



*Executive Summary of*  
**Google's WorldWideWatch over the WorldWideWeb**  
**Charting Google's Internet Empire & Data Hegemony**  
**Google's Data Dominance is Vast, Purposeful, Lasting & Harmful**

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# Executive Summary Of Google's WorldWideWatch

## Google's Internet Empire & Data Hegemony/Dominance

### Google's de facto WorldWideWatch.

- Sir Tim Berners-Lee invented the WorldWideWeb, a public and decentralized system to enable universal access to information online; Google's Larry Page has invented, and is perfecting, Google's de facto WorldWideWatch, a privately-controlled and hyper-centralized universal system to enable universal accessibility to information Google determines is "useful."
- Google's unique WorldWideWatch surveillance and data collection capabilities have created an unrivaled Internet empire and data hegemony, because Google's data dominance is demonstrably vast, purposeful, and lasting.

### Google's Vast Internet Empire is Unique (and on path to corner most of the global data economy).

- Over half of all daily Internet traffic involves Google in some way, and Google Analytics tracks 98% of top ~15 million websites
- Google controls 5 of the top 6, billion-user, universal web platforms: search, video, mobile, maps, and browser.
- Google leads in 13 of the top 14 commercial web functions of the Internet data economy and is #2 in the 14th: #1 in data collection, search, tracking-analytics, digital advertising, mobile, video, location, browser, Internet Infrastructure, consumer-Internet of Things, Apps store, translation, & email; Google is #2 & #3 in social with YouTube & Google+.
- Google's dominates Internet usage in most countries save for China, Russia, and South Korea, and it is the only entity offering multiple core services to most world Internet users in their native language.

### Google's Data Hegemony is Unique.

- Google's WorldWideWatch surveils more people, in more ways, for more data, than the NSA, or any other entity.
- Google's commercial surveillance syndicate tracks users via Google Analytics at the top 15m websites; Google pays 2m websites ~\$12b yr to collect data on users' behavior, interests and locations; and ~90% digital advertisers pay Google ~\$58b yr to target users via data profiles.
- Google's data dominance is purposeful. No other entity in the world has a stated omniscient [mission](#); an obvious omnivorous information and surveillance [appetite](#); a practically omnifarious [repertoire](#) of products/services to collect information; a near world-wide omnipresence; and practically omnipotent web ambitions.
- Google's data dominance is lasting as its the *only* ecosystem in the world where: users/buyers can go for ~all information; publishers can go for ~all advertisers/readers/viewers; and advertisers/sellers can go for ~all users/buyers. No other entity can match Google's data scale, scope, reach and capabilities.

# Executive Summary Of Google's WorldWideWatch

## The Harms Google's Data Dominance & Recommendations

**Economic Harms:** 1) *Gatekeeper power* to unilaterally dictate what online content most people discover, read, view & share; 2) *Bottleneck power* to unilaterally pick market winners and losers not on merit or competition; 3) *Market power* to dictate ad prices and advertising payouts to partners that provide half of all Google searches; 4) *Market power to corner or manipulate markets* from Google's unique omni-perspective of supply, demand, prices, & inventory; and 5) *Unregulated data-dealer/broker power* to self-deal, anti-competitively discriminate, and hide conflicts of interest.

**Competition Harms:** disintermediation and commoditization of much of the global economy: Advertising, Content, Distribution, Software, Cloud, Shopping, Travel, Hospitality, Communications, Insurance, Financial Services, Real Estate, Transportation, Delivery Services, Energy Services, Satellites, Military Contracting, Artificial Intelligence, Robotics, Health Care, Genomics, Wearables, etc.

**Societal Harms:** 1) Single point of failure for data protection, privacy & security; 2) De-humanization of users; 3) De facto surrender of national sovereignty; and 4) Mono-cultural-ization of the World in Google's Image.

### Recommendations:

1. **Enforce the law.** Don't settle for less or for the special treatment that Google demands.
2. **Maintain a realistic view of Google Inc.** because their poor competition/data protection/settlement record warrants it.
3. **Recognize Google's:** A) data dominance is the core source and epicenter of Google's radiating market power; and B) competition and data protection abuses are inextricable and one in the same, requiring a holistic, not fragmented enforcement approach.
4. **Require Google to:** A) Get meaningful consent from users, companies, and property owners to use their private/confidential information and property for their commercial or other purposes, and if they do not, hold them accountable for the misappropriation. The difference between sharing and taking is permission. B) Follow the Golden Rule – to treat others they way they treat themselves. C) Be a honest broker in its dominant data dealer function by being transparent and open about any financial and business conflicts of interests Google has with users, customers and partners; and not self-deal.

# Google's WorldWideWatch over the WorldWideWeb -- **By the Numbers**

## Summary of Google's Internet Empire, & Data Hegemony & Dominance over the Data Economy

"We don't have better algorithms than everyone else; we just have more data." Google's Chief Scientist Peter Norvig [3-10](#)  
"We're still 1 percent to where we should be...what I'm trying to do is... really scale our ambition." Google CEO Larry Page, [12-12](#).

### #1 Internet User Tracking & Analytics

- **Website Usage Tracking** G's Analytics has [~98%](#) site share with [>15m](#) sites tracking

### #1 Internet Usage Rankings

- **Traffic exchange** 60% of Internet devices & users exchange traffic [daily](#) with G's servers
- **Traffic involvement** >50% of websites' traffic involves G's analytics, hosting & ads [daily](#)
- **Internet traffic volume** ~25% of Internet's [daily](#) traffic is Google's
- **Internet dependency** in 5 min Google outage Internet traffic [declined](#) 40%

### #1 Public DNS Service Provider Ranking

- **Internet's Address Book** handle >70b DNS address requests [daily](#)

### #1 ICANN Top Level Domain Applicant

- **gTLDs** [101](#) .search, .ads, .app, .docs, .map, .dev, .cloud, .web, .mail, .music, .movies, .book, .games, .blog, .shop, .med, .fly, etc.

### #1 Data Collection Rankings

- **Index size** >100 million [gigabytes](#)
- **URLs crawled** ~60 trillion unique [URLs](#)
- **Collection partners display** [2m](#) websites
- **Collection partners maps** [1.2m](#) websites

### #1 Machine-Readable Fact-Base

- **Knowledge Vault** [~1.6b facts](#)

### #1 Web Platform Rankings

- **Search** ~1.3b [users](#)
- **Video distribution** YouTube >1b [users](#)
- **Mobile** Android OS >1b [users](#)
- **Location** Maps >1b [users](#)
- **Browser** Chrome ~1b [users](#)
- **Tracking/Analytics** [>15m](#) websites
- **Advertising** >2m display ad-[websites](#)
- **Apps** Play offers >1.3m [apps](#)
- **Translation** 80 languages, 97% world pop.
- **Email** Gmail >425m [users](#)

### #1 Digital Advertising Rankings

- **Digital Ad revenues** [\\$58b](#) ~5x #2
- **Mobile ad rev share** 50.4% [share](#) ~3x #2
- **Digital ad rev share** 31.9% [share](#), 5x #2
- **Traffic referrals to** [others](#) 38%

### #1 Search Rankings

- **Mobile search** 93.3% [share](#)
- **Overall search** 89.5% [share](#)
- **Searches** 6b searches, 2.1 trillion in [2013](#)

### #1 Video Distribution Rankings

- **Viewers** [>1b](#) total watching, [80%](#) outside US, [40%](#) watching on mobile
- **Online video viewing** 6 hours per user [monthly](#), [~7x](#) more than #2
- **Localized distribution** 61 countries/languages

### #1 Mobile Rankings

- **Smart-phone shipments** Android 85% [share](#)
- **User engagement** Android users check their smart phones 125x [daily](#)
- **Tablet share** for Android is [62%](#)
- **Mobile OS usage** share is [44.6%](#)
- **Ad traffic share** for Android is [>50%](#)

### #1 Maps & Location Services Rankings

- **Map searches** >1 billion [daily](#)
- **Websites** 1.2m sites use [Google Maps](#)
- **Mapped roads** mapped 28m miles of [roads](#), 94% or 194 of 206 countries
- **Street View** 5m miles in 50 [countries](#)
- **Home views** 75% of global pop. can [view](#) their homes on Google Maps
- **Google traffic warnings** in 600 [cities](#)
- **Most downloaded map app** on 54% of [smart-phones](#)

### #1 Corporate Rankings

- **Corporate acquirer** most acquisitions in world [last 3-yrs](#)
- **Data Center Investment** most data center cap-ex ~\$28b [2006](#) – [2014](#)
- **Server points-of-presence** 1400 in 140 or 68% of the world's countries [USC](#)

# How Google Increasingly Dominates the Global Data Economy

Google's *abuses of dominance/data protection* grow its universal data gatekeeper & market power

"What's ubiquitous and cheap? "Data. And what is scarce? The analytic ability to utilize that data." Google Economist Varian [5-09](#)

"Our model is just better... Based on that, we should have 100% share" Google Chairman Schmidt [12-09](#)

*Vertical  
Leverage of  
Insider Data,  
Search & Ad  
Self-Dealing  
Market Power*

	Advertising	Content	Distribution	Software	Cloud	Shopping	Travel	Hospitality	Communications	Insurance	Financial Services	Real Estate	Transportation	Delivery Services	Energy Services	Satellites	Military Contracting	Artificial Intelligence	Robotics	Health Care	Genomics	Wearables
<b>Monetization</b>	<p><b>Only data monetizer enjoying near universal commercial-dependency</b>                      Only entity where ~all: buyers can go for ~all info; publishers for ~all advertisers/readers/viewers; sellers for ~all buyers  <i>Data gatekeeper power, economic bottleneck power, &amp; unregulated data dealer/broker power to self-deal</i></p>																					
<b>Commercial Web Functions</b>	<p><b>Google leads in 13 of 14 top universal commercial web functions:</b>                      Data, search, analytics, advertising, mobile, video, maps, browser, Net Infrastructure, Internet of Things, app store, translation, &amp; email  <i>Competitive foreclosure via lock-ins/exclusions; serial acquisition of potential competitors &amp; complements</i></p>																					
<b>Users</b>	<p><b>Google controls 5 of top 6, billion-user, universal web platforms:</b>                      Search, video, mobile, maps, and browser  <i>Leverage dominance with service lock-ins, data exclusions &amp; insider metadata on competitors' clients</i></p>																					
<b>Data</b>	<p><b>Unique universal mission/capability to organize world's information</b>                      "Google's mission is to organize the world's information and make it universally accessible and useful"  <i>Assume universal "implied consent" from users &amp; property owners; &amp; no legal data protection obligations</i></p>																					

# How Google's WorldWideWatch Surveils More "Universally" Than NSA

"Google's mission is to organize the world's information and make it *universally* accessible and useful." [Google](#)

"We are very early in the total information we have within Google." Google Chairman Schmidt [FT 5-07](#)

## For 1-2 billion Internet Users, Google "universally" surveils:

**Who** they are by ethnicity, race, income, religion, politics, etc. & who are their friends/influencers...

**What** sites/content they visit, read, watch, listen to, share; what they do, think & believe...

**When** they do things, go places, get sick, have health, money, job problems...

**Where** people are, live, work, eat, sleep, gather, go, travel, vacation...

**Why** they do things, buy stuff, go places, vote for candidates...

**How** people are best influenced, most predictable...

Google's  
Cloud

### Google's Usage Bases

- ~1.3b Search users
- >1b YouTube Viewers
- >1b Android users
- >1b Maps users
- ~1b Chrome users
- 540m Plus Social users
- >425m Gmail users

### Google's Surveillance Syndicate

- 98% of top 15m sites** track users with Google Analytics
- 2m websites** paid ~\$12b yr to collect data on users' behavior/interests/locations;
- ~90% digital advertisers** pay Google ~\$58b yr to target users via profiles

**Google's WorldWideWatch Infrastructure & Software**

# Bio: Scott Cleland, President, Precursor<sup>®</sup> LLC

- **Bio:** Scott Cleland was the first analyst to foresee that Google would become a global monopoly with unprecedented market power and minimal accountability that would lead to severe competition, privacy, property, and security problems. He has written more Google antitrust, privacy, and accountability research than anyone in the world.
- Cleland is a precursor: a research analyst with a track record of industry firsts and a history of spotlighting harmful industry behavior and misrepresentation. He is President of Precursor<sup>®</sup> LLC, a Fortune 500 research consultancy focused on the future of Internet competition, privacy, security, property rights, and algorithmic markets. Scott Cleland is author of the book: *Search & Destroy: Why You Can't Trust Google Inc.* Cleland also authors the widely-read [www.PrecursorBlog.com](http://www.PrecursorBlog.com); and publishes [www.GoogleMonitor.com](http://www.GoogleMonitor.com).
- He served as Deputy United States Coordinator for International Communications and Information Policy in the George H. W. Bush Administration. Eight Congressional subcommittees have sought Cleland's expert testimony and *Institutional Investor* twice ranked him the #1 independent telecom analyst. Scott Cleland has been profiled in *Fortune*, *National Journal*, *Barrons*, *WSJ's Smart Money*, and *Investors Business Daily*. Cleland's Full Biography can be found at: [www.ScottCleland.com](http://www.ScottCleland.com)
- **Scott Cleland's Three Congressional Testimonies on Google:**
  1. Before the Senate Judiciary Subcommittee on Antitrust on the Google-DoubleClick Merger, September 27, 2007. [http://googleopoly.net/cleland\\_testimony\\_092707.pdf](http://googleopoly.net/cleland_testimony_092707.pdf)
  2. Before the House Energy and Commerce Subcommittee on the Internet on Google Privacy issues, July 17, 2008. [http://www.netcompetition.org/Written\\_Testimony\\_House\\_Privacy\\_071707.pdf](http://www.netcompetition.org/Written_Testimony_House_Privacy_071707.pdf)
  3. Before House Judiciary Antitrust Subcommittee, on Evolving Digital Marketplace, September 16, 2010. [http://www.googleopoly.net/Written\\_Testimony\\_House\\_Judiciary\\_Competition\\_Subcommittee\\_9-16-10.pdf](http://www.googleopoly.net/Written_Testimony_House_Judiciary_Competition_Subcommittee_9-16-10.pdf)