

Global Race Condition | The Week Ahead

Monday, April 28, 2026

Signal over noise, for people others depend on.

What to Watch This Week

1. Anthropic's Mythos Access Failure Exposes the Certification Problem

A Discord group gained unauthorized access to [Anthropic's Mythos](#), a frontier cybersecurity AI model offered to roughly 40 vetted enterprises and to CISA, by guessing the URL using Anthropic's standard naming conventions.

While CISA waited in line, the Discord group reportedly used it to build simple websites. Anthropic confirmed the breach. Fortune profiled it with quotes from Dario Amodei. Separately, [Microsoft tapped Mythos for secure software development](#).

A model positioned as too sensitive for general deployment, vetted only to elite enterprise clients and a federal cybersecurity agency, was accessible by typing a guessed URL.

As The Slow AI put it: *"if a Discord group can guess the URL, every state-level intelligence agency probably has access too. Anthropic built its enterprise differentiation on being the most security-conscious frontier lab. That claim survived exactly until someone checked."*

Once again, the organization responsible for certifying the security of a critical system has incentives aligned with the entity being certified.

Anthropic's enterprise security claims support its market differentiation. It's supposed to be "the secure one", and Mythos is both too dangerous to release and vulnerable to basic script kiddie URL guessing.

We're watching for:

- Whether Anthropic publishes a post-mortem or handles this through quiet remediation.
- Whether other frontier labs issue security advisories on their own access architectures.
- Any CISA or congressional response.

If this stays a one-news-cycle story, that itself is the story.

2. Quantum Computing Crosses Two Thresholds

What:

QuEra, Harvard, and MIT demonstrated 580 logical qubits in 1,152 physical qubits using a novel low-density parity-check code, achieving error rates of 1.3×10^{-13} per operation in simulation.

So what:

This is a more than five-fold improvement in encoding rate over current norms. Separately, resource estimates for breaking RSA-2048 have dropped from 20 million physical qubits to potentially fewer than 100,000 under newer architectures, per three papers published in under twelve months.

The only question on QDay (when a quantum computer can crack modern encryption) is timing.

Meanwhile, the **quantum supply chain faces severe mineral concentration risk**. Niobium for superconducting qubits is 100% imported by the US, with Brazil producing roughly 90% of global supply from a single dominant mine.

Chinese firms have quietly acquired significant ownership stakes. IBM, Google, Microsoft, and Amazon all use materials with comparable concentration risks.

Cryptographic transitions historically take 10-20 years across global infrastructure. Organizations with data requiring 10+ year confidentiality should begin post-quantum migration planning now.

Now what & what we're watching for:

IonQ and Florida LambdaRail announced a 100-mile quantum key distribution corridor from Palm Beach to Miami-Dade.

- Will other states follow with similar quantum-safe network pilots?
- Federal procurement language that converts NIST PQC guidance into vendor qualification requirements.

The gap between the recommended migration timeline and actual vendor readiness is where the risk lives. What is nearly certain? Your vendors are not ready.

3. Hormuz Negotiation Collapse: Iran's "Three Ms" Strategy

What:

Iran's foreign minister Abbas Araghchi completed a weekend diplomatic circuit through Oman, Pakistan, and Moscow, while the US cancelled its own envoy mission. Secretary of State Rubio **publicly rejected** Iran's proposal to reopen the Strait in exchange for deferring nuclear discussions. Oil closed Sunday at \$96.50 (WTI) and \$107.75 (Brent), up 44% and 48% respectively since the war began.

Iran's Kharg Island oil hub is reportedly days from hitting onshore storage capacity.

So what:

Iran's chief analyst Hassan Ahmadian framed Tehran's posture: "The Iranians are saying time is working in our favor for the three Ms: munitions, markets, and the midterms."

Iran is deliberately running out the clock to US political constraints rather than negotiating toward a deal. The UN maritime agency declared there is "no legal basis" for Hormuz transit fees, which changes nothing operationally but closes one diplomatic escape hatch. **The UK opposes the US blockade of Iranian ports** but backs Hormuz reopening through international partnership. The Atlantic alliance is fracturing along a predictable seam. **Pakistan opened new transit routes for Iran trade** during Araghchi's visit. **Bahrain revoked citizenship of 69 people** accused of Iranian sympathies.

Russia's strategic lens (full framework): Araghchi's Moscow stop is textbook. Russia provides diplomatic cover for Iranian resilience, prolonging the conflict that strains US commitments and elevates energy prices funding the Russian war economy.

Now what & what we're watching for:

- Carrier strike group repositioning in the Gulf.
- Any back-channel signals through Oman or Qatar.
- IRGC rhetoric calibration: if the language shifts from "resistance" to "retaliation," the posture has changed.
- **Trump's approval is at 33-36%** across three simultaneous polls, directly paralleling George W. Bush's Iraq-era slide.

The midterm clock is Iran’s strongest card, but Iran is nearly out of oil storage, and you can’t just shut down oilfields overnight. Sudden shutdowns can cause the reservoirs to seize, allowing water to infiltrate oil-bearing formations and making it incredibly difficult to resume production later. Iran risks permanent degradation and damage very soon, so the clock is against both the US and Iran.

Articles from the Weekend Worth Reading in Full

These are drawn from the sources that fed this week’s analysis. They’re worth reading in full.

- **“Slow Takes Ep. 9: What You Actually Find When You Look”** | [The Slow AI](#) — Primary source on the Mythos breach, plus UK Biobank data appearing on Alibaba, and clinical AI chatbots wrong four out of five times. Three stories that map the gap between AI safety claims and operational reality.
- **“Iran War: Trump, Negotiations, Munitions, Markets, and Midterms”** | [Drop Site News](#) — The “Three Ms” framework with primary-source Iranian officials. Best single piece on why the Hormuz talks collapsed and what comes next.
- **“Scientists Propose Early Warning System for Quantum Supply Chain”** | [The Quantum Insider](#) — Stanford/Los Alamos study on niobium concentration

risk. The quantum security problem is not just cryptographic. It is physical.

- **“JNIM and Allied Rebels Surge Across Mali”** | [FDD Long War Journal](#) — Primary field reporting on the scope of the offensive. Defense minister killed, capital threatened, Wagner pinned down.
- **“Scientific Superintelligence”** | [Metatrends](#) — Context for the Liam Price story: a 23-year-old with no advanced math training cracked an Erdos problem using a single GPT-5.4 Pro prompt. Terry Tao’s reaction is worth your time.

That is what is on the board this week. We will be back Wednesday with the Deep Dive. Until then, stay curious, stay skeptical, and y’all stay safe out there.

Chuck Herrin CEO and Managing Principal, Herrin Advisory

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