

Value the goose, crack every egg

Why a mechanism that asks to be trusted rather than examined is not a golden goose. It is an unaudited one.

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Eggs do not lay eggs

On stage in Tokyo, Masayoshi Son stood in front of a goose laying golden eggs from a factory in its stomach. The slides read "eggs do not lay eggs" and "what matters is not the eggs, it is the goose itself". Value the mechanism, he told investors. Stop being skeptical.

It is a good metaphor for an investor. Son's argument is that the market makes a mistake by pricing only the visible eggs and ignoring the thing that produces them. Judge the productive mechanism, not each unit of output it has already laid. On the investment point, he may well be right.

The framing has a second life the moment you carry it across into the software these geese are now meant to lay. Because "value the goose, not the eggs" is the exact inversion of how you should treat a mechanism you cannot see inside.

Two things the metaphor names

The eggs are the output you can inspect. The goose is the process that produced it. Son's pitch to the market is the same pitch made for every AI system that writes and ships code: trust the mechanism, it is smarter than you, stop checking each egg.

FIGURE 1 / WHAT THE METAPHOR MAPS TO

The egg · the output	The goose · the mechanism
The artefact you can hold. The pull request, the config change, the generated function. Inspectable. Testable. The thing that actually ships and runs.	The process that laid it. The model, the agent, the capability. Impressive, opaque, and asking to be valued on the strength of what it might produce next.

A mechanism that asks for faith

Son wants investors to stop being skeptical of the goose. That is a reasonable thing to ask of people pricing a stock. It is the wrong thing to ask of anyone shipping what the mechanism produces.

The whole discipline of shipping safe software runs the other way. You do not value the goose on faith. You check whether the thing it laid is sound. You keep a competent check at the point where the egg leaves the factory, and you make sure that check can halt the line.

THE PATTERN TO WATCH

Every pitch for an autonomous system carries Son's line in disguise. The author is more capable than you, so trust it and stop inspecting the output. That is capability being offered as a substitute for a check. It is not one. A more capable author with no competent check is a faster route to the same failure, not a safer one.

This is the same reframe that runs under the model-choice argument. Capability is the most measured variable in AI. It is also the least decisive. Knight Capital did not lose 440 million dollars because the code was written by something insufficiently clever. It lost it because nothing at the point of action could stop what was already running.

Make the goose ten times more productive and that gap does not close. The egg arrives faster. The question of who cracks it before it is used has not been answered. It has only become more urgent.

"The more productive the goose, the more the check at the point of action matters, not less."

Crack every egg

Trusting the goose and checking the egg are not in tension. You can believe the mechanism is remarkable and still refuse to ship what it lays unexamined. Those are two separate trust questions, and the mechanism's brilliance answers only one of them.

TWO QUESTIONS, NOT ONE

Is the mechanism sound? That is a question about the goose. Is this specific output sound? That is a question about the egg. A capable goose raises confidence on the first and tells you nothing about the second. Every egg still has to be cracked on its own.

FOUR THINGS TO HOLD ONTO

- 01 Value the mechanism if you like. Never let that value stand in for inspecting the output.
- 02 Keep a competent check at the point where the egg leaves the factory, not three steps downstream.
- 03 The check earns its place only if it can halt the line. A check that cannot say no is decoration.
- 04 A more productive goose makes the check more important, never less. Scale the checking with the laying.

Son told investors to stop being skeptical of the mechanism. Anyone shipping what the mechanism produces should do the opposite. Eggs do not lay eggs. Fine. But you still crack every one before you use it.