

Is OpenAI Signaling that Robots Are Next?

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Key Takeaways

- OpenAI's expanding robotics and simulation efforts signal that embodied AI is becoming the next frontier, strengthening the long-term case for physical AI.
- By prioritizing AI, simulation and data infrastructure over hardware alone, OpenAI is positioning itself to help scale general-purpose robotics.
- As AI and robotics converge, the [WisdomTree Physical AI, Humanoids, and Drones Fund \(WDRN\)](#) offers diversified exposure to this emerging megatrend.

There is a version of the OpenAI story that runs through language, with the company that gave the world ChatGPT, GPT-4 and the agentic systems now beginning to reshape knowledge work. That version is accurate but increasingly incomplete. A quieter story has been developing in parallel, one that involves actuators, simulation pipelines, and the physics of object manipulation. OpenAI is building a serious robotics effort, and for investors trying to understand where AI goes after software, that signal deserves close attention.

Why the Timing Matters

The clearest public marker is Sam Altman's May 2026 essay, "The Gentle Singularity."¹ In it, he sketched a rough capability roadmap:

- Agents doing meaningful cognitive work in 2025
- Systems capable of producing novel scientific insights in 2026
- Potentially, arriving around 2027, robots that can perform real-world tasks

He also described a possible feedback loop in which early humanoid robots, built the traditional way, could then operate supply chains, factories, and logistics networks to help build the next generation of robots and compute infrastructure. In this framing, robotics is not a separate product category, rather, it could be the mechanism by which digital intelligence becomes physical-world labor.

That distinction matters enormously. The current generation of AI has transformed knowledge work, and we have seen it in such areas as: writing, coding, research, legal analysis and financial modeling. But most of global gross domestic product (GDP) still requires atoms to move. Construction, manufacturing,

logistics, agriculture, care work, energy and lab sciences all depend on physical execution. A robot industry anchored by frontier AI changes the addressable market from knowledge work to all work.

Altman's public framing places physical robots close on the capability timeline, and OpenAI has been hiring robotics engineers in San Francisco, with salaries up to \$310,000,² as it pushes to build general-purpose robots with what it describes as artificial general intelligence (AGI)-level intelligence.

What the Hiring Actually Reveals

Demo videos and press releases can be choreographed. Hiring patterns are harder to fake, and OpenAI's robotics job postings³ in mid-2026 are unusually specific about the infrastructure being assembled.

OpenAI's Robotics team is described as focused on unlocking general-purpose robotics and pushing toward AGI-level intelligence in dynamic, real-world settings, working across the entire model stack, integrating hardware and software, and **exploring a broad range of robotic form factors**. That last phrase is important.

OpenAI is not describing a humanoid robot project. It is describing a research effort aimed at embodied intelligence across many possible bodies.

More revealing still are the data infrastructure roles. OpenAI is hiring for systems that span robotic data-acquisition stations, managed workforces, facilities management, fleet reliability, data quality, throughput and multi-site scaling. This is not the language of a company building a robot for a demo reel. It is the language of a company trying to industrialize the process of generating training data for physical systems.

The analogy to the large language model (LLM) era is apt. LLMs scaled because the internet provided an effectively unlimited corpus of text. There is no equivalent dataset for physical manipulation, meaning no internet-scale record of how to pick up a deformable bag, recover from a slipped wrench, or open a jammed drawer. Whoever builds a reliable robotic data factory has a chance to establish the kind of proprietary advantage OpenAI once enjoyed in language pretraining.

OpenAI's specific hiring roles, particularly in simulation environments and control systems suggest the company plans to train robots the way it trained its language models:

By running billions of simulated scenarios before deploying in the real world.

The Simulation Layer Is Underappreciated

Much of the public conversation about robotics focuses on the hardware, things like humanoid bodies, dexterous hands and impressive warehouse demos. The less glamorous but arguably more important layer is simulation. OpenAI is hiring for simulation roles that cover physics realism, sensor modeling, hardware-in-the-loop validation, reinforcement learning rollouts, imitation data collection and scaling simulated evaluations across large compute clusters. It is also hiring specifically for closing the sim-to-real gap, which can be described as the persistent problem that a robot which performs flawlessly in a virtual environment often fails when confronted with actual dust, worn parts, imprecise calibration and unmodeled contact forces.

This investment in simulation infrastructure is a strong signal that OpenAI is thinking about robotics as a scalable learning problem rather than a hardware engineering problem. The distinction matters for the industry, as the companies that figure out how to generate reliable synthetic experience at scale and transfer it reliably to physical systems, will have structural advantages over companies competing purely on hardware design.

The Ecosystem OpenAI Is Entering

OpenAI is not working in a vacuum. Google DeepMind has deployed Gemini Robotics, which brings multimodal reasoning into physical systems across multiple robot form factors. NVIDIA's Isaac GR00T platform targets humanoid robotics with foundation models and synthetic data pipelines. Tesla continues pushing its Optimus humanoid program. Robotics startups raised more than \$6 billion in 2025, and Morgan Stanley has estimated the humanoid robotics market could exceed \$5 trillion by 2050.⁴

OpenAI's entry into this landscape shifts its competitive dynamics. The company's advantage is the frontier quality of its general-purpose reasoning and multimodal models, rather than manufacturing experience or robot deployment history. Its disadvantage is precisely the latter. Looking at competitors, Tesla has physical production scale, Boston Dynamics has years of field data and a growing number of well-funded startups have hardware-software integration teams that have been working on embodied AI for years before OpenAI recommitted to the space.

The Figure AI episode is instructive here. Figure achieved what it described as a major breakthrough and ended its partnership with OpenAI, moving toward in-house AI models and securing a valuation that reached \$39 billion after its most recent funding round.⁵ That split probably taught both parties something, and the intelligence layer in robotics is too strategically important for either side to outsource casually. Robot companies, most likely, want to own their AI. AI labs, most likely, want enough robotics capability to avoid becoming mere application programming interface (API) vendors to robot original equipment manufacturers (OEMs).

The Strategic Prize

Altman's "Gentle Singularity" essay points toward something larger than a new product line. It describes a potential recursive loop, where robots help build more robots; automated systems lower the cost of compute infrastructure; cheaper intelligence enables better robots. If that loop is even partially realizable, robotics becomes not just an application of AI but part of the production function for AI itself. The bottleneck

to scaling intelligence, which includes power, chips, data centers, construction labor and other supply chain constraints, could, in this view, be partially resolved by the very systems intelligence is helping to build.

That may sound speculative, and much of it is. But serious capital is beginning to treat it as a planning assumption, not a science fiction scenario.

What This Means for the Investment Narrative

The right investment frame for OpenAI's robotics push is probably not "which humanoid robot stock wins?" It may be closer to a question like, what does a world in which frontier AI becomes physical-world capable look like as an ecosystem?

What OpenAI's renewed seriousness about robotics does signal, clearly and with the kind of hiring specificity that goes beyond marketing, is that the frontier AI lab with the largest installed base of users, the deepest general reasoning capabilities, and ambitions explicitly framed around superintelligence now believes the probability of scalable embodied AI is high enough to justify building the infrastructure from scratch.

That is worth knowing. The AI story has been a software story. It is starting to become something else.

The [WisdomTree Physical AI, Humanoids, and Drones Fund \(WDRN\)](#) is designed as a strategy that is seeking to generate a broad exposure to innovations across many different types of robotics platforms.⁶ We were excited to see Sam Altman and OpenAI send this signal, and we view it as an important step on the journey of continuing to monitor this important megatrend.

1 Source: Altman, S. (2025, May 16). *The gentle singularity*. Sam Altman.

2 Source: Evans, B. (2026, May 31). *OpenAI robotics ramps up hiring to build general-purpose robots*. Crypto Briefing.

3 Source: OpenAI. (n.d.). *Careers*.

4 Sources: **Google DeepMind / Gemini Robotics**: Google DeepMind. (n.d.). *Gemini Robotics*; **NVIDIA / Isaac GR00T**: NVIDIA. (n.d.). *Isaac GR00T*. NVIDIA Developer; Vittorio, A. (2025, September 24). *OpenAI's robotics push signals its ambitions for artificial general intelligence*. Built In.

5 Source: Cai, K. (2025, February 4). *Figure drops OpenAI in favor of in-house models*. TechCrunch.

6 WDRN is designed to track the total return performance of, before fees and expenses, the WisdomTree Physical AI, Humanoids & Drones Index, which is designed to generate exposure across humanoids, drones, autonomous vehicles, industrial/warehouse robotics, as well as certain critical components across the robotics and physical AI value chain.

Important Risks Related to this Article

There are risks associated with investing, including possible loss of principal. Companies engaged in Physical AI Activities are subject to unique regulatory, operational and technological risks, such as intense competition and potentially rapid product obsolescence. The regulation of such companies in the United States and other countries is diverse and rapidly evolving, which may inhibit or delay adoption. These companies are also heavily dependent on intellectual property rights and may be adversely affected by loss or impairment of those rights. Companies engaged in Physical AI Activities typically invest significant amounts of spending on research and development, and there is no guarantee that the products or services produced by these companies will be successful. Humanoid robotics companies are sensitive to trends in industrial production, capital-expenditure cycles, supply-chain conditions, and adoption rates of automation technologies across varied sectors including business and industrial end-users.

Humanoid robotics companies may have long and capital-intensive development timelines, highly uncertain paths to profitability and large-scale deployment, and limited product lines, markets, financial resources or personnel. Drone companies may be dependent on the U.S. Government and its agencies for a significant portion of their revenues, and the commercial and military adoption of drone technologies remains subject to extensive and evolving governmental oversight, including aviation safety standards, airworthiness certification requirements, export controls, and national security reviews. A fund that has a portfolio that is concentrated in the securities of issuers in a particular industry or group of related industries, may be adversely affected by the performance of those securities, and more susceptible to adverse economic, market, political, or regulatory occurrences affecting that industry or group of related industries.

Investments in non-U.S. securities involve political, regulatory, and economic risks that may not be present in U.S. securities. For example, foreign securities may be subject to risk of loss due to foreign currency fluctuations, political or economic instability, or geographic events that adversely impact issuers of foreign securities. Investments in securities and instruments traded in developing or emerging markets, or that provide exposure to such securities or markets, can involve additional risks relating to political, economic, or regulatory conditions not associated with investments in U.S. securities and instruments or investments in more developed international markets.

The Fund invests in the securities included in, or representative of, its Index regardless of their investment merit and the Fund does not attempt to outperform its Index. The composition of the Index is governed by an Index Committee and the Index may not perform as intended. Please read the Fund's prospectus for specific details regarding the Fund's risk profile.