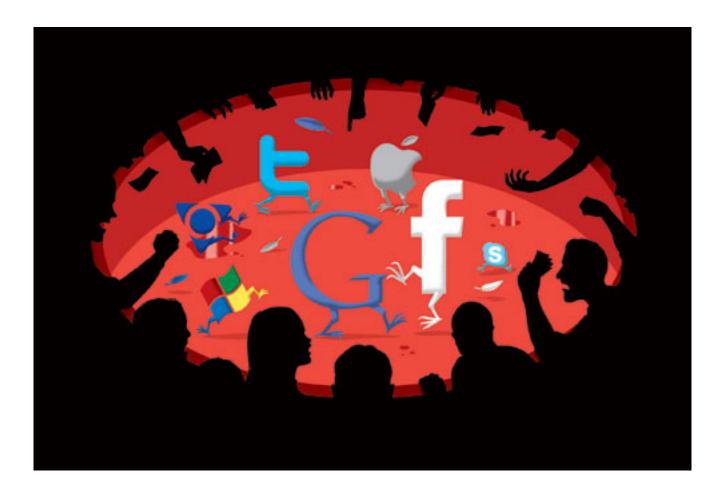**Ringside at the Web Fight**

Written by Michael Wolff

Everyone's betting on the Internet's next big thing. The author provides a tip sheet on competing theories–it's the platform (Google, Facebook); it's the machine (iWhatever); it's digital behavior (Twitter); it's porn (Skype sex!); etc.–along with his own hunch about the year to come. Plus: Live chat with author Michael Wolff about the Internet's next big thing.

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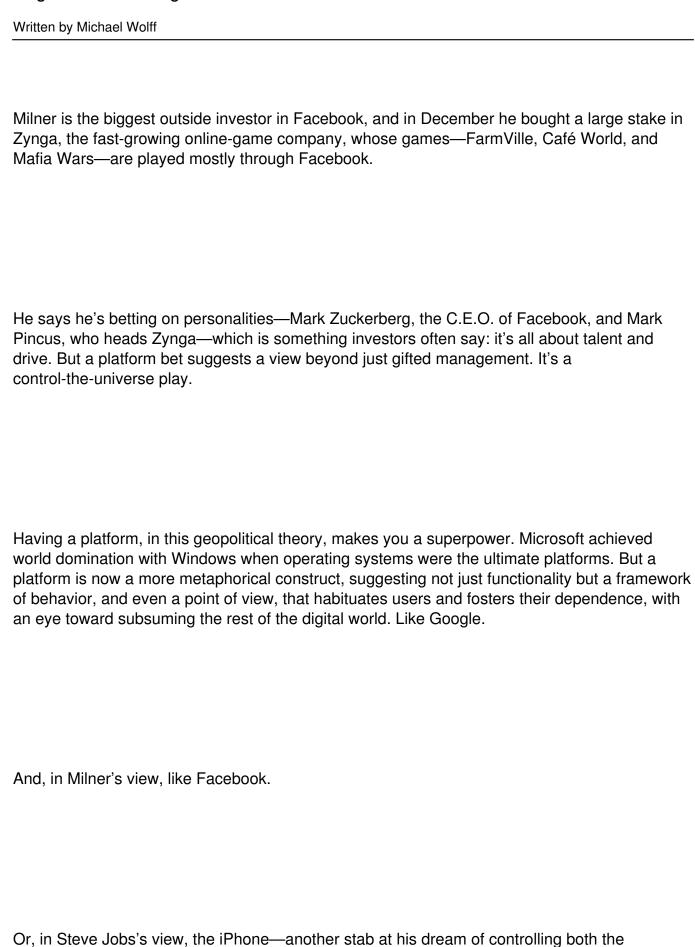
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I am told so many things about what is going to happen in the Internet business—happen imminently, happen in a way to transform human behavior and aspirations, happen in a way to disrupt the powers that be, or to restore the powers that used to be—that I should be in a position, if I could just focus my attention, to get rich, finally.
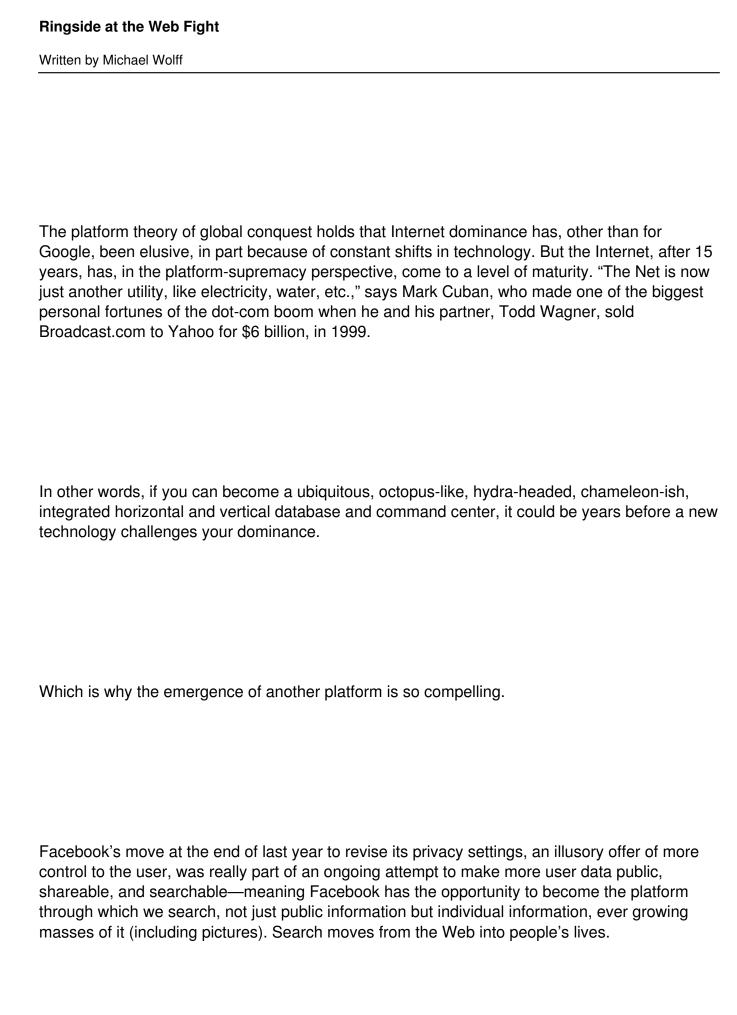
Everybody I know who follows the next big thing believes that this year—emerging from recession, with the death of so many aspects of conventional media—will be a year of, in Internet-speak, radical inflection, precipitating a wave of acquisitions and I.P.O.'s and a river of new investment. If you can only focus on what so many geniuses are saying, you can win big. But deciphering the chatter is no small talent, because the technology business is at least as much talk as it is science. The next big thing can sometimes feel like the coming of Christ, but it can also feel like the internecine debates about socialist doctrine that famously took place in the cafeterias of City College, in New York, in the 1930s.

So what I am going to do here—rather in an effort to create a *Next Big Thing for Dummies*—is to try to align the factions, parse the theories, distinguish the geek Lenins from the geek Trotskys, and offer the possibility for you to profitably know what this year is going to bring (or, anyway, hold your own at a cocktail party).

Actually, start with a Russian. Yuri Milner is a 48-year-old Muscovite, billionaire, and Putin look-alike, who, in the past year, has become one of the largest investors in digital media in the U.S., elevating the next big thing to something like geopolitical status. Other Russian billionaires buy sports teams or newspapers; Milner is buying "platforms."

Milner is the biggest outside investor in Facebook, and in December he bought a large stake in Zynga, the fast-growing online-game company, whose games—FarmVille, Café World, and Mafia Wars—are played mostly through Facebook.

He says he's betting on personalities—Mark Zuckerberg, the C.E.O. of Facebook, and Mark Pincus, who heads Zynga—which is something investors often say: it's all about talent and drive. But a platform bet suggests a view beyond just gifted management. It's a control-the-universe play.

Having a platform, in this geopolitical theory, makes you a superpower. Microsoft achieved world domination with Windows when operating systems were the ultimate platforms. But a platform is now a more metaphorical construct, suggesting not just functionality but a framework of behavior, and even a point of view, that habituates users and fosters their dependence, with an eye toward subsuming the rest of the digital world. Like Google.

And, in Milner's view, like Facebook.

Or, in Steve Jobs's view, the iPhone—another stab at his dream of controlling both the hardware and the software that control the world.

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The platform theory of global conquest holds that Internet dominance has, other than for Google, been elusive, in part because of constant shifts in technology. But the Internet, after 15 years, has, in the platform-supremacy perspective, come to a level of maturity. "The Net is now just another utility, like electricity, water, etc.," says Mark Cuban, who made one of the biggest personal fortunes of the dot-com boom when he and his partner, Todd Wagner, sold Broadcast.com to Yahoo for $6 billion, in 1999.

In other words, if you can become a ubiquitous, octopus-like, hydra-headed, chameleon-ish, integrated horizontal and vertical database and command center, it could be years before a new technology challenges your dominance.

Which is why the emergence of another platform is so compelling.

Facebook's move at the end of last year to revise its privacy settings, an illusory offer of more control to the user, was really part of an ongoing attempt to make more user data public, shareable, and searchable—meaning Facebook has the opportunity to become the platform through which we search, not just public information but individual information, ever growing masses of it (including pictures). Search moves from the Web into people's lives.

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This prospect leads, in just about everybody's estimation, to an I.P.O. for Facebook this year, which in its size and giddiness will transform the industry with new liquidity and provoke the ultimate superpower platform war, a face-off between Google's dominance over Web-page-based search and Facebook's command of the "social graph."
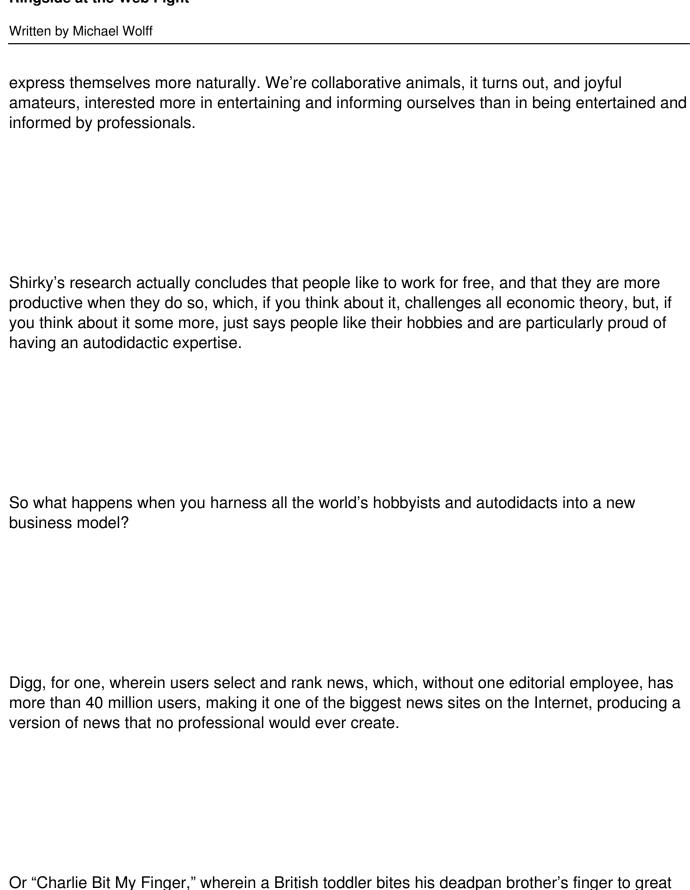
And yet, such platform politics, such continuing belief in the possibility of control, may be just so Cold War. The better way to look at what changes the game, according to a group you might call the digital behaviorists—part hucksters and part self-appointed sociologists—is to understand how the Internet radically alters the desires and habits and actions and reactions of the people who use it.

Clay Shirky, for instance, the author of Here Comes Everybody: *The Power of Organizing Without Organizations*   , is a man whose name is now uttered in technology circles with the kind of reverence with which left-wingers used to say, "Herbert Marcuse." "Web 3.0 is not an upgrade—it's a revolution," says Shirky characteristically. Shirky, along with Jeff Jarvis, a Cotton Mather (or Billy Sunday) figure, who has turned his sky-is-falling lectures to old-media executives into a lucrative consulting practice to old-media businesses, Chris Anderson, Wired's editor in chief, and Jay Rosen, an N.Y.U. professor—all dedicated bloggers and, in Internet parlance, "quote monkeys"—have essentially morphed the anarchic, 60s-style,
Whole Earth Catalog
roots of the Internet into aggressive business theory.

At its heart, the digital-behavior theory is that the old media business imposed an unnatural behavior on its users—not least of all a strict divide between creators and audience. The Internet, with a flat hierarchy, cheap distribution, and virtually no production barriers, lets people

express themselves more naturally. We're collaborative animals, it turns out, and joyful amateurs, interested more in entertaining and informing ourselves than in being entertained and informed by professionals.

Shirky's research actually concludes that people like to work for free, and that they are more productive when they do so, which, if you think about it, challenges all economic theory, but, if you think about it some more, just says people like their hobbies and are particularly proud of having an autodidactic expertise.

So what happens when you harness all the world's hobbyists and autodidacts into a new business model?

Digg, for one, wherein users select and rank news, which, without one editorial employee, has more than 40 million users, making it one of the biggest news sites on the Internet, producing a version of news that no professional would ever create.

Or "Charlie Bit My Finger," wherein a British toddler bites his deadpan brother's finger to great merriment, which, with 149 million views on YouTube, is bigger than the Super Bowl.

And if this obsessive disgorging and contributing produces, as Jarvis acknowledges, "a mountain of crap," this just means the next big thing will be about sorting, sifting, and filtering the crap.

Even the need for filters and editors, in the behaviorists' scheme, will be met by a product of the new behavior: Twitter.

Twitter, according to the behaviorists, is both the finest expression of free labor and infinite disgorgement, and the way we will navigate through ever greater vapidness and clutter. Twitter is, for the behaviorists, a second-by-second, real-time database of the human experience, a searchable record of all thoughts and actions, which will generate, according to Biz Stone, its co-founder, a billion search queries a day in the coming year. Instead of Google algorithms establishing the information hierarchy, the mass of Twitter-centric humanity—or one's pre-selected peer group among Twitter-centric humanity—will establish what's important and hence what comes up first in search results. "E-mail and I.M. have morphed quite naturally into a much broader and more open public discourse," says Stone, a discourse which in itself becomes a primary navigation tool and a way, "well beyond entering a term in a box and clicking a button," of interacting with the information world.

The live Internet, in the behaviorists' eyes, is the next big thing. Web sites and Web pages are out of date. "Google," says John Borthwick, whose Betaworks is a venture-capital firm that invests solely in behaviorist business models, "still thinks of the world as pages." In Jarvis's declaration, "media is no longer a product." It is not a production. It is not a box-office hit. It is how we contribute to and how we benefit from our collective expressiveness.

Which, according to various done-it-and-seen-it-all types, is a lot of hooey. Or, to the extent it's true that the costs of production have gone down and the available labor market has increased, it's all about a cost-savings opportunity.

Michael Wolff