Disruption Watch
Daily Strategic Intelligence

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The Enterprise Agent Stack Crystallises in a Single Week

Microsoft launched Copilot Cowork on Monday, built on Anthropic's Claude, bundled into $99/user/month E7 tier. Same day: Nvidia previewed NemoClaw open-source enterprise agent platform. OpenAI acquired Promptfoo ($86M, agent security). Google deployed Gemini AI agents to 3M Pentagon staff. Karpathy's autoresearch hit 8.6M views in 48hrs, Shopify CEO reported 19% improvement. Within 72 hours, the four largest AI companies plus the largest open-source project all moved to define the enterprise agent infrastructure layer.

1. AI & Agents [I] (HOT) [9]

Four Giants and an Open-Source Project All Move on Agents in 72 Hours

- Microsoft Copilot Cowork (Claude-powered), E7 at $99/user/month, May 1 launch - Nvidia NemoClaw preview ahead of GTC (March 16 keynote) - OpenAI acquires Promptfoo ($86M), Claude Code $2.5B ARR - Bessemer: $45T software market, AI-native takes share from legacy SaaS - Karpathy autoresearch: 630-line Python, 8.6M views, Shopify 19% improvement - SO WHAT: Enterprise agent stack crystallising. Microsoft chose Claude as brain. Nvidia provides open-source chassis. OpenAI buys security layer. Moat moving from model quality to agent infrastructure.

2. Quantum & Compute [P] (HEATING) [6]

OpenClaw Hits 250K Stars but Security Crisis Deepens

- OpenClaw: 250K GitHub stars, fastest-growing OS project ever, 9,123 stars in one day - 40,000 instances exposed, ClawJacked vulnerability - Fintech Brainfood: "OpenClaw is Linux, no Red Hat yet" - Chinese cities subsidising OpenClaw economies - SO WHAT: Linux without Red Hat gap is the opportunity. Someone will build the enterprise wrapper.

3. Digital Markets & Assets [I] (HEATING) [7]

Mastercard Builds a Virtual C-Suite as Agentic Commerce Goes Live

- Mastercard Agent Suite + Virtual C-Suite (Virtual CFO first module) - Garanti BBVA first agentic commerce transaction - X Money launching next month - SO WHAT: Agentic commerce moved from concept to live transaction. Banks must decide: platform or legacy rail.

4. Digital Trust [C] (HOT) [9]

The Anthropic Paradox Deepens

- 30+ Google/OpenAI employees amicus brief for Anthropic - Google deploys Gemini to 3M Pentagon staff while own employees protest - Polymarket 100% odds on Hegseth ban by March 31 ($2.3M volume) - OpenClaw ClawJacked vulnerability, AI-powered attacks scaling - SO WHAT: Trust architecture defined by litigation and employee revolt, not regulation.

5. Interface & Spatial [I] (HEATING) [6]

Copilot Cowork: Interface Disappears Into Workflow

- Copilot Cowork: AI moves from chat sidebar to autonomous agent - Figure 03 autonomous cleaning - Claude Opus 4.6 recognised BrowseComp benchmark - LeCun AMI Labs + Ray-Ban world models - SO WHAT: Paradigm shift from "AI you talk to" to "AI that works alongside you".

6. Bio-Human [P] (HEATING) [5]

Amazon's AI Health Assistant

- Amazon AI health assistant (POLITICO link) - Figure 03 in domestic environments - SO WHAT: Healthcare AI transitioning from information to autonomous agents.

7. Business Finance & Policy [I] (HOT) [9]

Microsoft E7 Reprices Enterprise AI; Bessemer Declares Legacy SaaS Dead

- E7 at $99/user = $119M annual for 100K-seat enterprise - Bessemer: $45T market, AI-native over legacy SaaS - The Diff: need "Gartner of AI" for ROI measurement - FCA/PRA securitisation consultation (May 18 deadline) - SO WHAT: E7 pricing signals AI past experiment phase into operational necessity.

8. Consumer [P] (HEATING) [6]

Gen Z Mall Rats, Roblox Millionaires

- 62% Gen Z purchases in physical stores - Roblox $1.5B to creators - David Birch: no organisation ready for AI-empowered customers - SO WHAT: Consumer fragmenting across physical/virtual while gaining AI negotiating tools.

9. Left Field [R] (HOT) [8]

LeCun Raises $1.03B to Bet Against LLMs

- AMI Labs $1.03B seed, $3.5B valuation - Bezos, Cuban, Nvidia backing - World models vs LLMs (anti-paradigm bet) - SO WHAT: Billion-dollar counter-bet validates multi-paradigm AI future.

10. Climate & Energy [P] (HEATING) [5]

Base Power: Batteries as Grid Infrastructure

- Base Power: $1.3B raised, $4B valuation - Texas ADER programme, El Paso Electric 10MW pilot - $70M revenue projected 2026 - SO WHAT: SaaS model applied to grid infrastructure.

11. Geopolitical [C] (HOT) [8]

Google Takes Pentagon Contract Anthropic Lost

- Google deploys Gemini to 3M Pentagon staff as Anthropic exits - Noahpinion: WW3 foothills, coalitions hardening - Pentagon 4-vendor AI strategy down to 3 effective participants - SO WHAT: Defence alignment now competitive differentiator.

12. Workforce & Talent [I] (HEATING) [7]

50 AI Interns Per Engineer

- Jeff Dean: 50 AI interns per engineer at Google - The Diff: need "Gartner of AI" for ROI measurement - Bessemer: legacy SaaS dead - BrianRoemmele: agents automate only 2.5% of freelance projects - SO WHAT: Workforce implications running ahead of measurement.

15 Data Points

$99/user/mo (MS E7)

$1.03B (AMI Labs)

250K (OpenClaw stars)

3M (Pentagon Gemini)

$2.5B (Claude Code ARR)

8.6M (autoresearch views)

$45T (Bessemer market)

30+ (amicus brief signers)

100% (Polymarket ban odds)

40,000 (exposed OpenClaw)

$86M (Promptfoo)

62% (Gen Z physical)

$1.5B (Roblox creators)

19% (autoresearch improvement)

$4B (Base Power valuation)