

Opinione | Parmy Olson , editorialista

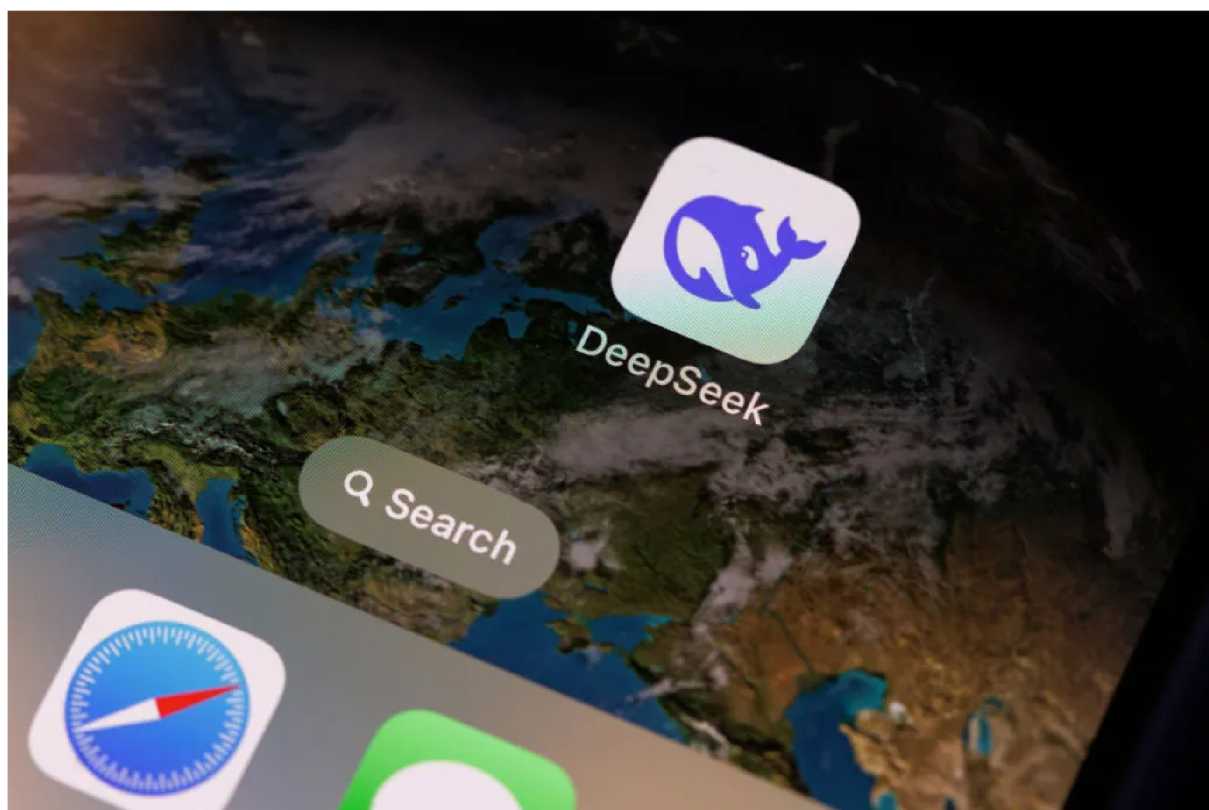
DeepSeek mostra l'enorme punto cieco della Silicon Valley sull'intelligenza artificiale

OpenAI e altri hanno continuato a navigare credendo che il denaro fosse il loro fossato. Non lo è.

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Di Parmy Olson

Parmy Olson è una editorialista di Bloomberg Opinion che si occupa di tecnologia. Ex reporter del Wall Street Journal e di Forbes, è autrice di "Supremacy: AI, ChatGPT and the Race That Will Change the World".



Fotografo: Bloomberg/Bloomberg

L'anno scorso, al CEO di una delle principali aziende di intelligenza artificiale è stato chiesto durante una cena privata nella Silicon Valley in che modo la sua azienda si differenziava dalle altre che costruivano "modelli di fondazione", i sistemi che sostengono chatbot come ChatGPT. Aveva un fossato? Sì, ha risposto, secondo un altro CEO presente. Nessun altro aveva raccolto i miliardi di dollari che aveva lui. Quello era il suo fossato.

Questo approccio miope al fare affari, secondo cui solo enormi somme di denaro possono tenere a bada la concorrenza, è il motivo per cui giganti come Meta Platforms Inc. sono in preda al panico per DeepSeek, un'azienda cinese che ha creato un formidabile modello di intelligenza artificiale per circa lo stipendio di un singolo dirigente di intelligenza artificiale negli Stati Uniti. Le sue scoperte ora rappresentano uno spostamento nell'equilibrio di potere e una resa dei conti per i giganti della tecnologia, che improvvisamente non sono più i vincitori garantiti dell'intelligenza artificiale.

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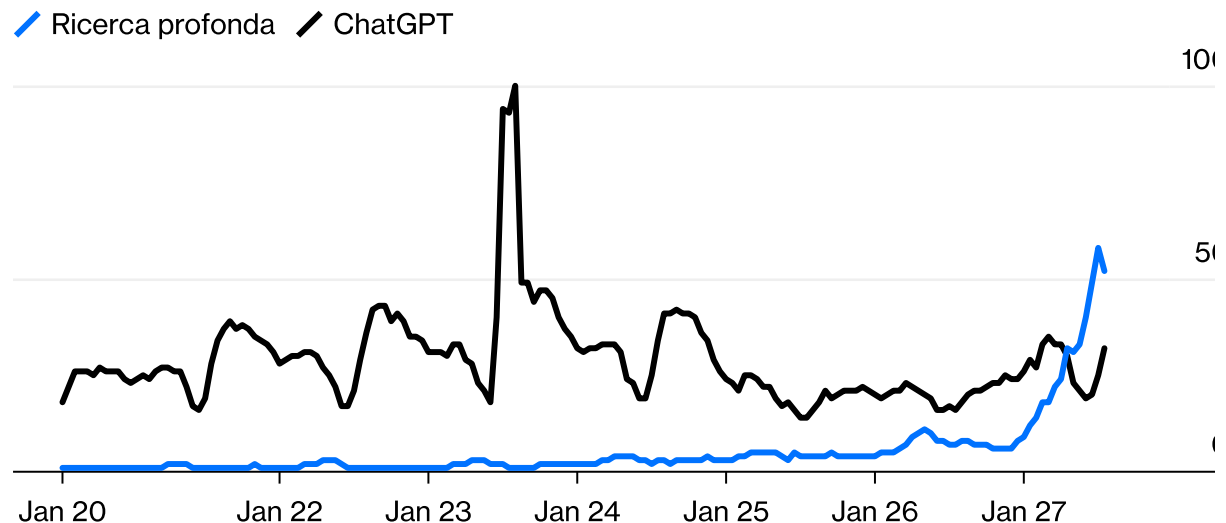
Lunedì il panico si è diffuso a Wall Street, con i futures del Nasdaq 100 scesi di oltre il 3%, proiettando i titoli tecnologici sulla buona strada per un crollo da 1.000 miliardi di dollari.

Il motivo è ovvio. OpenAI ha recentemente raccolto il più grande round di capitale di rischio della storia (6,6 miliardi di \$), mentre Mark Zuckerberg ha affermato che Meta spenderà fino a 65 miliardi di \$ in progetti di intelligenza artificiale quest'anno. I giganti della tecnologia hanno speso molto in intelligenza artificiale, e ora sembra uno spreco enorme.

DeepSeek's latest R1 model, released on Jan. 20, was built with just \$6 million in raw computing power and inferior AI chips, a fraction of the money and resources spent by firms like OpenAI and Alphabet Inc.'s Google. It's not only tied with ChatGPT in a closely watched ranking of AI model capabilities and can perform chain-of-thought reasoning, it's a hit with the public too, having topped app stores in the US, UK and Canada. ^[1] It's open source and free for personal use, and also cheap for businesses. ^[2] Silicon Valley soothsayer Marc Andreessen has called it "AI's Sputnik moment."

Searching for DeepSeek

Google Trends shows US searches for DeepSeek have outstripped inquiries about ChatGPT



Source: Google Trends

Does this mean that all the billions poured into chips, talent and energy infrastructure in the US have been for nothing? Not exactly, but that investment is no longer enough on its own. DeepSeek has shown that the future winners of AI will need both raw computing power and the efficiency innovations that Chinese firms have been forced to develop given US chip curbs.

Monday's grim market also points to major blind spots that both Wall Street and tech firms have had on AI. First, DeepSeek's growing capabilities have been public for months; my Bloomberg Opinion colleague Catherine Thorbecke wrote about the company in June. But it's also been clear for more than a year that companies like OpenAI, Anthropic and Google had no moats around their foundation model businesses. Enterprises and consumers could swap one for the other with ease. That was already a risky state of play, one that a Google engineer warned about in an infamous memo almost two years ago. Even so, OpenAI has continued burning money with no obvious path to profit in sight.

Part of the problem was that Silicon Valley brologarchs focused far too much on making AI that topped the benchmark rankings in an ego-driven, my-model-is-bigger-than-yours-contest, and spent far less on turning those innovations into well-designed *products* that businesses and consumers could use. DeepSeek's success should serve as a wake-up call for firms like OpenAI to differentiate by focusing on what their customers need. And that still leaves plenty of room for them to stay ahead of

competitors in China, where talent and hunger for AI supremacy abounds.

There's another reason for Silicon Valley to remain optimistic. Just a few months ago, the tech industry was worrying about a looming plateau for AI's capabilities, as so-called scaling laws hit a brick wall. But DeepSeek has shown that doesn't have to be the case, and that there are workarounds to those limits.



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Most important is the shift that DeepSeek has sparked in the competitive landscape. In the two years since ChatGPT was launched, large tech firms have been the biggest financial beneficiaries of the generative AI boom. But making AI cheaper - and not just bigger or better - is far more impactful to the rest of the world, something that tech leaders in their cloistered bubbles have failed to appreciate. When small organizations can do big things with AI, that promises a healthier and more dynamic market.

The great irony is that OpenAI's Sam Altman and other AI leaders can finally relate to the workers their AI systems are displacing. Now they must try and do more with less, or see themselves displaced too.

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1. DeepSeek's app ranked at No. 1 on Apple's App Store, and No. 5 on the Google Play Store at the time of writing. [View in article](#)

2. Accessing DeepSeek R1's application programming interface (API) costs just \$0.55 per million input tokens, compared to OpenAI's API, which costs \$15. [View in article](#)

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