

Is anybody thinking about the whole economy as a dynamical system?

What I see among the people watching the AI capital expenditure boom is everybody fine-tuning their deck-chair-placement algorithms.

https://www.wsj.com/tech/ai/ai-spending-tech-companies-compared-02b90046?mod=hp_lead_pos2

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Meanwhile, the economic system is absorbing a massive impulse. The four companies mentioned in this article know that they are in the midst of an historic land-grab, and maybe two of them will see some of their money coming back.

<https://www.bcg.com/publications/1976/business-unit-strategy-growth-rule-three-four>

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The system is going to ring. When, and how, I haven't the foggiest idea. We need to be having a conversation about this.

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