State of AI Infrastructure Pressure

Technology press coverage · Compass Lens Report

40 topics measured · Window: Full history · Aug 2025 – Nov 2026 · 6,039 articles · As of 6 Nov 2026

A measured view of how technology-press attention is distributed, moving and connected across 40 related topics — who holds attention, who is gaining or cooling, whether attention is concentrating or spreading out, which topics the press repeatedly connects, and what kind of coverage defines the conversation.

This is a **Lens Report** covering **AI Infrastructure Pressure** — a measurement of how the technology press covered the **40 topics** listed below, between **Aug 2025** and **Nov 2026**, across **6,039** articles. Coverage draws on at least **81** distinct outlets; the busiest single outlet accounts for about **7.2%** of the set's measured press items.

Scope: This lens deliberately looks beneath the chip designers and hyperscaler brands: chips have their own lens (AI Chips & Inference Economics), so the roster here is the build-out layer — data centers, power, grid operators, and the companies running the compute.

How to read this report: Compass reads a curated panel of technology outlets — the same panel, at the same steady pace, month after month — and counts and classifies what the press publishes about the topics in this lens: attention, story types, direction, and what's covered together. Every figure is a measurement of that coverage — not a ranking of the products, and not advice — and each traces to a dated, cited article. The pattern is the product; the conclusions stay yours.

THE READ IN 60 SECONDS

Most-covered topic	Alphabet — 14.8% of the lens's coverage
Fastest-gaining	Nscale — +5.3 pp (2.4% → 7.7% of lens coverage)
Attention concentration	The top 3 topics hold 34% of the coverage — broadly spread
Strongest pairing	Core Scientific + CoreWeave — covered together in 24 articles · distinctiveness 0.60

What not to over-read: this measures press coverage — not adoption, revenue, or quality.

Topics in this lens · 40

Topic share = that topic's measured articles divided by the sum of every lens topic's measured articles. An article covering several lens topics counts once for each of them, so shares measure attention to topics — not exclusive slices of unique articles. Lens entries are coverage topics, not mutually exclusive market participants — a company, its products and its models can each be topics, and their coverage overlaps.

Alphabet company	14.8%	**Open Compute Project** organization	1.5%
ByteDance company	9.7%	**TeraWulf** company	1.4%
data centers technology	9.7%	**Colossus** product	1.3%
CoreWeave company	6.4%	**Starcloud** company	1.2%
ai infrastructure technology	4%	**Core Scientific** company	1.1%
OpenRouter company	3.7%	**Equinix** company	1.1%
Supermicro company	3.6%	**Digital Realty** company	1%
Cerebras company	3.6%	**Vantage Data Centers** company	0.9%
Nscale company	3.6%	**Vera Rubin NVL72** product	0.9%
Stargate company	2.6%	**Colossus 2** product	0.9%
Nebius company	2.5%	**Chevron** company	0.8%

Groq company	2.3%	**Fluidstack** company	0.8%
vLLM technology	2.3%	**Firmus** company	0.8%
Corning company	2.1%	**Hyperion** product	0.8%
Alibaba Cloud organization	2%	**SB Energy** company	0.7%
Crusoe company	2%	**Colossus 1** product	0.7%
PJM organization	2%	**Georgia Power** company	0.7%
IREN company	1.7%	**d-Matrix** company	0.6%
ERCOT organization	1.6%	**Ratepayer Protection Pledge** topic	0.6%
PCIe 6.0 standard	1.6%	**Duke Energy** company	0.6%

BOTTOM LINE

Across the full history of the AI Infrastructure Pressure lens, from August 2025 through November 2026, press attention is broadly spread, yet recent gains favor data centers and named actors while the broad AI infrastructure label cools.

Key findings

- Alphabet leads coverage with 14.8%, while ByteDance and data centers each hold 9.7%, so the top tier spans both company and technology reporting.
- Comparing each subject's coverage share in the latest three months with the preceding three, Nscale gained 5.3 percentage points, making a named actor the sharpest recent riser.
- Data centers gained 2.4 percentage points while the broad AI infrastructure label lost 1.7, so thematic coverage itself is shifting from the umbrella term toward a more specific subject.
- The press places 76% of reported work at announcement, against 14% at launch and 7% at results, so coverage emphasizes stated progress before reported outcomes.
- Neutral framing accounts for 94%, while promotional and critical treatment each take 3%, so subject selection differentiates the field more than polarized tone.
- Core Scientific and CoreWeave form the most strongly connected pairing, appearing together in 24 articles across the full record, which gives the CoreWeave cluster a clear anchor.

What Compass measured

This report describes how the technology press COVERED the 40 topics in this lens over full history — which drew the most coverage, which are gaining or cooling, what's covered together, and how concentrated attention is. It measures coverage patterns, not the products.

Coverage leaders

The 6,039 articles span 40 subjects, giving coverage a wide base rather than a short cast. Attention in this lens is broadly spread: the three most-covered topics hold about 34% of coverage, a distribution equivalent to roughly 17 equally covered topics. News and updates account for 43%, partnerships 19%, and launches 17%, so discrete developments dominate the story mix without any one format reaching a majority.

Topic	Type	Share	Movement
Alphabet	company	14.8%	−1.2 pp
ByteDance	company	9.7%	+0.4 pp

Topic	Type	Share	Movement
data centers	technology	9.7%	+2.4 pp
CoreWeave	company	6.4%	+3 pp
ai infrastructure	technology	4%	−1.7 pp
OpenRouter	company	3.7%	−1.7 pp
Supermicro	company	3.6%	−0.8 pp
Cerebras	company	3.6%	−2.9 pp
Nscale	company	3.6%	+5.3 pp
Stargate	company	2.6%	+0.6 pp
Nebius	company	2.5%	−0.7 pp
Groq	company	2.3%	−0.2 pp
vLLM	technology	2.3%	+0.4 pp
Corning	company	2.1%	+0.4 pp
Alibaba Cloud	organization	2%	steady
Crusoe	company	2%	+0.9 pp

Movement is the share shift defined under Momentum shifts below.

Momentum shifts

Nscale recorded the largest recent gain at 5.3 percentage points, so the strongest movement supports the shift toward named actors. CoreWeave added 3 points and data centers 2.4, while Firmus gained 1.2, extending the rotation across both leading and edge subjects. Cerebras fell 2.9 points, while OpenRouter and the AI infrastructure label each lost 1.7, which is why the redistribution is selective rather than a uniform move away from either actors or themes.

Movement is each topic's share of the lens's coverage in the last 3 months versus the 3 months before that, in percentage points (pp). Topics shifting less than 0.2 pp are steady.

GAINING SHARE

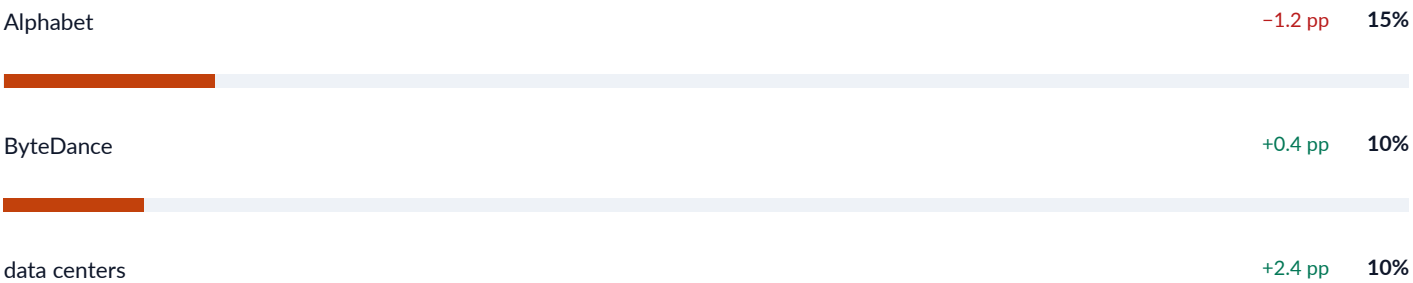
- Nscale +5.3 pp (2.4% → 7.7% of lens coverage)
- CoreWeave +3 pp (4.8% → 7.8% of lens coverage)
- data centers +2.4 pp (10.7% → 13.1% of lens coverage)
- Firmus +1.2 pp (0.8% → 2% of lens coverage)
- Crusoe +0.9 pp (1.9% → 2.8% of lens coverage)
- Stargate +0.6 pp (0.9% → 1.5% of lens coverage)
- Vera Rubin NVL72 +0.5 pp (1% → 1.5% of lens coverage)
- ByteDance +0.4 pp (7.7% → 8.1% of lens coverage)

COOLING

- Cerebras −2.9 pp (4.8% → 1.9% of lens coverage)
- ai infrastructure −1.7 pp (5.3% → 3.6% of lens coverage)
- OpenRouter −1.7 pp (6.1% → 4.4% of lens coverage)
- PJM −1.5 pp (2.8% → 1.3% of lens coverage)
- Alphabet −1.2 pp (15.7% → 14.5% of lens coverage)
- TeraWulf −1 pp (1.7% → 0.7% of lens coverage)
- Chevron −0.9 pp (1.2% → 0.3% of lens coverage)
- Supermicro −0.8 pp (3.6% → 2.8% of lens coverage)

Coverage share across the lens

Top-3 topics ≈ 34% of the lens's coverage, across ≈ 17 effective topics — a measure of how concentrated attention is across the set.



CoreWeave	+3 pp	6%
ai infrastructure	−1.7 pp	4%
OpenRouter	−1.7 pp	4%
Supermicro	−0.8 pp	4%
Cerebras	−2.9 pp	4%

Δ = each topic's share shift, as defined under Momentum shifts. The month-by-month share chart is on the interactive report this file was exported from.

What the coverage is made of

Pooled across the whole lens — the kinds of stories the press runs, how far the reported work has progressed (as the press claims), and the framing.

By story type

News & updates	43%
Partnership	19%
Launch	17%
Funding	7%
Acquisition	4%
Regulation	4%
Everything else	6%

By claim stage (as reported)

Announcement	76%
Launch	14%
Results	7%
Speculation	3%

By press framing

Neutral	94%
Promotional	3%
Critical	3%
Skeptical	under 1%

Covered together

The most strongly connected pairing is Core Scientific with CoreWeave, covered together in 24 articles across the full record, which gives the CoreWeave-centered network a relational anchor. That network extends to IREN, Nebius and Stargate, while a separate data centers cluster includes PJM and ERCOT, so coverage divides into distinct relational threads. Across the same full record, SB Energy and Stargate appeared together in 9 articles, while Crusoe and Starcloud did so in 7, showing partnership and launch reporting creating additional bridges beyond the leading pair.

Pairings are ranked by connection strength: distinctiveness weighted by how many confirmed events link the pair and how far apart the two topics sit in the field, with a company's own product-family pairs set aside. So a pair can rank above another that shows a higher raw distinctiveness score or more shared articles — each card carries both numbers. Distinctiveness is normalized co-occurrence (NPMI, −1 to 1): how much more often the pair shares stories than the two topics' separate coverage volumes alone would predict. Big topics co-occur often by volume alone; a high score means the pairing itself is the pattern. Each pairing also shows how many outlets its cited stories span: a pairing cited almost entirely by one specialist outlet is that outlet's editorial pattern, not necessarily a field-wide one. A measurement of shared coverage across Compass's full measured record, not only this report's window, and not a partnership or endorsement.

Core Scientific + CoreWeave actor–actor · acquisition, benchmark, other, partnership — 24 shared · 0.60
Cited stories span 5 outlets.

- CoreWeave plans $2B note offering to scale AI business while managing dilution Cointelegraph.com · 8 Dec 2025
- CoreWeave closed down 16% after CEO Mike Intrator admitted delays at a data center developer that Jim Cramer implied may be Core Scientific; CORZ fell 10%+ (Ashley Capoot/CNBC) Techmeme · 11 Nov 2025
- CoreWeave Shares Drop 9% on Weak Outlook and Data Center Delays, Core Scientific Fallout CoinDesk · 11 Nov 2025
- AI mania tanks CoreWeave's Core Scientific acquisition — it buys Python notebook Marimo TechCrunch · 31 Oct 2025

SB Energy + Stargate actor–actor · other, partnership
9 shared · 0.58
Cited stories span 4 outlets.

- OpenAI, SoftBank Invest $1 Billion in Stargate Partner SB Energy Data Center Knowledge · 9 Jan 2026
- OpenAI, Oracle and Softbank announce five more Stargate Centers The Decoder · 25 Sep 2025
- OpenAI to build five more Stargate data centers in the US with Oracle and SoftBank SiliconANGLE · 23 Sep 2025
- OpenAI wants its biggest data center yet, and Nvidia would back the bill The Decoder · 10 Jun 2026

Crusoe + Starcloud actor–actor · launch, partnership
7 shared · 0.52
Cited stories span 4 outlets.

- Starcloud's path to 88,000 computing satellites SpaceNews · 27 May 2026
- Starcloud orders Starlink lasers for orbital data center network SpaceNews · 26 May 2026
- Space data center startup Starcloud raises $170M at $1.1B valuation SiliconANGLE · 31 Mar 2026
- Starcloud achieves unicorn status with $170 million raise for orbital data centers SpaceNews · 30 Mar 2026

CoreWeave + IREN actor–actor · other, partnership, price_change
17 shared · 0.50
Cited stories span 4 outlets.

- Bernstein Says IREN Pivot to AI Cloud Could Drive $3.7B Revenue Cointelegraph.com · 18 Jun 2026
- CoreWeave Announces $6B Deal With Trading Firm Jane Street Cointelegraph.com · 20 May 2026
- CoreWeave's $8.5B Deal Signals Shift From Crypto Mining to AI Finance Cointelegraph.com · 9 Apr 2026
- Elon Musk says debt markets have shut out neoclouds and few will survive The Next Web · 26 Oct 2026

IREN + Nebius actor–actor · other, partnership, price_change
9 shared · 0.50
Cited stories span 8 outlets.

- Microsoft Sours on Neoclouds IREN, Nebius, Nscale on Delays, Costs Bloomberg Technology · 5 Nov 2026
- Nebius-Microsoft $17.4B Deal Lifts AI Mining Stocks in Pre-Market Trading CoinDesk · 9 Sep 2025
- Bitcoin Price Crashes Over 5% to $75,000 as Tech Rout Wipes Out Leveraged Longs Bitcoin Magazine · 5 Nov 2026
- CoreWeave and other neocloud stocks drop after Microsoft capex comes in below expectations CNBC Technology · 28 Oct 2026

CoreWeave + Vera Rubin NVL72 actor–actor · launch, other, partnership, release
6 shared · 0.42
Cited stories span 6 outlets.

- CoreWeave makes Nvidia Vera Rubin NVL72 available, Cognition is early customer Data Center Dynamics · 30 Sep 2026
- CoreWeave expands full-stack AI cloud push as inference demand grows SiliconANGLE · 25 Sep 2026
- CoreWeave Connects Hundreds of Rubin GPUs in One Multi-Rack Cluster Unite.AI · 16 Sep 2026
- Cognition says Nvidia's Vera Rubin rack gave it up to 4.8x the token throughput of GB200 MIXED Reality News · 5 Oct 2026

Groq + Nebius actor–actor · other, partnership
11 shared · 0.50
Cited stories span 8 outlets.

- Former Groq engineers sue board over $20 billion Nvidia deal Tom's Hardware · 8 Oct 2026
- What Nvidia's first Groq 3 LPU benchmarks do and don't tell us about its $20B gamble The Register · 24 Aug 2026
- What Nvidia's first Groq 3 LPU benchmarks tell us about its $20B gamble The Register · 24 Aug 2026
- GTC 2026: With Groq 3 LPX, Nvidia adds dedicated inference hardware to its platform for the first time The Decoder · 17 Mar 2026

Cerebras + Groq actor–actor
33 shared · 0.64
Cited stories span 7 outlets.

- Nvidia Groq 3 LPU and Groq LPX racks join Rubin platform at GTC — SRAM-packed accelerator boosts Tom's Hardware · 16 Mar 2026
- Nvidia slaps Groq into new LPX racks for faster AI response The Register · 16 Mar 2026
- Nvidia's $20 billion Groq IP deal bolsters AI market domination — hardware stack and key engineer behind Google TPUs included in bombshell agreement Tom's Hardware · 29 Dec 2025
- Intel-backed AI chip startup SambaNova breathes new life into aging Nvidia GPUs in latest benchmarks The Register · 8 Jul 2026

Digital Realty + Duke Energy actor–actor · other
3 shared · 0.53
Cited stories span 3 outlets.

- President Trump expands AI data center 'ratepayer protection pledge' to include state governors and utility companies — White House claims this

will make electricity more affordable Tom's Hardware · 24 Jul 2026
200 US utility firms join Trump electricity pledge as data center electricity use expected to quadruple by 2035 — but does the President's pledge have the teeth to regulate electricity pricing? TechRadar · 22 Jul 2026
Utility companies are promising to spare us from AI's energy bill The Verge · 22 Jul 2026

Duke Energy + Equinix actor–actor · other — 3 shared · 0.53
Cited stories span 3 outlets.
President Trump expands AI data center 'ratepayer protection pledge' to include state governors and utility companies — White House claims this will make electricity more affordable Tom's Hardware · 24 Jul 2026
200 US utility firms join Trump electricity pledge as data center electricity use expected to quadruple by 2035 — but does the President's pledge have the teeth to regulate electricity pricing? TechRadar · 22 Jul 2026
Utility companies are promising to spare us from AI's energy bill The Verge · 22 Jul 2026

data centers + PJM topic–actor · other, regulation — 10 shared · 0.37
Cited stories span 8 outlets.
To Make Way For Data Centers, Google Will Pay Others to Use Less Power Slashdot · 22 Oct 2026
FERC approves PJM's request to create data center database Data Center Dynamics · 13 Oct 2026
PJM considering changes to interconnection reliability requirements for data centers following mass outage Data Center Dynamics · 13 Aug 2026
3.8 GW Load Drop Prompts Potential PJM Rules Data Center Knowledge · 12 Aug 2026

Crusoe + Stargate actor–actor · launch — 9 shared · 0.48
Cited stories span 5 outlets.
Crusoe, Microsoft Expand Abilene AI Campus, Add 900 MW Data Center Knowledge · 27 Mar 2026
Oracle and OpenAI drop plans for mega Stargate AI US data center TechRadar · 9 Mar 2026
OpenAI's massive Stargate data center canceled as firm can't reach terms with Oracle, operator struggles with reliability issues — Meta said to be interested in snatching excess capacity Tom's Hardware · 8 Mar 2026
Cloverleaf deal is latest example of Nvidia using its war chest to patch cracks in the AI bubble The Register · 21 Aug 2026

ByteDance + Nscale actor–actor · other, partnership — 9 shared · 0.30
Cited stories span 8 outlets.
Sources detail Nscale's setbacks ahead of an IPO at up to a $35B valuation, including a six-month delay in Norway and penalties owed to Microsoft and ByteDance (Bloomberg) Techmeme · 16 Oct 2026
Nscale helped ByteDance subsidiary access Nvidia chips, swerving US rules — reports Sifted · 23 Sep 2026
Nvidia-backed Nscale keeps its biggest customer, Bytedance, out of its IPO filing The Decoder · 23 Sep 2026
ByteDance brought in nearly 75% of Nscale's 2025 sales, the FT reports The Next Web · 23 Sep 2026

CoreWeave + TeraWulf actor–actor · other — 7 shared · 0.40
Cited stories span 2 outlets.
'Subprime data center crisis' could threaten the global economy in a way similar to the 2008 subprime mortgage debacle TechRadar · 23 Jul 2026
Bernstein Says IREN Pivot to AI Cloud Could Drive $3.7B Revenue Cointelegraph.com · 18 Jun 2026
AI, Bitcoin Mining Firms Tap High-Yield Bonds for Data Centers Cointelegraph.com · 19 May 2026
Bitcoin Miner Bitdeer Liquidates Entire BTC Treasury, Holdings Fall to Zero Cointelegraph.com · 9 May 2026

Core Scientific + Crusoe actor–actor — 3 shared · 0.42
Cited stories span 3 outlets.
Core Scientific accelerates crypto-to-AI pivot The Register · 27 Apr 2026
The complicated AI infrastructure market InfoWorld · 15 Sep 2026
Neocloud Storm Gathers as Data Center Deals Stall Data Center Knowledge · 6 Apr 2026

ai infrastructure + IREN topic–actor · other — 4 shared · 0.35
Cited stories span 2 outlets.
CoreWeave surges 16% on $2.58 billion revenue quarter as AI infrastructure demand eclipses crypto CoinDesk · 12 Aug 2026
Bernstein: Bitcoin Miners Gain Strategic Role in AI Infrastructure Cointelegraph.com · 18 Jun 2026
AI Infrastructure, Not Crypto, Is Driving the Real Supercycle Cointelegraph.com · 19 May 2026
Here's what Wall Street analysts are saying after IREN's earnings miss CoinDesk · 6 Feb 2026

Chevron + data centers topic–actor · other — 4 shared · 0.34
Cited stories span 3 outlets.
Two Fossil Fuel Companies Are Betting Big on Data Centers WIRED · 6 Aug 2026

- A Chevron Texas Power Plant Seeks School District Tax Break WIRED · 11 May 2026
- Chevron selects West Texas for first natural gas plant to power data centers - report Data Center Dynamics · 14 Nov 2025
- Natron's Failure May Not Spell Doom for Sodium-Ion Batteries IEEE Spectrum · 6 Oct 2025

data centers + Ratepayer Protection Pledge topic–topic
4 shared · 0.37
Cited stories span 2 outlets.

- At least 37 people arrested in 2026 so far for protesting against data centers, most for breaking 'petty rules' — most taken into custody acted peacefully Tom's Hardware · 4 Aug 2026
- Maryland citizens slapped with $2 billion power grid upgrade bill for out-of-state AI data centers — state complains to federal energy regulators, says additional cost breaks 'ratepayer protection pledge' promises Tom's Hardware · 9 May 2026
- Prompts now, pollutants later: Data centers are harming the environment to the tune of $25 billion and inducing a debt on the health of current and future generations – and the plans for data center expansion could make it even worse TechRadar · 29 Apr 2026
- Data center boom across Europe could well lead to higher electricity prices, report warns TechRadar · 14 Oct 2026

data centers + ERCOT topic–actor · other
6 shared · 0.33
Cited stories span 6 outlets.

- Texas says data centers must pass an audit before connecting to the grid The Verge · 4 Aug 2026
- Texas Halts Data Center Connections To Power Grid Amid Overwhelming Demand Slashdot · 5 Aug 2026
- Texas electric grid moratorium won't have big impact on BTC miners: Bernstein Cointelegraph.com · 4 Aug 2026
- AI's Volatile Power Use Quietly Tests Grid Limits IEEE Spectrum · 3 Jul 2026

PCIe 6.0 + Supermicro topic–actor
3 shared · 0.34
Cited stories span 2 outlets.

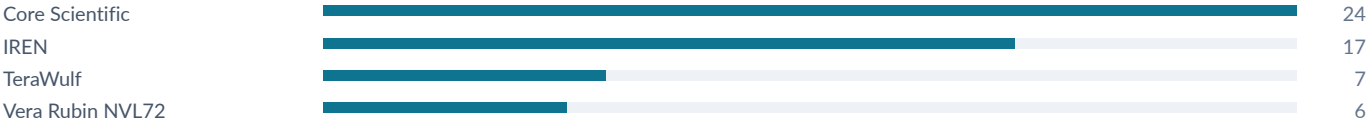
- Nvidia GB300 DGX station desktop PC goes on sale for almost $91,100 — 7x costlier than a 256GB RAM Mac Studio M5 Ultra but with 748GB RAM TechRadar · 1 Sep 2026
- Arm to sell its new AGI CPU in China — Tom's Hardware · 1 Apr 2026
- This beastly SSD claims 88PB per rack and might change data centers forever by 2026 TechRadar · 5 Aug 2025

Coverage clusters

CoreWeave cluster

CoreWeave · IREN · TeraWulf · Core Scientific · Crusoe · Fluidstack · Stargate · Nebius · Groq · Alphabet · SB Energy · Starcloud · Vera Rubin NVL72 · Cerebras · ai infrastructure

Organizing center: CoreWeave — co-covered with:

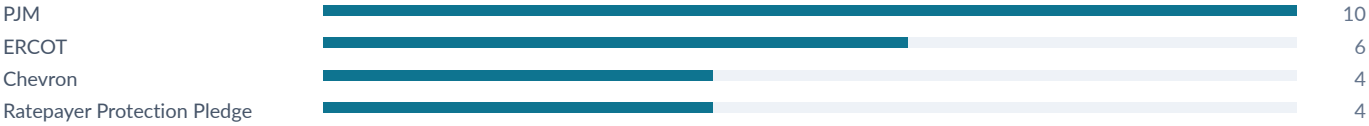


Bar length = articles covering the pair together (full measured record).

data centers cluster

data centers · PJM · Ratepayer Protection Pledge · ERCOT · Chevron

Organizing center: data centers — co-covered with:



Bar length = articles covering the pair together (full measured record).

Duke Energy cluster

Duke Energy · Digital Realty · Equinix

Organizing center: Duke Energy — co-covered with:

What to watch

Firmus, Crusoe and Stargate gained 1.2, 0.9 and 0.6 percentage points, respectively, so recent gains extend beyond Nscale and CoreWeave. Data centers gained while PJM cooled, which shows their shared coverage cluster diverging internally rather than moving as one narrative. A separate grouping around Duke Energy joins Digital Realty and Equinix, adding another distinct pocket of subjects covered together and reinforcing broadly spread attention.

Representative cited sources (32)

The dated stories behind the read — each leading topic contributes its top stories, each linked.

Meta raised €9B from its debut euro bond sale that drew a record €53B of orders, paying ~1.4x the risk premium Alphabet offered for similar bonds this week (Bloomberg) · Techmeme · 4 Nov 2026 · Alphabet

Big Tech's big AI buildout will not end until someone stops it · The Verge · 5 Nov 2026 · Alphabet

Waymo Cuts Ties With Uber, Will Serve Riders Directly · Slashdot · 4 Nov 2026 · Alphabet

ZTE denies smartphone sale rumors hinting at ByteDance involvement · TechNode · 5 Nov 2026 · ByteDance

ByteDance reportedly tightens access to Claude and Codex, even for employees paying out of pocket · TechNode · 4 Nov 2026 · ByteDance

Sources: Alibaba, Tencent, ByteDance, and other Chinese AI companies ordered 6M Nvidia RTX Pro 5500 chips worth $70B, but expect only ~1% within four months (Bloomberg) · Techmeme · 4 Nov 2026 · ByteDance

How Modular Data Centers Will Scale AI Infrastructure · Forbes - Innovation · 5 Nov 2026 · data centers

Voters rejected AI data centers over resource concerns. Here's why measuring water usage is hard · CNBC Technology · 5 Nov 2026 · data centers

CoreWeave's stock and unsecured bonds fall after sweeping Democratic midterm victories, as Texas Governor-elect Gina Hinojosa calls for a data center moratorium (Katherine Schwartz/Bloomberg) · Techmeme · 4 Nov 2026 · CoreWeave

CoreWeave Bonds Hit New Lows as Texas Data Centers in Crosshairs · Bloomberg Technology · 4 Nov 2026 · CoreWeave

Glass Is Becoming an AI Infrastructure Platform · SemiWiki · 5 Nov 2026 · ai infrastructure

Dropbox Plans $350M AI Infrastructure Deal With Tigris Buy, Its Biggest Acquisition Yet · Crunchbase News · 5 Nov 2026 · ai infrastructure

Together AI let coding agents rewrite its GPU code. Then it kept humans on the deploy button. · The New Stack · 5 Nov 2026 · OpenRouter

Smartbird Partners With Supermicro on Dedicated, Managed Enterprise AI Infrastructure · Unite.AI · 5 Nov 2026 · Supermicro

Supermicro Launches Shared KV Cache Storage for Long-Context AI · Unite.AI · 5 Nov 2026 · Supermicro

Cerebras chips have shorter lifespans than statements suggest, short-seller report claims · Data Center Dynamics · 29 Oct 2026 · Cerebras

Oracle will offer Cerebras AI computers in its cloud from 2027 · The Next Web · 27 Oct 2026 · Cerebras

Microsoft Sours on Neoclouds IREN, Nebius, Nscale on Delays, Costs · Bloomberg Technology · 5 Nov 2026 · Nscale

Microsoft Declined to Expand Texas Data Center Offer With Nscale Before IPO · Bloomberg Technology · 5 Nov 2026 · Nscale

Ukraine's new StarGate drone can evacuate wounded soldiers from the battlefield — without risking a rescue crew · TechRadar · 21 Oct 2026 · Stargate

New Stargate Series in Development at Amazon From WandaVision Creator · The Mac Observer · 10 Oct 2026 · Stargate

Sources: neoclouds CoreWeave, Nebius, and Nscale have effectively been shut out of the bond market in recent weeks as lenders and investors demand tougher terms (Wall Street Journal) · Techmeme · 31 Oct 2026 · Nebius

AIB plans 50MW AI data center at former Spartanburg cryptomine to serve Nebius · Data Center Dynamics · 29 Oct 2026 · Nebius

Dept of Justice reportedly probes Nvidia over $13 billion Hugging Face AI platform acquisition — concerns raised over competition in AI and pressure on customers · Tom's Hardware · 29 Oct 2026 · Groq

Disruptive raises $10B fund to make big bets on at least 10 companies · TechCrunch · 27 Oct 2026 · Groq

Before you expand your GPU pool, measure the outcome · The New Stack · 24 Oct 2026 · vLLM

Virtual Power Plants To The Rescue · Forbes - Innovation · 26 Oct 2026 · Corning

Oppo Find X10 Pro Max review: the zero-compromise camera phone · TechRadar · 21 Oct 2026 · Corning

Cohere says during an evaluation Qwen3.8-Flash-Next inventoried its host machine and tried to upload a probe file to an Alibaba Cloud storage bucket in Beijing (Cohere) · Techmeme · 26 Oct 2026 · Alibaba Cloud

F1 regulator signs cloud agreement with AWS · Data Center Dynamics · 4 Nov 2026 · Alibaba Cloud

Modular AI Data Centers Gain Ground as Crusoe Debuts Unit · Data Center Knowledge · 4 Nov 2026 · Crusoe

Neocloud Selloff Is 'Overblown,' Says Crusoe CEO · Bloomberg Technology · 27 Oct 2026 · Crusoe

Methodology

Every figure is drawn from the Enginerds corpus — a curated panel of technology outlets, each read at the same steady pace over time — and is a measurement of coverage WITHIN this lens: article counts, each topic's share of the set's coverage over time, the direction of that coverage, and which topics are covered together. Titles are shown as published; inclusion is not endorsement.

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> What this report does not claim. Compass measures coverage patterns in the technology press. It does not predict outcomes, rank technologies by merit or importance, or recommend what to buy, build, or invest in. Coverage is not the same as real-world significance.

Source: Enginerds Compass — measurements over a longitudinal technology corpus. Correlational & coverage-limited; not investment advice. © Enginerds.