



# **Google's WorldWideWatch over the WorldWideWeb**

## **Charting Google's Internet Empire & Data Hegemony**

### **Google's Data Dominance is Vast, Purposeful, Lasting & Harmful**

**By Scott Cleland\***

President, Precursor LLC\*\* [scleland@precursor.com](mailto:scleland@precursor.com)

Publisher, [www.GoogleMonitor.com](http://www.GoogleMonitor.com) & [www.Googleopoly.net](http://www.Googleopoly.net)

Author, *Search & Destroy: Why You Can't Trust Google Inc.* [www.SearchAndDestroyBook.com](http://www.SearchAndDestroyBook.com)

**September 2014**

*\* The views expressed in this presentation are the author's; see Scott Cleland's full biography at: [www.ScottCleland.com](http://www.ScottCleland.com)*

*\*\*Precursor LLC serves Fortune 500 clients, some of which are Google competitors.*

# Outline

- Executive Summary
- Introduction
- Google's Data Dominance is:
  - Vast
  - Purposeful
  - Lasting
  - Harmful
- Recommendations

Appendices

# **EXECUTIVE SUMMARY**

# 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
-------------	---------	--------------	----------	-------	----------	--------	-------------	----------------	-----------	--------------------	-------------	----------------	-------------------	-----------------	------------	----------------------	-------------------------	----------	-------------	----------	-----------

## Monetization

## Only data monetizer enjoying near universal commercial-dependency

Only entity where ~all: buyers can go for ~all info; publishers for ~all advertisers/readers/viewers; sellers for ~all buyers

***Data gatekeeper power, economic bottleneck power, & unregulated data dealer/broker power to self-deal***

# Commercial Web Functions

### Google leads in 13 of 14 top universal commercial web functions:

Data, search, analytics, advertising, mobile, video, maps, browser, Net Infrastructure, Internet of Things, app store, translation, & email

**Competitive foreclosure via lock-ins/exclusions; serial acquisition of potential competitors & complements**

## Users

## Google controls 5 of top 6, billion-user, universal web platforms:

Search, video, mobile, maps, and browser

**Leverage dominance with service lock-ins, data exclusions & insider metadata on competitors' clients**

## Data

## Unique universal mission/capability to organize world's information

“Google’s mission is to organize the world’s information and make it universally accessible and useful”

**Assume universal “implied consent” from users & property owners; & no legal data protection obligations**

# 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**



# INTRODUCTION

# Introduction to Google's WorldWideWatch

- Sir Tim Berners-Lee invented the WorldWideWeb, a public and decentralized system to enable universal access to information online; Larry Page has invented, and is perfecting Google's de facto WorldWideWatch, a privately-controlled and hyper-centralized, universal system to enable access to information Google determines is useful.
- Where Berners-Lee's WorldWideWeb system is the epitome of openness, diversity and transparency, Page's de facto WorldWideWatch system effectively operates as closed, monolithic, and secretive, where it matters most.
- **Google's data hegemony is unique.** No other entity in the world has: a stated world universal [mission](#) ; a universal information and surveillance [appetite](#); an increasingly universal [repertoire](#) of products, services to collect information; a near world-wide omnipresence; and practically omnipotent web ambitions.
- **Information is power.** *"Google's mission is to organize the world's information..."* Tagline: *"Powered by Google."*
- Google has acquired more information, both public and private, and has invented more ways to use it, than any entity in history. The evidence here shows Google has the real and latent power to organize, influence and control an ever-increasingly large portion of the Internet, and much of the offline world, in its image.
- **Google is the *only* platform in the world** where: users can go for ~all information; publishers can go for ~all advertisers; and advertisers/sellers can go for ~all users. As such, Google is the only entity that can record/track most all: user online traffic and demand for content; advertiser supply of advertisements and their exact target demographics; and what exact content is viewed by whom, when, where and how much.
- The unique value of this analysis is it holistically charts the size and scope the Google Internet Empire and Google's data hegemony for the first time.
- This analysis charts how Google's data dominance is vast, purposeful, lasting, and harmful.

# **GOOGLE'S VAST DATA DOMINANCE**

# 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](#)

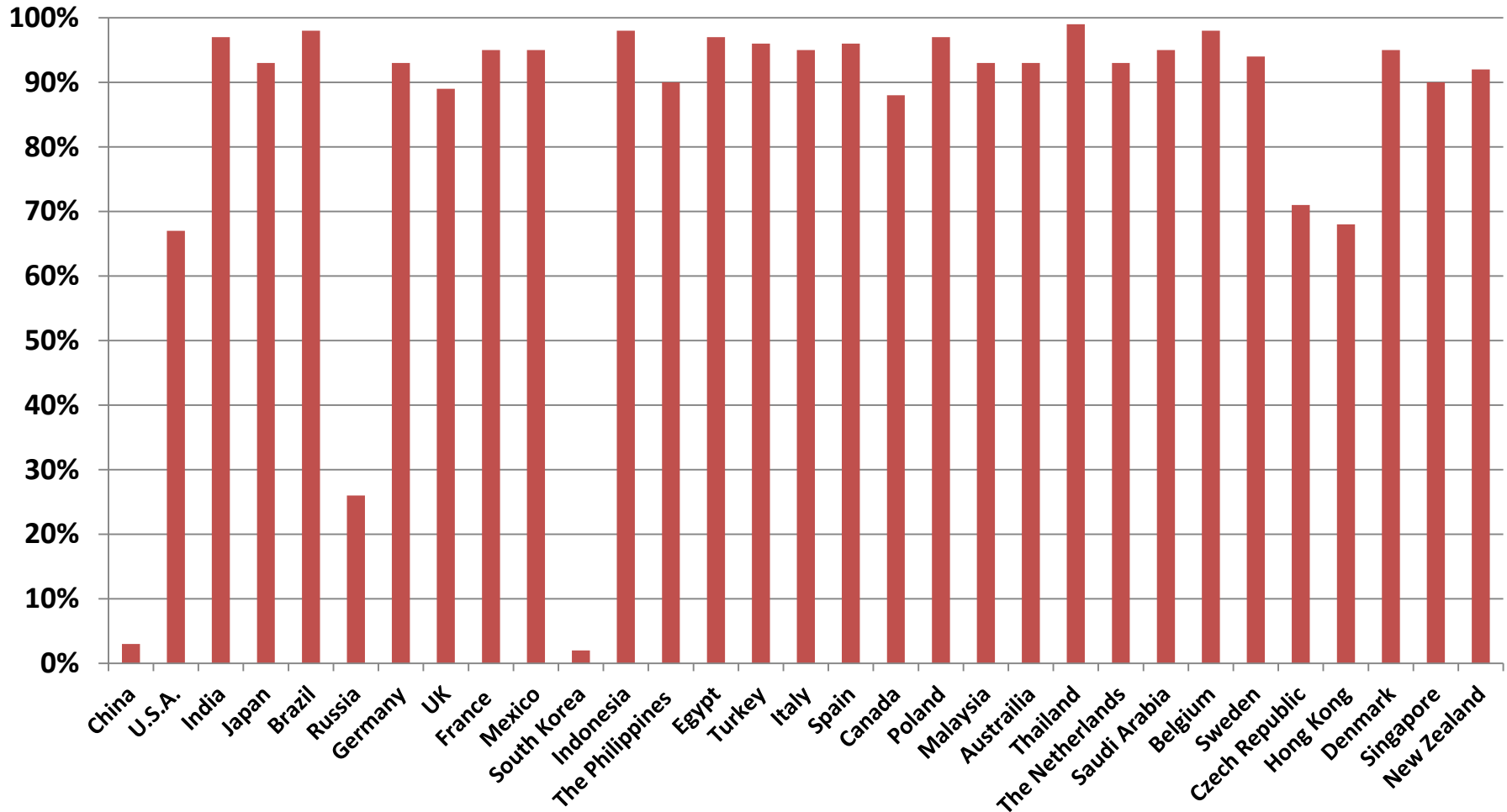
### #1 Corporate Rankings

- **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](#)

# Google's Global Data Dominance by Country Search Share

## *For the Top 31 Countries by # of Internet Users*

*"Search is critical. If you are not found, the rest cannot follow."* Google Exec Santiago de la Mora [NYT 8-09](#)



-Sources: [ReturnOnNow 2013](#), Google & Reuters

# What Data Google's WorldWideWatch **"Universally"** Collects/Centralizes

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

*"Ultimately our goal at Google is to have the strongest advertising network and all the world's information."* [Google's Schmidt](#)

## Centralize "the World's Information"

- 98% share of top >15m websites tracked
- Trillion+ web-pages crawled/copied regularly
- >25,000 sources copied by Google News
- >20 million books copied by Google Books
- 90+% movies/TV shows copied by YouTube
- ~99% satellite images copied by Google Earth
- >540m Google+ profiles grown by all G services
- >425 million users Gmails copied regularly
- 80 languages auto-translated via Translate

## Centralize Most Users

- 1.3b monthly search users
- >1b monthly YouTube Viewers
- >1b Android mobile OS users
- >1b Google Maps users
- ~1b Chrome browser users
- >540m Google+ social users
- >425m Gmail users

## Centralize Most Market Info/Analytics

- Only omnipresent Internet click tracking/analysis
- Uniquely see all online advertiser demand/trends
- Uniquely comprehensive view of user demand
- Unique complete view of publisher ad inventory
- Unique view of global supply/demand for prices
- Lone access to non-public Google Trends info
- First to see new trends/fads/growth inflections
- Unique access to unregulated inside info
- Unique knowledge of online ad market pricing

## Centralize Most Personal Identifications

- IP addresses via Search/Analytics/Cookies/Chrome
- Email addresses via Gmail scanning & Postini filters
- WiFi, SSID & MAC addresses via WiFi wardriving
- Phone/mobile #s via Play, search, Android, Voice, Talk
- Voiceprint recognition: Hangouts/Translate/YouTube
- Face-print recognition via Google+, Photos, YouTube
- 80 Languages identified via Translate/Voice/Video
- Home info: Maps/Earth/StreetView/Android/Play
- Personal info via Apps/product/service registrations
- Social Security/passport/license #s: Desktop Search
- Credit card & bank info: Checkout/Shopping/Wallet
- Health identifiers by Search, Google+, Gmail, Books
- Click-print IDs via analysis of multiple web histories

## Centralize Most Personal Location Info

- Android GPS tracks location when no apps running
- Search/Toolbar/Android use reveals user's location
- Hangout/Maps/Calendar signal destination plans
- Google Goggles recognizes location via Streetview
- Search/Earth/Maps/StreetView show favorite places

## Google's Maximal Data Collection & Centralized Storage Monetization

## Most Centralized System

- Most private metadata generated
- Single user sign-in for ~all services
- Unified privacy policy
- Unified sharing via Google+
- Unified Big Table database
- Most synchronized data centers

## Centralize Most Personal Intentions Info

- ~80% share of search/video, ~80% share of Mobile OS
- Behavioral advertising profile for targeted ad-serving
- Intensive interests via Google+, Search, Alerts, Play
- Click tracking: Analytics, DoubleClick, YouTube, Chrome
- Location interest via Maps, Earth, StreetView, Search
- Financial interests: Search/Finance/Shopping/Wallet
- Private drafts via Gmail, Docs, Groups, Desktop Search
- Plans via Google+/Calendar/Gmail/Voice/Talk/Docs
- Likely votes by party/issue: Search/News/Books
- Health concerns via Google+/Search/Books/YouTube
- Upcoming purchases: Gmail/Google+/Shopping/Search
- Google+/Gmail knows politics/religion/issue views

## Centralize Most Personal Associations Info

- Contact lists: Google+, Hangouts, Gmail, Voice, Groups
- Interests: Play,/Google+/Alerts/News/Reader/Groups
- Reading: Play/News/Books/My Library
- Viewing: YouTube/OnAir/Hangout/DoubleClick/Analytics
- Friends: Google+/Picassa/Gmail/Hangouts
- Gathering places: Earth, Maps, StreetView, Android

# 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**

# Google's WorldWideWatch is Dominating the Consumer "Internet of Things"

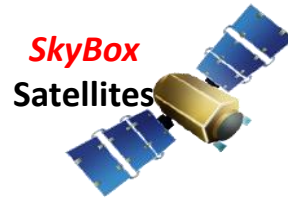
Only Google Has Acquired Most of the Piece-parts Necessary to Construct & Control a Universal Consumer Internet-of-Things Surveillance Network to Maintain its Data Dominance

*Google has acquired 166 companies 2001-2014; and 26 in first 8 months of 2014 [Wikipedia](#)*

## Google's Internet-of-Things WorldWideWatch



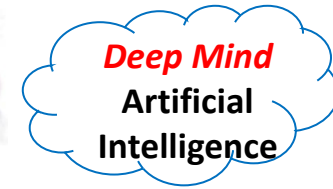
**Titan  
Aerospace  
Drones**



**SkyBox  
Satellites**



**Project  
Loon**



**Deep Mind  
Artificial  
Intelligence**

Note: **red=**  
**acquisitions**

## Android Internet-of-Things Surveillance Platform Secretly Watching ~Everything On the Move... ...At Home/Work



**Wearables:**  
Glass & Contacts  
Facial  
Recognition  
Watch  
Google Fit



**Android  
Devices:**  
Smart-phones  
Tablets  
Chrome-books  
Chromecast  
Android TV



**Boston  
Dynamics  
+ 6 companies**  
Military  
Robotics  
Androids



**Google  
Self-Driving  
Vehicles  
Connected  
Car  
Vehicle OS**



**Google  
Street View  
Vehicle  
Surveillance  
Mapping**



**Nest  
Energy  
Mgmt.  
Thermostats  
Detectors  
Appliances  
Sensors**



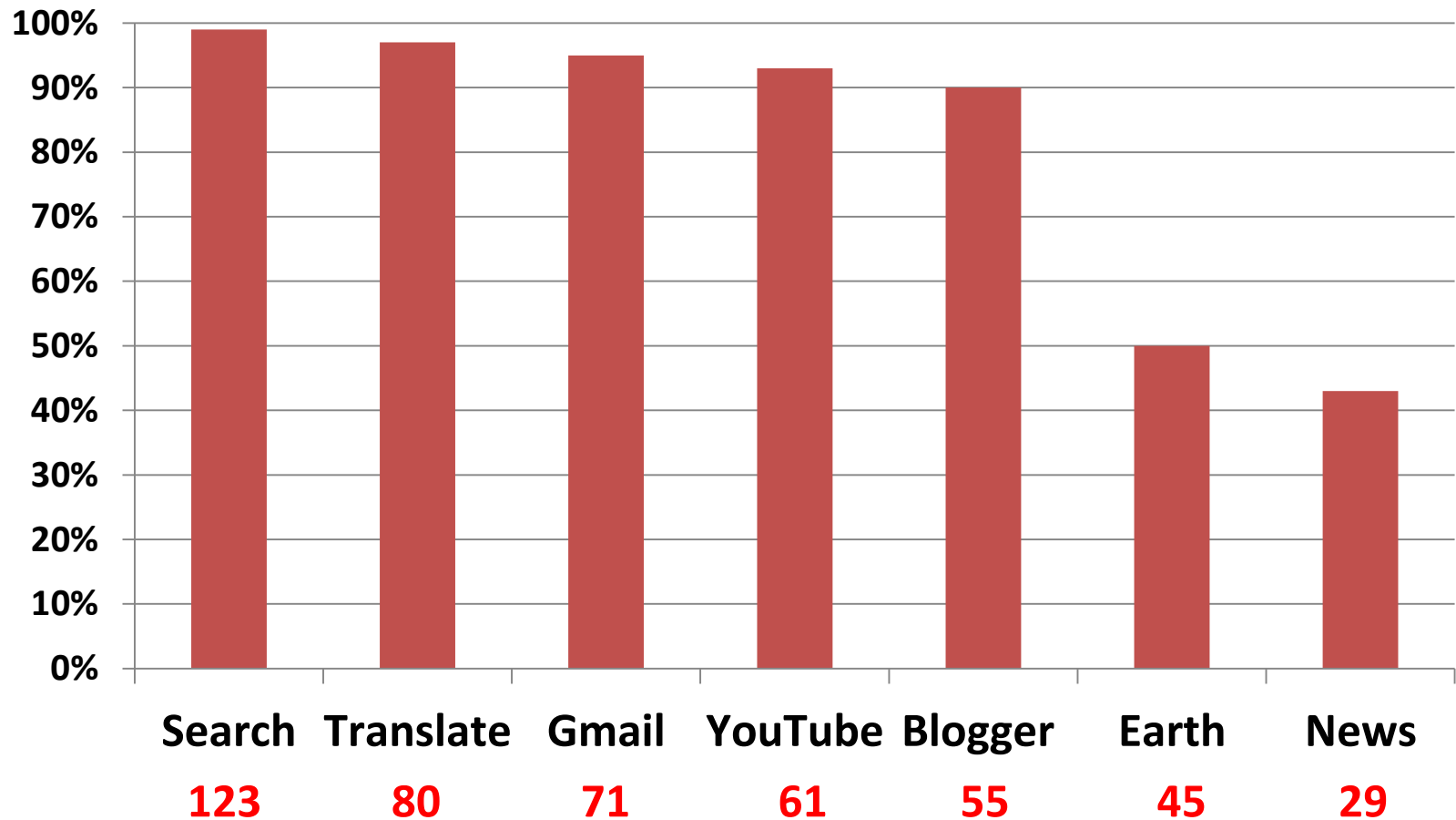
**Dropcam  
WiFi  
Continuous  
Video & Audio  
Surveillance &  
Sensors**



# Google's Unique Centralization of Language Translation in Commerce & Society

## % of World Population Google "universally" Reaches in One's Native language

### # of Languages Google Offers by Service



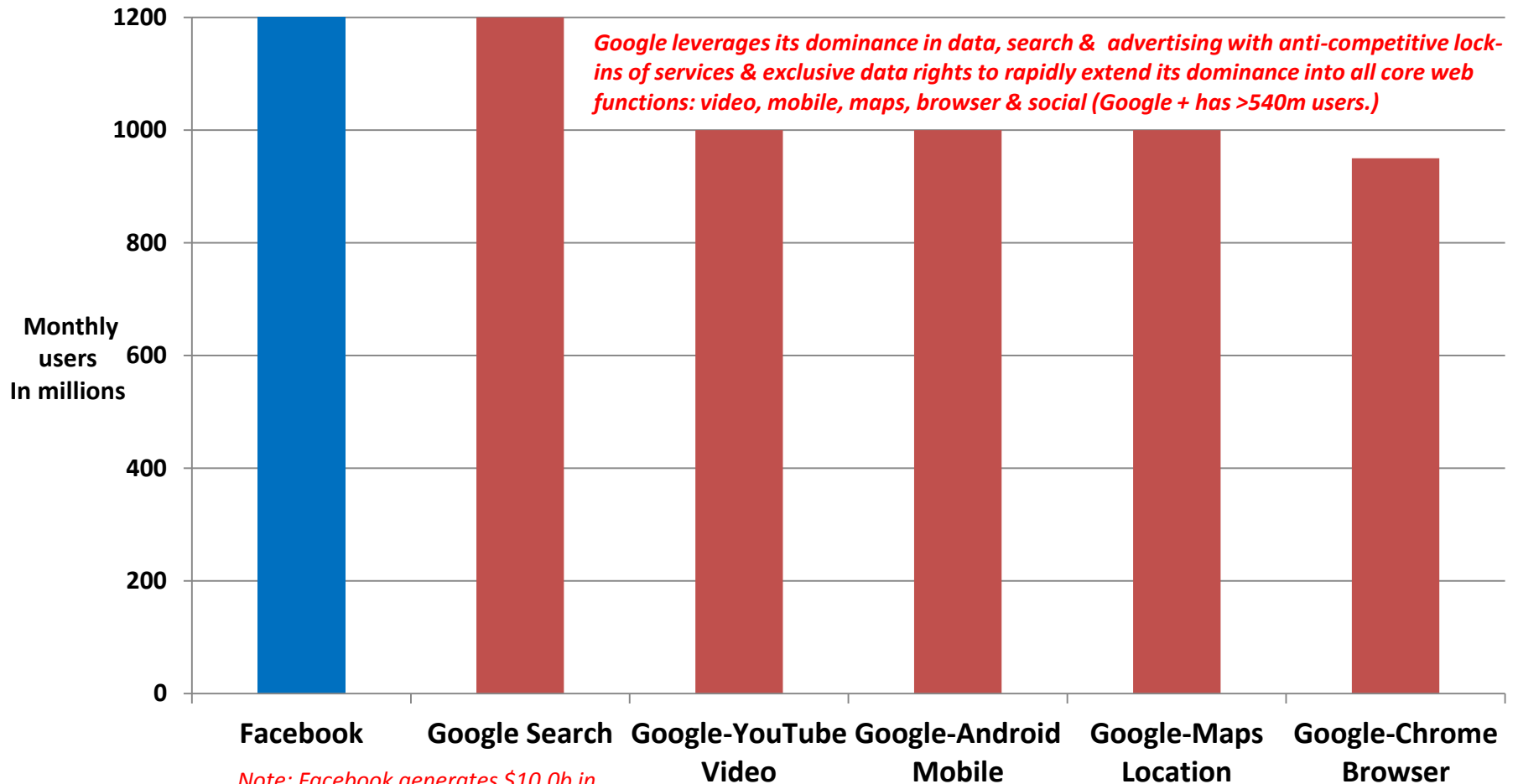
Source: Google.com

# Users: Google Controls 5 of Top 6, Billion-User Web-Platforms

"Platforms are where the aggregated value occurs... The way the industry creates wealth is creating platforms." [Google's Schmidt](#) 6-13

"Almost nothing, short of a biological virus, can scale as quickly, efficiently or aggressively as these technology platforms and this makes the people who build, control and use them powerful, too." [Google's Eric Schmidt](#) 12-12

"Google+ is the fastest-growing network thingy ever. More than 500 million people have upgraded" in 18 months; [Google Blog](#) 12-12



Sources: Google, Business Insider

# Google Leads in 13 of 14 Top Web Functions of the Global Data Economy

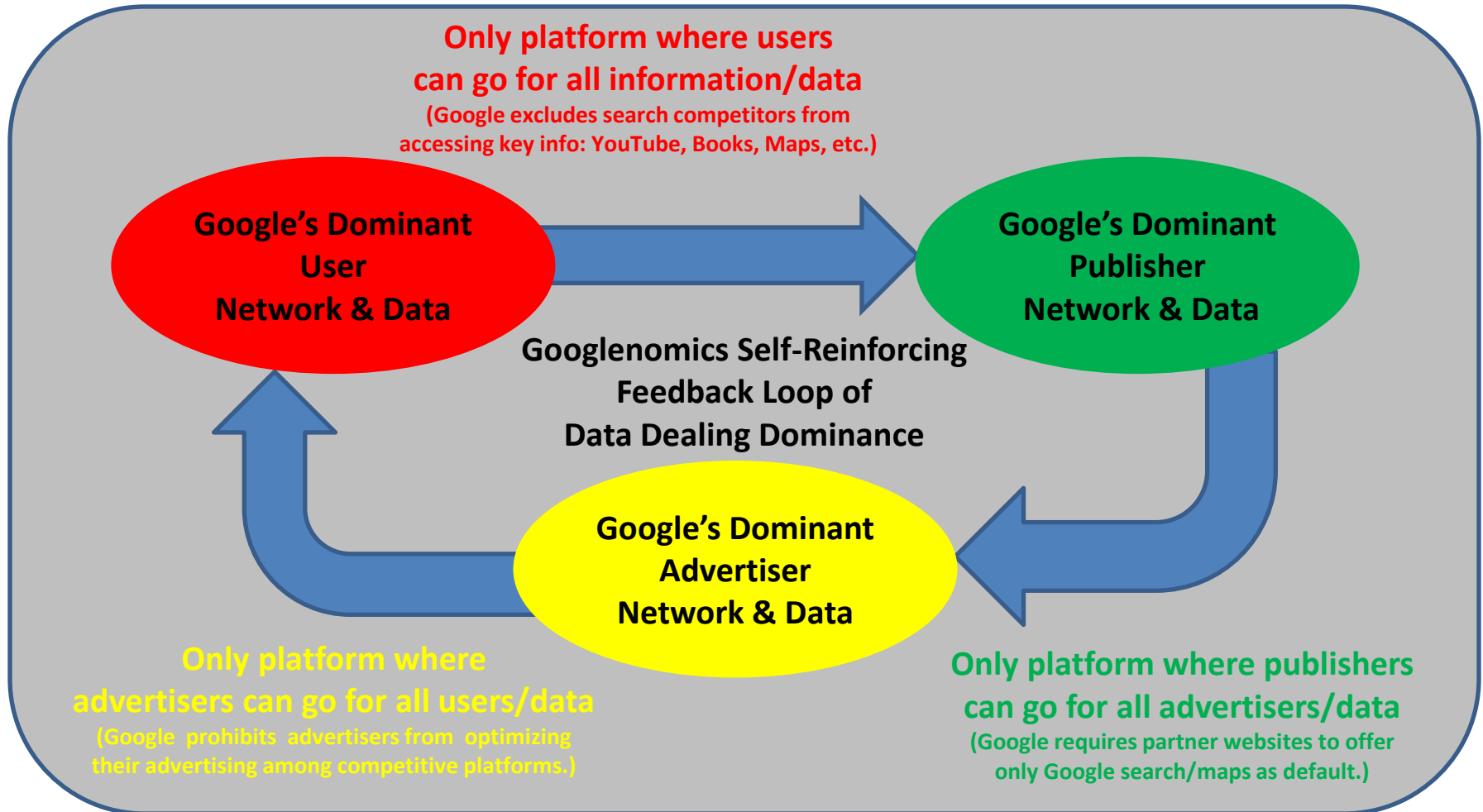
**Serial acquisitions** of potential competitors/complements helped extend Google's dominance beyond search  
Bloomberg Research **ranked Google #1 corporate acquirer** globally over last 3 years [2-14](#); (166 companies 2001-2014)  
*Google's data/search dominance enables it to identify emerging demand & competitors for acquisition before triggering antitrust attention*

- 1. Data Collection** G's Analytics has [~98%](#) site share with [>15m](#) sites tracking; >100 million [gigabyte](#) index; crawl ~60 trillion unique [URLs](#)  
*Acquisitions: DeepMind Technologies 2014; Metaweb 2010; Wavii 2013; JETPac 2014*
- 2. Search** ~1.3b [users](#) *Acquisitions: Usenet 2001, Outride 2001, Orion 2006; Like.com 2010; Sparkbuy 2011; ITA Software 2010;*
- 3. Video distribution** YouTube >1b [users](#) -- *Acquisitions: YouTube 2006; Marratech 2007; Omniso 2008; On2 2009; Episodic 2010; Widevine Technologies 2010; Global IP Solutions 2010; flickr 2011; Next New Networks 2011; Green Parrot Pictures 2011; SageTV 2011; Motorola Mobility 2011; RightsFlow 2011; Songza 2014; Directr 2014*
- 4. Mobile** Android OS >1b [users](#) -- *Acquisitions: Reqwireless 2005; Android 2005; Skia 2005; allPAY 2005; bruNET 2005; Peakstream 2007; AdMob 2009; agnilux 2010; LabPixies; Bumptop 2010; Simplify Media 2010; Zetawire 2010; BlindType 2010; Talkbin 2011; PittPatt 2011; Motorola Mobility 2011; Clever Sense 2011; Sparrow 2012; WIMM Labs 2012; Viewdle; BufferBox 2012; Bump 2013; Flutter 2013; Flexycore 2013; Bitspin 2014; Green Throttle 2014; Divide 2014; drawElements 2014; Directr 2014*
- 5. Location Maps/ Earth** >1b [users](#) -- *Acquisitions: Zipdash 2004; Where2 2004; Keyhole 2004; Endoxon 2006; Image America 2007; Zagat 2011; Waze 2013; Titan Aerospace 2014; Skybox Imaging 2014*
- 6. Browser** Chrome ~1b [users](#) *Acquisitions: Skia 2005; Green Border 2007; Instantiations 2010;*
- 7. Tracking/Analytics** Google Analytics is used by [>15m](#) websites -- *Acquisitions: Urchin 2005; Measure Map 2006; Trendalyzer 2007; DoubleClick 2007; Postrank 2011; PittPatt 2011; Viewdle 2012; Waze 2013; Nest 2014; Titan Aerospace 2014; Skybox 2014; Dropcam 2014*
- 8. Advertising** >2m display ad-[websites](#) -- *Acquisitions: Applied Semantics 2003; Sprinks 2003; dMarc Broadcasting 2006; DoubleClick 2007; AdMob 2009; Teracent 2009; Invite Media; AdMeld 2011; Adometry 2014; mDialog 2014*
- 9. Apps** Play offers >1.3m [apps](#) *Acquisitions: Appurify 2014*
- 10. Translation** 80 languages, 97% world pop. *Acquisitions: Phonetic Arts 2010; Quest Visual 2014;*
- 11. Internet of Things (consumer)** *Acquisitions: Deep Neural Networks 2013; Flutter 2013; SCHAFT Inc. 2013; Industrial Perception 2013; Redwood Robotics 2013; Meka Robotics 2013; Holomni 2013; Bot & Dolly 2013; Boston Dynamics 2013; Makani Power 2013; DeepMind Technologies 2014; Titan Aerospace 2014; Stackdriver 2014; MyEnergy 2014; Nest 2014; Skybox Imaging 2014; Dropcam 2014*
- 12. Email** Gmail >425m [users](#) *Acquisitions: Neotonic Software; Postini 2007; reMail 2010; Sparrow 2012;*
- 13. Internet Infrastructure** *Acquisitions: Akwan 2005; Current Communications 2005; Postini 2007; Sage TV 2011; Talaria Technologies 2013; Deep Neural Networks 2013; Imperium 2014; Titan Aerospace 2014; Stackdriver 2014; MyEnergy 2014; Nest 2014; Skybox Imaging 2014; Alpentel Technologies 2014; Dropcam 2014; Appurify 2014*
- 14. Social** >540m Google+ users #2 in social networking -- *Acquisitions: Usenet 2001; Pyra Labs 2003; Genius Labs 2004; Picasa 2004; Dodgeball 2005; YouTube 2006; Panoramio 2007; Aardvark 2010; Slide.com 2010; Jambool 2010; Angstro 2010; Plannr 2010; Picnick 2010; Like.com 2010; SocialDeck; Punchd 2011; Dealmap 2011; Zave Networks 2011; DailyDeal 2011; flickr 2011; Postrank 2011; Fridge 2011; SocialGrapple 2011; Katango 2011; milk Inc. 2012; Interactive Targeting 2012; Wildfire Interactive 2012; Behavio 2013;*

# Monetization: The Data Dealing Dominance of “Googlenomics”

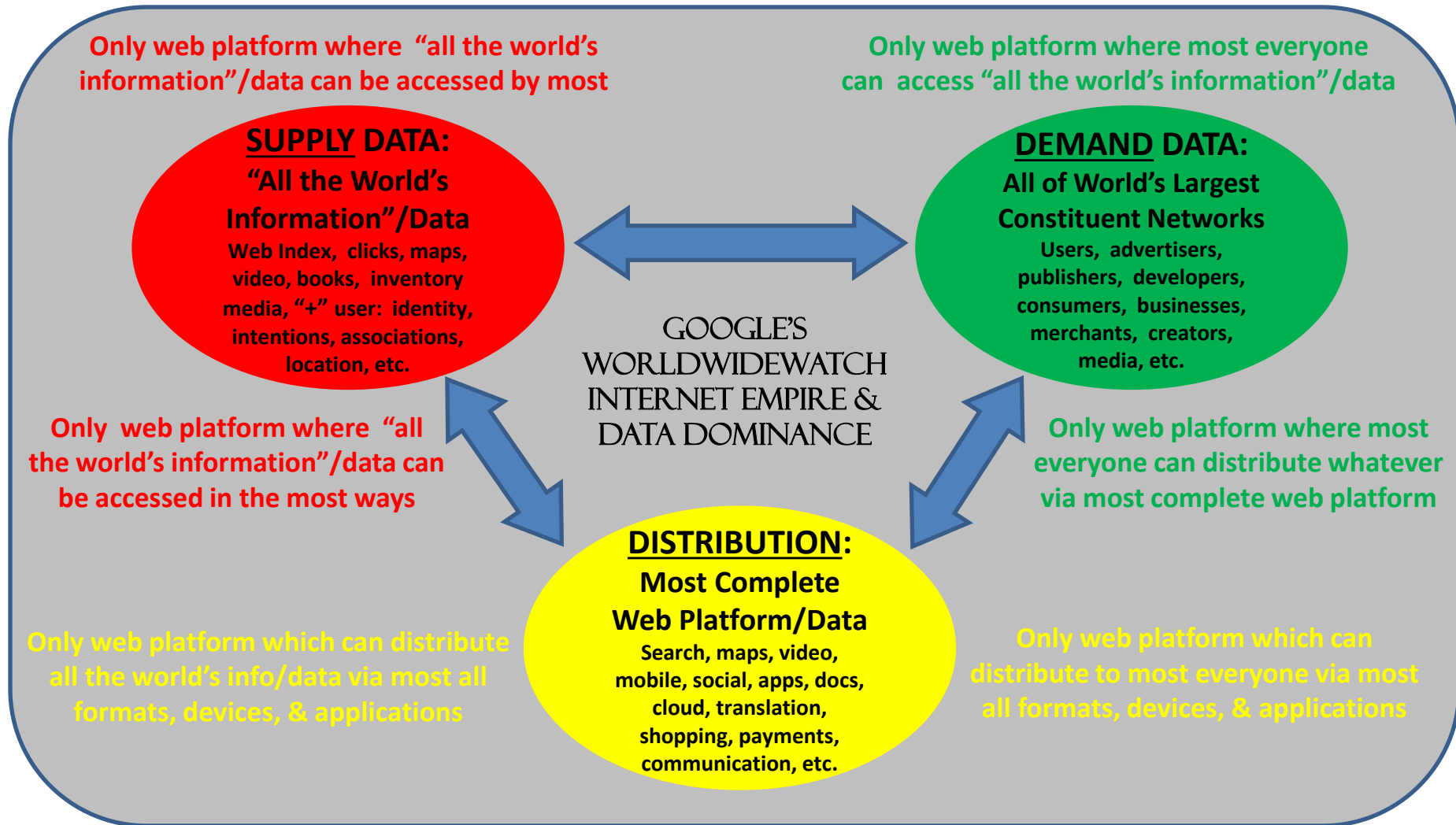
## Exclusion Fosters Google’s Self-Reinforcing Feedback Loop of Data Monetization Dominance

*“So more users more information, more information more users, more advertisers more users, more users more advertisers, it’s a beautiful thing, lather, rinse repeat, that’s what I do for a living. So that’s ... ‘the engine that can’t be stopped.’”* Jonathan Rosenberg, Google Sr. VP 2-08



# Google's WorldWideWatch, Internet Empire & Data Dominance Over the Global Data Economy's Data Supply, Demand & Distribution

*"The seller of an incomplete database...cannot compete effectively with the seller of a comprehensive product." DOJ vs. Google Book Settlement*



# 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	Artificial Intelligence	Robotics	Health Care	Genomics	Wearables
-------------	---------	--------------	----------	-------	----------	--------	-------------	----------------	-----------	--------------------	-------------	----------------	-------------------	-----------------	------------	----------	-------------------------	----------	-------------	----------	-----------

## Monetization

## Only data monetizer enjoying near universal commercial-dependency

Only entity where ~all: buyers can go for ~all info; publishers for ~all advertisers/readers/viewers; sellers for ~all buyers

***Data gatekeeper power, economic bottleneck power, & unregulated data dealer/broker power to self-deal***

# Commercial Web Functions

### Google leads in 13 of 14 top universal commercial web functions:

Data, search, analytics, advertising, mobile, video, maps, browser, Net Infrastructure, Internet of Things, app store, translation, & email

**Competitive foreclosure via lock-ins/exclusions; serial acquisition of potential competitors & complements**

## Users

## Google controls 5 of top 6, billion-user, universal web platforms:

Search, video, mobile, maps, and browser

**Leverage dominance with service lock-ins, data exclusions & insider metadata on competitors' clients**

## Data

## Unique universal mission/capability to organize world's information

“Google’s mission is to organize the world’s information and make it universally accessible and useful”

**Assume universal “implied consent” from users & property owners; & no legal data protection obligations**

# **GOOGLE'S PURPOSEFUL DATA DOMINANCE**

## In Their Own Words:

# Google's Global Data Hegemony Ambitions

- *"Google's mission is to organize the world's information and make it universally accessible and useful..."* [Google](#)
- *"Search is critical. If you are not found, the rest cannot follow."* Google Exec Santiago de la Mora [NYT 8-09](#)
- *"We are very early in the total information we have within Google."* Google Chairman Schmidt [FT 5-07](#)
- *"Anything that you see in the real world needs to be in our database"* Google Map's Evgeny Morozov [Slate 5-13](#)
- *"Our goal is to put together a sort of digital mirror of the world."* Google Maps Exec Dan Sieberg [Telegraph 9-13](#)
- *"Our map... is the world's map. ... Maps are an expression of culture."* Google Earth's Rebecca Moore [SEL 6-12](#).
- *"Ultimately our goal at Google is to have the strongest advertising network and all the world's information."* Google Chairman Eric Schmidt [ZDNet 8-06](#)
- *"Our goal is to put computing everywhere."* Google SVP Sundar Pichai [Quartz 7-13](#)
- *"Our goal with Android is to reach everyone."* Google Chairman Eric Schmidt [ATD 4-13](#).
- *"There is a real desire for YouTube to be a global classroom and a global town square, not just a global living room."* Google Exec Hunter Walk, per [Bloomberg 10-12](#).
- *"In genomics, there's a massive amount of information in which you can look for patterns and develop insights."* Google Ventures Head, Bill Maris. [WSJ 10-12](#)
- *"Our model is just better... Based on that, we should have 100% share"* Google Chairman Eric Schmidt [12-09](#)
- *"Google's "goal is to change the world, and monetization is a technique to do that."* Eric Schmidt [Wired 12-08](#)
- *"The entire industry is organized around this mobile transition and who gets there first is going to be both the economic winner and the influence winner,"* Google Chairman Schmidt [CNBC 4-14](#)



# Google's Global Data Hegemony Strategy

- *"It's obvious what our strategy should be. It's to work on problems on a scale no one else can."*
  - Sergey Brin, [Wired 6-09](#).
- *"I think what we're about is using large-scale kind of technology."*
  - Google co-founder Larry Page [Wired 4-12](#)
- *"Launch first, correct later."*
  - Google Chairman Eric Schmidt [FT 6-10](#).
- *"Platforms are where the aggregated value occurs... The way the industry creates wealth is creating platforms."*
  - Google Chairman Eric Schmidt [ZDNet 6-13](#).
- *"We are in the information business."*
  - Google Chairman Eric Schmidt [FT 6-10](#).
- *"Scale is the key. We just have so much scale in terms of the data we can bring to bear."*
  - Google Chairman Eric Schmidt [Bloomberg 10-09](#).
- *"We don't have better algorithms than everyone else; we just have more data."*
  - Google's Chief Scientist Peter Norvig [ECPM Blog 3-10](#)
- *"We start by cloning what we have until we master the new medium."*
  - Google's Brad Abrams [Forbes 11-12](#)
- *"Anything that benefits the Internet ecosystem will benefit Google."*
  - Google's Peter Greenberger [Philly.com 3-10](#)
- *"Selling ads doesn't generate only profits; it also generates torrents of data about users' tastes and habits..."*
  - Google-YouTube Chief, Susan Wojcicki [Wired 5-09](#).
- *"The power of individual targeting—the technology will be so good it will be very hard for people to watch or consume something that has not in some sense been tailored for them."*
  - Google Chairman Eric Schmidt, [to WSJ](#), 8-14-10

# Google Explains the “Googlenomics” of Data Hegemony

Google Chief Economist Hal Varian explains Google’s “*datarati*” power to “*harness supply and demand*” to Steven Levy of [Wired](#) in “*The secret of Googlenomics, data-fueled recipe brews profitability*” 5-22-09

- “Googlenomics actually comes in two flavors: macro and micro. The macroeconomic side involves some of the company's seemingly altruistic behavior, which often baffles observers. Why does Google give away products like its browser, its apps, and the Android operating system for mobile phones? **Anything that increases Internet use ultimately enriches Google, Varian says. And since using the Web without using Google is like dining at In-N-Out without ordering a hamburger, more eyeballs on the Web lead inexorably to more ad sales for Google.**” [Bolds added for emphasis.]
- “The microeconomics of Google is more complicated. **Selling ads doesn't generate only profits; it also generates torrents of data about users' tastes and habits, data** that Google then sifts and processes in order to predict future consumer behavior, find ways to improve its products, and sell more ads. This is **the heart and soul of Googlenomics**. It's a system of constant self-analysis: a **data-fueled feedback loop that defines not only Google's future but the future of anyone who does business online.**” [Bolds added for emphasis.]
- “...Varian believes that a new era is dawning for what you might call **the datarati**— and **it's all about harnessing supply and demand, "What's ubiquitous and cheap?"** Varian asks. “Data.” And **what is scarce? The analytic ability to utilize that data.**” [Bolds added for emphasis.]
- “Varian, of course, knows that his employer's success is not the result of inspired craziness but of an early recognition that the Internet **rewards fanatical focus on scale, speed, data analysis, and customer satisfaction.**” [Bold added for emphasis.]

# Google's Biggest Data Hegemony Warnings

- *"...we expect that advertising funded search engines will be inherently biased towards the advertisers and away from the needs of the consumers. Since it is very difficult even for experts to evaluate search engines, search engine bias is particularly insidious." ... "...we believe the issue of advertising causes enough mixed incentives that it is crucial to have a competitive search engine that is transparent..."* Google co-founders Larry Page & Sergey Brin, [1998 Research Paper](#)
- *"There was 5 exabytes of information created between the dawn of civilization through 2003, but that much information is now created every two days, and the pace is increasing... People aren't ready for the technology revolution that's going to happen to them."* Google Chairman Schmidt [8-10](#)
- *"In the future, there's going to be no hidden people."* Google Ideas Director Jared Cohen [CNN 5-13](#).
- *"If you have something that you don't want anyone to know, maybe you shouldn't be doing it in the first place;"* Google's Eric Schmidt [CNBC 12-09](#).
- *"Show us 14 photos of yourself and we can identify who you are;"* Google Chairman Eric Schmidt [Techonomy 2010](#).
- *"We know where you are. We know where you've been. We can more or less know what you're thinking about."* Google's Eric Schmidt [Atlantic 10-10](#).
- *"In this new future...We will know your position down to the foot and down to the inch over time;"* Google's Schmidt [Techcrunch 9-10](#).
- *"Virtually everything that we want to do, I think, is somewhat at odds with locking down all of your information for uses you haven't contemplated yet..."* Google CEO Larry Page 10-18-12
- *"Maybe you don't want to ask a question... Maybe you want to just have it answered for you before you ask it. That would be better."* Google CEO [Larry Page 7-14](#).
- *"The impact of the data revolution will be to strip citizens of much of their control over their personal information....The communication technologies we use today are invasive by design, collecting our photos, comments and friends into giant databases that are searchable and, in the absence of regulation...[it is all] fair game"* Google Chairman Eric Schmidt [CSM 5-13](#).
- *"Anything that increases Internet use ultimately enriches Google... more eyeballs on the Web lead inexorably to more ad sales for Google."* Google Chief Economist Hal Varian [Wired 5-09](#).
- Google is *"the biggest kingmaker on this earth."* Google Ranking Head Amit Singhal [Telegraph 6-10](#).
- *"I don't believe society understands what happens when everything is available, knowable and recorded by everyone all the time,"* Google Chairman Eric Schmidt [WSJ 8-10](#).
- *"Almost nothing short of a biological virus, can scale as quickly, efficiently or aggressively as these technology platforms and this makes the people who build, control and use them powerful too."* Google Chairman Eric Schmidt, per [WebProNews 12-12](#).
- *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, [Fortune 12-12](#).
- *"...show me a company that failed because of litigation. I just don't see it. Companies fail because they do the wrong things or they aren't ambitious, not because of litigation or competition."* Google CEO Larry Page [Wired 1-13](#)

# In Their Own Words

## Google's Culture of Unaccountability

- *"Google's leadership does not care terribly much about precedent or law."* top [Google lawyer](#) in [In The Plex 4-11](#).
- *"If we could wave a magic wand and not be subject to US law, that would be great;"* Google Co-founder Sergey Brin [Guardian](#), 4-12,
- *"Google is melding a positive office culture with minimal accountability controls."* The company's goal is "to think big and inspire a culture of yes" Google Chairman Eric Schmidt before the [Economic Club](#) per [WID 6-08](#).
- *"Sergey and Larry almost always decided to take the risk. They were pretty fearless."* Doug Edwards Googler #59 [Telegraph 7-11](#).
- *"We try not to have too many controls." "People will do things that they think are in the interests of the company. We want them to understand the values of the firm, and interpret them for themselves."* Nikesh Aurora, Head of Google European Ops [FT 9-07](#)
- *"People don't want to be managed"* Google CEO Larry Page in [In the Plex 4-11](#).
- *"The word 'control' is not such a strong word at Google."* Google Chairman Eric Schmidt per the [Telegraph 7-10](#).
- *"In most cases... the [Google] default is not to use the most secure form because it slows everything down. ... Ultimately we are not going to do anything that disadvantages speed,"* Google Chairman Schmidt [YouTube 9-08](#).
- *"We do not guarantee that Android is designed to be safe; its format was designed to give more freedom. When they talk about 90% of malicious programs for Android, they must of course take into account the fact that it is the most used operating system in the world. If I had a company dedicated to malware, I would also send my attacks to Android."* Google Android Chief Sundar Pichai, [Frandroid 2-14](#).
- *"Google has a 'healthy disrespect for the impossible.'" Vic Gundotra, Google Sr. VP Social, [FT 6-12](#).*
- *"At Google, we give the impression of not managing the company because we don't really. It sort of has its own borg-like quality if you will. It sort of just moves forward."* Google Chairman Eric Schmidt in [Gigaom 5-11](#).
- *"No harm, no foul."* Google CEO Schmidt on Google Street View's secret snooping on private WiFi [BBC 5-10](#).
- *"It's important to distinguish between 'worry versus harm' when it came to privacy online."* Larry Page, [BBC 5-10](#).
- *"It's every man for himself... In the end, it seems every machine has to defend itself. The internet was designed that way."* Vint Cerf, Google Internet Evangelist and co-father of the Internet, [Guardian 9-08](#).

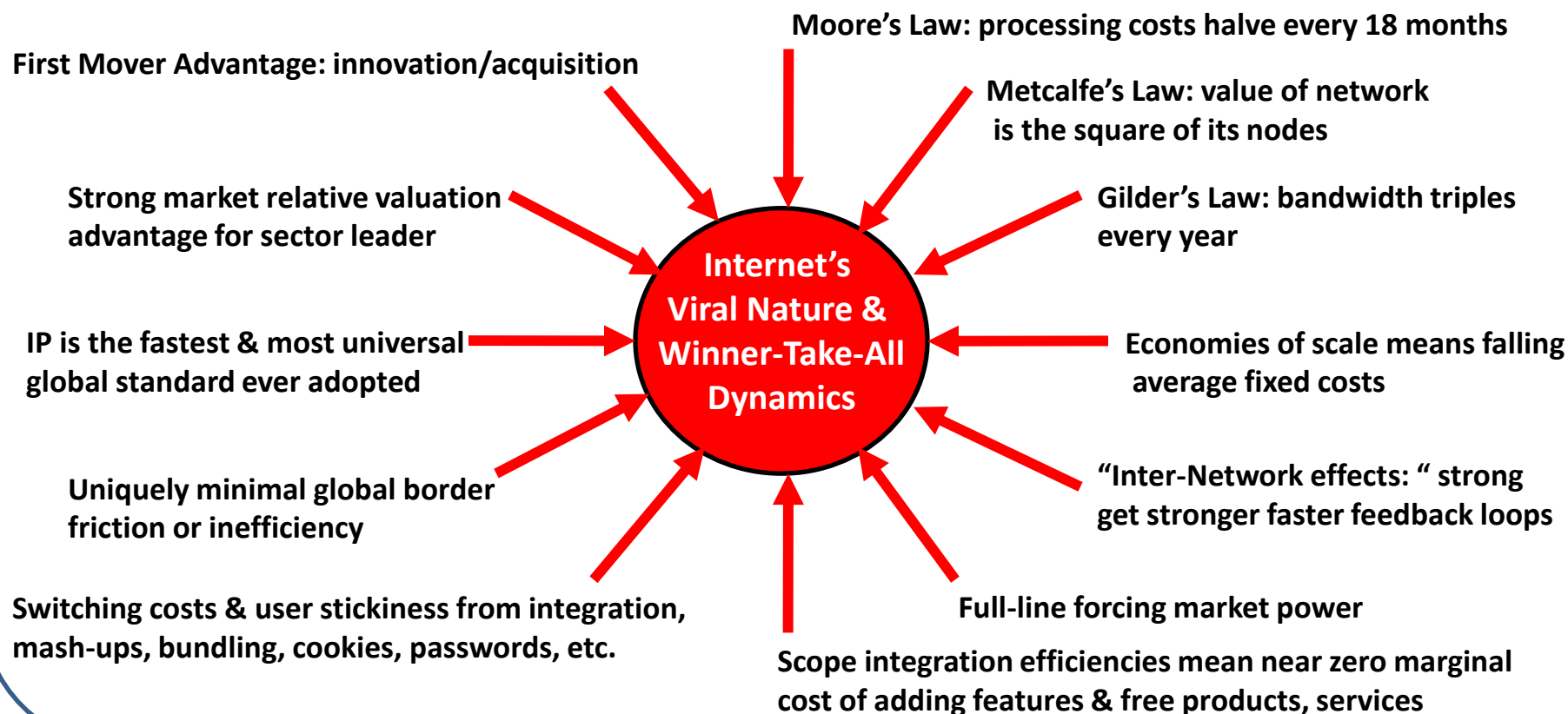
# **GOOGLE'S LASTING DATA DOMINANCE**

# “Inter-Network Effects” Make Internet Competition/Antitrust Different

## Google’s Leveraging Internet’s Viral Nature & “Winner-take-all” Dynamics

*“Anything that benefits the Internet ecosystem will benefit Google.”* Google’s Peter Greenberger 3-2-10

### “Inter-Network Effects”



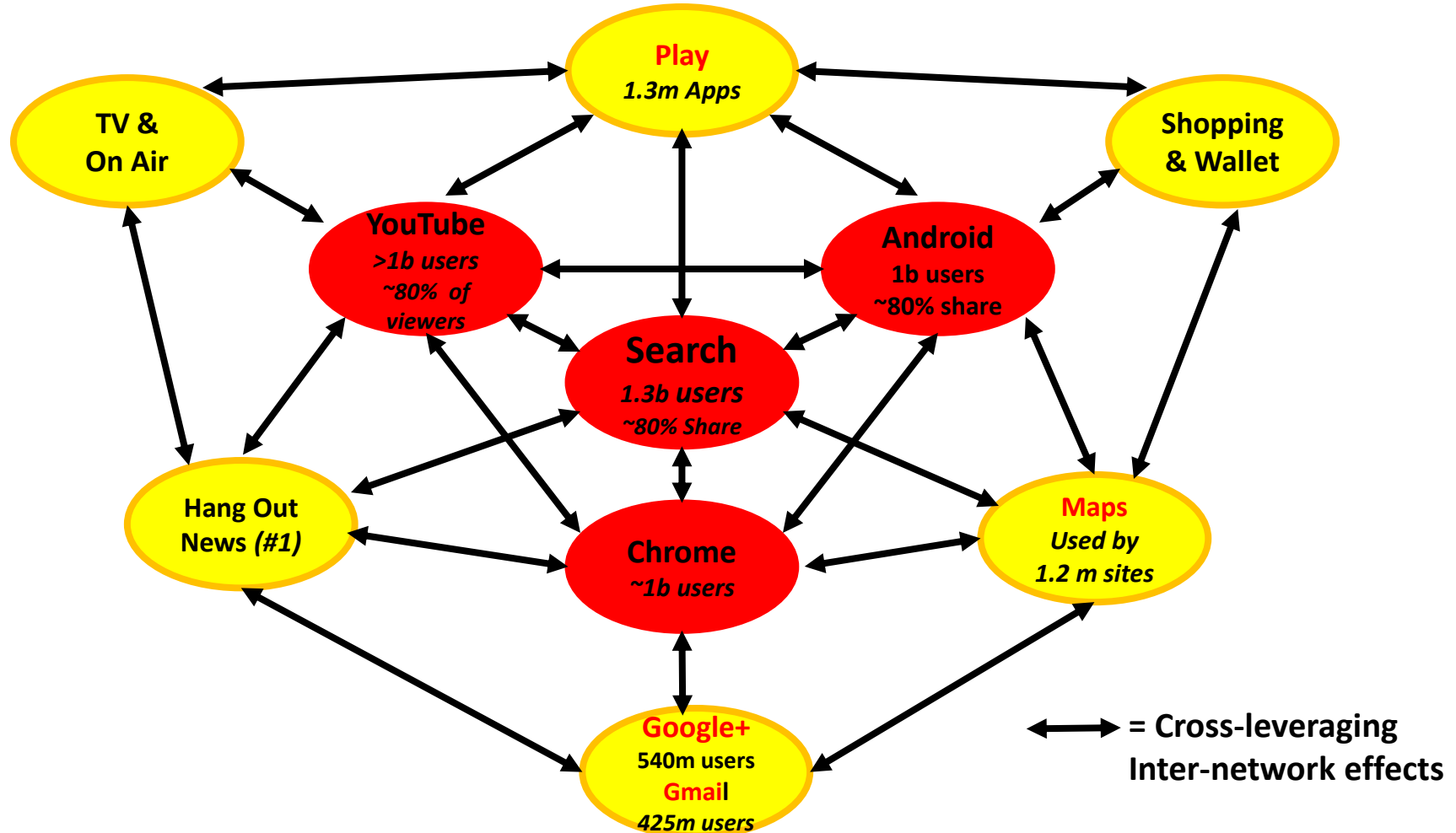
# Google's Cross-Leveraging Inter-Network Effects for More Dominance

Cross-Leveraging Search, YouTube, Android, Maps, Chrome, Play, Google+, & Gmail

**Maintains Google's Data/Advertising Dominance, Extends it to Adjacent Markets**

*"We start by cloning what we have until we master the new medium."* Google's Brad Abrams 11-12

*"Almost nothing, short of a biological virus, can scale as quickly, efficiently or aggressively as these technology platforms and this makes the people who build, control and use them powerful, too."* Google Chairman Eric Schmidt 12-12

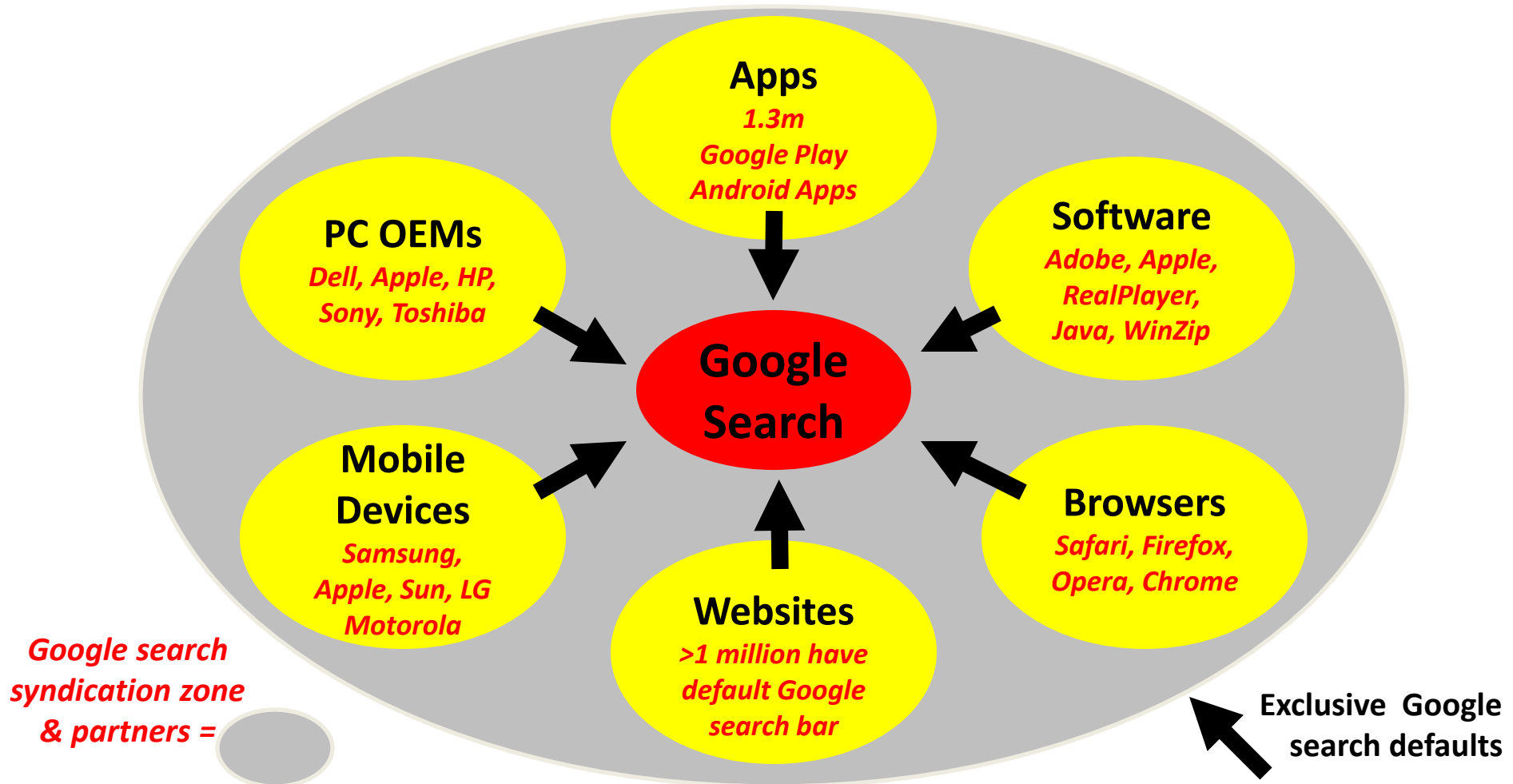


# Google's Surveillance Syndicate Reinforces Google's Data Dominance

## Google's Leveraging Million-plus Exclusive Search Syndication Deals to Exclude Competitors from Competing for Half of Google's Searches/User Data

Half of all Google searches originate from websites other than Google per Google's CBO Nikesh Arora, [ATD](#) 2-13

This means Google pays its "partners" ~\$12b annually to make Google their default search engine and to contractually exclude search competitors from competing for half of Google's dominant search share.





# **GOOGLE'S HARMFUL DATA DOMINANCE**

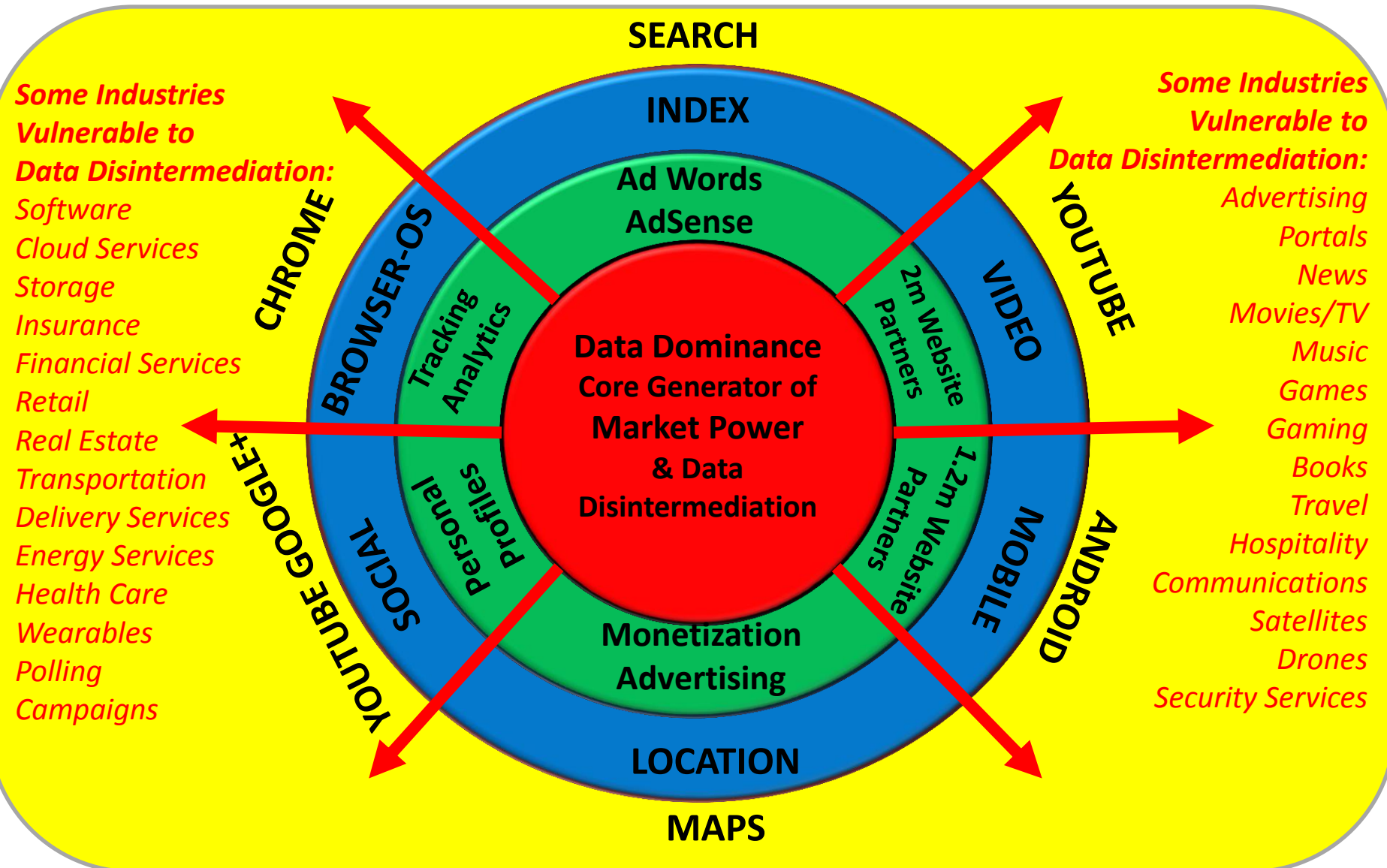
# The Economic Harms of Google's Extreme Centralization of Global Information Power & Data Dominance

- **Gatekeeper power** to unilaterally dictate what online content most people discover, read, view & share
  - *"Search is critical. If you are not found, the rest cannot follow."* Google Exec Santiago de la Mora [NYT 8-09](#)
  - *"We won't (and shouldn't) try to stop the faceless scribes of drive1, but we can move them to the back row of the arena."* Google SVP Rosenberg [2-09](#)
- **Bottleneck power** to unilaterally pick market winners and losers not on merit or competition
  - Google is *"the biggest kingmaker on this earth."* Google Ranking Head Singhal [Telegraph 6-10](#)
  - *"Anything that increases Internet use ultimately enriches Google... more eyeballs on the Web lead inexorably to more ad sales for Google."* Google Chief Economist Hal Varian [Wired 5-09](#).
- **Market power** to dictate ad prices and advertising payouts to partners that provide half of all Google searches
  - *"So more users more information, more information more users, more advertisers more users, more users more advertisers, it's a beautiful thing, lather, rinse repeat, that's what I do for a living. So that's ... 'the engine that can't be stopped.'"* Google SVP [Rosenberg 2-08](#)
  - *"Ultimately our goal at Google is to have the strongest advertising network and all the world's information."* Google Chairman Schmidt [8-06](#)
  - *"Our model is just better... Based on that, we should have 100% share"* Google Chairman Schmidt [12-09](#)
- **Market power to corner or manipulate markets** from Google's unique view of supply, demand, prices, & inventory
  - *"There are many, many things that Google could do, that we chose not to do."... "One day we had a conversation where we figured we could just try to predict the stock market... and then we decided it was illegal. So we stopped doing that."* Google's Schmidt Fortune [3-10](#)
- **Unregulated data-dealer/broker power** to self-deal, anti-competitively discriminate, and hide conflicts of interest
  - No duty to not self-deal, or to be an honest broker that discloses conflicts, or to operate fairly, transparently, & non-discriminatorily

# Anti-competitive Harms of Google's Data Dominance: Google has Market Power to: Disintermediate, Commoditize & Destroy Competitive Markets in >Half of the Economy

*"What if we were the storefront ourselves?" Google asked an ecommerce competitor [WSJ 8-14](#)*

*"All the value add is going to Google and everyone else becomes a commodity." a former Google competitor [WSJ 8-14](#)*



# The Societal Harms of Google's Extreme Centralization of Information Power

- **Single point of failure for data protection, privacy & security** (*Too big to not fail*)
  - “Global Internet traffic dipped by 40 percent when Google experienced a complete blackout [for less than five minutes], web analytics firms have claimed.” per [Search Engine Land 8-13](#)
  - Imagine the systemic risk to the financial system if one global provider held half of the currencies, stocks, bonds, loans & precious metals, and provided half of the world's banking, brokering, and public exchange functions?
  - Or imagine the economic risk if one provider dominated global distribution of electricity, gas, oil, coal, water, etc.?
- **De-humanization of users**
  - Users are the product Google monetizes for advertisers/partners, not their claimed customer.
  - Google users are effectively inanimate data, to be tracked, mined, tested, profiled and influenced, not individuals with personal individual sovereignty, rights, privacy, dignity or real choice.
  - Google's operating presumption of “innovation without permission” is essentially a Google imperial doctrine of “implied consent” of users who have no expectation of privacy, and who have no right to be forgotten, left alone, or be safe -- as Google subordinates security to speed and unfettered freedom.
- **De facto surrender of national sovereignty**
  - Enable a non-sovereign entity to increasingly dictate de facto, lowest-common-denominator, universal standards for online behavior, speech, civility, propriety, privacy, property rights, justice, news, ethics, business, politics, etc.
  - **If information is power, Google's data/platform dominance is power to influence elections/candidates/parties**
  - “It's every man for himself... In the end, it seems every machine has to defend itself. The internet was designed that way.” Vint Cerf, Google Internet Evangelist and co-father of the Internet, [Guardian 9-08](#).
- **Mono-cultural-ization of the World in Google's Image**
  - “Our map... is the world's map.” Google Earth's Rebecca Moore [SEL 6-12](#).
  - “There is a real desire for YouTube to be a global classroom and a global town square, not just a global living room.” Google Exec Hunter Walk, per [Bloomberg 10-12](#).
  - “Maybe you don't want to ask a question... Maybe you want to just have it answered for you before you ask it. That would be better.” Google CEO [Larry Page 7-14](#).

# **RECOMMENDATIONS**

# Recommendations

1. Enforce the law. Don't settle for less or for the special treatment that Google demands.
  - Don't ignore Google's own admissions/warnings of its data dominance, ambitions, and culture.
2. Maintain a realistic view of Google Inc. because the record shows Google:
  - Is the single most dominant company competition authorities have ever investigated;
  - Is a serial [violinator and recidivist](#) of competition law;
  - Is a serial [violinator and recidivist](#) of data protection law;
  - Has a long and continuous [history](#) of data protection security failures with Android;
  - Has a poor and defiant track [record](#) with its many previous legal settlements;
  - Has [operated](#) as if Google is above the law; and
  - Fosters a business [culture of unaccountability](#).
3. Recognize Google's:
  - Data dominance is the core source and epicenter of Google's radiating market power; and
  - Competition and data protection abuses are inextricable and one in the same, requiring a holistic, not fragmented enforcement approach.
4. Require Google to:
  1. 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.
  2. Follow the Golden Rule – to treat others they way they treat themselves.
  3. 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 by not self-dealing.

# **APPENDICES**

# Appendix A - 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)



# Appendix B: [www.Googleopoly.net](http://www.Googleopoly.net) Research

Google-Android's Data Protection Failures – [August 2014](#)

Google's Privacy Rap Sheet – [June 2014](#)

Google's Anti-Competitive Rap Sheet – [April 2014](#)

## Googleopoly Antitrust Research Series:

- [Googleopoly I](#): The Google-DoubleClick Anti-competitive Case – 2007
- [Googleopoly II](#): Google's Predatory Playbook to Thwart Competition – 2008
- [Googleopoly III](#): Dependency: Crux of the Google-Yahoo Ad Agreement Problem – 2008
- [Googleopoly IV](#): Google Extends its Search Monopoly to Monopsony over Info -- 2009
- [Googleopoly V](#): Why the FTC Should Block Google-AdMob – 2009
- [Googleopoly VI](#): Seeing the Big Picture: Google's Monopolizing Internet Media --2010
- [Googleopoly VII](#): Monopolizing Location Services – Skyhook is Google's Netscape –2011
- [Googleopoly VIII](#): Google's Deceptive and Predatory Search Practices – 2011
- [Googleopoly IX](#): Google-Motorola's Patents of Mass Destruction -- 2012
- [Googleopoly X](#): Google's Dominance is Spreading at an Accelerating Rate -- 2013
- [Googleopoly XI](#): A Satire: Grading Google's Search Antitrust Remedies in EU Test – 2013
- [Googleopoly XII](#): Google-YouTube's Internet Video Distribution Dominance – 2013
- [Googleopoly XIII](#): Let's Play Pretend: Satire of Google's Second EU Search Remedy Proposal 2013

Please visit [www.GoogleMonitor.com](http://www.GoogleMonitor.com) for additional information.

# Appendix C: Search & Destroy: Why You Can't Trust Google Inc.

See: [www.SearchandDestroyBook.com](http://www.SearchandDestroyBook.com)

## Search & Destroy

Why You Can't Trust Google Inc.



Scott Cleland  
with Ira Brodsky

This is the other side of the Google story—the unauthorized book that Google does not want you to read. In *Search & Destroy*, Google expert Scott Cleland shows that the world's most powerful company is not who it pretends to be.

Google pretends to be a harmless lamb, but chose a full-size model of a Tyrannosaurus Rex as its mascot. Beware the T-Rex in sheep's clothing. Google has acquired far more information, both public and private, and has invented more ways to use it, than anyone in history. Information is power, and in Google's case, it's the power to influence and control virtually everything the Internet touches. Google's power is largely unchecked, unaccountable—and grossly underestimated. Google is the Internet's lone superpower—the new master of the digital information universe. And Google's power depends almost entirely on the blind trust it has gained through masterful duplicity. Google routinely says one thing and does another.

Cleland proves the world's #1 brand untrustworthy. He exposes the unethical company hiding behind a “don't be evil” slogan. He uncovers Google's hidden political agenda. And he reveals how Google's famed mission to organize the world's information is destructive and wrong. Cleland is the first to critically examine where Google is leading us, explain why we don't want to go there, and propose straightforward solutions.

Google's unprecedented centralization of power over the world's information is corrupting both Google and the Internet—a natural result of unchecked power. Google is evolving from an information servant to master—from working for users, to making users work for the Internet behemoth.

*Search & Destroy conclusively demonstrates that Google's goal is to change the world by influencing and controlling information access. Ultimately, Google's immense unchecked power is destructive precisely because Google is so shockingly-political, unethical and untrustworthy.*