The Information TITV Interview with Mark Zuckerberg

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Interviewer: Jessica Lessin, CEO and Editor-in-Chief, The Information

Subject: Inside Zuckerberg's AI Playbook

Transcript

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[Applause]

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Akos Masricha: Good morning. Welcome to the information's TI TV. My name is Akos Masricha. There is a lot happening in tech news right now, but we want to get right to a great conversation that our CEO and editor-in-chief Jessica Lesson had with Meta CEO Mark Zuckerberg yesterday. They talked all about Meta's AI strategy. We want to play that for you. Let's take a listen.

[0:54]

Jessica Lessin: Thank you, Akos. And Mark, thanks for joining TITV. We're happy to have you.

Mark Zuckerberg: Happy to be here.

[1:00]

Jessica Lessin: Already this morning, news that you've spent even more money

with your big announcement about your new supercomputers. We'll get to that. But to start, you took a huge stake in scale AI. You have been on a blitz of AI hiring. Why? And why now?

[1:17]

Mark Zuckerberg: Yeah, it's been busy. Um, you know, I think the the most exciting thing this year is that we're starting to see early glimpses of self-improvement with the models, which means that developing super intelligence is now in sight. and and we just want to make sure that we really strengthen the effort as much as possible to to go for it. Our mission with the lab is to deliver personal super intelligence to everyone in the world. Um so that way you know we can put that power in in every individual's hand. Um and I'm really excited about it. It's it's a different thing than what the other labs are doing. Uh and you know my view is that this is going to be something that is the most important technology in our lives. it's going to underpin how we develop um everything at at the company and um and it's going to affect society very widely. So we just want to make sure that we get the best folks to work on this from entrepreneurs to researchers to engineers working on the data and infrastructure and then of course we want to back it up with just an absolutely massive amount of compute which um which we can support because we have a very strong business model that throws off a lot of capital.

[2:27]

Jessica Lessin: Did you feel like Llama was behind? Um, I think the field is accelerating. You know, we keep on uh like having goals for where we want to be and then the field keeps on moving faster than than we expect. So, you know, look, I mean, I I'm I'm not a person who's ever particularly happy with with where we are. I always want to do better. But I think the the the thing here that

I'm very focused on is just the technology that's going to be possible to develop in the over the next period of time is is just it's going to be super fundamental. And I just want to make sure that we position ourselves as well as possible. I mean there's this big debate in the industy

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Mark Zuckerberg: knows the answer to that but I just think that we should bet and act as if it's going to be ready um in the next 2 to 3 years. I think that I believe that there's a shot at that and I think if that's what you believe then you're going to invest hundreds of billions of dollars in building up the compute and whatever it takes to build out the strongest team in the industry. Now, I want to ask, there have been reports of pay packages at $100 million, $200 million. How do you justify that amount of investment for these researchers?

[3:37]

Mark Zuckerberg: Sure. So, look, I mean, a lot of the specifics that have been reported aren't aren't accurate by themselves, but it is a very hot market. I mean, as you know, and and you know, there's a small number of researchers who are just the best who can who are in demand by all of the different labs. So I I I think that you know it certainly is quite competitive. Um you know what I'd say I think to put this in in perspective you know if you're going to be spending hundreds of billions of dollars on compute and building out multiple gigawatts of clusters then you know it really does make sense to compete super hard and do whatever it takes to get the you know 50 or 70 or whatever it is top researchers to build your team. You know I think that the physics of this is you don't need a massive team to do this. you you actually kind of want the smallest group of people who can fit the whole thing in their head. So there's just a an

absolute premium for the the best and and most talented people. So it kind of makes sense that the market would be aggressive when you kind of think about it. And that and that from that perspective the um you know the amount that is being spent to to recruit the people is actually still quite small compared to the overall investment and all the compute that we're doing. There are so many companies in this super intelligence race from Google to OpenAI, Anthropic. I'm I'm curious how Meta's vision of super intelligence um maps with those or doesn't. Many of those companies obviously have large enterprise businesses.

[5:02]

Mark Zuckerberg: Yeah. Well, well, look, I mean, I think personal super intelligence is a different vision than what the others are are are going for. um you know AI it's you know it's kind of like when when the internet was first getting to scale people like all right is the is the internet going to be for productivity is it going to be for entertainment or is it going to change how we work at our companies and the answer is all and I I think the same is going to be true for AI and there are going to be different companies that focus on different parts of it. So, so far I think that you know you you hear a lot from the other labs around um you know wanting to automate all of the economically productive work in society and you know certainly I think that um that economic automation and economic progress there's there's a lot of potential there to do great work that's very helpful to a lot of people but there's another side of this which is like what are the things that people care about in their own lives and some of that is productivity but a lot of it is um is relationships and culture and creativity and having fun and enjoying life. And my guess is that you know there's a lot of um a lot of the folks at at at the other labs kind of talk about okay we want to develop the central super intelligence and directed at grand problems

and I think the reality is that um you know there's a lot of great stuff to do there and I'm excited about that and I think when you put personal super intelligence in people's hands some of what they're going to want to do is directing it at grand problems but I actually think a lot of what people care about are just relatively simpler things in their lives and part of our ethos and values have always just been to try to put that power into people's hands directly and that's what we're going to try to do um with personal super intelligence. So it is a bit of a different focus. Um you know I think that there's some at some level you know I think this is also going to shape how we build the company and how we write all the software and all the technology and product. So that'll probably be pretty similar to a lot of the other places. Um, and and a lot of the fundamental methods are similar, but I think the products that we're going to build are going to be are going to be pretty different and I think are just going to touch billions of people's lives. I think we're we're kind of the the premier company at at developing products and scaling them to billions of people. And we're of course leading in the next generation of computing platforms with the glasses um that are doing exceptionally well. and and I continue to think that that's going to be the best form factor for um for AI because you know they can see what you see and hear what you hear and you can talk to them throughout the day and you know once we get a display and the holograms in there it'll be able to generate a UI for you. So I I think that that's going to be there's just going to be this incredible connection between those things.

[7:33]

Jessica Lessin: Picturing my meta super intelligence glasses companion friend doing things for me. I don't know. Am I on the right track?

[7:42]

Mark Zuckerberg: Yeah. I mean, I I think it's going to I I think we're going to reach a point where, you know, you're going through the world and you're having conversations. One thought experiment that I like to do is in almost every conversation that I have, there's like five things I want to follow up on. Um, but I almost don't ever follow up on all five, right? Just cuz I go do something else. Maybe I'll follow up on one if I'm lucky. And you know, I just think like, okay, in the future, we're going to have glasses and they're going to be able to, if you want, um, you know, observe what's going on in your life and be able to go follow up on things for you and and and either, um, you know, follow up with you later or or give you information in real time in the glasses. And it's it's almost going to be like, look, if you need vision correction and you don't have glasses, um, just optical glasses, you're sort of at this cognitive disadvantage. And I think in the future, if you don't have AI glasses, you're basically going to be at a cognitive disadvantage, too. Um, so yeah, I mean, that's part of what we're going to do, but we're also very focused on the entertainment, the culture, um, the the kind of personal relationships with with people. I think that like having having an AI that can help you with that is going to be super valuable. So anyway, there's there's a ton to do. There's no shortage. And in addition to the direct products, super intelligence is also obviously going to really change how we develop things at the company um and how all of our software development goes. And I I think our engineers are just going to be way way way more productive than they are now. Um so I think that that's going to be really exciting and is is just something that we want to uh that we really want to focus on especially the self-improvement loop. we are already seeing glimpses of um of of the the models um you know even based off of Llama 4 improving the Facebook algorithm and other and other AI systems across the company autonomously. So

I mean I think that that's um it's it's a you know it's pretty exciting to see glimpses of that and I know you have to go but I do want to ask you about your news first of all at some point another time we'll have to talk about how you name these data centers. Well, they're they're titans. You you know, I love um you know, I'm I'm a fan of of Greek and and Roman mythology,

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Jessica Lessin: but I want to ask, is there a limit to how much you'll spend on capex?

[9:47]

Mark Zuckerberg: I mean, I I think we'll see how the technology trends and we'll see the what the results are. I mean, in in running the company, I'm sort of always looking for ways that I can convert capital into a higher quality service for people. And one of the benefits of reinforcement learning is um it gives you a a venue to, you know, potentially convert very large amounts of capital into a better and better service um and potentially a better likely a better service than um other less wellunded or less bold competitors will be able to do. So I view that as a competitive advantage um if we can get this to work well. And that's why we are basically all in on this. Um we're building, you know, we're building multiple multi-gawatt data centers and um and we can basically do this all funded from the cash flow of the company. Um we have a very strong business model that supports this. We have a very strong infrastructure team that um is doing novel work to um to build up data centers. You know, I wanted them to to not just um you know, take four years to build these concrete buildings. Um, so we we pioneered this new method where um we're basically building up these weatherproof tents and building out the networks and the GPU clusters inside them in order to be able to build them faster.

[11:02]

Jessica Lessin: Yeah, they're hurricane hurricane proof tents. Um but um no and we have people working around the clock um on Prometheus and Hyperion, which are our first two Titan clusters that are going to be greater than a gigawatt. Hyperion is going to scale to up to 5 gawatts over the coming years. and and I share this image of it, but it's uh you know the you know the size of the site covers a significant portion of the footprint of Manhattan in terms of space. The thing is just massive. Um you have a large um amount of the the the energy in the and and kind of the of people's energy in the area that it's getting built going towards constructing it. Um, it's uh I think it's great for the community and um and it's it's just these are these are really exciting projects that I mean you can tell I get I mean I'm very excited about building them in an innovative way and I'm very excited that I think we're going to have um the largest compute fleet of any company and focusing on that on building um on on being powered by a small and talent dense team means that I think we're going to have by far the most um compute per researcher to do leading edge work. And um I think that that's it's just going to be really exciting.

[12:08]

Jessica Lessin: Big few years coming up.

[12:10]

Jessica Lessin: That was what jumped out at me about your announcement on threads and Facebook was you saying you have the capital to do this, which made me think it was maybe a slight jab at those competitors who might have to still raise the capital to build that out. Um do you see that as an advantage?

[12:25]

Mark Zuckerberg: Well, I mean I think it's an advantage. I think it's an

advantage, but also um you know I think a lot has been written recently. I'm obviously spending a lot of time on recruiting and and a lot has been written about money and all that and like I said before a lot of the numbers specifically have been inaccurate but I think it discounts the other key reasons why people are super excited to come work on on meta super intelligence labs and one of the biggest is that you just have more leverage as a researcher you have more compute right it's I mean the best researchers basically like historically when I was recruiting people to different parts of the company you know people are like okay what's my scope going to be and you know Here people say I want the fewest number of people reporting to me and the most GPUs. And so having having basically the most compute per researcher is definitely a strategic advantage not just for doing the work but for attracting the best people. And I actually think that that has been under reportported as one of the main reasons why people are excited to come do this. The other is just having a clean slate is um is fun, right? I mean a lot of times people refer to building up the infrastructure for these things. Someone gave me this analogy that it's like it's like building a house. The first one you build for your enemy, the second one you build for your friend, the third one you build for yourself. And um you know, I think the ability to start from a clean slate, you know, where you're not just at at the at another company working on on some other infrastructure and you get the opportunity to build a new lab from scratch is going to be um you know, I think it's just really appealing to a lot of people. So anyhow, yeah, I'm out there very focused on this.

[13:54]

Jessica Lessin: I know we've got to let you go soon, but I have to ask it was Sun Valley last week. you have Sam Alman of OpenAI there as well as so many other

executives um whose uh team members you've been hiring. Um did you get a chance to say hi and what do you talk about?

[14:09]

Mark Zuckerberg: Yeah, I mean I I think part of the the fun of Sun Valley is you run into to all your all your friends and colleagues. So yeah, I mean I saw Sam said hi. Um I also saw saw Dario and saw Sundar and Satia and everyone who's who's kind of in the space working on this stuff. Um, and and look, I mean, what would I say? I mean, look, we're building up this new team from scratch. And there's like five or six places in the world that have a lot of great researchers. You know, Meta, of course, is one of them. And part of what we're doing is pulling over um a lot of the uh key folks in in in into um to the new efforts as well. But we're also doing a big recruiting push. So, I I don't know. It's not we're not trying to target anyone individually. I just, you know, I want to make sure that I personally get to know all of the top researchers in the industry. Um, so that way whether it's now or in the future, if there's a good opportunity to work together, then um we can we can make that happen.

[15:02]

Jessica Lessin: Well, it's the hot AI summer, Mark, and you're at the center of it. So, um, thank you for joining TITV and, uh, we'll be watching.

[15:11]

Mark Zuckerberg: Awesome. Good luck. See you.

[15:13]

Jessica Lessin: Back to you, Akos.

[15:16]

Akos Masricha: That was our conversation with Meta's Mark Zuckerberg. Jessica

is here with us and Jessica, I want to take a couple minutes here just to debrief your conversation with with Mark. I mean, what were your biggest key takeaways?

[15:29]

Jessica Lessin: You know, Akos, it's really interesting. I knew Mark was going to want to talk about all this new compute he and Meta were bringing online. But I think there are two um new doctrines, if I want to call that, that emerged out of the interview that I really heard Mark talk about for the first time. One was Meta's vision for personal super intelligence which I think is a move to differentiate it from what we're seeing from OpenAI, Microsoft, Google and he went on at length about that. I think the other one was really his approach to capex spending to this infrastructure race that clearly he thinks they're in a wonderful position. So, um, we can unpack those a little bit more, but I think those were two themes that we haven't heard him talk about that I think are his new frameworks. Obviously, when I asked him if this hiring blitz was the result of the failures of Llama 4, he had a good answer, I suppose, which is, well, actually, the field is moving ahead very quickly. So, I thought that was an interesting response to that. um he really tried to push back on the notion that he's luring all these researchers with these massive pay packages. Of course, it's been all over the headlines as we've been reporting in the information as well. You know, instead he was saying, look, it's it's also the ability and I think he says, you know, the people I'm recruiting want to do these jobs with the fewest number of people and the maximum amount of compute. And so I thought his framework actually on how the landscape has shifted there. It used to be you hired people by promising them the biggest possible scope, I believe was his word, biggest possible set of responsibilities. Now these AI researchers really just

want to be with their crew with access to a lot of computers. So certainly a lot to unpack and I I think I'm I'm still kind of making sense of some of the things he was saying and and what they mean for the company and the industry.

[17:27]

Akos Masricha: Yeah. No, I mean, you know, I I think those were some of the things I picked up on as well. And I think he really talks about super intelligence in the context of the of the rest of the company. And, you know, I think he really talks about it um you know, in a way of him trying to productize it and eventually make money off of it, which is um you know, which is uh something that other CEOs when you don't have such a big company to work with, uh something they might get be a little bit slower, too. So, I think those are all Nash. Think the money point is a good one in that you know if I had more time I would have pressed him on how do you pay for personal super intelligence right so if super intelligence is a hundreds of billions of dollars arm race and I think it's notable he did acknowledge that the timing is very unclear but he basically says it could be two it could be five it could be seven but you have to act like it's seven or I'm sorry you have to act like it's two but you Meta's framework and Mark's framework is we have this amazing core business that throws off the cash to be able to invest and he actually pointed out that they have the capital to do this and you know I pressed him are you implying that others don't and he said yes we have a business that does this but what about the business model of the future and I think that is one question that everyone is really grappling with we know right now that businesses are paying for AI we see some examples around consumer subscriptions, but this and and we can unpack it a bit more, but you know this personal super intelligence, this intelligence I think Mark said that thinks of those five things in your head you want to follow up on a conversation

but never do and does them for you with the help of your meta glasses of course um you know what's the business model around that and so I think this is one of the reasons it is so exciting to be covering these titans now and honestly I've been doing it since 2005. So for 20 years I've been covering um Google and Meta and so forth. But I think the question around Yes. Now Mark is drawing these lines about how Meta is going to focus on these personal use cases on these things that billions and billions of people use. Obviously how those are going to be the next cash cow engine for the company or whether they can be is a big question. Let let me ask you let me ask you one one quick question before we go. You know you've been covering Meta really since its inception and and and you know you talked about personal super intelligence. One of the questions I I I wanted to sort of understand from you is Meta has spent big on other technologies in the past. We've seen it you know we saw we've seen it with reality labs. I mean how does this investment in personal super intelligence how does that compare or contrast to other big investments that the company has made throughout its lifetime? Well, look, if you look on the dollar of the dollar amount, AI is trumping everything. And that's true of all the big companies across the board. Um but I think you can if you want to understand how Mark thinks you can look to other big bets especially uh reality labs where they dialed up the spending obviously acquired Oculus put the cash cow into it and have been pruning I will say especially through the the postcoavid age of efficiency um but still investing and obviously now I think the company would say those investments are fueling their position in AI with next phase of hardware. So I think what you can take from that is there's there's a shall we say at least in their mind a prudence to the wild and crazy investing. You know when I asked Mark if there's a limit to capex he said we'll see how the technology progresses. So, you know, I I think I take from that he doesn't want to be a step behind his competitors, but he's willing to

adjust course, maybe more so, frankly, than other CEOs because he can act um you know, so singularly at the company. So, you know, we're we're absolutely at an unprecedented phase here. Um but I think you can learn from behaviors of the past and assessing how the company will react, you know, in the years ahead. I mean, but the the difference, of course, is you're you're investing so far ahead. I mean, I guess Mark is maybe cutting a little cost on these data centers by putting them inside hurricane proof tents, but that seems um more about speed than anything else. So, um but yeah, it'll be wild. One more thing I'll say, Akos, too, and I know it's a small thing, but as an observer of these companies, I think Mark's shirt choice from the interview was very telling. And I know um this can seem silly and I have no inside knowledge here, but you know, we've seen um I just I think there was a seriousness to him. Not super formal, but the fact that it had a caller, it had some kind of a caller. And I think there have been many phases of Mark over the past two years. And I think, you know, the one I felt like I was talking to yesterday was someone who was serious, who was dialed in. You know, if you go way back in Facebook's history, and it was Facebook back then, there was a year he wore a tie to work every day. And it was a and I think he at the time told the team this because it's a serious year. And I I just sort of in in his demeanor, in you know, his outfit choice, which was probably random, but but I think I I sensed, you know, he's here to play. And um I think when we look at this moment across AI more broadly, um it it's quite an exciting one. And again, I just keep coming back to his comments really trying to draw those lines between what he believes Meta is doing in AI and others. I mean, he talked about uh the other companies focused on these grand plans. And I think while he thinks AI can do wonderful things for society, he's really focused on on what it could mean for individuals. and um I thought it was very different as well as saying, you know, that they're going to be in this infrastructure race. They view

it as a huge advantage. It's an advantage in their recruiting. Um and it doesn't seem like they're going to stop.

[23:57]

Akos Masricha: Yeah. Well, look, you know, we we'll we'll get even more answers in a couple weeks when the company reports its quarterly earnings. We've got uh earning season coming up, all the big tech companies coming up. Um Netflix is this week. Um, thank you Jessica for uh being with us here to debrief. Uh, it was a great conversation. Look forward to us having more with executives like that.

[24:19]

Akos Masricha: Well, that is it for today's show. We'll be back tomorrow with more analysis and breaking down the headlines of the biggest stories in tech. I want to thank AWS who is our presenting sponsor for this production. Thank you for tuning in today and we will see you tomorrow on TITV.
