

Operator Memo

Weekly decision state for production-AI operators

August 25 - September 01, 2026

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DECISIONS

MOVED

COVERED HOLDS

COVERAGE GAPS

WATCHES

REVIEWS DUE

Decision movements

Named decisions whose maintained assumption actually moved.

No named decision moved this week. 8 covered holds recorded below; everything else is coverage state, not movement.

Covered holds

Owned source set checked in full; the assumption holds.

model vendor mix 8 days · last 2026-09-01

No material decision change: model vendor mix — engineering and product leaders choosing which model vendors carry production traffic. Today's evidence does not move the current split of production traffic across model vendors. Revise by 2026-09-11 if a primary vendor publishes a price change, deprecation date, or licence restriction covering a model already carrying production traffic.

Owned sources: model vendors and their first-party documentation

Holds until: a primary vendor publishes a price change, deprecation date, or licence restriction covering a model already carrying production traffic

Owned-source receipts

- [OpenAI API pricing](#) · checked 2026-09-01T16:21:51.026389+00:00 · ok · threshold not_crossed · no normalized fact change

- [Anthropic pricing](#) · checked 2026-09-01T16:21:51.026389+00:00 · ok · threshold not_assessed · no normalized fact change
- [GitHub changelog](#) · checked 2026-09-01T16:21:51.026389+00:00 · ok · threshold not_assessed · no normalized fact change

Decision consequence: Do not infer stability; restore owned-source coverage and reassess the maintained vendor mix.

Incomplete coverage

Decisions whose owned sources were not fully checked. Absence of movement here is not evidence of stability.

Every assessed decision had its owned source set checked.

Watches — open and matured

Weak-source signal held against a review date rather than acted on.

No weak-source watch items were opened this week.

Reviews due

Promoted judgments past their review horizon and still pending.

No promoted judgment is past its review date.

Scored outcomes

Reviews that ran this period, and how each resolved. Mean confidence across 8 recorded days: 64.4/100.

model vendor mix **HELD THROUGH HORIZON** resolved 2026-09-01

No material decision change: model vendor mix — engineering and product leaders choosing which model vendors carry production traffic. Today's evidence does not move the current split of production traffic across model vendors. Revise by

2026-09-01 if a primary vendor publishes a price change, depreciation date, or licence restriction covering a model already carrying production traffic.

No relevant new displayed evidence found in this review cycle.

Claimed 2026-08-22 at confidence GREEN 60

model vendor mix HELD THROUGH HORIZON resolved 2026-08-31

No material decision change: model vendor mix — engineering and product leaders choosing which model vendors carry production traffic. Today's evidence does not move the current split of production traffic across model vendors. Revise by 2026-08-31 if a primary vendor publishes a price change, depreciation date, or licence restriction covering a model already carrying production traffic.

No relevant new displayed evidence found in this review cycle.

Claimed 2026-08-21 at confidence GREEN 70

model vendor mix HELD THROUGH HORIZON resolved 2026-08-30

No material decision change: model vendor mix — engineering and product leaders choosing which model vendors carry production traffic. Today's evidence does not move the current split of production traffic across model vendors. Revise by 2026-08-30 if a primary vendor publishes a price change, depreciation date, or licence restriction covering a model already carrying production traffic.

No relevant new displayed evidence found in this review cycle.

Claimed 2026-08-20 at confidence GREEN 75

runway and market risk HELD THROUGH HORIZON resolved 2026-08-29

Decision: runway and market risk — founders and technically literate investors managing runway and exposure. Today's evidence moves the current runway, financing, and revenue-concentration assumptions. Revise by 2026-08-29 if a rate decision, funding round, or reported result changes financing cost or the valuation comparable a plan rests on.

No relevant new displayed evidence found in this review cycle.

Claimed 2026-07-30 at confidence YELLOW 35

model vendor mix HELD THROUGH HORIZON resolved 2026-08-28

No material decision change: model vendor mix — engineering and product leaders choosing which model vendors carry production traffic. Today's evidence does not

move the current split of production traffic across model vendors. Revise by 2026-08-28 if a primary vendor publishes a price change, deprecation date, or licence restriction covering a model already carrying production traffic.

No relevant new displayed evidence found in this review cycle.

Claimed 2026-08-18 at confidence GREEN 60

model vendor mix HELD THROUGH HORIZON resolved 2026-08-27

No material decision change: model vendor mix — engineering and product leaders choosing which model vendors carry production traffic. Today's evidence does not move the current split of production traffic across model vendors. Revise by 2026-08-27 if a primary vendor publishes a price change, deprecation date, or licence restriction covering a model already carrying production traffic.

No relevant new displayed evidence found in this review cycle.

Claimed 2026-08-17 at confidence YELLOW 55

AI infrastructure budget HELD THROUGH HORIZON resolved 2026-08-25

No material decision change: AI infrastructure budget — AI platform owners and engineering leaders running their own inference capacity. Today's evidence does not move the approved quarterly inference and accelerator spend envelope. Revise by 2026-08-25 if a named vendor, cloud, or export change moves delivered cost per accelerator-hour by more than 10 percent.

No relevant new displayed evidence found in this review cycle.

Claimed 2026-08-11 at confidence GREEN 65

Portfolio coverage

All 1 maintained decisions, including the ones this week never touched.

Decision	State	Days	Last seen	Moves when
model vendor mix model buyers	covered hold	8	2026-09-01	a production model is repriced, deprecated, or relicensed

Operator Memo by Debug the Hype

Decision portfolio production_ai_operator_portfolio_v2 · source registry
production_ai_decision_source_registry_v3

42 episodes scanned as inventory · generated 2026-09-01 16:25 UTC

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