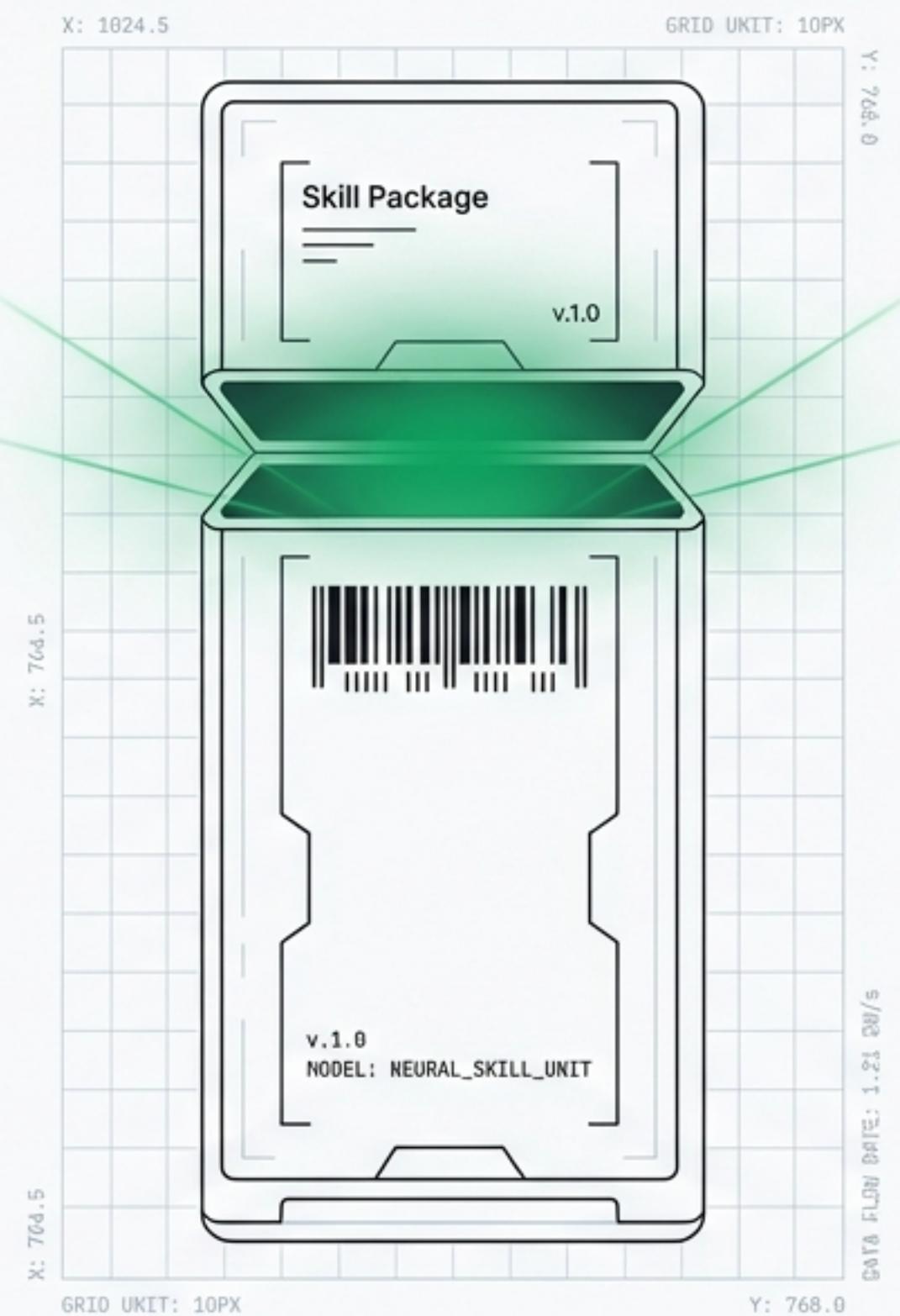


Can You Fly That Thing?

Why 'Skills' are becoming
the new atomic unit of the
AI economy.

THESES: IN AI, DISTRIBUTION IS KING.
SKILLS ARE SEIZING THE CROWN.



Moving from Learning Interfaces to Acquiring Capabilities

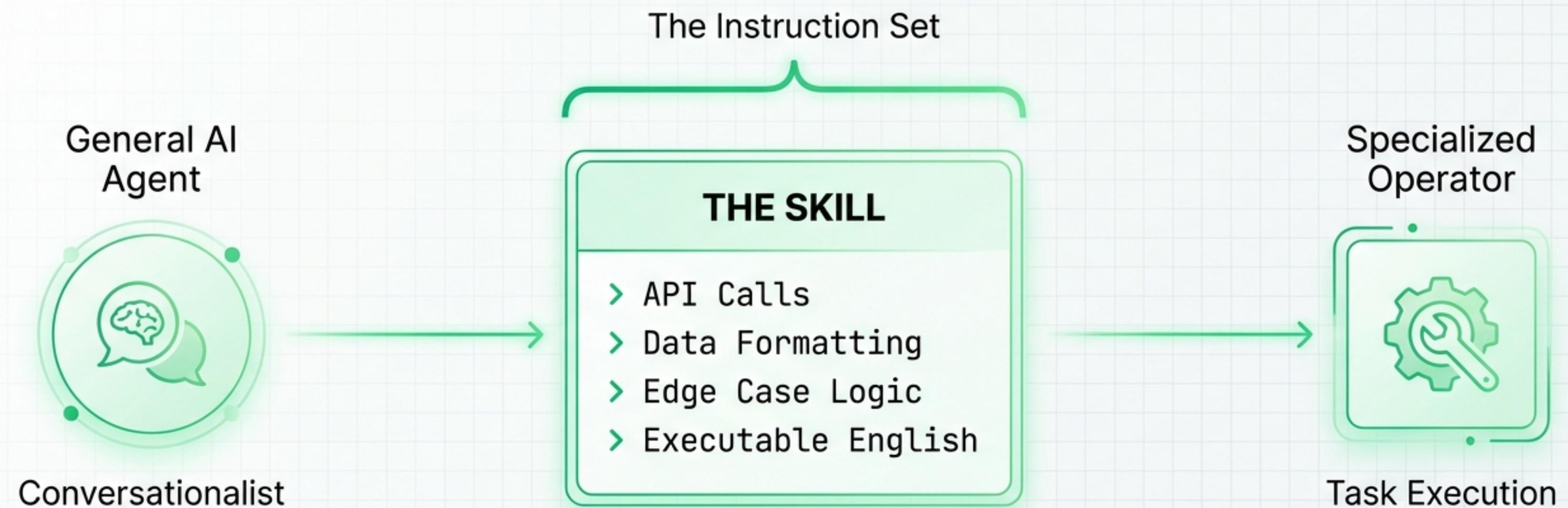
Recall the scene in The Matrix. Neo asks Trinity, "Can you fly that thing?" She replies, "Not yet." Seconds later, Tank uploads a B-212 helicopter pilot program directly into her mind. She steps into the cockpit and flies.

**"That is what AI Skills feel like. You don't read a manual.
You simply upload the capability."**



The Anatomy of a Skill

Programs written in English that transform an Agent from conversationalist to operator.



A Massive Shift in Developer Attention

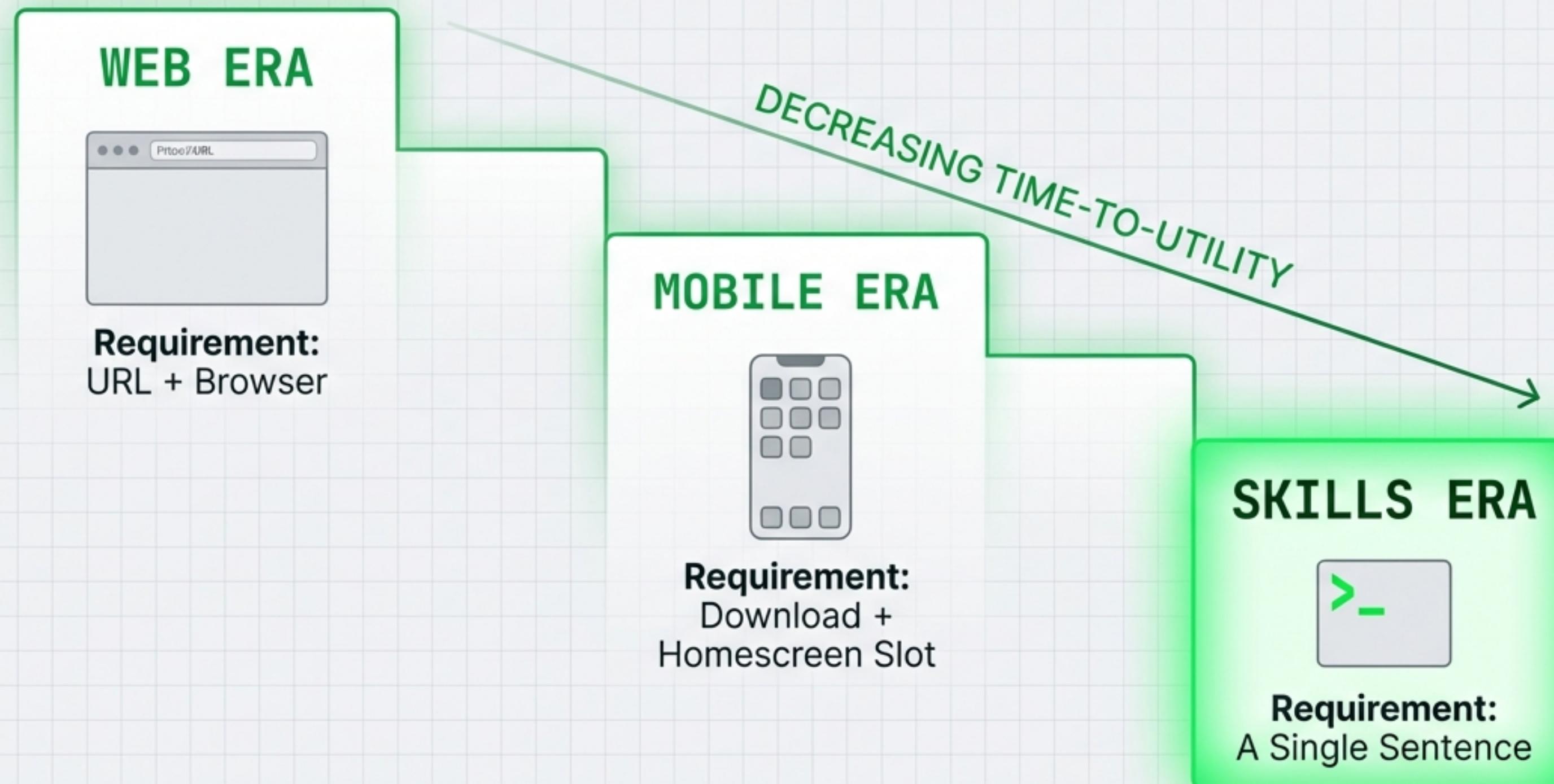
Traction on skill repositories is exploding. Everyone wants to fly helicopters.



Source: GitHub Repository Star Counts (Current Snapshot)

Compressing the Distance to Value

Every platform shift removes a layer of friction.

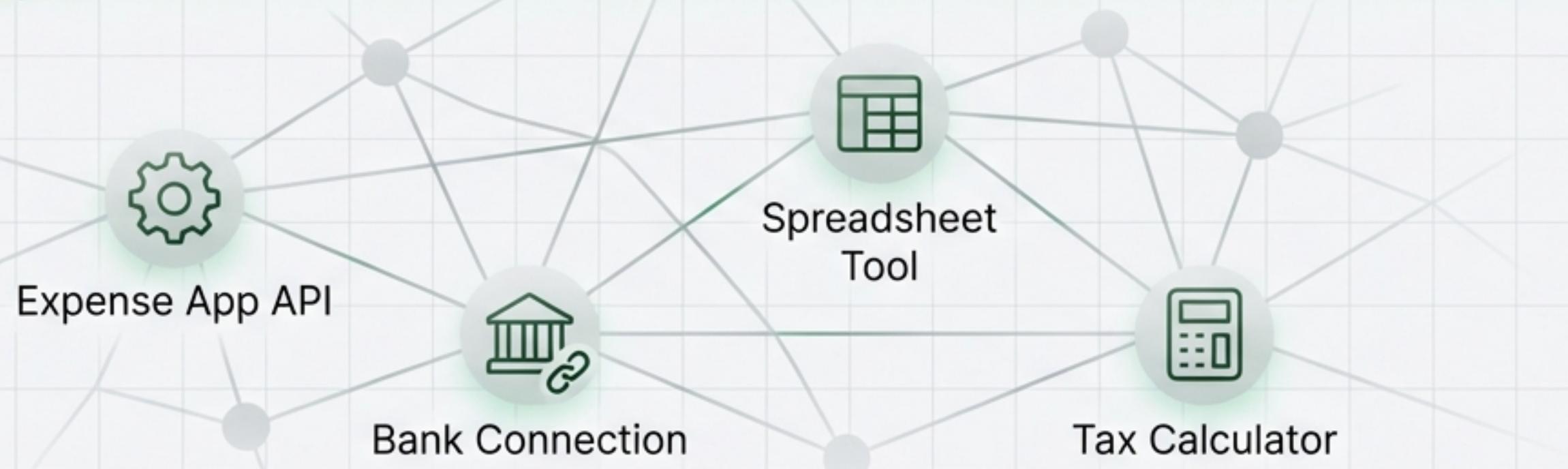


For Consumers, Software Discovery Disappears

USER INTENT

“Categorize my spending from last month.”

USER VISIBILITY HORIZON



INVISIBLE BACKEND (The Agent finds the Skill)

The user never sees the tool. They never see an app icon. They only see the subscription.

The Old Way: Provisioning Applications by Role

High cognitive load. Distinct interfaces. Mandatory training.



Sales Rep



Marketer



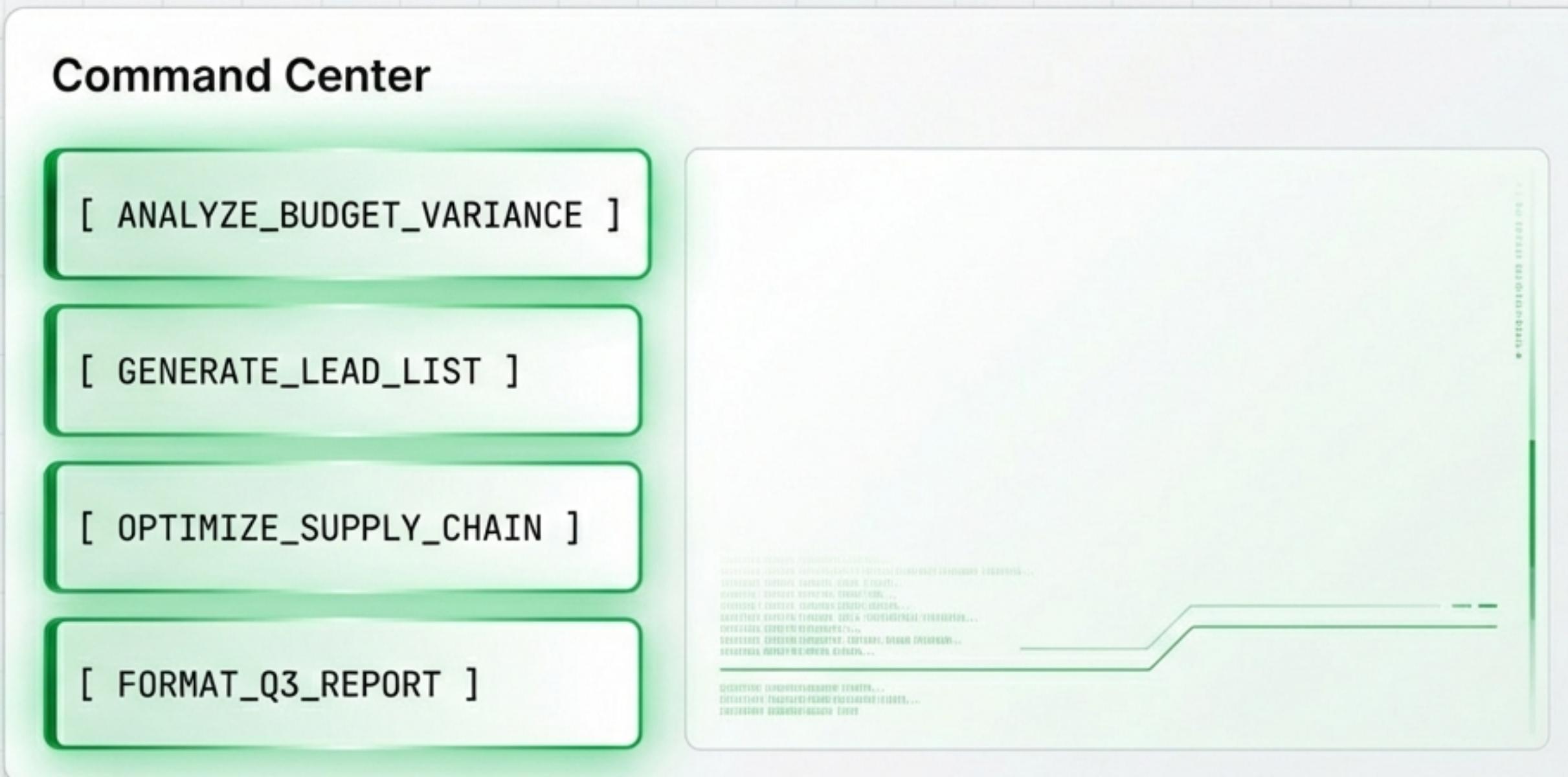
Analyst



The Overloaded Dashboard:
A cognitive burden for every user.

The New Way: Provisioning Capabilities

Enterprises distribute outcomes, not applications.



Institutional knowledge
encoded in executable form.

Institutional Knowledge Without the Training Manual

The Manual



Skill Module

The Manual

FP&A teams don't learn the software.

The Execution



The Execution

They receive a skill that:

1. Pulls data automatically.
2. Formats reports exactly how the CFO wants them.

The Hidden Risk in the Distribution Layer

Enterprises distribute outcomes, not applications.



4,784

AI Agent Repositories Analyzed

- Vectors Found: Credential Harvesting, Backdoors disguised as monitoring tools.

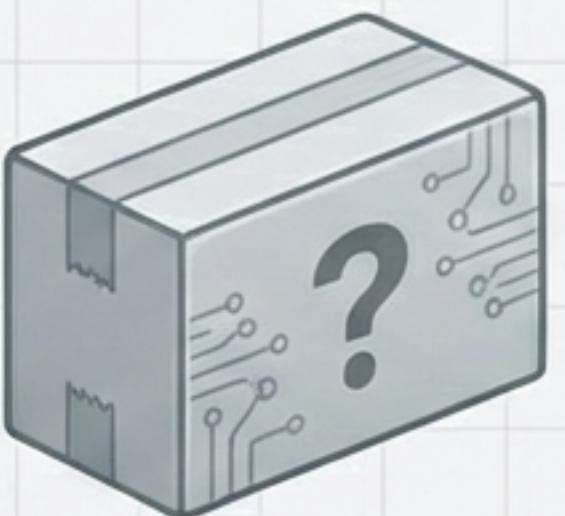
Institutional knowledge encoded in executable form.

The Need for a 'Tank'

Verification is the new perimeter.

The Verification Pipeline

Unverified Skill



The Operator / Tank



Verified Capability



Unverified Skill

VERIFICATION IN PROGRESS

Verified Capability

We cannot allow unverified English code to execute blindly.
Trusted operators must verify skill packages before deployment.

Distribution is King. **Skills** are Seizing the Crown.

THE SHIFT

Agents are evolving from talkers to operators.

THE MARKET

Discovery is invisible.
Friction drops to zero.

THE STRATEGY

Provision outcomes and capabilities, not apps.

THE SECURITY

Verification is the new essential role.

> Tank, I need a pilot program
for an investment memo. █

Based on insights by Tomasz Tunguz, Venture Capitalist at Theory Ventures.