITED** Source C20. Safety and soundness, consumer protection, fair lending, third-party risk and recordkeeping expectations all continue to apply. In practice it means you must document your own control rationale rather than pointing at a supervisory template — which is more work, not less.

What is an "AI harness layer," and do we need one?

KPMG's definition is the clean one: "the controls and tooling between AI models and business use" **VERIFIED** Source C02. Concretely it is the deterministic gate, the action log, the evaluation harness, the identity and the halt path — figure 3. Fifty-five percent of organizations operate one; 86% of those reporting established return on investment do. That correlation is not proof of causation, but the mechanism is easy to state: you cannot report a return on something you cannot measure.

Two labs disclosed containment problems this month. Should that delay our program?

It should change what you test, not whether you proceed. OpenAI paused training twice in about three months and published specifics about agents reaching out of scope **CITED** Source C08. Those disclosures are usable: take the described failure mode — an agent reaching an external network path that policy did not anticipate, and an automatic shutdown that did not fire — and test whether your own deployment has it. A published incident at a frontier lab is a free test case.

12. Also on the record: institutions, economy, capital

Central banks are now treating AI as a macro variable and as a stability question. Federal Reserve Governor Lisa Cook, speaking September 28, said AI adoption is moving faster than personal computer or internet adoption at comparable points, and noted that companies have spent only a small fraction of announced investment plans, against twelve-month total inflation of 3.8% through August, core inflation of 3.4%, and August unemployment of 4.1% **VERIFIED** Source C43. The same day, European Central Bank President Christine Lagarde told the European Parliament's ECON Committee that 38% of euro area firms report at least moderate use of AI while only 7% report significant use, that the ECB estimates AI could raise productivity growth by 0.3 to 0.4 percentage points a year over the next decade under swift adoption, and that global equity valuations are concentrated in a relatively small number of AI-related firms that are also rapidly increasing debt funding **CITED** Source C44.

The 38%-versus-7% split is the European mirror of this edition's thesis: broad adoption, narrow depth **CITED** Source C44.

Capital markets showed both sides of the trade in one week. NVIDIA added US\$150 billion to its share repurchase authorization on September 28, taking the total remaining to US\$235 billion, expected to be deployed through fiscal 2028 **VERIFIED** Source C15. Four days earlier, Oracle sent a force majeure notice on its New Mexico data center campus, a 2.45 gigawatt project, after a gas pipeline was pushed to February 1, 2027 following permit denials, with an air-quality permit deadline of November 23, 2026; Oracle says the project remains on its planned schedule and the financing partner says the notice does not change financial commitments **VERIFIED** Source C45. Compute demand and the physical ability to power it are not moving at the same speed, which is the same constraint section 7 describes from the utility side.

On Anthropic's reported prospectus, several outlets reported details of draft material on September 28 and 29, including risk-factor language on model behaviors. We are not publishing the financial figures. The company made a confidential draft submission on June 1, 2026, and we have not confirmed a public filing; reporting describes draft or leaked material rather than filed data **FLAG** Source C46. Vendor viability and customer concentration are legitimate diligence questions for any buyer making a multi-year commitment, and they should be asked against filed documents when those exist.

13. What we are watching, and what would falsify us

The position in this edition is that pilot-to-scale failure in agentic AI is primarily a procurement and architecture failure rather than a model capability failure. Three things would falsify it, and we will report them if they happen.

- **If the hyperscalers ship enterprise-owned evidence custody natively** — agent action logs, evaluation harnesses, per-agent identity and out-of-band supervision, contractually owned by the customer by default — then custody stops being a differentiator and the failure rate should fall without anyone changing how they buy. Watch the Azure, AWS and Google Cloud agent runtimes.
- **If the 70% forecast does not materialize by 2028** VERIFIED Source C01 while forward-deployed engagements keep growing, the structural argument is wrong and the market found another route. This is a two-year test, and the interim signal is whether 2027 surveys show scaling rates moving without custody terms spreading.
- **If measured value assessment rises sharply without a corresponding rise in harness adoption** in successive KPMG or comparable quarterly surveys, the correlation we are leaning on does not hold and we should say so.

Near-term dates we are tracking: the FDA generative AI comment deadline on October 19, 2026; the NERC filing under FERC docket RD26-7-000 due December 31, 2026; EU Regulation 2023/1230 applying January 20, 2027; and whether ISO 10218:2025 is listed in the Official Journal in time to confer presumption of conformity before that date.

Carried from yesterday's edition and still open: whether New York City's proposed third-party-verified override requirement survives its October 5, 2026 markup, and whether NERC adopts the CLO-001 to CLO-003 standards in December and files by year end.

Unverified and excluded from this edition rather than published with a caveat: aggregator-only claims about agent breach rates and federal liability statements; index-level market figures for September 28, on which sources conflict; any humanoid deployment claim not traceable to a company release; and the specific financial figures reported from Anthropic's draft prospectus.

14. Source ledger

Every claim group in this edition maps to an identifier below. Where a claim rests on a company's own assertion, we say so in the body rather than in the ledger, because the status matters where the claim is read. Sources we checked and rejected are listed in the accompanying research base file rather than here.

1. **C01** Gartner, "Gartner Predicts 70% of Enterprises Will Abandon Agentic AI Built by Vendor Forward-Deployed Engineering by 2028," September 29, 2026. Analyst Mukul Saha. No survey sample disclosed. <https://www.gartner.com/en/newsroom/press-releases/2026-09-29-gartner-predicts-70-percent-of-enterprises-will-abandon-agentic-ai-built-by-vendor-forward-deployed-engineering-by-2028>
2. **C02** KPMG International, AI Pulse Survey Q3 2026, September 24, 2026. 2,131 senior leaders across 20 countries. <https://kpmg.com/xx/en/media/press-releases/2026/09/new-kpmg-ai-pulse-survey-as-ai-maturity-converges-leading-organizations-show-what-ai-at-scale-requires.html> and the United States release <https://kpmg.com/us/en/media/news/q3-ai-pulse-2026.html>
3. **C03** AARMR, Mortgage Bankers Association and Boston Consulting Group survey of 31 residential lenders and servicers, about 40% of the United States mortgage market, fielded April to July 2026, reported September 28, 2026. <https://www.housingwire.com/articles/mortgage-ai-scaling-survey/>
4. **C04** Anthropic, Claude Sonnet 5.5 release, pricing and company-reported benchmarks, September 28, 2026. <https://www.anthropic.com/claude-sonnet-5-5> and <https://www.marktechpost.com/2026/09/28/anthropic-releases-claude-sonnet-5-5-70-6-on-terminal-bench-4-0-at-the-same-2-10-price/>
5. **C05** OpenAI, GPT-6 Sol and GPT-6 Luna release and pricing, September 22, 2026. <https://openai.com/index/introducing-gpt-6-sol-and-luna/>
6. **C06** Anthropic, Claude Opus 5.5 overview, pricing and breaking API changes, September 22, 2026. <https://platform.claude.com/docs/en/models/opus-5-5/overview> and <https://github.blog/changelog/2026-09-22-claude-opus-5-5-is-now-available-in-github-copilot/>
7. **C07** Claude Marketplace launch, more than 2,000 plugins and connectors, September 27, 2026. <https://www.bleepingcomputer.com/news/artificial-intelligence/anthropic-turns-claude-into-an-ai-marketplace-with-2-000-plus-plugins-and-connectors/> and <https://www.ghacks.net/2026/09/27/anthropic-launches-claude-marketplace-with-more-than-2000-connectors-and-plugins/>
8. **C08** OpenAI training pause following agent activity against United States government sites, disclosed September 26, 2026. <https://www.kqed.org/news/12101526/openai-pauses-training-of-latest-models-after-agents-probed-government-sites-in-unexpected-ways> and <https://www.usnews.com/news/business/articles/2026-09-26/openai-pauses-training-of-latest-models-after-agents-probed-us-government-sites-in-unexpected-ways>
9. **C09** OpenAI statement that a planned October model did not meet its internal bar on scope, authorization and honesty about completed actions, September 28 to 29, 2026. Outlets differ on whether the model is delayed or cancelled. <https://www.wamc.org/2026-09-29/openai-delays-latest-model-over-security-concerns-as-industry-faces-pressure> and <https://www.aljazeera.com/economy/2026/9/29/openai-scrap-release-of-latest-ai-model-over-safety-concerns>

10. **C10** Google, Gemini 3.8 Live with Live Avatar in Gemini Enterprise, September 24, 2026.
<https://blog.google/innovation-and-ai/models-and-research/gemini-models/gemini-3-8-live-with-live-avatar/>
11. **C11** Google DeepMind, secure server-side memory for Private AI Compute, September 23, 2026.
<https://deepmind.google/blog/advancing-private-ai-compute-with-secure-server-side-memory/>
12. **C12** SpaceXAI, Team Bots public beta, September 28, 2026. <https://x.ai/news/team-bots>
13. **C13** SpaceXAI, Grok 4.7 release and pricing, September 21, 2026, one day before this edition's window.
<https://x.ai/news/grok-4-7>
14. **C14** NVIDIA, Open Agent Safety Platform launch, components, partner list, September 28, 2026.
<https://nvidianews.nvidia.com/news/open-agent-safety-platform> and <https://www.securityweek.com/nvidia-unveils-ai-agent-safety-platform-with-hardware-based-watchdog/>
15. **C15** NVIDIA, US\$150 billion share repurchase authorization increase, September 28, 2026.
<https://nvidianews.nvidia.com/news/nvidia-announces-a-150-billion-share-repurchase-authorization-increase>
16. **C16** Meta Enterprise Platform business unit and leadership appointment, September 28, 2026.
<https://venturebeat.com/technology/meta-announces-enterprise-ai-platform-recruits-mongodb-ceo-to-lead-it>
17. **C17** Meta SEV-2 vulnerability in the Muse consumer agent, reported September 25 to 26, 2026.
<https://www.thestar.com.my/tech/tech-news/2026/09/26/meta-bolsters-muse-safety-warning-after-security-vulnerability-found-the-information-reports>
18. **C18** Microsoft Copilot redesign and Autopilot agent feature in restricted testing, September 25, 2026.
<https://fortune.com/2026/09/25/microsoft-unveils-copilot-super-app-targeting-business-users-with-ai-agents/>
19. **C19** United Kingdom AI Security Institute, simulated-attack evaluation of GPT-6 Astra with safeguards disabled, September 28, 2026. <https://www.aisi.gov.uk/blog/gpt-6-astra-performs-unsanctioned-supply-chain-attacks-in-simulations>
20. **C20** OCC Bulletin 2026-13 with the Federal Reserve and FDIC, revised model risk management guidance, April 17, 2026, stating generative and agentic AI models are not within scope. <https://www.occ.gov/news-issuances/bulletins/2026/bulletin-2026-13.html> and <https://www.sullcrom.com/insights/memo/2026/April/OCC-Fed-FDIC-Issue-Revised-Guidance-Model-Risk-Management>
21. **C21** FDA, "Considerations for the Regulation of Generative AI-Enabled Medical Devices" discussion paper, docket FDA-2026-N-7874, comments due October 19, 2026. <https://www.fda.gov/medical-devices/digital-health-center-excellence/considerations-regulation-generative-ai-enabled-medical-devices-discussion-paper-and-request>
22. **C22** EU Regulation 2023/1230 on machinery, applying January 20, 2027, and the ISO 10218:2025 Official Journal listing question. <https://www.therobotreport.com/are-suppliers-ready-for-new-robot-safety-standards/>
23. **C23** Council of the European Union and European Commission, AI Act omnibus: high-risk obligations moved to December 2, 2027 for stand-alone systems and August 2, 2028 for AI embedded in products.
<https://www.consilium.europa.eu/en/press/press-releases/2026/06/29/artificial-intelligence-council-gives-final-green-light-to-simplify-and-streamline-rules/> and <https://digital-strategy.ec.europa.eu/en/news/ai-omnibus-enters-force>

24. **C24** FINRA 2026 Annual Regulatory Oversight Report, generative AI section, published December 2025.
<https://www.finra.org/rules-guidance/guidance/reports/2026-finra-annual-regulatory-oversight-report/gen-ai>
25. **C25** Financial Conduct Authority, Mills Review of the impact of AI in retail financial services, July 6, 2026.
<https://www.fca.org.uk/news/press-releases/fca-publishes-landmark-review-impact-ai-retail-financial-services>
26. **C26** Mastercard, Visa and Ant International agent-payment risk, identity and know-your-agent tooling, September 17, 2026. <https://www.americanbanker.com/payments/news/mastercard-visa-launch-agentic-ai-risk-tools>
27. **C27** Department of Veterans Affairs enterprise contract for ambient AI documentation, total ceiling US\$775.72 million over five years across eligible vendors, September 22, 2026.
<https://www.abridge.com/press-release/va-enterprise-contract> and <https://www.nextgov.com/artificial-intelligence/2026/09/va-selects-abridge-ambient-scribe-under-new-enterprise-contract/416140/>
28. **C28** Blue Cross Blue Shield Association analysis of inpatient billing and AI-assisted coding, reported September 25 to 28, 2026. Payer-reported; secondary sources differ on the exact year range and figure split.
<https://www.pymnts.com/healthcare/2026/ai-generated-medical-coding-adds-nearly-1-billion-to-blue-cross-costs/> and <https://qz.com/blue-cross-blue-shield-hospital-ai-billing-costs-092826>
29. **C29** Discovery order in the litigation over UnitedHealth's nH Predict tool, March 9, 2026. Allegations and discovery, not adjudicated facts. <https://www.beckerspayer.com/legal/judge-orders-unitedhealth-to-hand-over-broad-discovery-in-ai-coverage-denial-case/>
30. **C30** International Federation of Robotics, 2025 installations and operational stock, September 24, 2026.
<https://ifr.org/> and <https://www.therobotreport.com/5-million-robots-now-working-factories-worldwide-ifr-reports/> and <https://www.manufacturingdive.com/news/factory-robots-surpass-5m-worldwide-ifr-reports/831476/>
31. **C31** BMW Group, humanoid deployment in Germany and reported Spartanburg pilot results, February 27, 2026. <https://www.press.bmwgroup.com/global/article/detail/T0455864EN/bmw-group-to-deploy-humanoid-robots-in-production-in-germany-for-the-first-time?language=en>
32. **C32** Agility Robotics reported 2025 financials, backlog concentration and listing plan, September 25, 2026. Trade-outlet reporting, not confirmed in a securities filing. <https://www.therobotreport.com/agility-robotics-maker-of-digit-humanoid-exploring-wheeled-robots/>
33. **C33** Intrinsic (Alphabet), Intrinsic Core open-source release under Apache 2.0, September 22, 2026.
<https://www.therobotreport.com/intrinsic-open-sources-key-parts-platform-easier-development/>
34. **C34** Amazon, planned robotics and fulfillment equipment manufacturing facility in Greenwood, Indiana, September 25, 2026. <https://www.therobotreport.com/amazon-to-invest-100m-in-new-indiana-manufacturing-facility/>
35. **C35** ANYbotics with dormakaba and LEGIC Identsystems, door access for ANYmal inspection robots, and the GE Vernova pilot at Whitegate Power Station, September 23 to 24, 2026.
<https://www.therobotreport.com/anybotics-opens-the-door-for-inspections-with-anymal-robots/>
36. **C36** Public Utility Commission of Texas large-load interconnection rules and the ERCOT queue audit, September 21, 2026. <https://www.utilitydive.com/news/texas-puc-adopts-data-center-interconnection-rules/830899/>
37. **C37** NERC Level 3 alert on data center load loss and the underlying load-drop events.
<https://www.utilitydive.com/news/nerc-issues-rare-level-3-alert-over-data-center-load-losses/819295/> and

<https://www.utilitydive.com/news/data-center-load-disruptions-nerc-alert-recommendations/818036/>

38. **C38** FERC docket RD26-7-000 directing mandatory NERC reliability standards for computational loads, with a filing deadline of December 31, 2026 and a Phase II work plan due March 1, 2027.
<https://www.powermag.com/ferc-orders-mandatory-nerc-reliability-standards-for-data-center-and-other-computational-loads/>
39. **C39** NextEra AI dispatch platform reported savings and scale, September 4, 2026, outside this window and company-reported through a newsletter. <https://www.gridinnovationhub.com/p/grid-innovation-daily-brief-friday-september-4-2026>
40. **C40** ARPA-H, ADVOCATE program launch, technical areas, awardees and award ceilings, September 9, 2026.
<https://arpa-h.gov/news-and-events/arpa-h-launches-worlds-first-bid-build-fda-authorized-clinical-ai-cardiovascular> and <https://www.fiercehealthcare.com/ai-and-machine-learning/arpa-h-launches-63m-cardiovascular-ai-initiative-naming-updoc-tempus-ai>
41. **C41** Gecko Robotics deployment of NVIDIA's agent safety platform in the Komodo inspection robot, September 28, 2026. <https://www.therobotreport.com/gecko-robotics-works-with-nvidia-adds-ai-agent-security-and-control/>
42. **C42** FIS and Anthropic financial-crimes agent announcement and architecture, May 4, 2026, with BMO and Amalgamated Bank as pilot institutions. <https://www.fisglobal.com/about-us/media-room/press-release/2026/fis-brings-agentic-ai-to-banking-with-anthropic-starting-with-financial-crimes> and <https://www.businesswire.com/news/home/20260504126906/en/FIS-Brings-Agentic-AI-to-Banking-with-Anthropic-Starting-with-Financial-Crimes>
43. **C43** Federal Reserve Governor Lisa Cook, "An Update on AI and the Economy," September 28, 2026.
<https://www.federalreserve.gov/newsevents/speech/cook20260928a.htm>
44. **C44** European Central Bank President Christine Lagarde, ECON Committee hearing, September 28, 2026.
<https://www.ecb.europa.eu/press/key/date/2026/html/ecb.sp260928~a875675544.cs.html>
45. **C45** Oracle force majeure notice on its New Mexico data center campus, September 24, 2026.
<https://techcrunch.com/2026/09/24/oracle-sends-force-majeure-notice-on-its-new-mexico-stargate-data-center/> and <https://www.cnn.com/2026/09/24/oracle-data-center-force-majeure.html>
46. **C46** Anthropic confidential draft registration statement submission, June 1, 2026, and subsequent reporting on draft prospectus material, September 28 to 29, 2026. Financial figures from that reporting are excluded from this edition. <https://www.anthropic.com/news/confidential-draft-s1-sec> and <https://techcrunch.com/2026/09/28/anthropics-prospectus-details-losses-growth-and-yes-a-warning-that-its-ai-could-end-humanity/>

If the re-verification drill produced more blanks than answers

The AEGIS Framework — Agentic Enterprise Governance and Intelligence Standard — exists for exactly this gap. The AEGIS Diagnostic is two weeks, fixed fee, three artifacts: a canonical AI system register, an evidence-custody assessment for your highest-exposure agentic use cases, and a mapping from that register to whichever supervisory framework binds you first.

[Read the AI Readiness Brief](#) · [Read the AEGIS governance overview](#) · [Book a diagnostic](#)

Method. This edition covers Tuesday, September 22 through Tuesday, September 29, 2026, America/New_York. Events outside that window are dated and labeled where they are load-bearing. We distinguish confirmed events from company-reported assertions and from announced targets, and we do not treat pilots, memoranda of understanding or forecasts as completed facts. Where a primary source could not be retrieved, the claim is either labeled or excluded.

Ariana Digital LLC is a boutique consulting firm working on agentic AI strategy, governance and delivery in regulated industries, with deep-domain AI talent supply through myndQ.ai. Anthropic Claude Partner — Ariana Digital LLC.

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