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Access is the new scarce asset.

The AI market is moving from a contest over the best model to a contest over controllable access: cheap enough inference, portable open weights, dependable compute, and the contractual power to decide who may use which model inside which product.

1. Model access is becoming a control surface

On 28 August 2026, OpenAI notified SpaceX that it will wind down the contract providing OpenAI models to Cursor, with a proposed shutoff date of 12 November 2026. OpenAI cites uncertainty that SpaceX will use the technology within its terms of service after the change of control, and says it will not provide future models — including the upcoming model it calls Astra — to Cursor. It says it is giving the maximum notice in the contract so developers can retain access as long as the agreement allows.

Reuters reported the same day that Anthropic plans to increase compute supporting Claude models in Cursor. Elon Musk replied on X that he “couldn’t care less.” Cursor co-founder Michael Truell, now a SpaceX executive, said the company was speaking with OpenAI to resolve the issue. Reuters also reported that SpaceX completed its acquisition of Anysphere, the startup behind Cursor, earlier this month, after announcing a $60 billion all-stock deal in June.

This is more than a corporate feud. A coding product can have users, workflow knowledge, and distribution, yet still be exposed to the model supplier’s contract. The scarce asset is not only intelligence. It is durable permission to call the intelligence.

SOURCE RECEIPTS

- OpenAI, 28 Aug 2026 — “Our decision on Cursor following its acquisition by SpaceX” · openai.com
- Reuters, 28 Aug 2026 — “OpenAI to cut off AI models for SpaceX-owned Cursor” · reuters.com

2. Cheap tokens arrive with a billing calendar

Google’s Gemini Developer API pricing page, last updated 28 August 2026, is the live schedule for Gemini 3.7 Flash. As listed there: $0.75 per 1 million input tokens and $3.75 per 1 million output tokens through 31 December 2026, with higher listed prices beginning 1 January 2027. The same page lists a free tier and says batch API access is priced at a 50% reduction from standard paid pricing. Those figures are Google’s listed prices, not an independent audit of invoices.

The important shift is not simply that tokens cost less. Google is putting capable agentic and multimodal inference on a price calendar. That invites developers to move more work into software — and makes the vendor’s pricing date part of an application’s architecture.

SOURCE RECEIPT

- Google AI for Developers, pricing page last updated 28 Aug 2026 · ai.google.dev/gemini-api/docs/pricing

3. The effective price is list price times tokenization

Anthropic lists Claude Sonnet 5 at $2 per million input tokens and $10 per million output tokens. Its 10 August changelog says introductory pricing was made permanent rather than rising to $3 and $15 on 1 September. Anthropic also says Sonnet 5 uses an updated tokenizer, so the same input can map to roughly 1.0 to 1.35 times as many tokens depending on content type. The list price and the tokenization range are both stated on Anthropic’s page.

A buyer comparing vendors on price per million tokens alone is measuring the meter, not the trip. Benchmark a complete task, including retries, tool calls, reasoning tokens, and output review. A lower list price can still produce a higher bill when an agent takes more steps.

SOURCE RECEIPT

Anthropic, Claude Sonnet 5, 30 Jun 2026 with 10 Aug pricing update · anthropic.com/news/claude-sonnet-5

4. Open weights are a distribution and hardware strategy

Hugging Face's 14 August State of Open Models report says public model repositories grew from 2.43 million to 2.96 million in its January–August window, and reports a concentrated adoption pattern: roughly 85.6% of models have fewer than 200 lifetime downloads, while 1.5% of repositories account for 99.2% of downloads. Those figures are the report's measurements.

The same report says AMD and NVIDIA each released more than 200 new model repositories in 2026, framing open models as a way for hardware vendors to demonstrate and sell chips. Kimi's launch page describes Kimi K3 as a 2.8 trillion parameter open model, with full weights scheduled for release by 27 July 2026, activating 16 of 896 experts in its Stable LatentMoE configuration. Those are company claims, useful as signals, not independent benchmark proof.

The real open-model winner may not be the loudest launch. It may be the family that becomes dependable infrastructure across sizes, runtimes, chips, and workflows.

SOURCE RECEIPTS

Hugging Face, 14 Aug 2026 — State of Open Models · huggingface.co/blog/state-of-open-models-summer-2026

Kimi, Kimi K3 launch page · kimi.ai/blog/kimi-k3

5. Compute control is expanding below the GPU

NVIDIA's blog lists Vera, its first CPU built for agents, as shipping at scale on 27 August 2026. Separate NVIDIA infrastructure writing describes an 800 VDC architecture being developed with Google and Microsoft through the Open Compute Project, with an 800 VDC power rack expected in the second half of 2026. These are NVIDIA's claims.

The AI factory is a stack: model, runtime, memory, networking, CPU, power delivery, and the contracts that bind them. A model improvement that cannot be served reliably, cheaply, and at the required density is not yet a market advantage.

SOURCE RECEIPTS

NVIDIA blog, Vera shipping notice dated 27 Aug 2026 · blogs.nvidia.com

NVIDIA, 800 VDC power architecture · blogs.nvidia.com/blog/800-vdc-power-architecture-ai-factory

Structural read: own the path, not just the model

The visible competition still looks like model rankings. The economic competition is different. OpenAI is asserting control over downstream access. Google and Anthropic are compressing the cost of useful inference, while pricing and tokenization determine true unit economics. Hugging Face's adoption data shows most repositories never become infrastructure. NVIDIA is pushing control downward into CPUs, memory, networking, and power.

Advantage has four parts: capability (the system can do valuable work), unit economics (a complete task is affordable), portability (the workflow survives a model or contract change), and throughput (the compute, energy, memory, and network are actually there). A frontier lab with a brilliant model but fragile distribution can lose access.

An open model with no usable deployment layer can remain a demonstration.

One concrete 24-hour move

Build a one-page portability ledger for every AI workflow you rely on. Record the model provider, model name, input and output pricing, tokenizer caveats, tool permissions, data location, fallback model, and the exact task-level acceptance test. Run one representative task through two providers and compare total task cost, completion quality, latency, and number of model calls. The objective is not to chase the cheapest token. It is to identify where access, pricing, or contract dependence can interrupt the workflow.

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Primary sources checked against OpenAI and Reuters on 30 August 2026. Pricing and hardware figures are as stated on the linked vendor pages, not independently audited invoices.