

- the play to open source Borg (our underlying infrastructure system) was a counter play against any one competitor becoming dominant in the IaaS space.

This idea of future possibilities through stepping stones is an important concept within strategy. If we look at the first method again (i.e. banking on recombination efforts in the uncharted space) then this is often a bad position to find yourself in. More often than not it leads to a dead end — the phone firearm or the phone tooth. I tend to refer to these high risk approaches as “gambling” rather than “opportunities” because opportunities should expand your future possibilities and not reduce them. If you’re going to gamble then the only way to consistently make this work is to be lucky. Try instead not to gamble as much as focus on expanding future possibilities. Just because you could do something, doesn’t mean you should do it. Strategy is as much about saying what you won’t do as it is about what you will do. This is summed up in the highly mischievous phrase “opportunities expand as they are seized” which is often misinterpreted as “grab everything” which is precisely not what you should be doing. This is also why Fotango pivoted from a declining online photo service to a platform play, as it expanded our possibilities. See also Stewart Butterfield who seems to have become a master of such pivots. This doesn’t however guarantee success as these are opportunities and not certainties.

Policy or technology?