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Recommended Reading from Tech Founders

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Fred Wilson sent readers to the four-part thesis in USV's \$900M fund announcement. Also covered: Jaan Tallinn's reading list on The Generalist and Chamath Palihapitiya's take on an a16z energy essay, plus short picks from Elad Gil, Garry Tan, Bill Gates and Elon Musk.

Top pick: USV's thesis essays, via Fred Wilson

Wilson shared The Next Chapter of USV, the post announcing the firm's new funds. He told readers to look past the headline that “we have filled the gas tank again at USV and this tank is bigger” and to “scroll down to see the four areas we want to invest these funds into” [1]. USV is his own firm, and the post announces \$900M in new funds [2].

The four theses, each linking to a longer USV essay: - **Obliterate Don't Automate:** AI will reshape markets completely rather than just make them faster [2]. In USV's companion YouTube conversation, a speaker who isn't named calls Wilson's 2014 post “probably the best articulation of the thesis USV has always had”: moving value to end users and away from “the centers of power in the middle” [3]. - **Data at the Edge:** the most valuable data is data that couldn't be reached until now, gathered through physical intelligence, robotics, sensors and similar tools [2]. - **The Rebel Alliance:** buyers want more powerful intelligence but closer alignment on trust, security, memory and cost [2]. - **Energy:** USV's dedicated energy fund is being folded into the core fund [2].

Jaan Tallinn’s reading and viewing list (The Generalist)

Tallinn is a founding engineer of Skype, an early DeepMind investor and the lead of Anthropic’s first round [4]. The show notes for his Generalist episode give his complete reading list as one book: Roger Penrose’s *Shadows of the Mind: A Search for the Missing Science of Consciousness* [4]. The notes don’t name Penrose; that credit is added here, and no reason for the pick is given. His listed favorite movies are *The Odyssey*, *On the Edge*, *Limitless*, *Ex Machina* and *Colossus: The Forbin Project* [4]. Other resources in the notes include “The Bitter Lesson,” AI 2027 and *The Glass Bead Game* [4]. Listen

Chamath Palihapitiya: a16z on powering AI growth

Chamath quoted a16z’s post linking @rmcentush’s essay on Texas and data centers. The post says the US grid plans to add 86 GW this year, including 43.4 GW of solar, 24.3 GW of batteries and no new nuclear [5]. Chamath’s takeaway: solar and batteries are becoming “hugely lucrative markets.” He expects them to consolidate the way natural gas did in the late 2010s, with “many new big energy companies” emerging [6].

Elad Gil: Hone’s “Closing the Gap”

Gil reacted to Hone’s launch with “Exciting” and pointed to its blog post. What he singled out was “the self-improvement” [7].

Garry Tan: two endorsements

- **Pope Leo XIV’s homily.** The quoted passage argues that intelligence “must draw on memory” and recall lived experience, not “simply compile data” [8]. Tan’s comment: “This is why I made GBrain” [9].
- **Elena Verna’s clip on Lenny Rachitsky’s account.** Verna argues that if AI is changing work, “ICs should get paid more than managers” [10]. Tan called it “Logical” and said ICs with agents will outperform equivalent managers from earlier eras [11].

Bill Gates: contrails (Gates Notes)

Gates linked his own piece on the “mind-blowing impact” of fixing contrails [12]. His case: persistent contrails cause about half of aviation’s warming effect, and getting rid of some could eliminate “up to two percent of all global warming” [13].

Elon Musk: Artificial Analysis’s legal benchmark

Musk shared the Harvey LAB-AA v1.1 results with “Grok 4.7 ranks first in legal matters” [14]. xAI is his own company. The lead is narrow: 9.4%, against 8.9%

for Meta’s Muse Spark 1.3 and 8.6% for GPT-6 Astra on the new hallucination-gated metric [15]. The report also says more than 60% of otherwise passing results contained a material hallucination [15].

Shorter mentions

- **Naval** quoted Amjad Masad’s post on AI decompilation, which ran in the last brief via Chamath. His one-liner: “Turns out the ‘Open’ part refers to *your* code” [16].
- **Sarah Guo** promoted Baseten’s All-Gather research conference in San Francisco on November 18. She called a day of researchers arguing about inference “my idea of a good time” [17]. She is also listed as a speaker [18].
- **Jason Lemkin** promoted his own 20VC x SaaS episode with MongoDB’s Dev Ittycheria. The episode covers OpenAI’s \$70B run rate and agents picking vendors [19]. On the show, a panelist called a Wall Street Journal piece on a withdrawn IPO “a good piece” [20].

Sources

1. X post by @fredwilson
2. X article by @mignano
3. USV’s New \$900M Fund: Fred Wilson, Rebecca Kaden & Mike Mignano
4. Jaan Tallinn would like us to survive
5. X post by @a16z
6. X post by @chamath
7. X post by @eladgil
8. X post by @Pontifex
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15. X post by @ArtificialAnlys
16. X post by @naval
17. X post by @saranormous
18. X post by @baseten
19. X post by @jasonlk
20. Cognition vs Factory | Anthropic Under Threat | ElevenLabs Doubles Its Valuation to \$22B