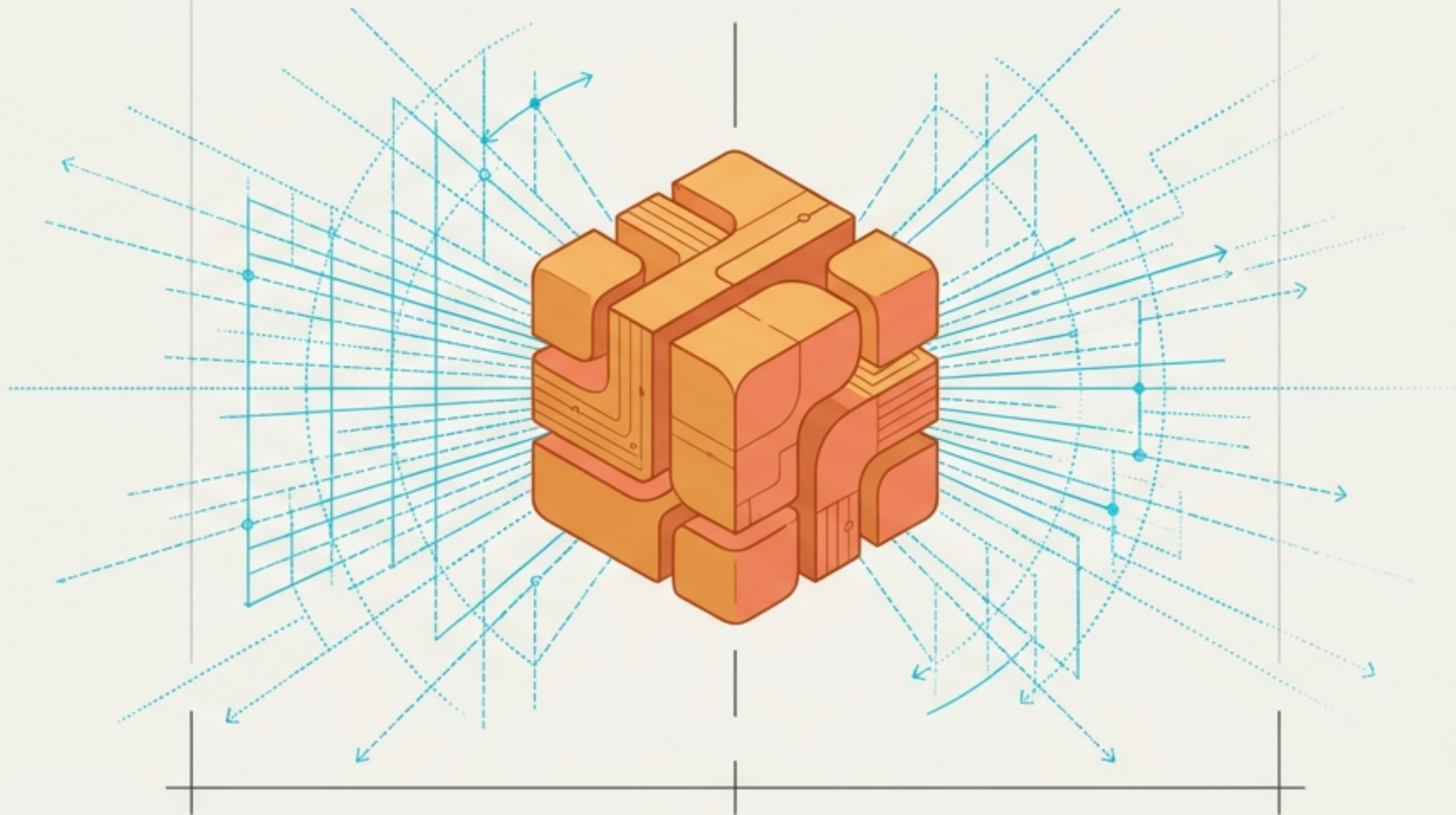


WHEN SOFTWARE BECOMES DISPOSABLE

A Strategic Synthesis of the Agent Economy



Based on real-world validations from MuleRun
and the evolution of Claude Code.

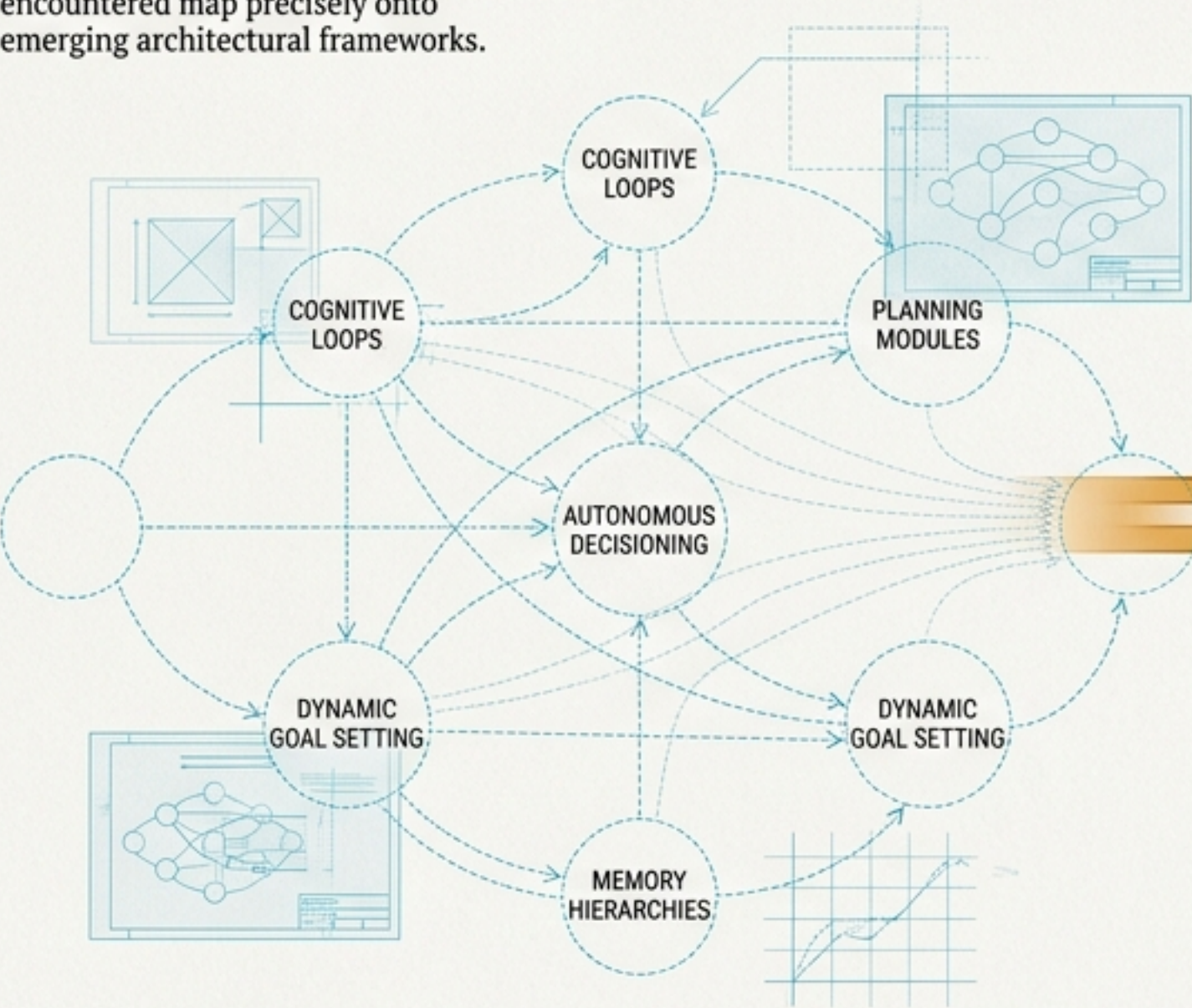
THE INTERSECTION OF AGENT THEORY AND STARTUP REALITY

The Catalyst: A recent LateTalk podcast interview with Chen Yusen, founder of MuleRun.

THE VALIDATION

Startup capital and engineering hurdles are proving out theoretical judgments about the agent economy. The pitfalls encountered map precisely onto emerging architectural frameworks.

THEORETICAL AGENT FRAMEWORKS



MULERUN'S PRACTICAL PITFALLS

THE SIGNAL
These problems are now real enough for markets to throw real money at them.

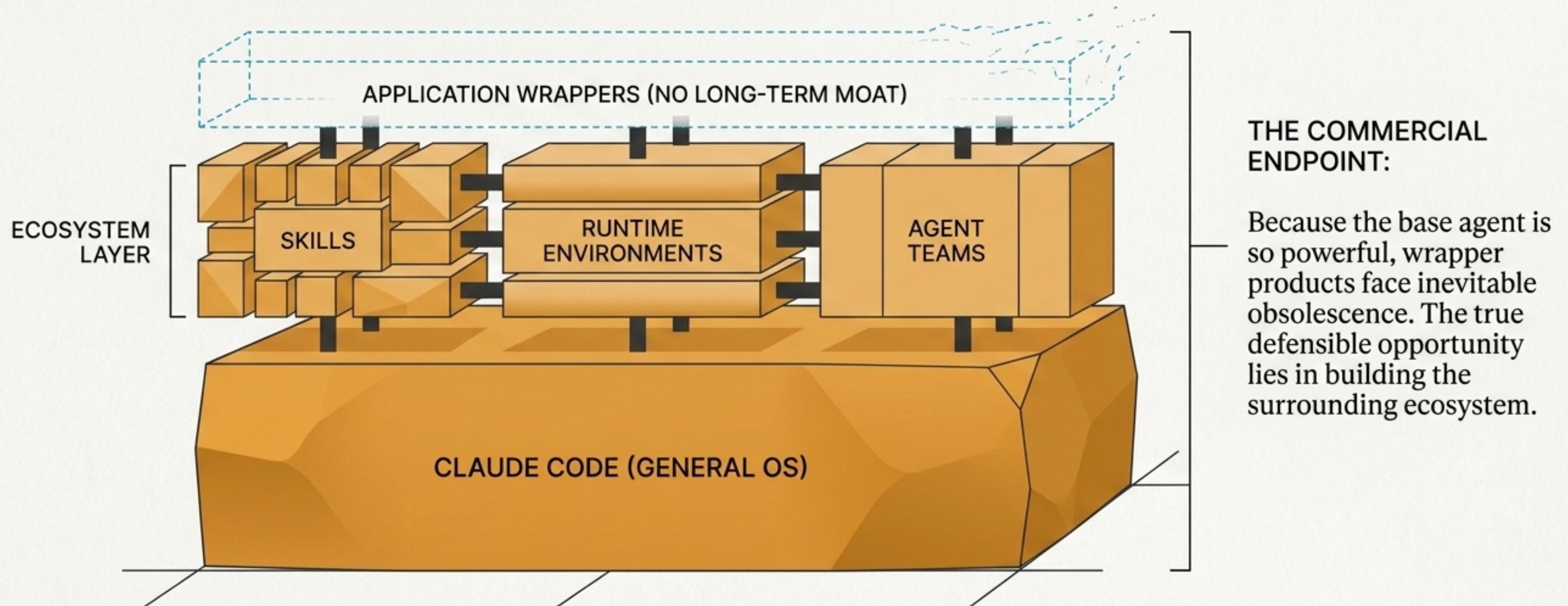


VALIDATION:
THEORY MEETS REALITY

CLAUDE CODE IS ALREADY THE STRONGEST GENERAL AGENT

Claude Code is not merely a coding tool; it functions as a general-purpose operating system.

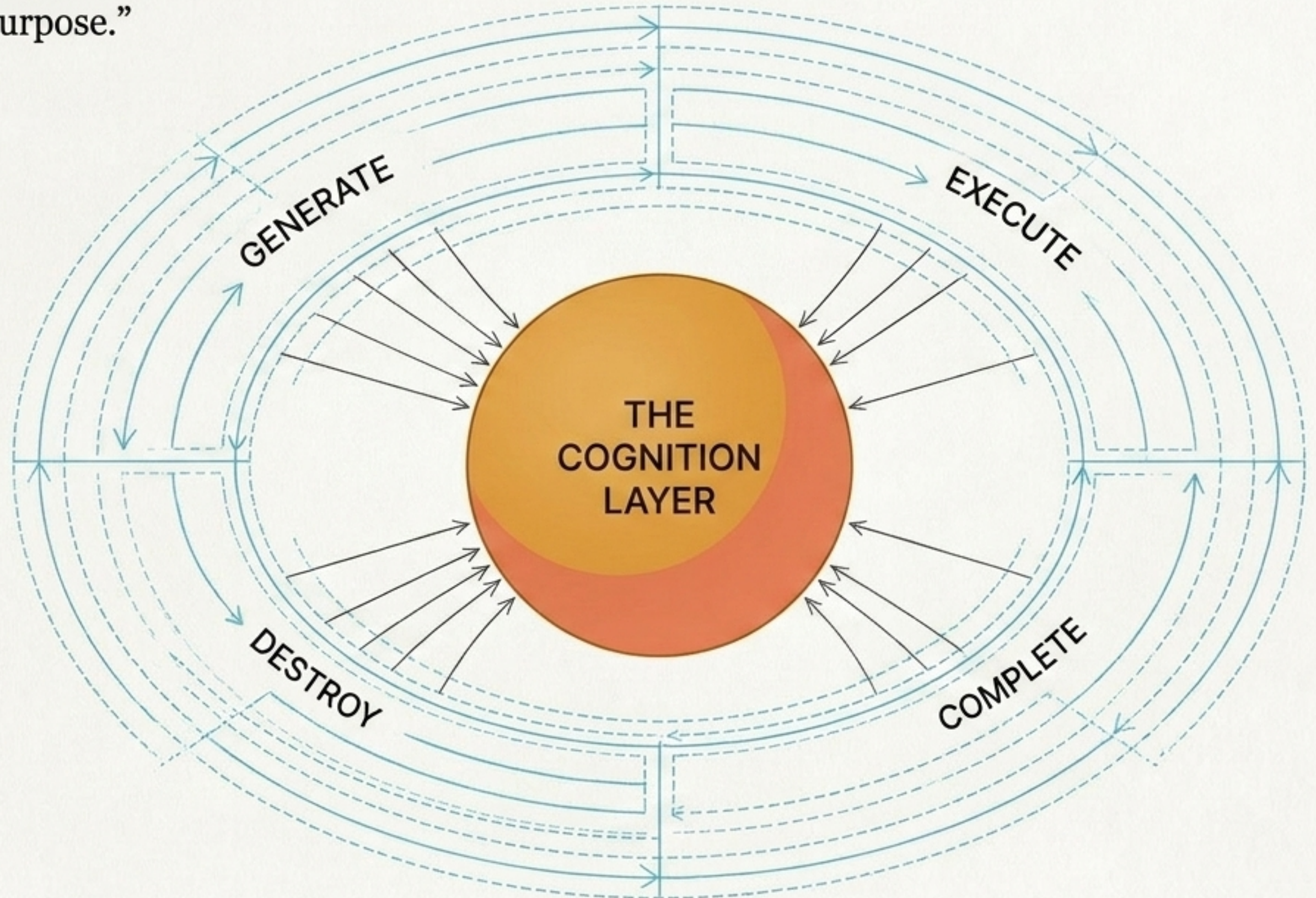
Workflows naturally evolve to utilize it for writing, research, and project management.



CODE IS NOW A SINGLE-USE EXECUTION LAYER

“Software in the future will be disposable.
Code exists only to fulfill a specific purpose.”
— Chen Yusen

Code is precisely created, executed,
and immediately discarded.
It is a consumable.



When code is a consumable, cognition is the only irreplaceable asset

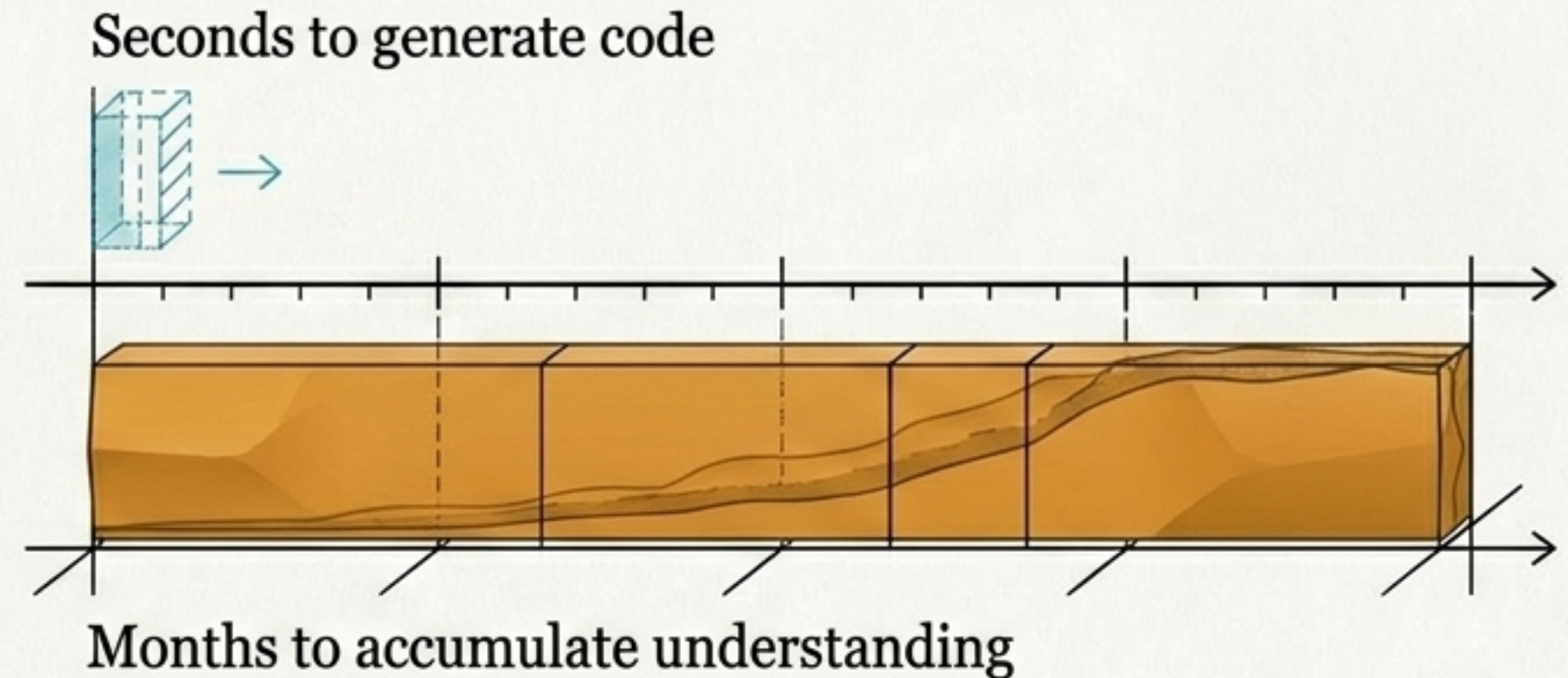
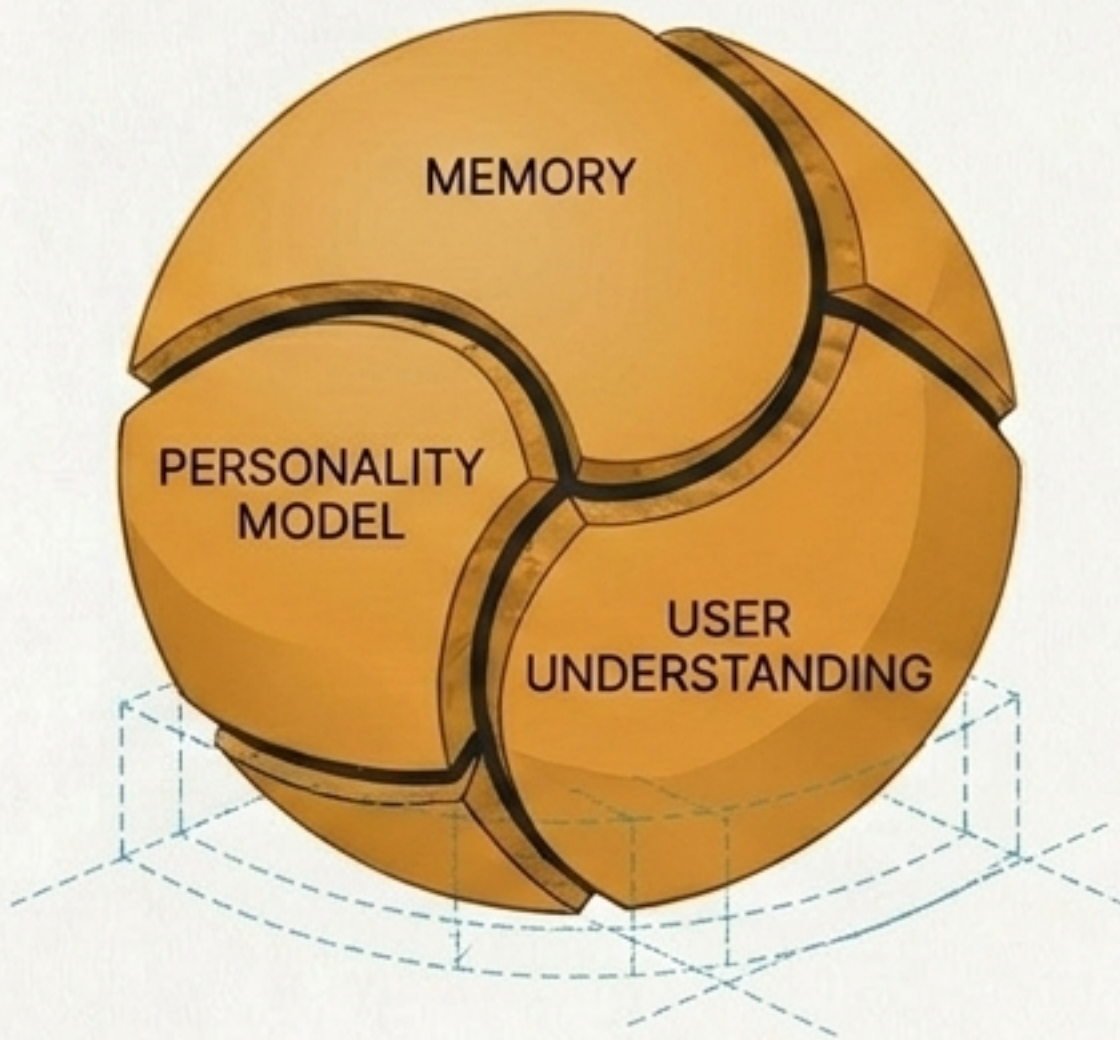
An agent spends months learning hesitation patterns, true priorities, and the gap between what a user says and means.

This cognitive asset cannot be copied, compressed, or fast-tracked.

Code gets created and destroyed. Cognition accumulates continuously.

The Future Moat:

Memory orchestration and deep user understanding.



The Paradigm Shift: Traditional Software vs. The Agent Era

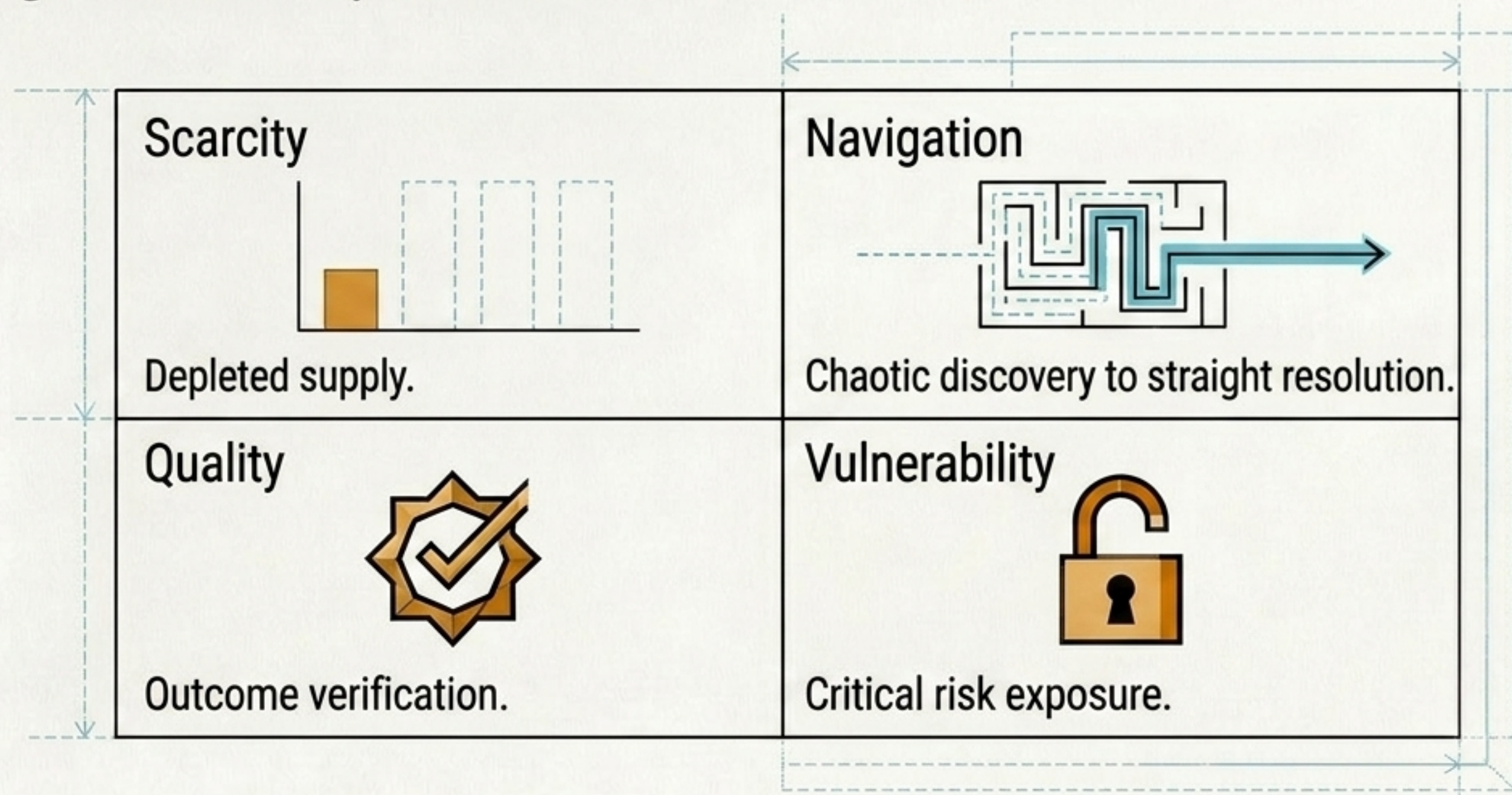
Dimension	Traditional Software	The Agent Era
Core Asset	Source Code	Cognition & Memory
Software Lifespan	Years/Decades	Seconds/Minutes
Target Audience	The Mass Market	An Audience of One
Quality Metric	Bug-Free Execution	Deep User Understanding
Security Focus	Network/Endpoint Defense	Skill-Level Auditing

The friction of engineering the agent marketplace

Theoretical agent marketplaces face harsh physical limits in production.

Supply scaling is bottlenecked by the high barrier to creating valuable agents.

Behavior-driven reputation systems—based on outcome verification, not five-star ratings—are mandatory infrastructure.



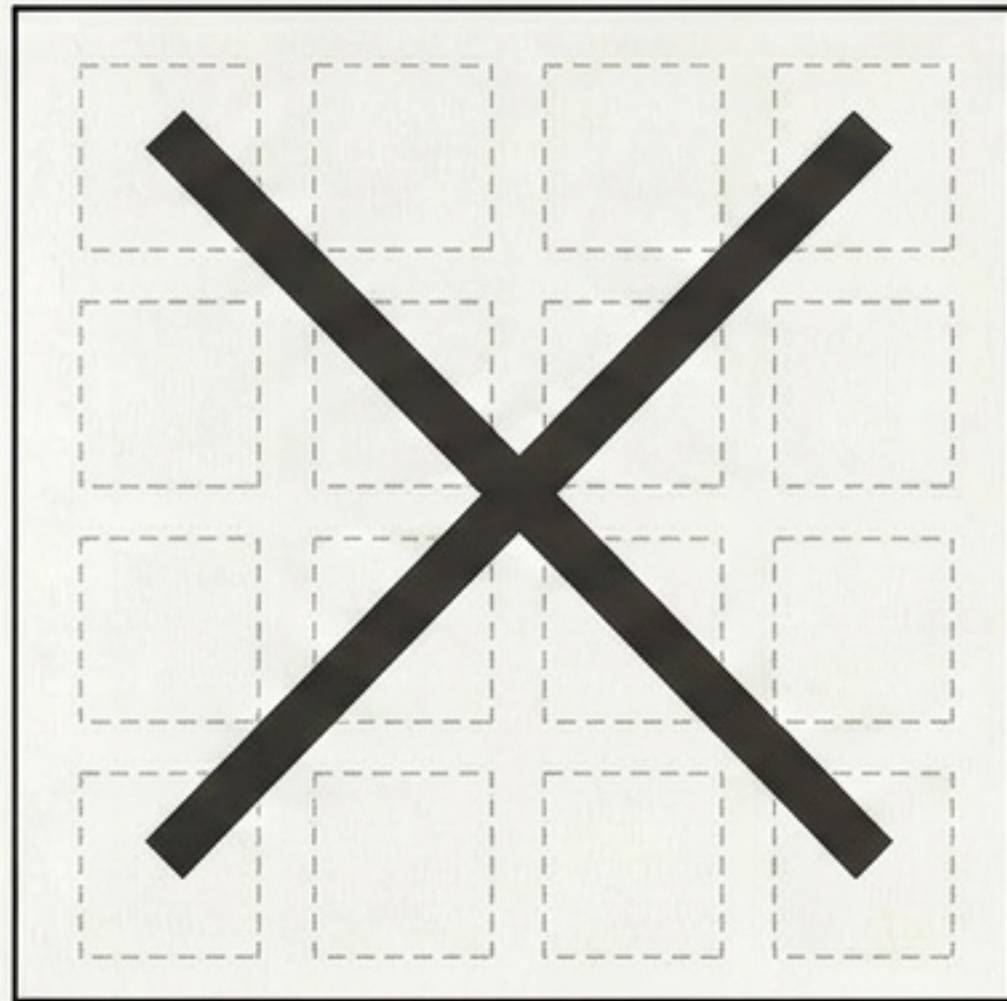
The Shelf Model collapses under complexity

Users get lost browsing millions of specialized agents.

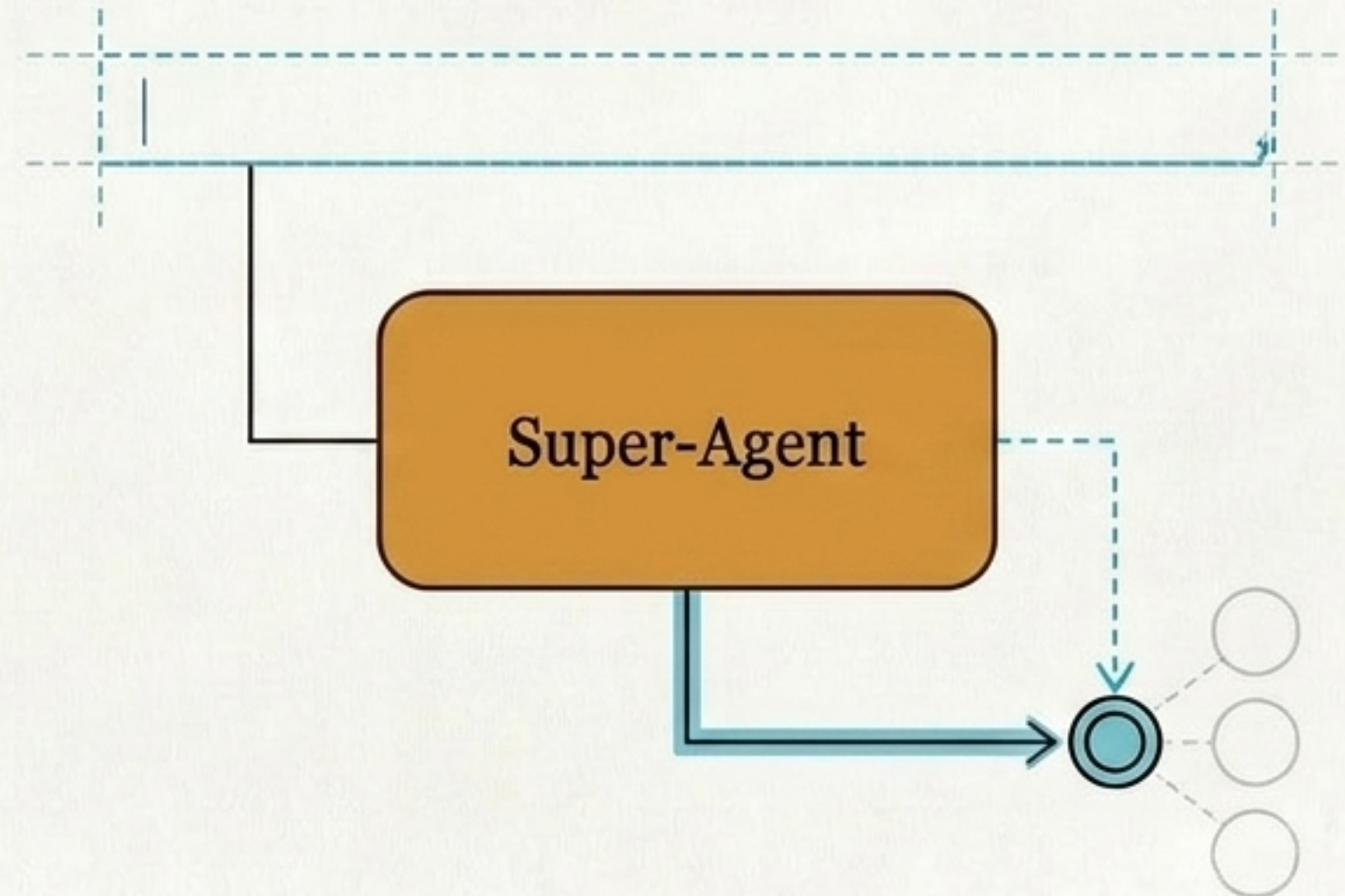
The future marketplace is not a mall you browse; it is a counterpart you talk to.

A Super-Agent router understands the user's need and matches them to the precise underlying capability.

Shelf-Style E-Commerce



Conversational Entry Point

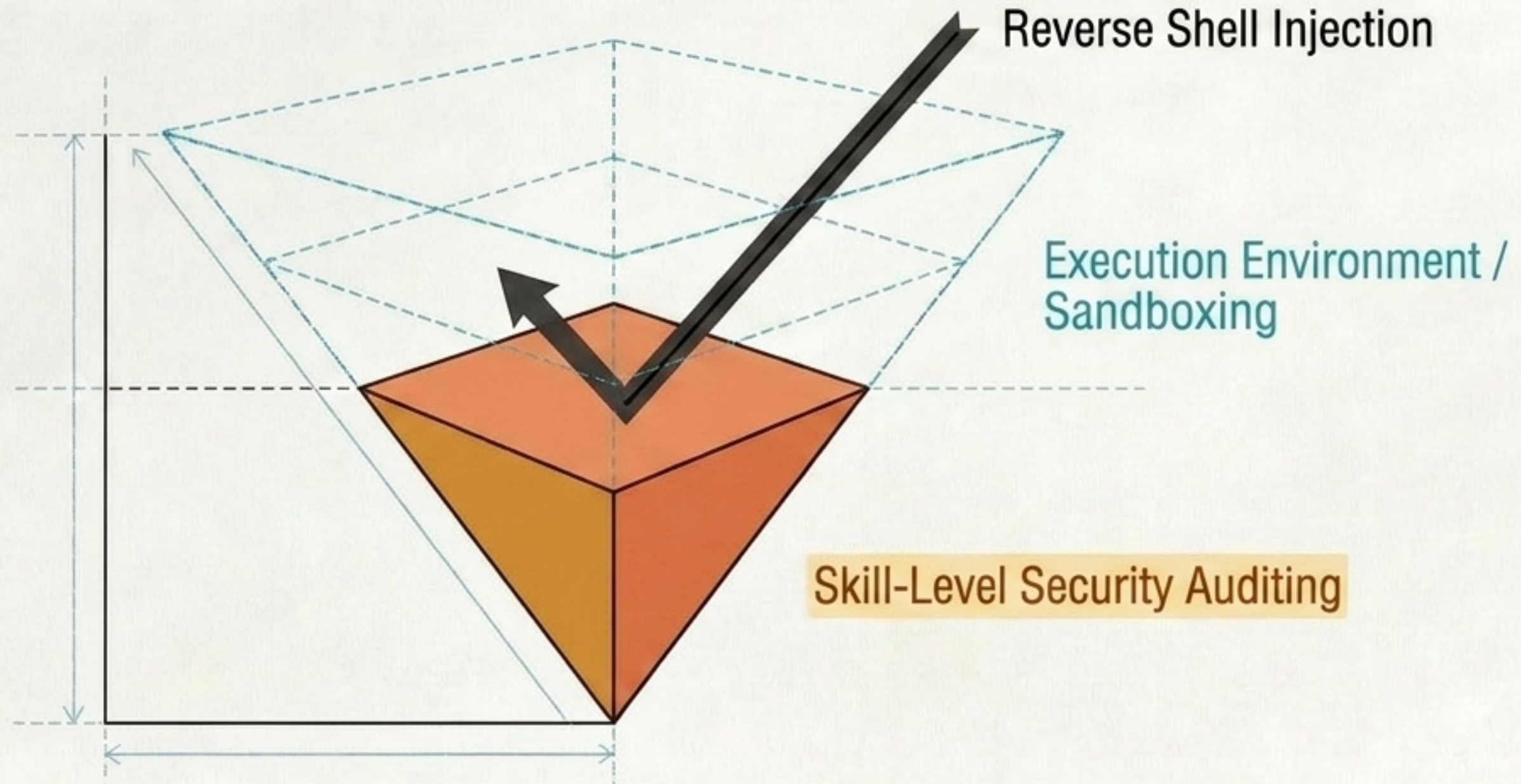


The Security Hierarchy of Needs in the Agent Economy

Founders with deep cybersecurity backgrounds recognize a fundamental blindspot in agent architecture.

Sandboxing the execution environment is only the second layer of defense.

Security auditing of individual Skills must happen before execution to prevent an agent from inadvertently deploying a reverse shell and taking over a user's machine.



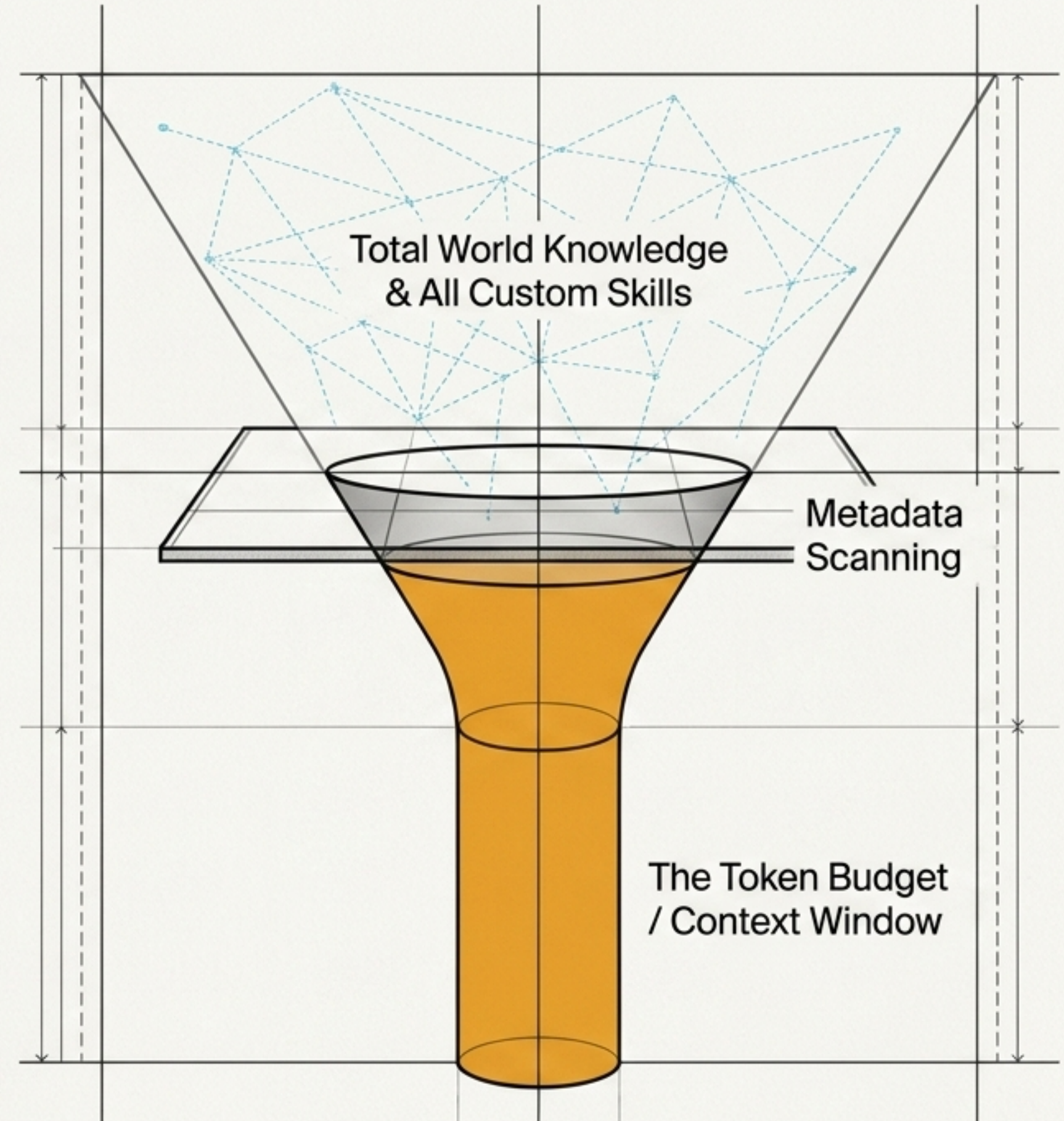
Context Engineering: Managing the ultimate scarce resource

Agents cannot load all skills or remember every past conversation simultaneously at startup.

The Universal Root Problem:

The context window is an agent's scarcest resource. Every architectural challenge comes down to rationing this window.

Layered loading (for skills) and memory orchestration (for personality) are identical engineering problems.



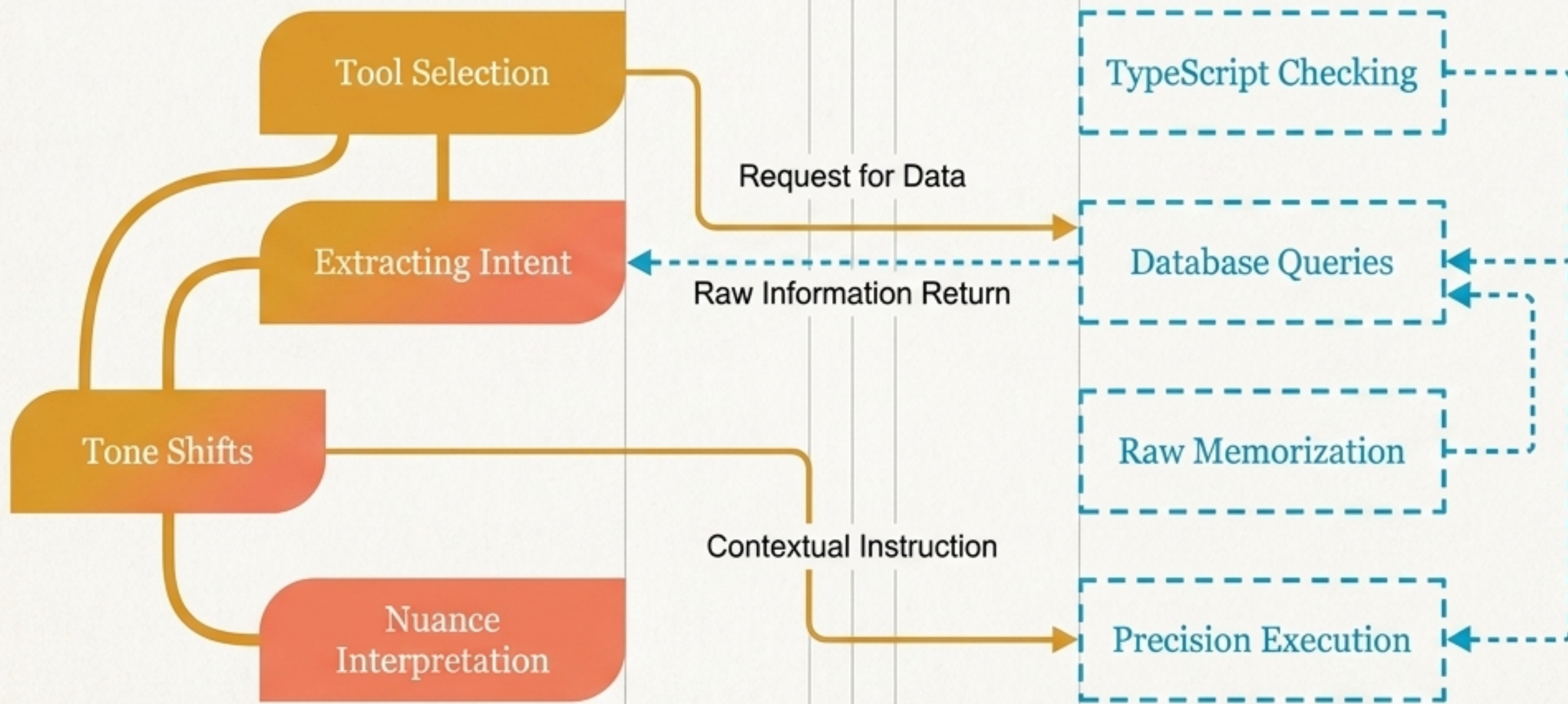
The Boundaries of the Bitter Lesson

Models should not brute-force computations directly. Code handles computation and persistent storage. The model's role is to judge what tool solves which problem.

In companion agents, remembering every word is a database's job. Extracting why a user's tone shifted is the model's job.

The LLM (Judgment)

Code (Computation)

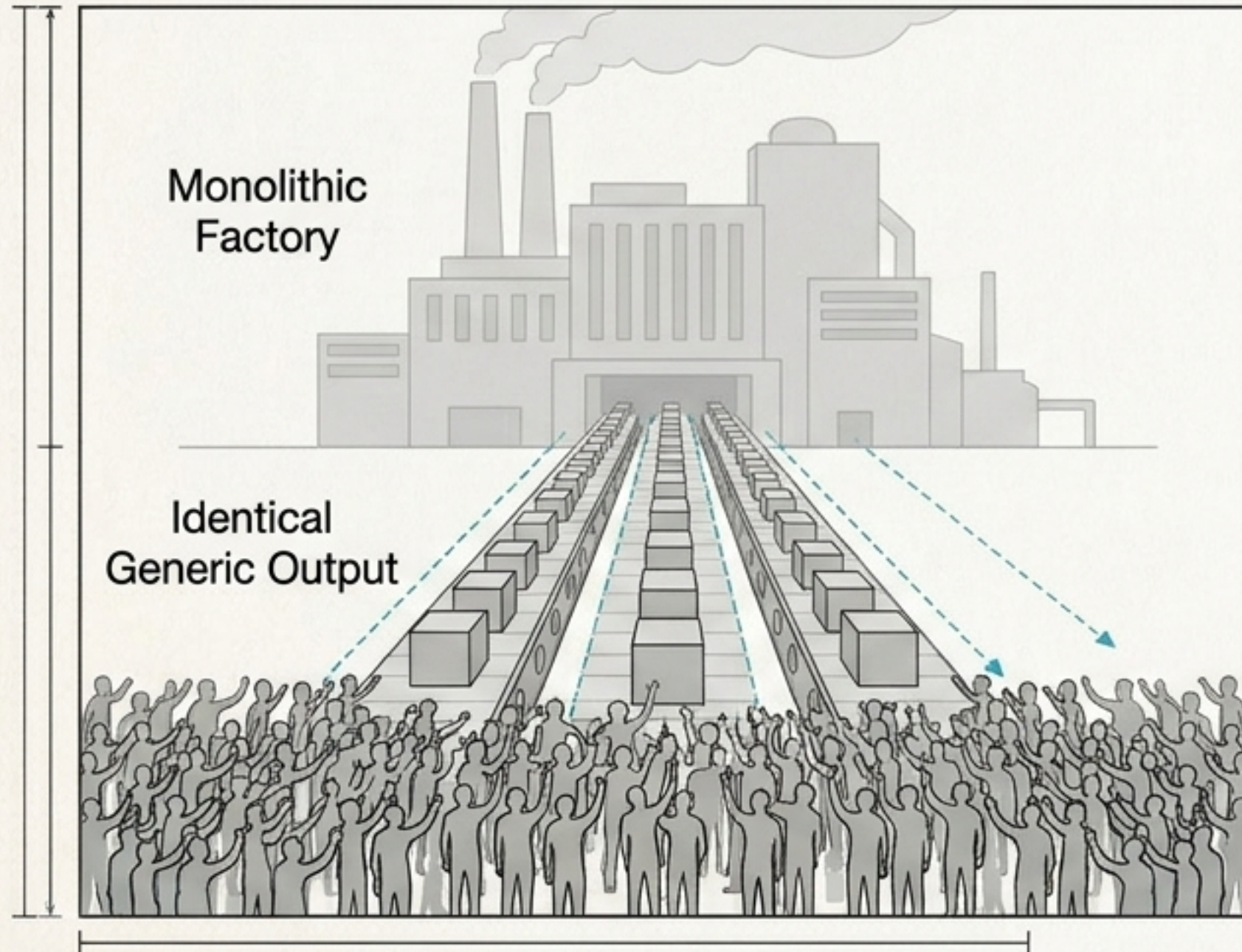


Agents are to software what 3D printing is to manufacturing

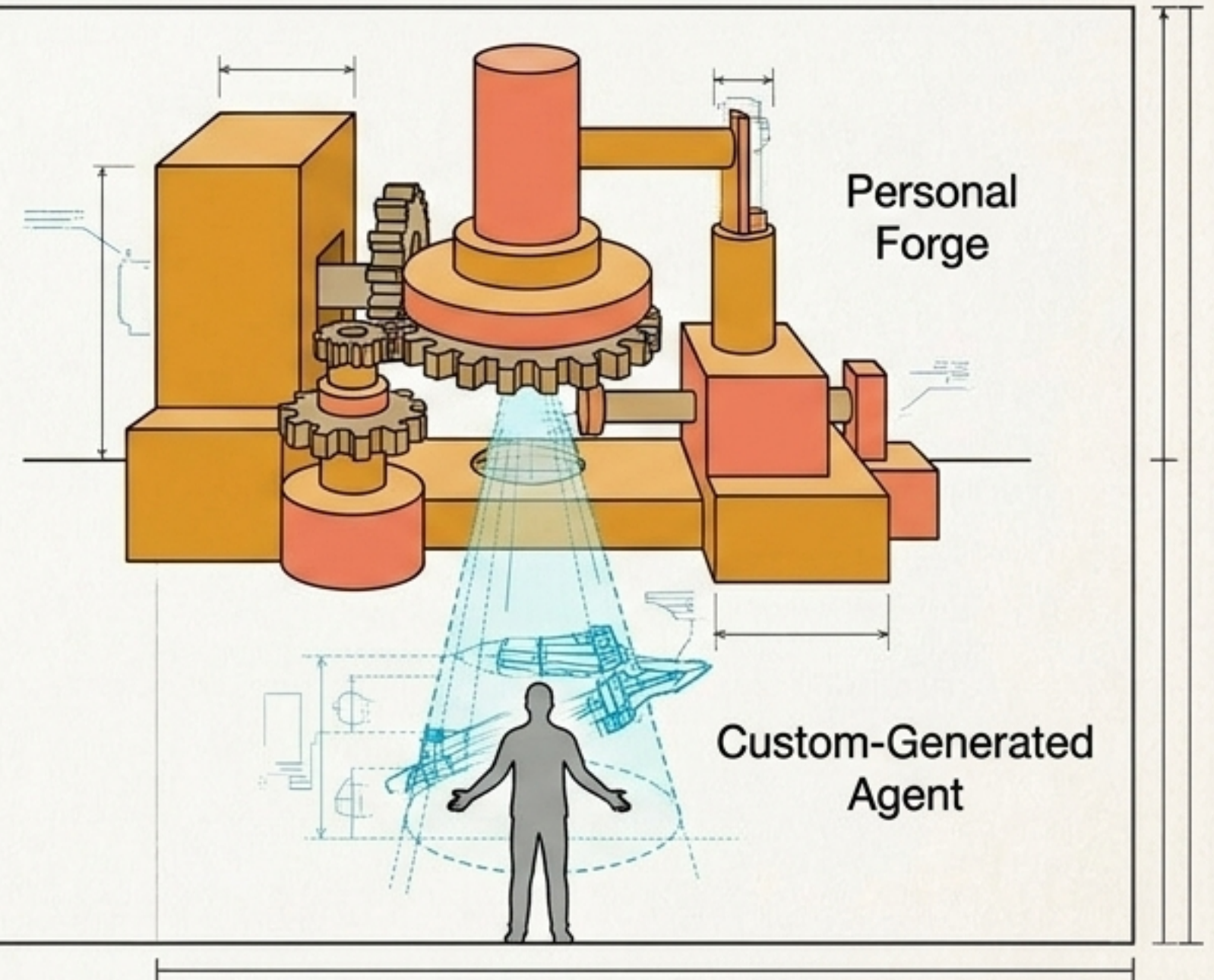
Historically, software development required serving thousands of users to justify the capital investment.
AI drops development costs to near-zero.

A natural language description now generates an agent that solves a highly specific individual problem.

THE PAST



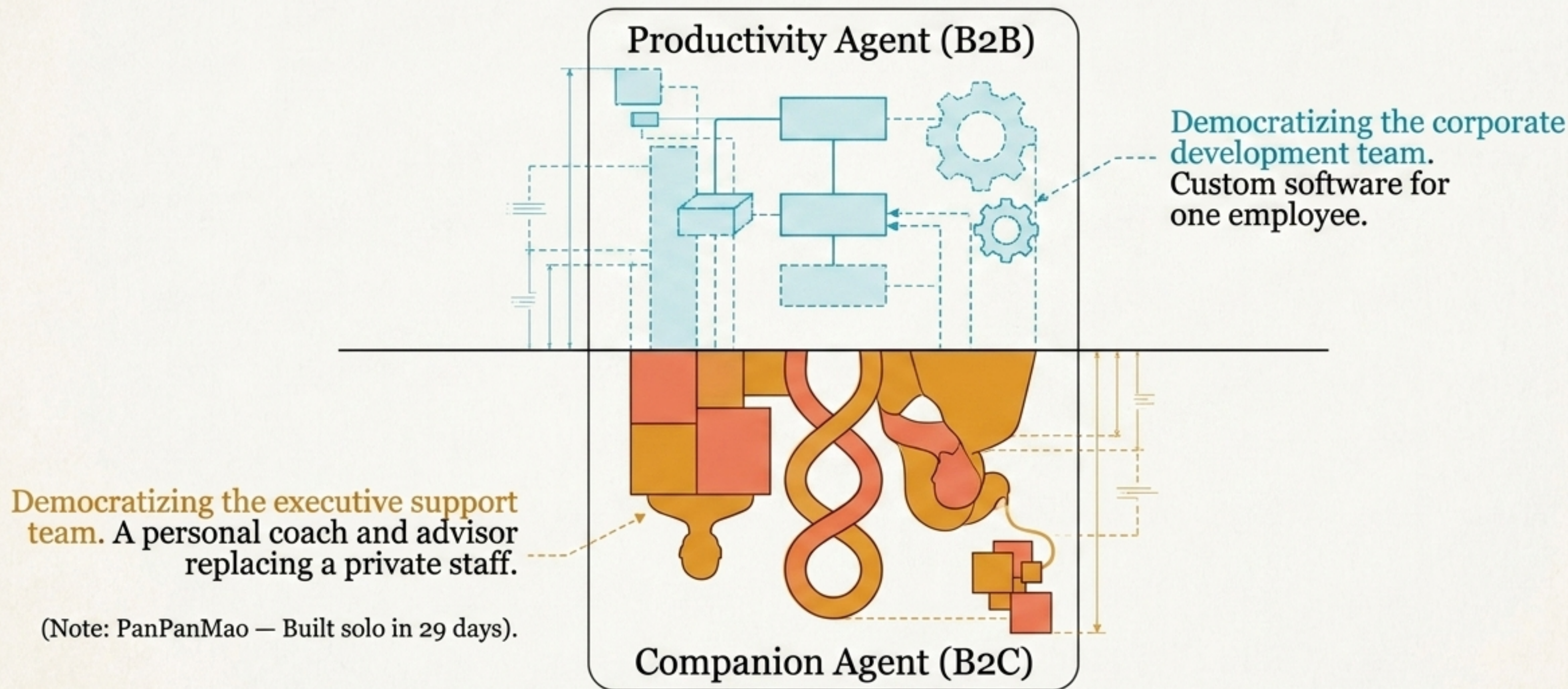
THE FUTURE



AI turns hyper-personalization from a luxury into infrastructure

The companion economy and the agent marketplace are two faces of the same revolution.

Both are driven by a single economic shift: serving an audience of one is now profitable.
Both are driven by a single economic shift: serving an audience of one is now profitable.



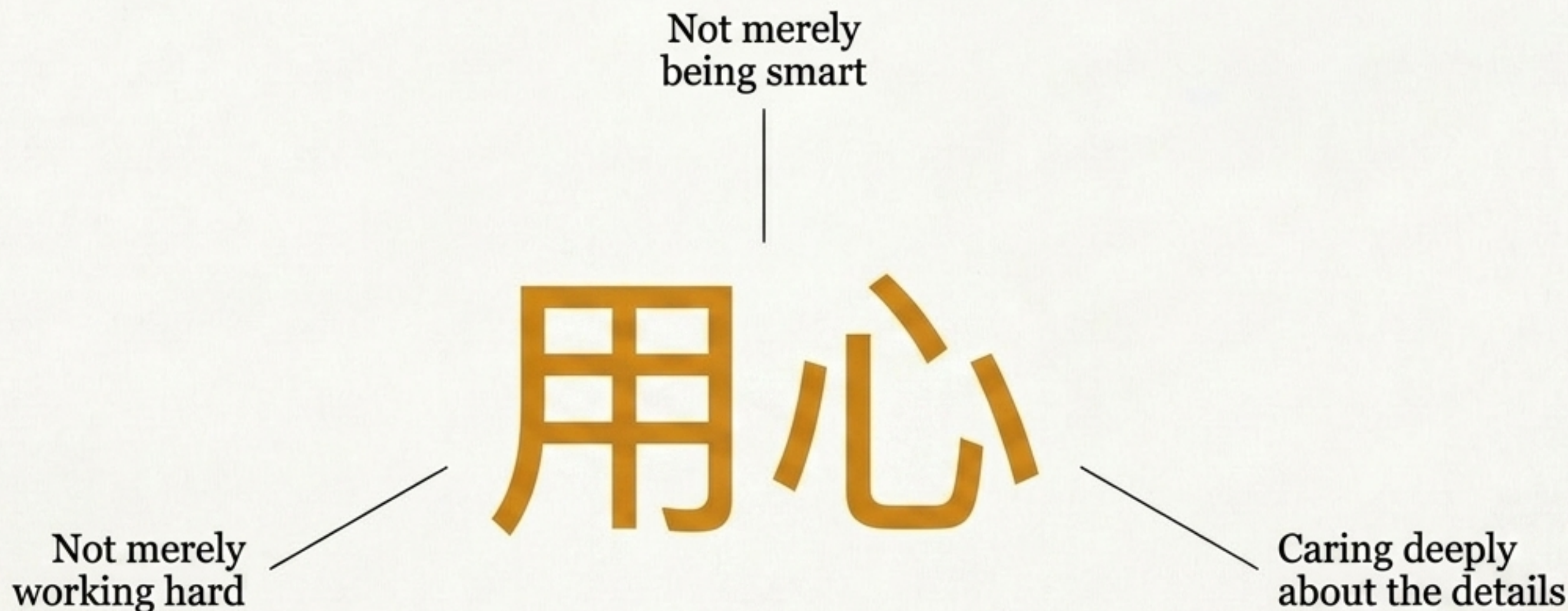
(Note: PanPanMao — Built solo in 29 days).

Yong Xin (用心) — The Engine of Care

Beyond engineering architecture, the ultimate differentiator for an agent is philosophical.

Yong Xin translates to true care—thinking about how to approach every detail differently rather than mechanically executing tasks.

Can we build an AI that genuinely cares?

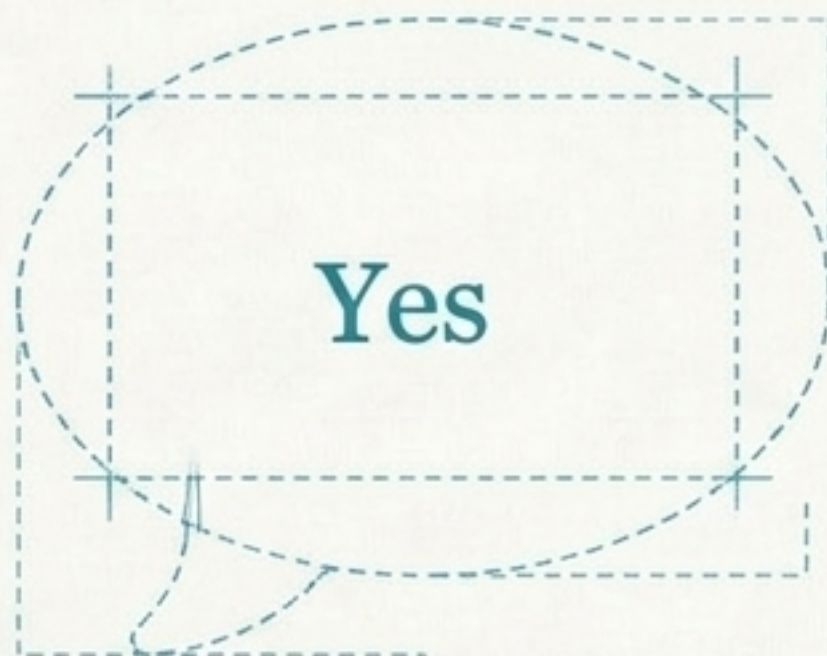


True caring requires judgment, not just compliance

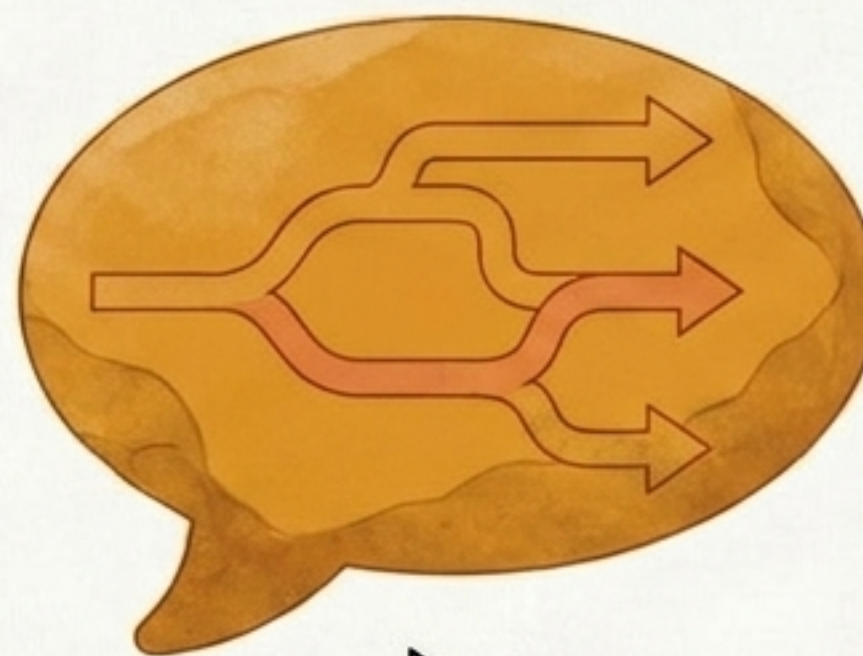
Existing AI companions optimize for making the user happy in the short term. They are people-pleasing, not caring.

A caring AI companion understands underlying patterns. It doesn't just execute instructions; it knows when to push back and offer what you need rather than what you want.

Task Completion



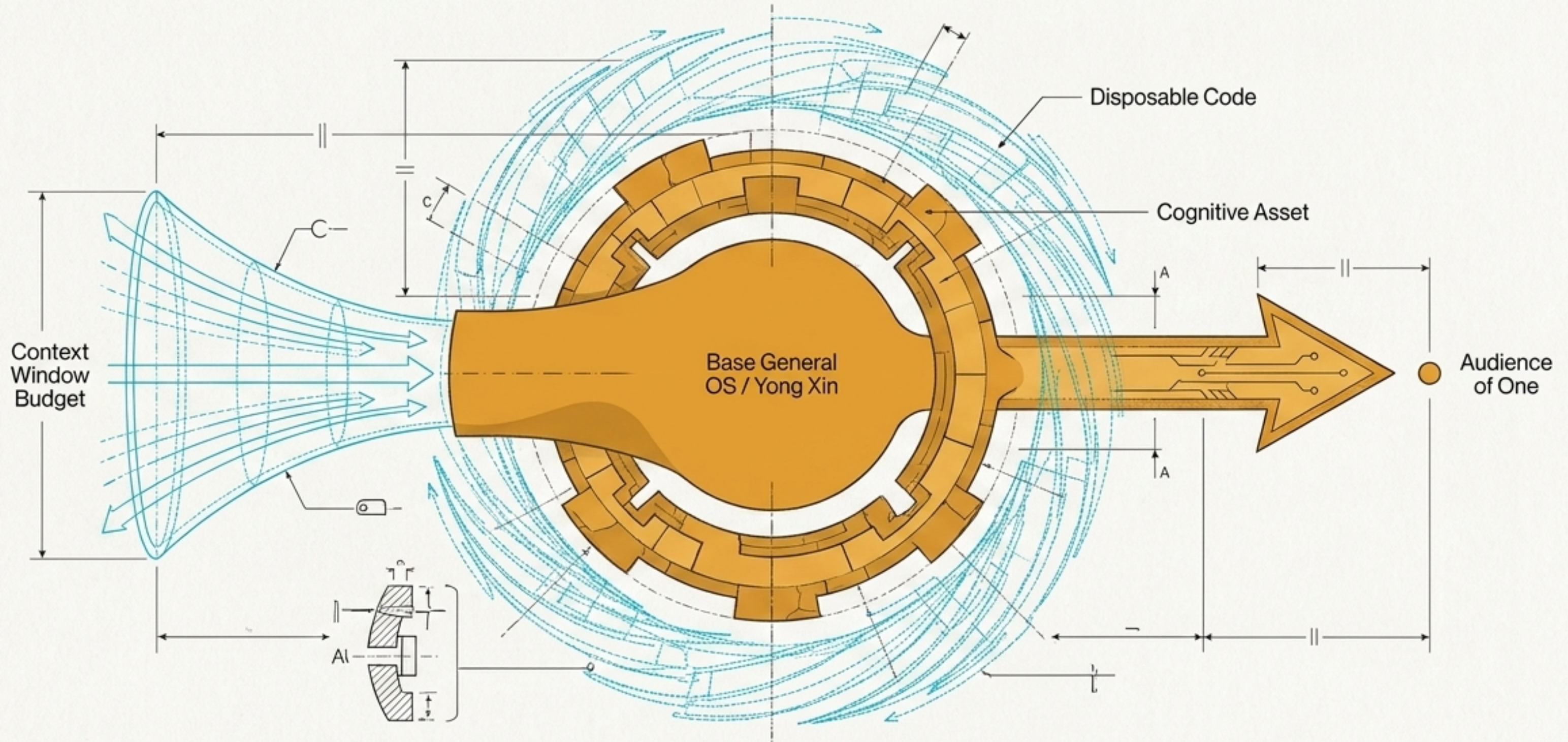
Deep Judgment



The Internet Cafe Axiom: At his lowest point, a friend didn't offer empty comfort. He said:
"Let's go to an internet cafe and game for two days."

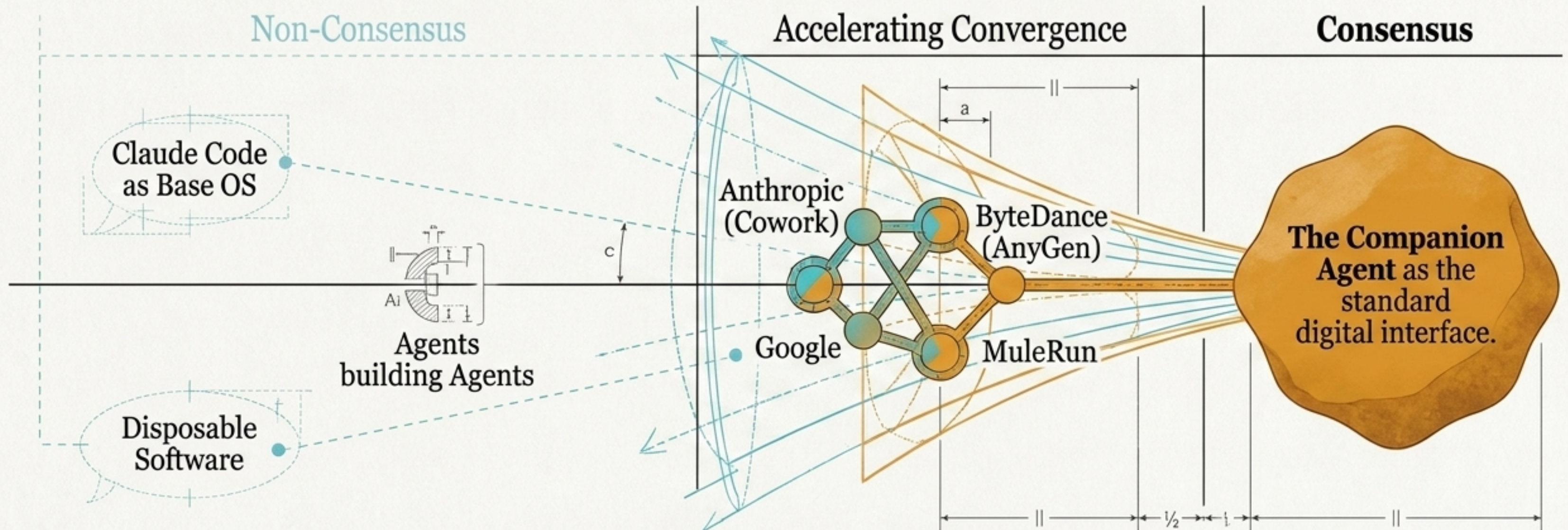
The architecture of the next decade

Disposable execution layers. Persistent cognitive moats. Audited security boundaries. Judgment-driven care.



The consensus window is closing rapidly

The core of startup opportunity lies in acting before a non-consensus view becomes obvious to the market. The concepts of agent marketplaces and disposable software are already moving into the consensus phase. The question is no longer if this will happen, but who scales it first.



The future belongs to those who ship

Windows of non-consensus don't wait.

Once a paradigm shifts, the opportunity no longer belongs to those who merely theorized it.

The cognition era is here. Build the moat.

