

A question for you. When was the last time you surfed the net ? Can you remember when you just clicked around looking to discover new sites or a site to occupy your time ? Now ask yourself when was the last time you sat on your couch or laid in bed clicking the remote looking for something to watch on TV. Finally, how long do you regularly spend on Facebook ? How much time do you spend checking out your Wall, your friends' Wall and hopping from profile to profile checking people out ?

If you are like most, you kill more time hopping around on Facebook than you do exploring the Net. IMHO, while good old TV remains the ultimate, passive cure for boredom at home, Facebook is now where we kill time at work, on our mobile devices or while at home with the TV on.

Everything that the net was 5 or more years ago, Facebook is today.

The interesting thing is that Facebook knows it. Slowly but surely they are extending their tentacles into traditional websites, mobile apps (android/iphone/ipad) and soon your HDTV .

It started with Facebook Connect. It extended with search from inside the Facebook Platform. Now they are accelerating their extensions through Virtual Currency (a future goldmine as it extends to business), allowing websites to add a Like button with user pictures through a simple widget and much much more. In other words, your favorite website doesn't know it yet, but Facebook is in the process of annexing it.

Brilliant in its simplicity. Facebook is putting out trojan horse after trojan horse and no one seems to care. The only thing FB has not done is create a mobile operating system ala Android/iphone as a platform for applications.

Why would Facebook create a mobile operating system ? For the same reason Google did. For the same reason that Apple banned Flash and other meta platforms from the Iphone. The mobile operating system is the ultimate trojan horse for billions of devices. If you can create a mobile operating system that phone manufacturers adopt and that becomes a popular platform for application development, you have hope of controlling your own destiny. If you are just an application on someone else's operating system and perceived as a threat you can be "Flashed". Does Facebook have a choice but to create a mobile operating system ?

It won't be long, if it hasn't already happened that Google and Apple will see Facebook as a unique threat to their future. Apple has some level of connection to its customer/users, Google has minimal if any connection to their users. Facebook knows more than all of us like to admit about its users. They have our personal information, our pictures, our friends, our family members, our employers and business associates all in a database and they are extending that information base to what we like on sites outside the Facebook platform. Plus they are creating their own currency. Just as important is the fact that we are progressively spending more time on Facebook than we are sites and applications that Apple and Google can control . That is a threat to Apple and Google.

It wasn't all that long ago that the concept of Apple excluding Flash from its mobile platform would have been laughable. It's not any longer. Both Apple and Google have to see Facebook as the greatest threat to their futures. The question is what do they do about it and how does Facebook respond ?

Unlike Google and Apple, Facebook doesn't have 10s of billions of dollars in cash to subsidize development and distribution. They can't outlast a direct assault from Apple or Google.

Enter Microsoft. Already a shareholder. Already with a mobile and desktop operating system /development platform. Most importantly, already with billions in cash and the capacity to pay 15 or 20 Billion dollars or more to acquire Facebook.

There is no doubt that this is NOT the direction that Facebook wants to go. They want to remain independent. But just as Apple and Google quickly turned from friend to foes, Facebook will soon be the object that both of those companies see in the rearview mirror. I don't see either Apple or Google as being suitors to buy Facebook. That isn't their style. On the other hand, it's straight out of the Microsoft playbook. If you can't beat them or outlast them, buy them.

Time will tell, but there is no question that Facebook is quickly becoming the biggest threat to the futures of Apple and Google