

At Orange Capital Partners we believe in the proliferation of superhuman intelligence in the next 10 years. We see 3 major steps that will lead us from human intelligence to superhuman intelligence.

1. Development of self driving cars
2. Automation of manufacturing
3. Quantum Computing

As an investment company with real time net asset value reporting we invest in publicly listed companies and assets whose value is determined by a liquid marketplace. We are fortunate that the first phase of our 10 year plan offers a number of investable assets. Phase 2 and 3 are not investable yet (for us), but we expect that to change in the near future.

Phase 1. Self Driving Cars

Human Intelligence has been developing over millions of years. It started accelerating around the Cambrian period when living objects started to see. From then on living beings were able to differentiate and specialize based on what they perceived in nature. For example, they could find better food or better shelter from predators. Reacting to the natural environment became the engine for intelligence development.

We see a similar development in computer intelligence. Here is a quote from Qi Lu, COO at Baidu and a leading practitioner in the transformation of industry to AI: "If you want to truly build digital intelligence to be able to acquire knowledge, make decisions, and adapt to the environment, you need to build autonomous systems." We share this view: The best way to develop intelligence is to build objects that interact with nature. The self driving car is a great tool for that since there is a large market with lots of iteration and industrial development. This concept is based on a paper by Robotics Professor Rodney Brooks, "Elephants don't play chess".

The idea also roots in psychology. For example, we don't know why and how we see. But we know what to do with vision. Thanks to vision we can develop our own understanding of the world and hence become more intelligent.

The self driving car is a catalyst for intelligence development because it fosters understanding of machine perception and reaction to the environment. We invest in companies that are at the forefront of this development. Companies like Tesla, which is building an electric and autonomous car and software, Nvidia which is building semiconductors and software or Intel and Qualcomm which are also building semis and software. We also invest in companies that help bridge the analog and digital world with sensors and software such as Analog Devices.

Phase 2. Automated Manufacturing

Self driving cars will create a wave of iteration and progress in computer intelligence. We expect the next phase to impact manufacturing and robotics. "Machines will learn how to build the machine."

One particular development will be the ability to analyze nature in the very small. This we call quantum. Quantum effects can be better understood and thus nature will be better understood. With the improved understanding of quantum effects in nature we expect progress in the development of quantum computing. Quantum computing will propel a new phase of computer intelligence which we call quantum intelligence.

Phase 3. Quantum computing and the development of superhuman intelligence

Quantum computing uses nature to better process information. Today our computers work in classically defined environments where information processing is limited. Quantum computing unleashes a whole new world of possibilities with the ability to process much larger amounts of information.

The learnings from phase 2 will help us bridge the gap from classical computing to quantum computing. In particular we will learn how to analyze particles and dynamics at very small scale. With quantum computing new forms of intelligence can be developed. We call it quantum intelligence. This type of intelligence is superhuman.

Currently all our investments are in Phase 1.