

UPSIDE PODCAST — #Episode 100

Four predictions for 2028. Four different bets.

Where Bitcoin, Big Tech, Europe, and space are actually headed, according to the people who watch this every week.



BITCOIN AND THE TECH GIANTS

Bitcoin drifts toward irrelevance. *Apple and Google quietly win AI.*

The call: Bitcoin becomes structurally sidelined, settling well below its highs by 2028. **Meanwhile Apple owns personal, on-device AI through pure distribution, and Google does the same in the enterprise.** Not the flashiest labs. The ones who already own the gateway.



SPACEX AND ENERGY

SpaceX halves, *then becomes critical infrastructure*

One prediction: SpaceX drops sharply from its post-IPO highs before recovering as genuinely sovereign infrastructure, less about the ambitious space bets, more about becoming the plumbing everyone depends on.

Alongside it, the case that energy, not data, becomes the resource every AI strategy is actually built around.



SMART GLASSES AND QUANTUM

Smart glasses go mainstream. *Quantum goes into winter.*

One bet: by 2028 wearable AI glasses become a genuine daily form factor. A separate bet, from the same table: quantum computing hits a valuation reset, with several heavily funded public players correcting hard before the technology has real revenue behind it.



THE EUROPE DIVIDE

Pensions still stuck below 2%. *Or Europe finally turns the corner.*

One view: European pension allocation to venture stays under 2% by 2028, still too cautious to move the needle. The counter: with 8 new decacorns in two years already, more than the entire prior decade, the tide is already turning. *Nobody at the table agreed on this one.*

CLOSER

None of these are
certain. *That's what
makes them worth
saying out loud.*

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