

**SO WHAT'S THE
BIG DEAL?**

Inherently general: Omni-use

Increasingly Autonomous:
minimal human intervention

Asymmetric Impact: Scale/pace

Intelligent: New
knowledge/innovation

Big Tech Pivot



We'll make them
'dance'

Satya Nadella, Microsoft CEO
(Feb 2023)



**THE AI ARMS
RACE IS ON!**

Gen AI Tech Stack

Infrastructure (GPUs, Cloud, Devices)

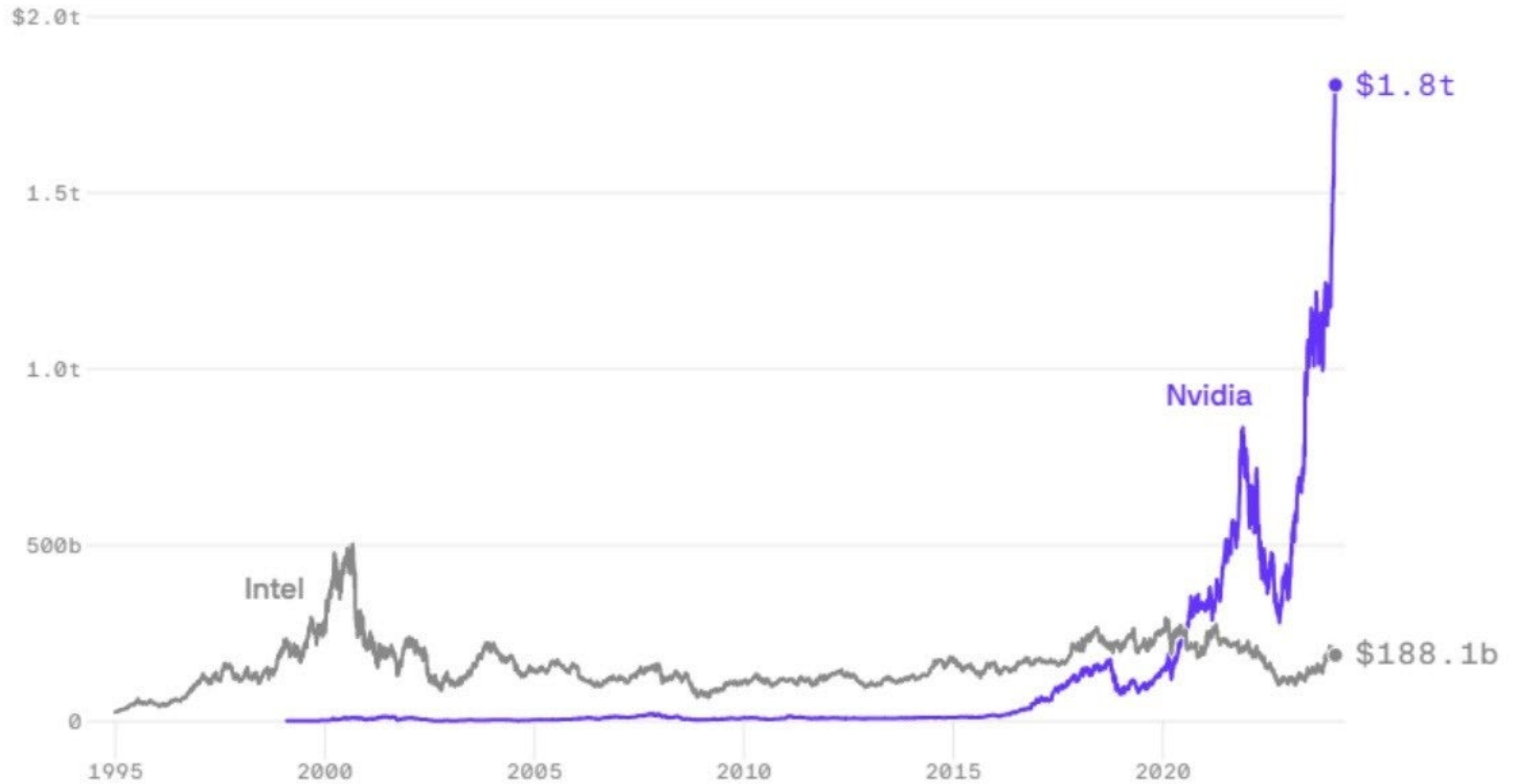
Platform (Foundational Models)

Applications

Trillion Dollar Club



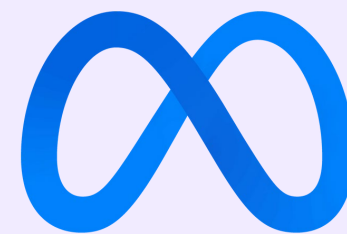
Daily, Jan. 3, 1995, to Feb. 15, 2024



Model Mania

Microsoft
Google
Amazon
Meta
Apple

Tencent
Baidu
Alibaba



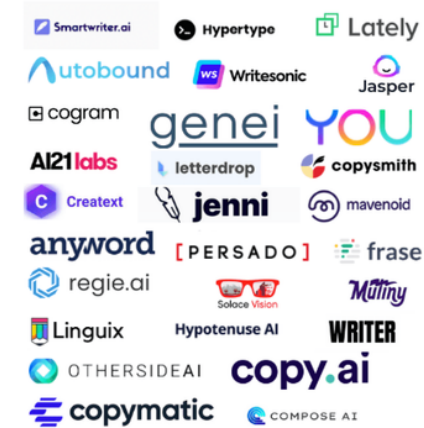
THE *GENERATIVE AI* STARTUP LANDSCAPE



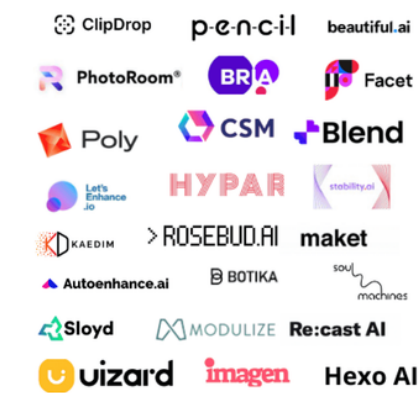
Gen AI saves VC amid tech slump

\$ 18 b n

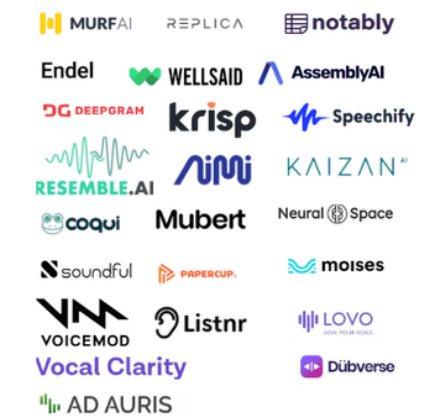
TEXT



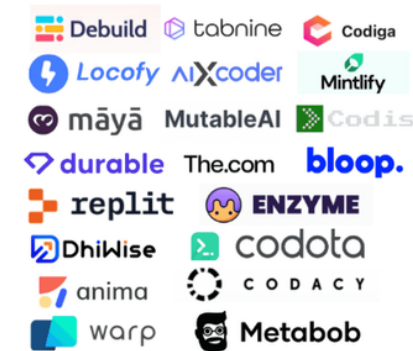
IMAGE



AUDIO



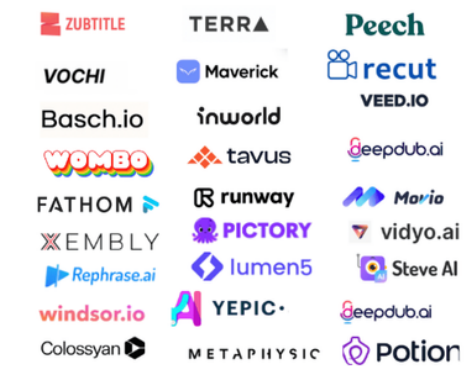
CODE



CHATBOTS



VIDEO



ML PLATFORMS



SEARCH



GAMING



DATA



Geopolitical Competition

US, China, Canada
(early movers, 2016-17)

Since then, over 50
National Strategies on
AI



US/China

US investment
outpacing China

US export controls on
critical infrastructure

Race for infrastructure
and penetration

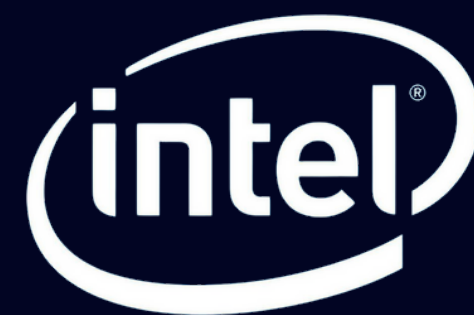


AI Hype?

- Nvidia's Earnings
- OpenAI's Sora
- Google Gemma
- China's Moonshot AI (\$1bn)
- SoftBank's \$100bn chip venture
- Mistral Next
- Intel launches Systems Foundry
- Intel signs Microsoft as major Foundry Partner

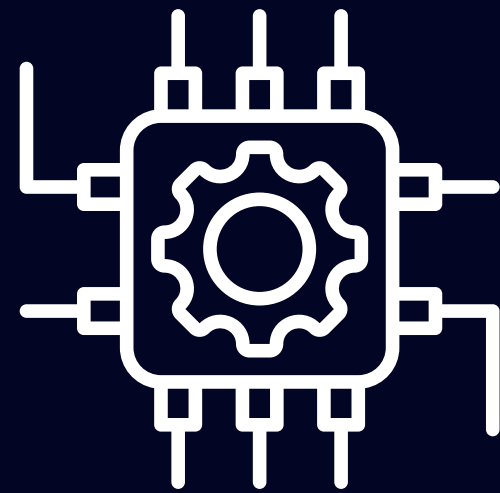


= SoftBank





IT'S HERE!



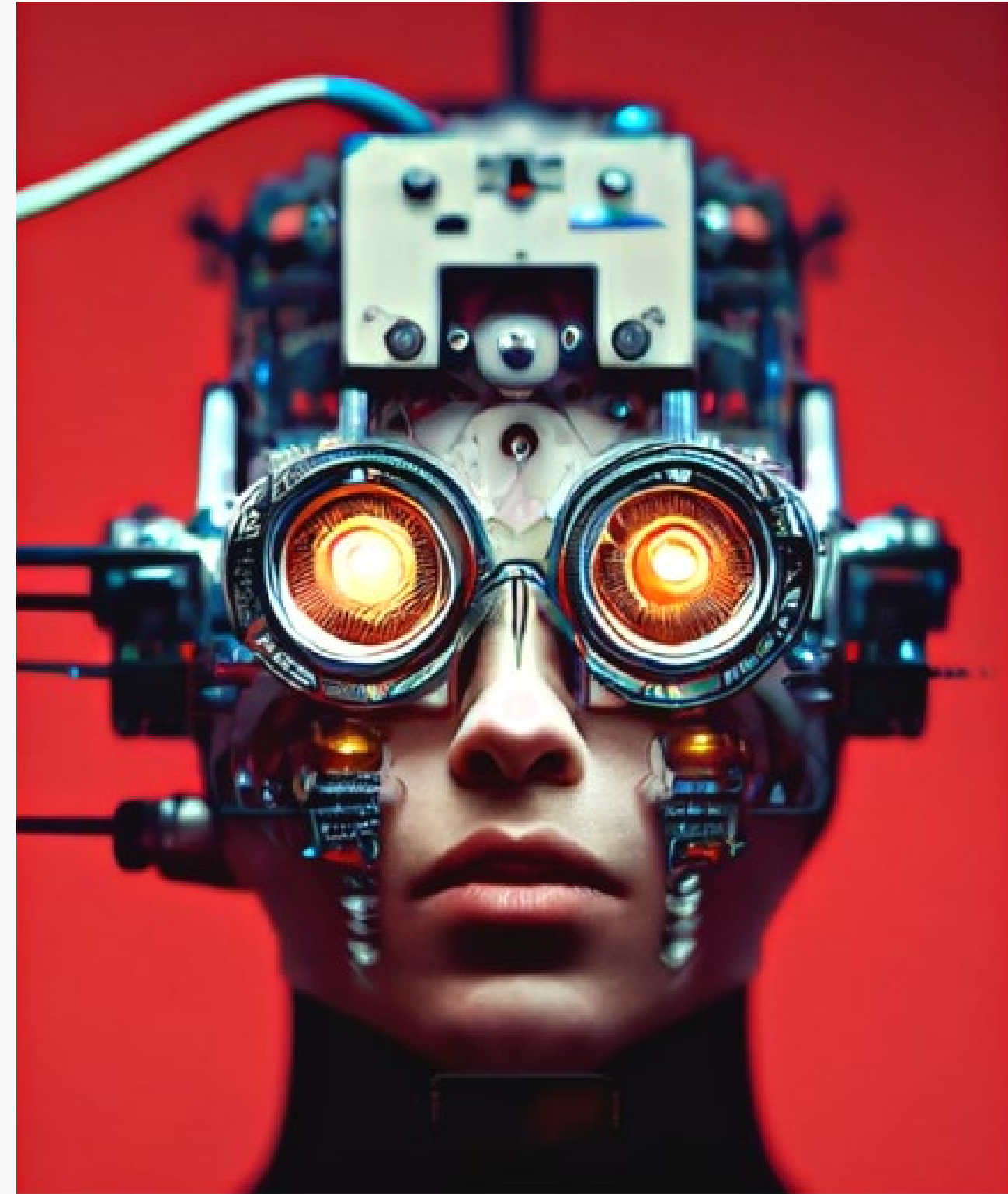
HARDWARE



SOFTWARE

80%

US Workforce could be affected by LLMs
(OpenAI/UPenn)



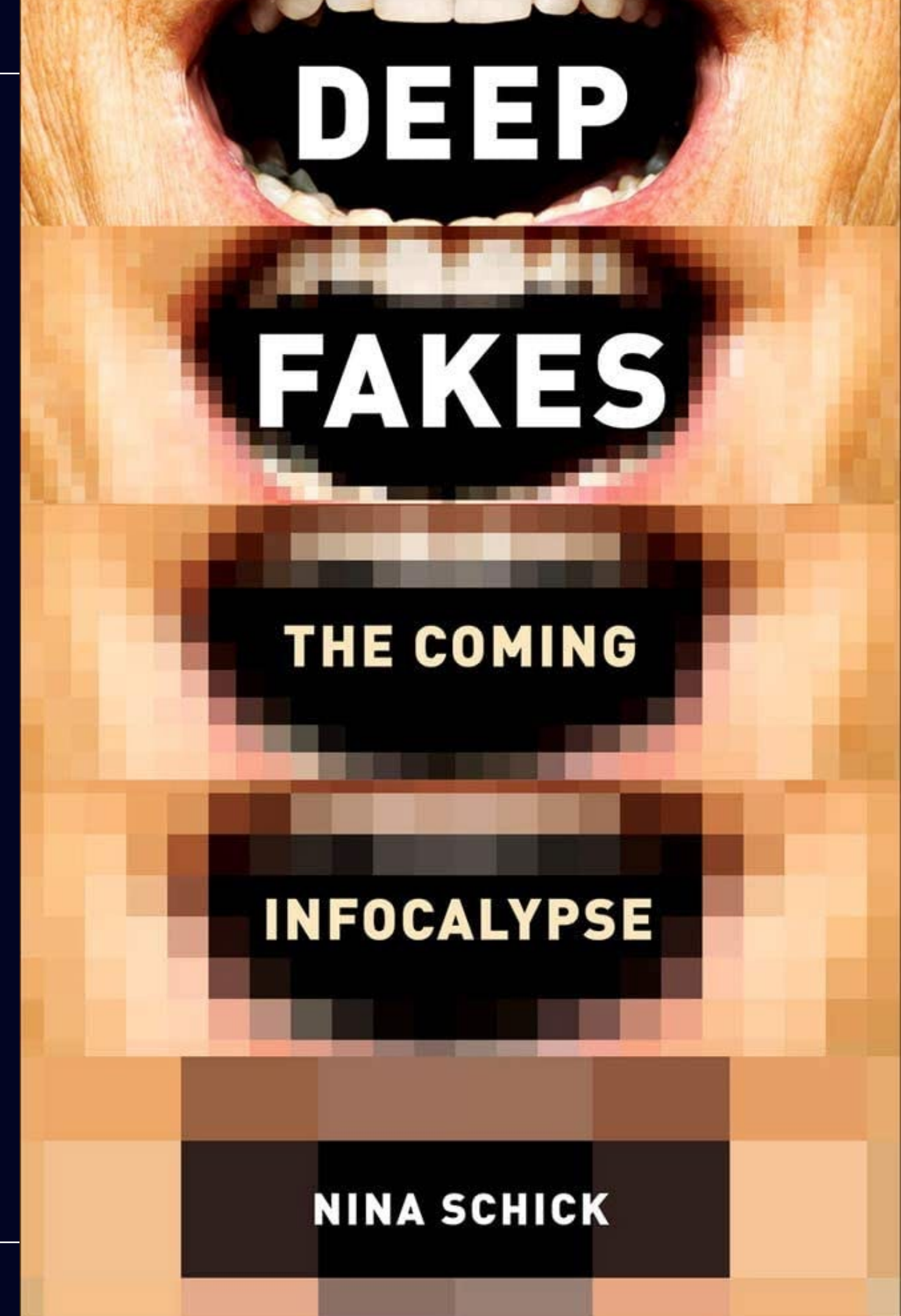
Human / Machine



AI won't take your
job. Someone using
AI will take your job.

Mixed Auton

INFORMATION INTEGRITY
THE LIAR'S DIVIDEND



DEEP

FAKES

THE COMING

INFOCALYPSE

NINA SCHICK

NINA SCHICK

Trump 'Arrest'



NINA SCHICK

Trump 'Arrest'



NINA SCHICK

Trump 'Arrest'

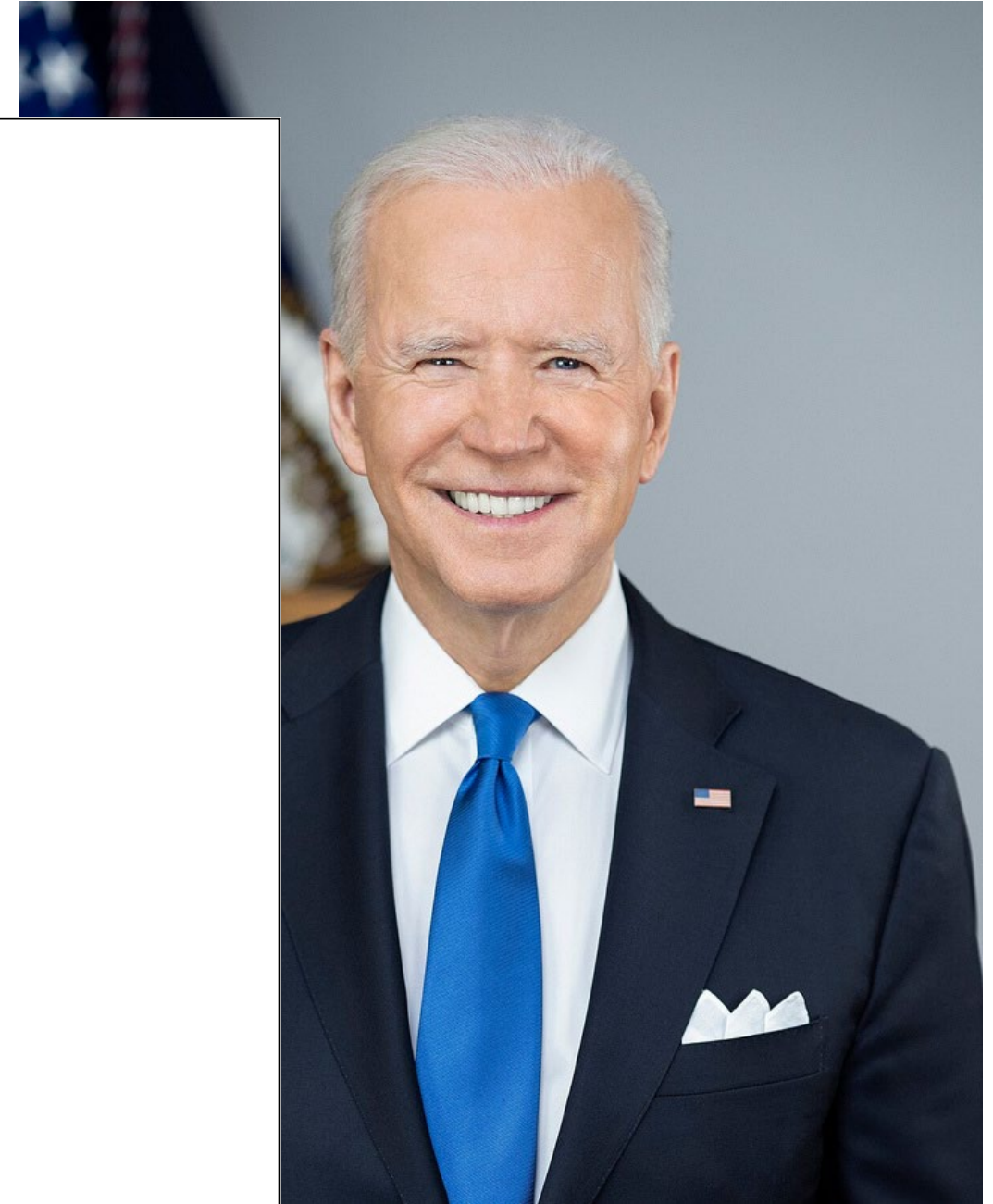


NINA SCHICK

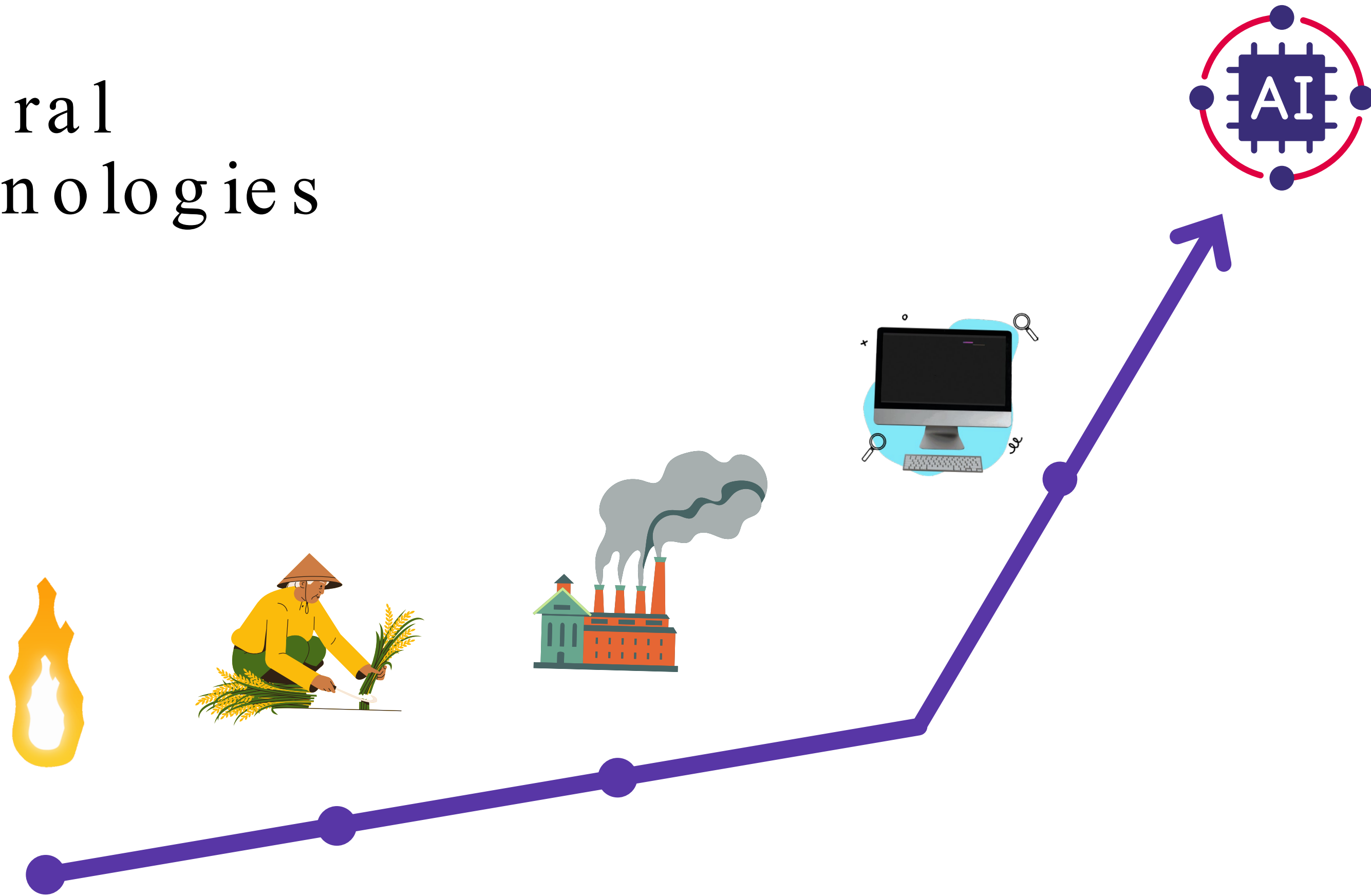
Trump 'Arrest'



Biden 'robocall'



General Technologies



What does it mean to be human?

