

An AI Essay That Changed Garry Tan’s Thinking, and a Useful World-Models Taxonomy

Recommended Reading from Tech Founders

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Garry Tan provides today’s strongest signal, saying a Sam Altman essay changed how he thinks about what builders should do next in AI. The rest of the set includes his shorter book recommendation, Scott Belsky’s endorsed world-models taxonomy, and one repeat-view cultural pick from Paul Graham.

Strongest signal: the Sam Altman essay Garry Tan says “opened my eyes”

Among today’s items, this is the clearest recommendation tied to a change in thinking. Tan says a Sam Altman essay he refers to as *Age of Intelligence* “really opened my eyes” to what he thinks builders should do next [1].

“His essay of Age of Intelligence was what really opened my eyes to what I think we should do from here, which is I think it’s time for us



to boil the oceans.” [1]
A Conversation with Garry Tan (21:56)

- **Title:** *Age of Intelligence* (as Garry Tan names it) [1]
- **Content type:** Essay [1]
- **Author/creator:** Sam Altman [1]
- **Who recommended it:** Garry Tan [1]
- **Key takeaway:** Tan says it changed how he thinks about what to do from here and pairs that with criticism of what he sees as too much doomerism from some frontier labs [1]
- **Why it matters:** This is the strongest signal in the batch because the endorsement is explicitly about changed thinking, not generic praise [1]

Same recommender, much shorter format

Tan also reaches for a very different kind of resource: a compact book he describes as simple but foundational [1].

- **Title:** *Who Moved My Cheese* [1]
- **Content type:** Book [1]
- **Author/creator:** *Not specified in the provided material*
- **Who recommended it:** Garry Tan [1]
- **Key takeaway:** He calls it “a short, very simple book” and also “the defining” one [1]
- **Why it matters:** The strength of the endorsement stands out given how compact he says the book is [1]

Best map for a crowded AI topic

Scott Belsky’s most useful recommendation today is an explanatory X thread by @zhuokaiz that he calls “good posts on blurring lines of varied approaches to so-called world models...” [2]

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- **Title:** *Five categories of world models* [3]
- **Content type:** X thread [2]
- **Author/creator:** @zhuokaiz [2]
- **Link/URL:** <https://x.com/zhuokaiz/status/2032201769053212682> [2]
- **Who recommended it:** Scott Belsky [2]
- **Key takeaway:** The thread is useful because it does not flatten “world models” into one idea; it organizes the space into JEPA, spatial intelligence, learned simulation, NVIDIA Cosmos, and active inference [3]
- **Why it matters:** For readers trying to get oriented quickly, a five-part taxonomy is more actionable than treating the whole field as a single bucket [3]

A few concrete anchors from the thread:

- **JEPA / V-JEPA 2:** latent-space prediction instead of pixel reconstruction; after large-scale video pretraining, just 62 hours of robot data is described as enough for zero-shot planning [3]
- **Spatial intelligence / Marble:** persistent 3D environments that can be generated from images, text, video, or 3D layouts [3]
- **Learned simulation:** the thread argues generative video models and RL world models are converging around the same need—simulating how actions change environments over longer horizons [3]
- **NVIDIA Cosmos:** positioned as a platform play spanning data curation, tokenization, training, and deployment rather than one world model alone [3]
- **Active inference / AXIOM:** an object-centric, Bayesian alternative to monolithic neural world models, with robotics examples built around hierarchical agents and online inference [3]

One offbeat repeat-view pick

This is the outlier in today’s set, but it is still a clear organic recommendation because Graham emphasizes repeat viewing, not novelty [4].

- **Title:** *The Larry Sanders Show* [4]
- **Content type:** Show / series [4]
- **Author/creator:** *Not specified in the provided material*
- **Who recommended it:** Paul Graham [4]
- **Key takeaway:** He says the show is “so amazing,” says he is watching it again “for about the fourth time,” and calls it “brilliant people skewering

a world they know all too well” [4]

- **Why it matters:** The repeat-viewing detail makes this feel more durable than a one-off mention [4]

What stands out

The most useful recommendations today do one of two things: they either clearly **change a leader’s posture** or they **make a crowded area legible**. Garry Tan’s Sam Altman essay recommendation is strong because he explicitly says it reframed what to do next, while Scott Belsky’s thread recommendation is useful because it gives readers a compact map of competing world-model approaches [1, 2, 3].

Sources

1. A Conversation with Garry Tan
2. X post by @scottbelsky
3. X post by @zhuokaiz
4. X post by @paulg