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Recommended Reading from Tech Founders

2026-11-23

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By Recommended Reading from Tech Founders • November 23, 2026

Sam Altman backs an OpenAI essay proposing shared, perplexity-based safety limits. Tobi Lütke names a book on founder-run companies and a DHH talk, and Collison, Levie, Belsky, Sweeney, Rauch and Casado share their own picks.

Altman: "Perplexity and Intelligence"

Sam Altman called *Perplexity and Intelligence* "the most important thing OpenAI has published in awhile." He said OpenAI is sharing a lot about its pretraining progress and hopes the field can agree on common limits, which he thinks "would be very wise and help ensure safety and control" [1]. The essay was shared by @merettm. It argues for common limits based on perplexity and other measurements, with progress past those limits gated on how well we can understand AI behavior [2]. Altman connected it to the White House Accords, under which labs agreed to set safety standards. He believes talking about perplexity can help meet those goals [3].

Lütke: a book on founder-run companies, and a DHH talk

On his podcast, **Tobi Lütke** said why founder-run companies work so well is "under like understudied." He said "probably the best book straight on this topic I've read" is *The Managerial Revolution*, which he credited to "John Burnham." He says it was written before World War II and "nails the the thesis," which he feels is under-discussed [4].

On the same episode, he told even non-programmers to watch clips from **DHH's** Rails World talk. In his view, David did "an enormously good job" framing something important when he told that audience that programming "is no longer a job" [4].

Collison: Stripe's agentic commerce data

Patrick Collison shared Ernie Tedeschi's *The agentic story on the eve of the 2026 holiday season*, writing "Agentic commerce is growing extremely quickly" [5]. According to the piece, daily spend on Stripe's Link Agent Wallet was nearly 80 times higher in mid-November than at the start of September, and it doubled over the past month [6]. Airfare, travel and lodging made up over 40% of volume, and more than half of consumers who buy once through an agent come back to buy again [6].

Levie: "Agent platform of 2027"

Aaron Levie said "Yes to all of this" about @john_ssuh's post [7]. The post argues that an independent company will own an "everything agentic operating system" as the application layer, and that other software will become databases for it [8]. Levie's takeaway is that swarms of long-running agents will need new orchestration so they can share knowledge, track tasks, coordinate with humans and get access to resources securely. He sees room for both horizontal and vertical approaches [7].

Belsky: simulation as a decision tool

Scott Belsky shared @iHarshAga's study of behavioral simulation, writing that simulations are at an early stage but "soon they will become a default step in decision making" [9]. The study covered six Swiss federal initiatives, and the simulation matched the official national outcome in 17 of 18 conditions. Synthetic personas pushed accuracy at the canton level to 79.5% [10]. Full breakdown [10].

Shorter picks

- **Tim Sweeney** quoted Elon Musk's post on real-time AI video generation with no game engine, running on half of one AI4 TRIP accelerator [11]. Sweeney called it the first real-world use case, not a tech demo, where "a world model runs circles around engines." He expects world models and engines to keep leapfrogging each other [12].
- **Guillermo Rauch** recommended "everyone" read Vercel's essay *Everything Hackable Will Be Hacked*. His point is that anything that can be hacked now will be, so companies need to "shore up" their security. He also pointed to Vercel's open-source DeepSec harness [13].

- **Martin Casado** called Brittani Natali's demo "the craziest full splat demo I've ever seen" [14]. The demo is a Gaussian-splat robot and environment, lit in real time and running in the browser on WebGPU [15].

Sources

1. X post by @sama
2. X post by @merettm
3. X post by @sama
4. Jensen Huang, AI & Why Founders Are Irreplaceable | Tobi Lütke, Shopify
5. X post by @patrickc
6. X article by @ernietedeschi
7. X post by @levie
8. X post by @john_ssuh
9. X post by @scottbelsky
10. X post by @iHarshAga
11. X post by @elonmusk
12. X post by @TimSweeneyEpic
13. Vercel CEO: "Everything Hackable Will Be Hacked"
14. X post by @martin_casado
15. X post by @BrittaniNatali