

The Cloudcast (00:01.358)

Three, two, one. And we're back. And folks, another AI and Cloud News of the Month. And excited to have Brandon Wicher back with us. Brandon, it's been a month. How you been, man?

Brandon Whichard (00:12.26)

It's been fantastic. I've survived my first major spring torrential rain here in Austin, Texas. No damage, so I feel like that's a win. If we can just get to about mid-June where it stops raining and it becomes like a desert of heat, we will have successfully navigated what is always a tricky time of year, which I know also in North Carolina you have some of the similar issues.

The Cloudcast (00:33.324)

Right, yeah, no, it's, well, it's weird. well, I saw that, I saw that you got a hailstorm or something like that, right, in Austin? Okay.

Brandon Whichard (00:38.565)

Yeah, we had like hail hurricane kind of thing, but there aren't really words for Texas Weathers. There's actually no word. Like they just have to like put things together. They're like, it's a tornado hurricane winds and hail. So like that's the three things that are happening simultaneously. So there's no word for that. just look and then they put up every color of potential warning and it's just like, it's like a knock where everything's just bad. You got red going yellow, purple, deep purple. You have to look at the legend. You're like, what does that mean? I haven't even seen that color before.

The Cloudcast (00:59.669)

Right.

Brandon Whichard (01:05.827)

So, but it only lasts like 30 minutes and then it goes back to like blue skies.

The Cloudcast (01:09.628)

wow. wow. Yeah, I saw something on social media. And was like, that might be AI. I mean, it just looked like, like, like a month, but it was it was like a monsoon of hail. It was just pounding on somebody's back deck or something. So glad you're okay.

Brandon Whichard (01:20.517)

That is, I can confirm not fake news, not AI. I witnessed some of it myself. So that's, that was all true.

The Cloudcast (01:24.974)

Now, is that different than a derecho or a derecho? That's a term I hear with weather sometimes down in that part of the world. There you go.

Brandon Whichard (01:32.657)

Oh, I don't even know. I that sounds— I'm out of the loop. I don't even know. It's probably like a Spanish word that I should know that I have no idea what it means. But yeah, we probably have that too. Whatever you just said, I bet you that happened as well.

The Cloudcast (01:40.558)

Yeah, we usually have we're in kind of a calm period. Tomorrow will probably be full on summer. think tomorrow will just automatically jump. It'll go from May 30th, where we're recording to say June 1st. It'll be 100 degrees tomorrow. It's 70 degrees today, but that's just how summer works here. But yeah, no pollen's gone, so that's all good. yeah, so this is going to be an interesting show because we call it AI and Cloud News of the Month or Cloud and AI News of the Month.

As far as I can tell people spent about I don't know 250 billion dollars on cloud this last year give or take, know Depending on how it counts. There is almost no news in the last month like cloud literally just took May off There's one I'm gonna throw it out there. They feel like there's one news story Actually, there's two news stories that I think we should talk about One is somebody has gone and created a site a list It's like a github page that now lists all the things that either AWS is broken

The changes that they're making or things their end of life thing so we had we had 15 years now We probably had 20 almost 20 years of AWS telling us nothing will ever go away That's why they're different than every other cloud and now they're you know under Matt Garman again You know comes back to him there now and do end of life and stuff I'm worried. No, but there is not one cloud thing related to AWS this whole month Does this worry you at all that we just don't talk about it anymore? Or is it just the nice? It's the it's the foundation. We don't have to think about

Brandon Whichard (03:09.584)

think there's two ways to say it. think there's what you said, the latter there, I think it's a sign of maturity, right? I mean, it's like anything else. Like we don't talk about VMs, right? But like most of the stuff, most of the workloads in the world are running on VMware or VMs. It's just like, kind of like we know that, right? So I think part of it is just the maturity of AWS. It's like it's everywhere, everyone's using it. And to the point, like you said.

The Cloudcast (03:21.442)

Yeah.

Brandon Whichard (03:29.88)

There's this AWS breaking changes GitHub, which is just, don't know. I don't even know if this is like a snark or is this like just an informational thing? There's like so many ways to just read what's going on here. But I think it's a credit, if you will, to AWS is like they've just become part of the mainstream, it's part of the core fabric. We don't think about it, but at the same time, we're not talking about them as part of all the exciting AI stuff, right? They're sort of like, oh, and there's AWS and oh, they sort of have a partnership with Anthropic.

The Cloudcast (03:41.048)

Right.

Brandon Whichard (03:57.327)

But it's always like the last tail end thing or never leading with anything like that. So I don't know if that means Matt Garmin is happy or sad, probably sad, but it is what it is.

The Cloudcast (04:01.72)

Right.

The Cloudcast (04:06.54)

Yeah, and I don't mean to sort of poke light at it. It just looks like somebody just put together, I mean, this looks like something you would see on like an internal IT page. It's like, here's a list of stuff. If you have a problem, check this first and then you can open a ticket. Looks very standard. It doesn't look like Corey Quinn put this together. It doesn't look like he's making fun of anything. It's just a thing. It's just a list.

Brandon Whichard (04:26.255)

But it's like, to me, it's like dry humor, right? Because it's so straight and because it's just very informational, it's also kind of like a subtle, it's least a subtle shot, like hey, guys, your stuff's broken, we're just making a list so we know. No problem, we'll go watch Tokino, but here's the list of stuff you haven't fixed, if you're interested, right? So, like I said, I don't know, and probably know the people that use GitHub, who I love, me as well.

The Cloudcast (04:29.133)

Yeah, a little bit.

The Cloudcast (04:40.974)

That's right.

Brandon Whichard (04:52.95)

It probably is just meant to be informational. But like I said, I like to read into the deep subtlety of the GitHub repost.

The Cloudcast (05:00.022)

Yeah, yeah. The other thing we've got under the category we always call good old fashioned cloud news, not totally cloud. Obviously, Uber again, sort of become a thing that everybody uses all the time. In the creativity department, they are launching something that they categorized as we are going to have a service that runs on a regular time schedule between two busy areas, between two points of thing. I think you categorize this as bus service.

I think Uber launched a bus service, which again, I don't know if they're actually doing it via buses or if it's just, you you can ring up somebody and be like, I would like to go from, you know, Austin to the outside of Austin or something along those lines. But it is interesting that, you know, there are no new ideas. We just come back to going, I'm going to cannibalize, you know,

whatever else is out there. And, but it's interesting to see Uber, you know, instead of focusing on, you know, autonomous driving, they're like, nope, screw that too many.

too many hurdles there, let's just replace bus services, which is great.

Brandon Whichard (06:02.297)

Well, this was this announcement, you know, because they call it route share. Right. And it's like and it's kind of funny. So it's always like I saw this and it's it's because, know, maybe we'll talk about a little bit later. But it's like, you know, the reason I think people should hate tech people at times like it's like when things start to become like look like Silicon Valley, like when you're like you're not sure this is a skit or not. So this route share, think is is probably fine. Right. They didn't like if they had released like a 10 minute video being like

The Cloudcast (06:06.958)

Right.

Brandon Whichard (06:31.415)

we redefine transportation. It's where it's like basically they're just reintroducing buses. So it's like this one I think is just like what you said. It's like, okay, well, turns out like people could use like a bus type service. Probably many cities don't have great bus service. So we'll do it. So they did, they edged up though to parody. think the route share was like, we'll give it a new name but we're not gonna release a 10 minute video talking about how we redefine transportation. I give them, I'm just gonna say this was good. This was fine.

Right? It's I think people who need it will probably enjoy it. It probably works and Uber will continue to make money. So good job, Uber. We'll give you like you didn't make a self-parody. You're getting close. You could see the line where it was, but you stayed below it. So I'm gonna give you good marketing on this.

The Cloudcast (07:07.022)

That's right.

The Cloudcast (07:17.048)

There you go. There you go. All right. That more or less wraps up the cloud news, although there is, guess, one last thing. Everybody and their brother is now launching a secure base image service, just like Chain Guard. The Wiz launched one. There's another one that got launched, I think maybe as part of Google. I'm sure Red Hat at some point will launch one. You spend some time in the security. That just seems like a normal thing that should just happen. It doesn't feel like it needs to be a launch thing. It just seems to be like.

Yeah, please just give me give me an operating system that doesn't have a bunch of junk in it. I like the concept of it. It's it's interesting that everybody has jumped on board this. You know, again, it goes back to you know, you wonder, the chain guard have sold out before this, you know, is the whiz launched something new and exciting around this? I mean, I guess the

question is, does this change ultimately the operating system that any companies use? Or are you just sort of like

Do you question like why a SUSE or Red Hat hasn't been leading the charge in this because that's where you get your operating system anyways?

Brandon Whichard (08:17.997)

Well, I think that and also, mean, I think Docker came out with a version as well. And that's like, to me, like Docker sort of popularized this whole like, you know, image catalog. I mean, maybe existed before that as well. And so, you know, it's, I guess it's one of these things where it's, an obvious problem. It's an easy thing to ask money, you ask for money, right? It's, one of those things too. It's like, well, you could do it yourself, but everybody that's been involved in a build pipeline, it's like, well, you basically got to hire people just dedicated to like looking at the patches. So it seems like the perfect thing.

The Cloudcast (08:21.142)

Yeah, they had one too. Yeah.

The Cloudcast (08:26.988)

Yeah.

Brandon Whichard (08:46.561)

to outsource and know, it's really like Chain Guard's an interesting, we've had them on software to find talk and this idea is it's just, it's very simple and I get it and they've raised, Chain Guard has raised a ton of money. I think on this last round, which always tells me at least in this, I don't know if it's a series B or C, but like clearly they're having some success selling it. But I think to your point though, it's inviting all of the big people are making, you know, if you will,

The Cloudcast (09:00.258)

Yeah. Yeah.

Brandon Whichard (09:15.083)

competitive products here. So it does kind of feel like because it's an obvious problem and because so many people are doing this in big companies, it kind of does feel like, like, why are you going to, know, like, Chain Guard is a standalone company. It seems like either it's going to get bought or it's going to have to do something else, right? Because whiz, Docker, even Google, I Google's been doing this. They've had like a version of it, which I know it's always kind of perilous to say that because like, yeah, they'll announce it and kill it off. But I don't know. It's like, what do you see? You talk to customers all the time. Like when you,

When you, do they ask about these, this, you know, if you will, protection of images?

The Cloudcast (09:49.218)

I think it I think it comes up. I think it's one of these things where you you know, you kind of question like, is this a really unique new idea? Or is this just somebody being like, I'm so frustrated with this. Let's just go you know, it's the it's the equivalent of like, you know, for a while there was there are people who were like, you should dress like Steve Jobs, Steve Jobs dresses the same way every single day. He has no choices to make his entire closet is black shirts with and and you do just wonder if like there are people who are like, screw it, I'm tired of

I'm tired of getting these big bloated images. Let's just start from essentially nothing. Let's start from the most basic thing. And then, you know, if you want anything, you have to go through some process to get it. But I don't have to go chopping out 50 packages every single month. like, I do wonder if it's like, is there a lot more than just that? Right? This this like, you know, you live in one side of the spectrum for a long time, you get really frustrated, you're like, the best way to fix this is just go to completely the opposite side of the spectrum. And

And you sort of wonder, like, but at some point you're going to want the, you know, the Python library, you're going to want the other library. You're to want these six tools involved. Like at some point, don't, doesn't every company just get back to kind of some bloated thing like this? Or, you know, does this really take off?

Brandon Whichard (11:00.972)

I think the way I want it to work, I guess the world I want to live in is kind of the decentralized internet, it's like I just want the owner of this specific package to take ownership of like I'm the Python people or whatever, pick anything. Maybe your day job here, it's like I do Linux all day long, that's all I think about and I'm going to provide everyone here is the best hardened version of the Linux thing. You just come to me because I'm doing it, I'm making it, right? I don't want Chain Guard, if Chain Guard has to go find patches I haven't put in it,

The Cloudcast (11:13.644)

Right, right, right.

The Cloudcast (11:25.474)

Yeah, yeah, yeah.

Brandon Whichard (11:30.508)

I haven't done my job. So it's just sort of like everyone, if everyone is like, you know, it sounds like a family or something or like a group. It's like if everyone cleans up their own room, we'll have a clean house. You know what I mean? And it's like, that's what I want. And so to me, that seems like the reason people should be doing it. Now, I guess the problem is, like there are people like, you know, obviously, know, Red Hat and the Unix, I mean, the Linux vendors are probably incentivized to do it. Maybe there just isn't like, there isn't a Python.

you know, no one's taking ownership of it. So chain guards sort of saying we will. Now the other issue I do see with this is there is always a little bit of security theater here, right? Because the thing they're all talking about is like all the CVEs are gone, right? Basically all the potential

threats are gone. But one, as we know, not all CVEs, if I could say that, are created equal. So maybe one's like a small warning and it's okay, right? Because it causes these other problems to resolve, right? We see that all the time. And then of course,

It doesn't, this is the theater part, it's like, great, you protected me against what we know about, but it's like what we don't know about is usually the bigger problem. So there's a little bit of like, you know, it's like, this is good. I mean, it's like, yeah, you locked your door, but let's not pretend that you're like Fort Knox. There still can be security problems here.

The Cloudcast (12:34.892)

Yeah.

The Cloudcast (12:44.118)

Yeah, yeah, I feel like this is gonna fit into like a year now to two years from now I feel like this is gonna fit into the same category that like you guys have on your show and you've had for ten years Which is like why can't the system just be smart enough? know like you guys have a thing about you know Why can't the system be smart to just schedule things for people? I can't just look at everybody's schedule and find a time to do it feel like this is the same thing like Why can't instead of being like I got to have this really smart neckbeard Linux guy who figures all this stuff out like can't there just be an AI that looks at it and goes

these are the things that are the most commonly fixed and patched, this is the stuff that's on the CVE list, just figure it out, and just give me the base image that everybody wants so I don't have have a process. I feel like there's just gonna be a million things where we're like, yeah, can't just the AI, like, I don't know, and again, this is where we're gonna get into, well, that's not how AI works, or I'm not sure how you would actually do that in there, but there's just gonna be a million of like, the system should be smart enough after all these years to figure out what the thing is, just make the thing, right? Like stop.

you know, stop having to have an entire company with an extra subscription I have to buy to do the thing that's just like, well, you know, wouldn't the world just like to have like a secure OS? Okay, cool. Just put that thing out there. Yeah, whoever

Brandon Whichard (13:53.908)

just do it, right? Well, I know, like, you know, one of the things here we can talk about is, you know, in the AI section here is an anthropic CEO says 50 % of white collar jobs are gone in five years. And it's always like, okay, I mean, that seems maybe that's possible. And you're like, hypothetically, in your mind, you've listened to lot of Ben Thompson, and like, you listen about AI stuff, maybe even use it, you're like, I can see that I can see people like, doing research and some of these kind of like, entry level jobs, but like a good entry level tech job is like, okay, you got to

run the build of making sure of getting everything that tested as well as make sure it's all secure. And it's like, just what you're saying here, so like Chain Guard or all of these are good

examples. It's like, okay, so like if this is happening, this is just a computer thing. This isn't like you don't have to interact with the outside world. Like look at my Docker file, right? You see the Docker file that I'm using to run my software. Now look at it and tell me where are there any security vulnerabilities and go ahead and like,

pull in the necessary updates, right? So it's like, that's a pretty self-contained problem. And it's like, on one hand, I'm like, all these jobs are gonna be gone in five years. On the other hand, I'm like, no way would I trust an AI to do that today on its own. I would require someone to be like, you need to go through and actually check and see what's going on. So it's like, you there's always this dichotomy between it. And I don't know what your thoughts are, but I don't think any CISO today would be like, yeah, we just run lights out, just the AI. They just rebuild the images and they tell us it's secure. It's like,

That seems crazy, right? I would never do that today. But at the same time, I'm optimistic about AI, so I don't know where it leads me. Maybe I'm the one that's confused.

The Cloudcast (15:28.982)

No, think it's the classic thing. I could definitely see a situation, and again, this is going to be the other fun thing about AI is everybody who works in white collar is going to be like, I don't think my job's necessarily going to get replaced. But I could see that industry over there. I could see lawyers. I could see the junior lawyers getting replaced, or whatever it is. And I always feel like it's one of these things where, and I do feel like we'll just jump to the AI stuff, and let's just jump to this anthropic thing.

I feel like the anthropic guy must have a like weekly meeting where he's like, look, I told you guys that we're going to extend life by 25 years in the last big article I wrote, that didn't seem to catch. What's the next thing I can say that's going to get everybody all riled up? All right, what if we all lose our jobs? Okay, God, now, we're not going to live any longer. But now we're to we're going to work less. Like, I feel like he's the one that that gets the most and I feel like, you know, because they're like, you know, number two or three or four, wherever, wherever they are in the ranking of stuff.

That's kind of all this guy talked like that's all that ever catches with this guy. But I do, but to your point of like, I think we're very now deeply into this thing of people treat it very binary, right? Like there are so many articles that are now written by some smart engineer or somebody who's like, I'm a senior engineer. And they're like, I don't trust that the system would get it done, right? And you're like, okay, but.

How much would you trust it? Would you trust it 50 % or 30 % or whatever? And they kind of want to be like, I would need to trust it 100%. In fact, I'd have to trust it 110 % before I'd even consider it. And then you go, but you're constantly complaining that you're overworked and that you're slammed and that you can't get through your backlog. I feel like there's just going to be this constant going back and forth of like, well, OK, but what would you let the system do? What do you trust the system to do?

You know, and it's, I think we're, going to be in this interesting sort of quagmire of like, we don't really know how to measure it. You know, what's, you know, what you can, what you could give off, but, but the, the, you know, the headlines are all going to be like, I'm only going to write a headline. If it's going to be a hundred percent, Oh, 50 % of the people are gone. Okay, cool. I'll write that because those jobs are gone. They're not like, they're not like augmented they're gone. And, and I think it's just going to, it's going to frustrate people to no end. And I think, you know, we're going to see just like, you know, just like we're seeing

The Cloudcast (17:53.506)

you know, we've seen for two years, will be like, yep, all code's gonna be getting written by softwares and agents. And now there's just this slew of articles that are being written, which is like, yeah, we did some analysis of that. And really it only writes about 10, 15%. And I don't think it's really very good. And it took, you know, 16 tries to get that last pull request to be able to work. I think we're all realizing very quickly, like, essentially how can I filibuster this stuff? Because,

I don't know if it's gonna work or not. I don't know if I want it to work or not. I don't know how to measure if it's gonna work or not. So, let's just sort of live in this thing between like, if all you care about is 100 % or 0%, I'm gonna kind of muck up the middle. I don't know what the answer to that is, right?

Brandon Whichard (18:37.48)

Right. But I think the thing we can watch though, but I think you hit on it, but I kind of look at it like, I don't think we can really know the answers on this. And I think the Anthropic CEO is just like, he's smart, he's been around AI, so he's quotable. But he really, doesn't know anything more than, like he knows more about technology, doesn't necessarily, he's not any better at predictions than probably you or I or anyone listening to this. But I do think, I always just kind of like, okay, what can we watch? And I can't remember.

The Cloudcast (18:49.058)

Yeah.

Brandon Whichard (19:01.53)

if it's in this list or not, but there was a thing about like something to the effect of like, well, if it's writing all this code, where are all the open source contributions, right? Because that is the one ongoing thing you hear all the time about this open source project doesn't have enough people, they're too busy, they can't fix the bugs, they can't do the new features. And it's like, if there's any place where there's somebody, there's already a group of people trying to do something, right? If you could just be like software agent, open source agent, go.

The Cloudcast (19:08.28)

Yeah. Yeah. Yeah.

Brandon Whichard (19:30.119)

Maybe even make it simple. Fix all these outstanding bugs. That's probably the most time consuming, boring part of open source is fixing bugs that are just annoying. And it's like, okay, why doesn't every open source project have an agent just doing it? Because it seems like it'd be very cheap and it would make the software a lot better. So that's something to just watch. like, okay, when does this actually happen? It's kind of like self-driving cars.

You know, be skeptical if you want. But like I drive around Austin, Texas now and I see them. I'm like, it is a thing. It is not taken over the world. It hasn't revolutionized everything to the point like Uber's out here still launching a bus service. So it hasn't changed everything, but you can at least see it. So that's the same thing I'm interested. Like where's the open source project that's just like, it's productivity has gone up, you know, tenfold because they got software agents just working all the time, doing all the stuff that we need and they have a great project. Like I haven't seen that yet.

But we should watch for it.

The Cloudcast (20:26.766)

Yeah, it feels like it would be, this would be really interesting, again, because we love a behind the scenes documentary. We should ask Chris Anisek, know, CTO over at the CNCF, be like, how far away are you guys? Because there's always the complaint of like, nobody's paying the contributors or the maintainers, and there's 9,000 projects in the CNCF. Wouldn't they be the perfect place to be like, hey, as part of Kubernetes,

you know, two dot whatever, 100, wherever we're at right now, be like, we are gonna implement an agent-based maintainer and we're gonna see where that goes. I mean, there's 10 plus years of code. can also put summarization of all the project meetings together. can create a gem or a specific GPT around it. That feels like it would be the perfect thing because it's like, well, what do you have to lose?

Right? You're probably going also have a human maintainer along with it. But that feels like it would be one of the most interesting behind the scenes documentary because on one hand, you're like, I'm trying to relieve this pressure we have that there's tons of open source and there's just not enough people to maintain it and all this stuff. And by the way, nobody's signing up. No billionaire is signing up to be like, hey, here's a bunch of money for those folks. But at the same time, what would be the message they're giving out to the open source community of like,

Yeah, we're not, know, like it was all about people and community and contributions. And I feel like that would be an interesting sort of dichotomy.

Brandon Whichard (21:58.054)

No, I think that would be good, maybe that's a little too political. like just people with, there's like very small open source project I use and like a little personal hobby project. It has like one issue. It has this one compatibility thing and it's just like, it's just two people, they're going by.

just watching the issue. Of course, I'm not doing anything. I'm like, I guess I could try to help, but I'm just like, I wish they'd fix this. And it's just like, so I'm just like, you know, I wish I could just be like, I would probably, if it was easiest to be like, if I could pay, I'd be like, here, okay, here, pay.

The Clouddcast (22:12.706)

Yeah.

Brandon Whichard (22:24.133)

Here's, I don't know, here's the \$20 for, I'll pay the agent fee for a month. Have the agent go off and like do it, fix it. And I love to do that, right? Because I just be like, okay, agent, go do it. And I guess it would only, hopefully it would only take like, I don't know, hours. But like, so again, this is just back to like, I always like to just keep these ideas in my head. It's like, okay, everything in the world is gonna change. We're gonna have 20 % unemployment. There are gonna be no jobs. And then at the same time, I'm like, okay, when are we gonna see this open source software? When are people gonna, when can I, like you and I.

When will we not have to like exchange emails or messages to schedule a meeting? It'll just look at our calendars and be like, this is kind of when they do it, this is kind of what I've seen before, right? Like don't do something stupid. We're not recording this at like 12 a.m. at night. It's like, intelligent, right? And so, okay, when I start to see those things, then you can start to feel it. Otherwise, it's just like to your point, it's maybe as they say in investing, people just talking their book. Maybe it just helps in thropic to just say, it's like, well, in five years, everything's gonna be different. And if you don't invest in us, then you've missed out.

So from that respect, I get it, but it's just like, I don't know, we have to root ourselves somewhat in reality to be like, what do we actually see?

The Clouddcast (23:27.992)

Yeah, no, think you've hit on a really important thing, which is I don't think we have any idea how to, like if somebody said, hey Brandon, how's AI doing? And you were like, okay, if somebody asked me like how your favorite sports team was doing, you would go like, well, there's a bunch of specific data that I can point to that gives you a sense like how many games that they won or lost, how many players are injured, like are they ahead of, whatever it is. I don't feel like there's any.

common metrics that we point to and go, AI is doing well or not, right? Because we don't really get revenue numbers. When it was cloud, it was like, what do the AWS revenue numbers look like? OK, I don't know if that's good or bad, but they grew or whatever. And then when there was a second one, you were like, OK, compared to Google, they are whatever. Compared to Microsoft, they are whatever.

But you could measure stuff. You could be like, OK, there's been 43 cuts for pricing for S3. So that gives us a sense of, is this coming down? How many customers spoke at the event? I don't feel like we have a sense of what that is, other than people being like, did you look out at the

hugging face model repository thing for this weird? you're like, OK, I mean, it? But just the fact that some model is fast or it's at the top of the leaderboard.

doesn't give me any sense of where is AI right now. And I feel like we need some sort of baseline, because people are like, I'm planning to spend a lot of money on this stuff. And I don't really know what success looks like. I don't know what best practice looks like. I don't know if the industry is completely on fire, or it's totally in the green, because I can look at these three or four metrics.

I don't know, I feel like there's an opportunity for somebody to be, maybe that's us, maybe we should just come up with those things.

Brandon Whichard (25:15.972)

you're hitting on like I think you're doing the right thing you're doing sort of the business outcomes like what are the objective metrics because I think what we do have go ahead

The Cloudcast (25:20.364)

Right. mean, if I were to just say like, yeah, I was just gonna say like, if people want to be like, hey, you know, is there a lot of interest in AI would be like, there's a lot of money in AI. But I don't know that that's, you know, like, I can point to that. And I can show you every headline that comes out and says, you know, somebody put \$10 billion into it. But beyond that, I'm like, I don't know what that means. Right.

Brandon Whichard (25:39.781)

Well, think so I think you're right. I think you're getting at the what are the objective business results? That's good. I mean, that's sort of like the classic Brian Gracely, like show me the money. And I like that question. But I think the best you can do is sort of the subjective side. It's sort of like, like, you know, what everyone listening to this, many of you listening have had this moment of like, like you did something with AI and it was impressive. Like it did help you find a bug or it did rewrite an email for you or it did give you an idea like or or it taught you something. Right. So like it's very subjective. And then there's sort of just like

Well, OpenAI, we have no idea if they're gonna make money, but we know hundreds of millions of people are using it. So hundreds of millions of people like ourselves are having this experience. They're like, and everybody's thing is different. It could just be as simple as like, it helped me make a better recipe for chicken, or it taught me how to fix this problem, or it rewrote something. And it's like, so we just kind of have these, I don't know, these subjective good experiences, but to your point, it's like collectively, is it?

Like does that result in like someone making a lot of money? mean, you Google obviously with AI search is maybe the ones that are like out there the most trying to do it. But it's a huge open question. I mean, I think this is like the defining question for the next five years.

The Cloudcast (26:45.686)

Right. Right.

The Cloudcast (26:52.046)

Yeah, yeah, no, I think it's interesting. What was I gonna say? Anyways, we'll go through some things. Let's hit on a few of these that I feel like we need to make normal things. Nvidia announced their earnings. They hadn't announced them as of last month. They're up 69%. They're making a ton of money. Jensen is both very happy, but he is also because apparently, again, we're recording this on May 30th. You may be hearing this an hour from when we record it or six days from now.

tariffs are going to prevent chips from being sold into China, which he's saying is like, he's missing out on \$50 billion worth of business, which I don't doubt maybe the numbers are in it. So I feel like Nvidia is, it was interesting, like a year ago, we were like, man,

Nvidia's, you know, we're wondering like when the bubble pops, we're wondering when, you know, these things are going to slow down. Now, I don't think it feels so much like that we're wondering like, is the next quarter when the bubble pops, we're like, macro, you know, geopolitical things are now potentially their biggest problem. And, you know, this is one of these things that's like, this is not a math problem. This is a

You know, mean they're literally like writing articles now that are like Jensen is having to go to Mar-a-Lago to you know kiss Trump's butt and you're like God how big of a Brinks truck does he have to roll in there to get him to you know to allow this to happen? So I I do feel like Nvidia now has something that they can't get around like Jensen can't overhype it to get around this thing But they still are killing it and you know as we see, you know more and more things whether it's agents or whatever it is

People are like, yeah, video's not going away. Their stock is back up again, 6%.

Brandon Whichard (28:33.551)

It's funny, if you trace this thing from the beginning, it all started with like, well, they just wanted better graphics on a Sun, I think a Sun micro workstation. And then they're like, well, really wanted to make first person shooter games work a little bit faster. And you fast forward all the way to this point, and now it's literally like one of the world's largest companies involved in geopolitics. And it's literally a negotiating between the two world superpowers. And it's like, yeah, like I don't even know what to say. You're like, I mean, like these are problems like only a few companies.

The Cloudcast (28:38.431)

Right, right, right.

Brandon Whichard (29:03.178)

ever in the world even have. it's like, I mean, it's like you're the winner. Like, I don't know how much like, it's like how much dominate, world domination do you win? It's like you're at the top. I

guess you can go higher, but it's like, I don't know. There's nothing left to like really achieve. Like from a business level, it's like you're number one. You're in the hall of fame. You know, I don't know what else to tell you. Great.

The Cloudcast (29:06.028)

Right.

The Cloudcast (29:24.078)

Yeah, I don't I don't and again, I feel like I feel like we're talking about their numbers the way we did with with Amazon. We're like, yeah, they went way up and, you know, I mean, shit, they're they're a \$3 trillion company now. Up 70 % after I mean, they're not up, you know, 70 % from \$3 trillion. But I mean, earnings are up, you know, basically 70 % from you know, quarter over quarter year over year. Awesome. Good job. You know,

Brandon Whichard (29:49.1)

Call us next time. We'll buy the stock before you do all this. If only we could see the future.

The Cloudcast (29:53.55)

I feel like there's a couple of other big chunks in here for AI that we should cover. One of them is, and again, going back to one of your favorite topics, everybody now has a, either...

And I guess maybe there's some nuance that we should think about here. But everybody either has a coding assistant or a asynchronous AI coding agent. So Mistral announced one, Google announced one. Mistral's one is called DevStraw. Google's is, in typical Google sense, not called the Google code assistant. It's called Jules. Anthropic extended out their API to help with this, make AI agents.

Brandon Whichard (30:24.086)

Yeah.

The Cloudcast (30:32.974)

Help me again. Maybe I'm going to ask you this every month. Where is all the money for these things going? do we need to look at this as if you call it an asynchronous agent that happens to write software that's different than a copilot, than windsurf or cursor? Or did these guys all just leapfrog cursor? I'm trying to get my bearings around. Where does an agent stop? Where does the coding assistant start? If there's so much money going into these agents to help you write code,

Brandon Whichard (30:56.47)

Yeah.

The Cloudcast (31:02.072)

But on the other side, we're like, well, but the code's not good enough to go into open source. How do I interpret this? How do I read this? Are they any good? Like you said, you think they're

great. so I'm trying to figure out, individually, are these things really good? But when they start to bubble up to being like, because you don't really necessarily use it to protect your job or save your job, but I feel like the people that do are like, this thing's not that good. But then there's billions of dollars pouring into this. Everybody's building one.

I feel like my head's a little bit in a blender as to, you know, how do I interpret this stuff?

Brandon Whichard (31:34.945)

Yeah, I think we can kind of unwind the whole thing a little bit there. I think today to kind of dive into what you said, like people say it's not good. I think what people are saying there is like the idea that you can let it, if you will, an agent in a completely autonomous way, just build and do stuff. I would say that is not good enough, right? That is not enough. Now everybody, I would say everyone that's writing code professionally today is using a coding assistant. Like it is the spell check. It is, you know, whatever you want it, the spell grammar check that everyone uses.

There, you, I don't know, whoever the world number one programmer is today, developer, I don't know who that person is. Whoever that person is, even that person benefits quite a bit by having, you it is, it's like pair programming. It's just like you have someone riding shotgun with you all along, right, that has read the entire internet, knows everything about your programming language, and you can always ask questions. So when people say it's not good enough, I think the autonomous part is true, but I think all of them, all of them have it in the,

the, if you will, the side pane and they're asking questions and they're letting it make edits and, you know, it's like all these things, like things that, you know, think about all the templating that is in code. It's like, how many times are you gonna write a for loop? How many times, like at some point you just let the machine take over, right? And you're just kind of watching and it's so much faster and generating tests. like, I think that part is, and again, I think it is, unless you do it, it probably sounds like noise, right? It's sort of like, until you touch it and you're like, oh wow.

The Cloudcast (32:47.224)

Yeah.

Brandon Whichard (33:01.608)

Like this thing, I was able to do something that would have taken me like a couple days to do. I could do it in a couple hours, right? Where it's like, because I'm just watching it it's doing it. And so that part I think is a hundred percent. And then you can kind of mention Cursor and Windsurf, that's the other one. It's, you know, they are, I mean, to be real, just to kind of in the details a little bit, like they just sit on top of the models and the agents. So they have just, all they are, and I don't know, I say this all, but they're worth, I think 10 billion and three billion respectively.

The Cloudcast (33:24.099)

Right.

Brandon Whichard (33:31.232)

They have just taken this and be like, hey, you know what we should do? We should just put VS code. We should integrate with VS code and we should have the AI agent that we worked with super integrated so that I can just tell it to do stuff, right? This is the thing that's missing in the writing world. Like in the coding world, you just tell it and it'd be like, oh, it creates the files for you. It makes all the edits. You can go back and it knows what's going on. That's what you want. I want one writing. Like right now it's a lot of cut and paste, right? Like write this, edit this. Maybe you can use like a canvas.

in like an open AI, but you're not in your core app, right? It's like, I got a canvas, I got a word. So it's like, so there really is like, I think the place that where people can really see productivity gains. And I would call, you know, email me if you are. The only people that are not using it on a developer sense are people that are just like, I like to code. It's like painting. I paint because I like to paint and I do, I enjoy the physical moments. I'm not using any specific tool. But if you're doing it professionally, trying to get done,

everyone's using it. So I think all of these CEOs are seeing that and they're like tremendous productivity gains. But to your point, I think it's at the individual level. And this may be this I mean, no one would like to hear this. It's like, well, maybe AI is just good at letting people get their work done faster, so they can go home and play with their kids, right? Versus like letting it, you know, if you will, or doing more in that same time period, but like, versus like letting the AI agent kind of just do everything on itself. Now people want the ladder, and I think we'll see if it happens, but

Certainly, everyone's seeing a lot of value in doing it. And it is to the point of like, I bet you most people that code for a living, they're, and I would assume most businesses just do it, but if their business doesn't pay for it, you would just pay for it yourself. You'd be like for \$20 a month. I'm saving like 10, 20 hours a week, probably. So I think that part is good. I'm very bullish on that part. But again, you gotta do it to actually experience it. Otherwise you're just like, I don't get it.

Right, and it's like, don't, you know, so, but that's the use case. Hopefully everyone will eventually ask the AI to do something they think is hard. And then they're like, I see. I see why these people are optimistic.

The Cloudcast (35:33.283)

Yeah.

No, think it's right. think where I get myself hung up with it is going. think the way to read this is like, is a, I think everything in Silicon Valley has now convinced themselves that every segment, whether it's developer assistance or whatever it is, is winner take all. And so they're all just like, well, I'm gonna pour a bunch of money in it. I have to be in the beginning of every one of these new things. And I think a year from now we'll look at it and we'll be like, hey, remember when there was like seven or eight different ones and now they've all coalesced around

whichever one won. Which one is the VS code of this? OK, cool. There's that one. And then there's a secondary one that people still kind of dabble with and whatever. They're right. Right. Right. That's right.

Brandon Whichard (36:04.359)

Almost certainly, yes.

Brandon Whichard (36:12.179)

And then there's the one at Amazon they launched that they that they're going to forget about and cancel in five years. And it's going to be on that GitHub site. They're like, doesn't they they gave up.

The Cloudcast (36:19.234)

That's right, Google will kill their software or whatever. I think that was one of the big things in AI. Again, there's a million things listed. You can go take a look at them in the show notes. The other one I think we need to do, and again, I think this should just become sort of a running bit for every quarter we do. So OpenAI, obviously on a big buying spree, they bought Windsurf for \$3 billion. They now just bought Johnny Ive, famous for having

And again, this is where it gets interesting. Johnny Ive was essentially the hardware guy for all the Apple stuff when Apple became really popular. They sort of compared him to the yin to Steve Jobs' yang in terms of that sort of stuff. I loved him because he liked to pronounce things like aluminium instead of aluminum. So I'm glad to have him back in my life for learning English pronunciations.

But they bought his company, which was called IO, for \$6.5 billion. Nobody's exactly sure what that actually makes. Apparently, they're going to make AI things. And apparently, he did what everybody does who was successful at something previous. He had to completely bash it. So he was like, miserable that the iPhone is out there. It's destroying the world.

And I would like to build the replacement thing for that. So I think the thing we need to do on our monthly basis is figure out what is open AI going to build? Not necessarily from the I.O. stuff, but they are now, they hired a person who is sort of a CEO with a bunch of experience in ads. They just basically hired a CEO who's really famous for building hardware. They want to be in developer coding. Is there any?

What do we think they're going to do? And I think we don't need to have any sort of reality in what we think they're going to do, but they've got a gigantic valuation. What are they going to build? What beyond chat GPT are they going to build?

Brandon Whichard (38:08.414)

Well, I'm gonna do a couple of things here. One, I'm gonna plug my other podcast, Software Defined Talk, and the episode came out here Friday, May 30th. It's labeled McGuffin, right, where we go into a long discussion about that. So much that we actually, Brian, there's actually,

I know you haven't had a chance to listen, there's actually a request for you to give us your take on one of your Sunday shows as well. So there's a little homework for you. So we probably don't have a lot, I won't go two hours on this, I think we could, but I think ultimately, you know,

The Cloudcast (38:29.026)

no.

Okay.

Brandon Whichard (38:37.586)

for those that are not in the know, MacGuffin is just like a, it's a term used in cinema, right, where it's like, where it's like everyone's chasing the thing, but you just never name it, right, you just like, it could be whatever, it could be the jewels, it could be the secret plans or whatever, but like it doesn't really matter because we're there to see the movie and the chase and the story, like what they're actually going for, who cares, right, you know, there's lots of examples of it in movies and I think this is where I kind of come down on this entire thing with OpenAI, it's like they,

and to make that whole episode a lot shorter, think it's sort of like Sam Altman's like, you know, we're worth \$100 billion. If we just tell everyone Johnny Ives with us, we're probably worth at least 106, we're probably worth \$110 billion because we just invite the comparisons of like, hey, where are the next Apple? And Apple's worth, I don't know, three, \$4 trillion today. So I think one, you just invite that. And then two, the brilliance are the, and this is I think where Kote specifically asks you, we like to your take, it's sort of like,

The Cloudcast (39:26.296)

Right.

Brandon Whichard (39:34.301)

Another way to call a MacGuffin is just vaporware, right? But when does it make sense to do it? And I think Altman is sort of like, in two years, they've said they're gonna have something and they've told us it's not a watch, it's not glasses, it's not an iPhone, right? It's a MacGuffin. Because our brain will start to just invent things, like could be a flying car. I don't even know, what's left, right? But you say that it's gonna be here in two years and so what are we doing? We're doing it right now, we're falling into the trap.

The Cloudcast (39:37.39)

Sure.

The Cloudcast (39:56.792)

Right.

Brandon Whichard (40:02.279)

We're speculating on what this thing could be, right? So it gives OpenAI two more years to just be like, we got Johnny Ive in the lab. We're building a MacGuffin. We're gonna be the next Apple. you should give me more money. you don't wanna give me more money? This other person is gonna give me the money and you're gonna miss out. You're gonna write the book about how you had the chance to invest and you didn't. Because at this point, and then my whole final point is like, two years in this AI life cycle, the life cycle,

infinite amount of time. It's likely the thing that they actually build will have no bearings on the success because like something will have happened, you know, in two years. Like, I don't know what, like a new business model, search takes over a million things. So it's just sort of like to me, it's just a great way to raise more money for two years to give people infinite, let the mind just like, let people just envision what it's gonna be. Flying cars, nuclear, cold fusion, whatever, right? And then, you know, and you just see what happens and then you have two years to be like,

The Cloudcast (40:37.708)

Yeah, yeah, yeah.

The Cloudcast (40:53.261)

here.

Brandon Whichard (41:00.336)

we could hit it big or AI could just like, if you know the hype could all like go away and we just think it was just another hype cycle, but nothing to lose if you're open AI. that to me is sort of like what's going on. And then of course, final point here is they made the most ridiculous 10 minute video introducing this of all time, right? The thing that like clearly is like a self parody, right? It's like, I mean, it really is. but you know, when you're this rich and you can do what you want, like I guess you can make a 10 minute video. So if you haven't watched the video,

The Cloudcast (41:17.122)

Yeah, yeah.

Brandon Whichard (41:29.328)

Like people are like, really are underestimating how crazy it is. And you only have to watch a few minutes. You don't have to watch the full 10. But you need to watch a few minutes to get a sense of how crazy that thing is.

The Cloudcast (41:35.01)

Right.

Yeah, it is. I'm trying to think of this. I mean, like I've heard it described as sort of like, it's like a very over the top, like New York Times, like wedding announcement. I've heard you know, it's like an episode of the Kardashians. It's, it is a very weird. Yeah, it's a weird Johnny and Sam sort of. Yeah, it's yeah.

Brandon Whichard (41:56.892)

Pick your favorite Oscar winning director, and I mean this, paired with like the greatest cinematographer of our age, and be like, you know what you guys are gonna make? You're gonna make a 10 minute video of us talking, and that's what you got. To the point of like, you're like, I was like, what was the budget for this? I mean, this is like a small, like it's like a, maybe it's a small film, like it's almost like a short film. You're like, the way it's shot and the sound, so it's crazy. I mean, to the point of like, that's the part where you're like, it's possible these people have lost all touch for reality.

The Cloudcast (42:00.8)

Yeah. yeah.

Brandon Whichard (42:26.46)

The fact that they made the video and watched the video and they're like, that's what we need. That is what we need to do, right? It's crazy.

The Cloudcast (42:31.417)

Yeah. Yeah. Yeah. Now it is good. I do I accept Kote's challenge. I'll have to go listen to your show. Again, yours just came out today. I haven't had a chance to listen to it yet. But I will. I think I will accept this challenge off to figure out what it is. But I do think on this show, we should, you know, just like just like we have the the non Hall of Fame for Pat Gelsinger and others, I do think we need to come up with some absurdity possibilities. Because like you said, none of will be wrong. None of them can be, you know, any worse than like

Apple believing that millions and millions of wanted to wear one of those gigantic things on their head. There's lots of possibilities with this thing. No, I like it. I like the idea that it could go anywhere. There are no wrong answers. And part of it is, and I've learned a new word, I didn't know MacGuffin. I saw you put that in the show notes and I thought, this is like a MacGyver kind of, MacGroober kind of thing. But it's something new now, so it's good.

All right, well, let's wrap it up there. I don't think we can get any more absurd or any more off the charts than Johnny and Sam and the ridiculous amounts of money that they're spending. And who knows? mean, if they come up with something awesome, that would be great. Moves our industry forward. We don't know what it is. It's hard to project that. But we couldn't have projected the iPhone either, necessarily, although maybe we could have. But all right, man, well, thank you very much, as always, for being on. Where can folks find software to find talk? If it's their first time ever hearing you on the show, what's the best way to get plugged in with that community?

Brandon Whichard (43:54.181)

Just right now, just searching your podcast player for software to find talk and listen to the episode labeled MacGuffin. I think you'll like it and you'll see, you'll hear about Brian's homework

and see, know, maybe in a few days or weeks, he gives us another episode on vaporware. I think it'll be fun. I look forward to it.

The Cloudcast (44:01.325)

Yeah, there you go.

The Cloudcast (44:10.296)

That's right. And join the slack if you want to kind of keep up with what we do week to week where all these things come from. So all right, Brandon, thank you very much. Thank you for helping out as always this week. And Aaron had a last minute thing. Hopefully we'll get him back next week. But folks, thank you all for listening. Thanks for telling a friend. And we will talk to you next week.