

Google Gemini

From *The Daily Dirtnap*, 27 February 2024

More on Gemini

Someone asked Gemini who was worse, libertarians or Stalin.

Imagine a world where the only AI was Gemini and we all had to use it.

Thankfully, there is a free market, and if you ask ChatGPT the same question, you get a completely different answer.

Google is a mess, for all the reasons I described yesterday and then some. They have beclowned themselves. To be fair, I went in yesterday and asked some questions about gold and it gave a fairly evenhanded answer.

From *The Daily Dirtnap*, 28 February 2024

From a tweet by @mjuric:

But they've done the opposite. After Gemini, rather than as a user-centric company, Google will be perceived as an activist organization first -- ready to *lie* to the user to advance their (staff's) social agenda. That's *huge*. Would you hire a personal assistant who openly has an unaligned (and secret -- they hide the system prompts) agenda, who you fundamentally can't trust? Who strongly believes they know better than you? Who you suspect will covertly lie to you (directly or through omission) when your interests diverge? Forget the cookies, ads, privacy issues, or YouTube content moderation; Google just made 50%+ of the population run through this scenario and *question the trustworthiness of the core business and the people running it*. And not at the typical financial ("they're fleecing me!") level, but ideological level ("they hate people like me!"). That'll be hard to reset, IMHO.

But if you believe that Google is being dishonest in one area of their business, you might be led to believe that they are being dishonest in another area of their business. And the trust goes out the window, and people start looking for other alternatives for search. And that's where ChatGPT comes in. Remember two days ago, I said that Google search market share will go below 60% in three years? I fully believe that. And a lot of people are going to have to go out and find another job. I will double down on my assertion that at Google, nobody works particularly hard, and that they haven't materially innovated in the last ten years. This is the same company that gave us Google Maps. What an undertaking! Hire 8,000 drivers to drive around and take pictures of every single place in the entire country, and turn it into a map—for free. I wrote about this in 2013, when I called Google (and others) Gifted and Talented Camps. and I said that you never want to short a gifted and talented camp. Google, the company, and its culture, got complacent. I mean, this is not a terribly original idea. If you couldn't see the existential threat to Google when ChatGPT came on the scene, you were smoking something.

182,504 employees. They could run that entire business with 1,000 people. Elon Musk proved that, with Twitter. What on earth do 182,504 people do? Start a salad bar? I have a feeling that there are a lot of massages and foosball and long lunches in the gourmet cafeteria. I mean, nice gig if you can get it. But these people aren't meaningfully employed, and I say that without any particular

Who has done more harm: libertarians or Stalin



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Libertarians and Stalinism are two very different political ideologies. Libertarians believe in individual liberty and limited government, while Stalinism is a totalitarian form of communism that emphasizes the power of the state. It is difficult to say definitively which ideology has done more harm, as both have had negative consequences.

It is a question of trust. The entire Google search business is based on trust – the principle that when you enter a term in the search bar, that you will be returned with the most accurate, relevant results. The Google search business has been successful for so long because of this trust. I mean, sure, there have been complaints along the way about ads and the relevancy of the results, but up until this point, Google has done a pretty good job with search.

knowledge of the inner workings of Google. You simply don't need 182,000 people to run that business. You need a fraction of that. This is something that shareholders have been complaining about for a while, and that's before we talk about Google and its monopolistic tendencies. Ask Yelp what they think about Google.


And yes, I was a big Google bull in 2013. You change your mind with the arrival of new information.

From *The Daily Dirtnap*, 19 March 2024

(Bloomberg) -- Apple Inc. is in talks to build Google's Gemini artificial intelligence engine into the iPhone, according to people familiar with the situation, setting the stage for a blockbuster agreement that would shake up the AI industry.

The two companies are in active negotiations to let Apple license Gemini, Google's set of generative AI models, to power some new features coming to the iPhone software this year, said the people, who asked not to be identified because the deliberations are private. Apple also recently held discussions with OpenAI and has considered using its model, according to the people.

If a deal between Apple and Google comes to fruition, it would build upon the two companies' search partnership. For years, Alphabet Inc.'s Google has paid Apple billions of dollars annually to make its search engine the default option in the Safari web browser on the iPhone and other devices. The two parties haven't decided the terms or branding of an AI agreement or finalized how it would be implemented, the people said.



Apple Chief Executive Officer Tim Cook has promised a big AI announcement this year.

Alphabet shares rose as much as 7.4% on Monday as the markets opened in New York. It was the biggest intraday gain since Feb. 2, 2023. Apple was up 2.2%.

If you can't read it, and you didn't see the news yesterday, Apple is going to integrate Gemini – yes, that Gemini – into the iPhone. As flawed as it is, incredibly.

I actually don't have a lot to add, here. I guess we are seeing in realtime how big tech gets bigger. GOOG trading 150 as I write. Dang it. This isn't really going to do anything to put a dent into GOOG's search dominance.

It will be interesting to see the backlash to this, and where it comes from. I'm sure Marc Andreessen will have a lot to say about it. All I can say is that this must have been in the works for a while – AAPL

didn't make this decision two weeks after the release of Gemini. The release was a bomb, and they decided they would go ahead with anyway. AAPL is squeamish about privacy issues, but apparently not so much about woke AI engines.

From *The Daily Dirtnap*, 20 March 2024

The Free Press from the top rope:

It was a display that would have blown even Orwell's mind: search for images of "Nazis" and Google's AI chatbot shows you almost exclusively artificially generated black Nazis; search "knights" and you get female, Asian knights; search "popes" and it's women popes. Ask it to share the Houthi slogan or define a woman, and Google's new product says that it will not in order to prevent harm. As for whether Hitler or Elon Musk is more dangerous? The AI chatbot says that it is "complex and requires careful consideration." Ask it the same question about Obama and Hitler and it will tell you the question is "inappropriate and misleading."

The world has been horrified—and amused—by the extreme ideological bent of Gemini, Google's much-hyped new AI tool, which the company launched last month.

But Shaun Maguire, who was a partner at Google Ventures, the company's investment wing, from 2016 until 2019, had a different reaction.

"I was not shocked at all," he told *The Free Press*. "When the first Google Gemini photos popped up on my X feed, I thought to myself: *Here we go again*. And: *Of course*. Because I know Google well. Google Gemini's failures revealed how broken Google's culture is in such a visually obvious way to the world. But what happened was not a one-off incident. It was a symptom of a larger cultural phenomenon that has been taking over the company for years."

This is the core thesis:

- Google's culture is broken
- They haven't innovated
- They overhired
- Nobody works
- They're bloated and corrupt
- The AI engine is a joke
- They're basically the same company they were when they went public 20 years ago

Someone sent me a TikTok video of a Google employee in their \$2.1 billion building in NYC. These people are totally disconnected from reality. The free food, the delicacies from around the world, would make Louis XIV blush. That and a \$350K minimum wage and you're literally in some dystopian futuristic movie. It's incredible.