6.1 - CC: AI Business

Artificial Intelligence Policy

Prof. Jack Reilly

S2026

Think:

What monetizable product is it that AI companies make? Is it cost-effective, given labor, compute, and energy costs? Absent venture capital, how profitable is it likely to be short-, medium-, and long-term?

Read:

- Paterson, Cal. "Building LLMs is probably not going be a brilliant business" Blog post.
- Leaked Google Memo: "We Have No Moat, And Neither Does OpenAI" (You don't need to read the paywalled "Timeline" portion)

Listen:

- Dario Amodei, 2026. "Something Will Go Wrong: Anthropic's Chief on the Coming AI Disruption" *Interesting Times with Ross Douthat* New York Times Podcasts.

Browse:

- Thompson, Ben. "AI's Uneven Arrival". Blog post.
- Olson, 2026. "The Week Anthropic Tanked the Market and Pulled Ahead of Its Rivals"
- Jin, 2025. "Anthropic Is on Track to Turn a Profit Much Faster Than OpenAI" Wall Street Journal.
- "Researchers created an open rival to OpenAI's o1 'reasoning' model for under $50"
- *The Economist:* "Will the bubble burst for AI in 2025, or will it start to deliver?" and "The very real constraints on artificial intelligence in 2025"
- Zuckerberg, Mark. "Open Source AI is the Path Forward"
- Glazer, "Why AI Risks Are Keeping Board Members Up at Night" *Wall Street Journal*
- "Apple Engineers Show How Flimsy AI 'Reasoning' Can Be" Wired.

Submit:

- Discussion question to course chat

> 💡 Tip
>
> - " Read", " Listen", and/or " Watch" items are required content for the day, and should be read/heard/watched before class on that day.
> - " Browse" items should be briefly looked at but do not need to be read deeply unless you want to
> - " Additional Resources" do not need to be looked at; they are there to serve, if useful, as further references for your debates, final projects, and general edification later.