

Software in the AI Age, Zero to One, and China's AI Chip Map

Recommended Reading from Tech Founders

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By Recommended Reading from Tech Founders • June 14, 2026

The strongest signal today was Keith Rabois's repeated endorsement of a Harry Stebbings interview with Matan SF on the future of software in the AI era. The rest of the list rounded out the learning stack with Matan Grinberg's startup classic *Zero to One* and Bill Gurley's broader map of China's AI chip ecosystem.

What stood out

Today's authentic recommendations worked at three levels: a **conversation** about where software is heading in the AI era, a **book** that helped a founder learn startups from the outside, and an **article** that broadens the usual China AI chip narrative beyond Huawei [1, 2, 3].

Most compelling recommendation

Harry Stebbings interview with Matan SF of FactoryAI

- **Title:** Harry Stebbings interview with Matan SF of FactoryAI
- **Content type:** Podcast interview [1]
- **Author/creator:** Harry Stebbings [1]
- **Link/URL:** <https://open.spotify.com/episode/40R3ULhqI2XjfUqG27lU7O?si=Eo4aKww2R0SG2khS0VO0ow> [1]
- **Who recommended it:** Keith Rabois [1]
- **Key takeaway:** Rabois said the episode explains “the future of software in the age of AI” and later amplified a distillation of it as “Outstanding,” saying it explains why the podcast is not skippable [1, 4]
- **Why it matters:** This was the clearest signal today because it was the only resource that drew a direct recommendation and a second, stronger follow-up from the same investor [1, 4]

“Outstanding distillation. Explains why you can’t skip this podcast.”
[4]

Two more useful picks

Zero to One

- **Title:** *Zero to One*
- **Content type:** Book [2]
- **Author/creator:** Peter Thiel [2]
- **Link/URL:** Not provided in notes
- **Who recommended it:** Matan Grinberg, CEO and co-founder of Factory [2]
- **Key takeaway:** Grinberg said he read it while learning about startups after leaving physics and described it as “incredible,” “so concise,” and “beautifully written” [2]
- **Why it matters:** The value here is the specificity of the use case: this is the book he reached for when building startup intuition from scratch [2]
“incredible book... so concise, beautifully written” [2]

China’s AI Chip Landscape: A Complete Overview

- **Title:** *China’s AI Chip Landscape: A Complete Overview*
- **Content type:** Article / Substack post [3]
- **Author/creator:** Not provided in notes
- **Link/URL:** <https://crossingriver.substack.com/p/chinas-ai-chip-landscape-a-complete> [3]
- **Who recommended it:** Bill Gurley [3]
- **Key takeaway:** Gurley said people often focus only on Huawei when discussing AI chips in China, even though there is a much larger ecosystem of players, including Cambricon, and many are already public [3]
- **Why it matters:** It is a useful corrective for readers trying to understand China’s AI infrastructure beyond a single-company narrative [3]

Sources

1. X post by @rabois
2. OpenAI vs Anthropic vs Open-Source | Token Maxing, AI Hangovers & The Coming ROI Reckoning
3. X post by @bgurley
4. X post by @rabois