Leaked Google document: "We Have No Moat, And Neither Does OpenAI"

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SemiAnalysis published something of a bombshell leaked document this morning: Google "We Have No Moat, And Neither Does OpenAI".

The source of the document is vague:

The text below is a very recent leaked document, which was shared by an anonymous individual on a public Discord server who has granted permission for its republication. It originates from a researcher within Google.

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