

*Point 2* — Compute was likely to become more of a utility. I didn't know quite when but I had signals that this transformation was going to happen soon especially given a company like ours could create our own internal private utility (or what is now called a private Cloud). Compute was a massive industry with huge profitability and revenues. Someone was likely to attack it. That someone would not be encumbered by an existing product or rental model. I honestly expected it was going to be Google but it was Amazon that moved quickly.

*Point 3* — There would be resistance to the change (i.e. inertia) of compute becoming a utility. That inertia would exist in both suppliers of hardware and rental services along with their customers. Regardless, that component was going to evolve and companies would be under pressure to adopt. The first movers would likely consist of unencumbered companies e.g. startups.

*Point 4* — What was going to happen to compute was going to happen to coding platforms. This was another area that there was considerable revenue and profitability to attack. All those “yak shaving” tasks (a term used to describe an unpleasant and unnecessarily repeated activity) such as configuration, setup and installation would disappear. We were going to enter a future world where I could just code and deploy.

*Point 5* — These utility coding platforms would eventually run on utility compute environments. We could anticipate a “line of the