

## Market Design and the AI Economy

A FOO Camp for the new agentic economy

*Co-hosted by O'Reilly Media, AI Disclosures Project, and Partners*

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Lighthaven, Berkeley, CA<sup>1</sup>

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You are invited to join a weekend “FOO” Camp to discuss the future of the AI Economy. As AI agents become a new layer for web discovery and transactions, they will reshape who captures value and where sustained value can ultimately reside. But the rules, mechanisms, and digital infrastructure needed to steer these markets toward broadly beneficial outcomes are not in place yet. Over the weekend, we will consider together what sustainable business models in the agentic era can look like – models that can support third-party ecosystems, encourage high-quality participation, attribute value fairly, and reward innovation and honesty.

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### Background

Every major technological transition reshapes the economy not merely by automating work or reducing costs, but by creating entirely new markets, products, and forms of coordination. AI is no exception. While AI will displace existing jobs and business models, it also has the potential to generate millions of new roles and revenue streams. Whether those markets actually emerge, however, depends less on the technology itself than on whether the right economic infrastructure, incentives, and cooperative arrangements are put in place to allow new AI-native business models to take root.

Content providers, economists, product designers, and researchers are often focused on preserving existing economic structures – attempting to mechanically integrate AI into legacy products and business models. For publishers and content providers this reflects the death of a future they once felt confident predicting. Lawsuits alone will not get them very far economically without new mechanisms that incentivize market participants **towards new economic arrangements, monetization standards, and standards that enable sustainable AI-era business models.**

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<sup>1</sup> Want to suggest people who should attend? Contact: [marsee@oreilly.com](mailto:marsee@oreilly.com); Would you like to be on the convening committee? Contact: [ilan@aidisclosures.org](mailto:ilan@aidisclosures.org)

YouTube Content ID offers a useful historical precedent from a private system. When music companies responded to user-generated video with takedown notices, YouTube proposed a different question: *how can we help you monetize this instead?* The result was not simply a copyright enforcement mechanism, but an entire ecosystem, built on new technical systems, negotiated rights frameworks, and highly automated market infrastructure that created value for creators, platforms, and users alike.

This convening will bring together 150+ leading AI experts from across domains to explore:

### **Business Models & Value Creation**

- What is the future of knowledge curation and consumption in AI-native and agentic markets? What kinds of formats will this take?
- If not 'clicks' or 'views', what are the key signals through which agentic AI markets will value inputs and content, and make market allocations between demand and supply?
- What are the new “win-win” AI-native business models for the web that can help scale agentic AI without premature content enclosure?
- What types of human-created ecosystems are the most sustainable and monetizable under agentic AI (rather than simply mechanized)?

### **Market Design & Governance**

- How to separately value individual inputs that jointly contribute towards AI inferences? And how to create programmatic markets for AI's consumed inputs?
- Which AI market problems are amenable to classical mechanism design, and which require new institutions, governance, and participation regimes?
- What key market failures – such as free-riding, adverse selection, congestion, and externalities – is a convening method most appropriate to tackle?
- What ‘matching’ problems are we actually trying to solve for, and what guarantees would prevent these from unraveling into side deals?

### **Technical Infrastructure & Rights Frameworks**

- What technical architectures would incentivize interoperability in data and inference across AI application layers, while reducing winner-takes-most dynamics?
- How can inspectability, traceability, and interoperability be baked into agentic actions and markets? What new data and identification concepts for the web may be required?

- What can mature rights and licensing regimes (music, publishing, stock media, open source) teach us about translating provenance, royalties, and collective management into AI-era markets without recreating legacy gatekeepers?
- How can markets best disincentivize the pollution of the digital information environment?

As Alissa Cooper, Director of the Knight-Georgetown Institute, noted to us, we need an AI economy in which humans not only consume content, but are rewarded for continuing to create it. Achieving this goal requires structural change; aligning the incentives of individual creators, who need attribution, control, and structured inclusion, with those of AI labs, which require a scalable and sustainable business model. Under agentic AI search systems, websites are routinely crawled and consumed, frequently without meaningful consent or compensation, leading to a systematic misalignment in how value is distributed between the inputs from content producers and downstream AI-mediated outputs.

If agentic AI systems continue on anything like their current trajectory, existing search referral traffic, display advertising, or subscription models will not remain viable for large segments of click-driven media. Many of these legacy business models will wither, if not collapse entirely. Caution is, therefore, warranted in mechanically applying old economic arrangements onto a fundamentally new technology. The central question is not how to preserve yesterday's models, but what mutually beneficial arrangements can best replace them. This is an existential challenge not only for publishers and media companies, but also for AI labs that must integrate high-quality external content more formally in order to build durable, monetizable products.

**The aim of this workshop is to converge on a positive, constructive vision of what a functional and fair AI-first media and knowledge economy could look like, as well as interrogate the specific mechanisms needed to make the agentic-first market economically sustainable.**

As AI companies, platforms, economists, and policy advocates increasingly act as *market shapers*, they face a shared responsibility: to help design markets in which value circulates rather than concentrates, supporting reinvestment, innovation, and long-term growth across the AI economy as a whole. Doing so requires not only getting the protocols and standards right, but also building the norms, protections, and enforceability mechanisms that make trust, cooperation, innovation, and growth possible in the next economy.