

Macro Roundup Article

Headline: [Friendly Google and Enemy Remedies](#)

Article Link: <https://stratechery.com/2024/friendly-google-and-enemy-remedies/>

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Tweet: [.@BenThompson](#) argues that Google “stagnates by being too nice” to potential competitors. Banning default search deals, like the one that generates profits of ~\$20B/year for Apple, would promote competition and ultimately benefit consumers.

Summary: I would also note that the behavior I am calling for — more innovation and competition, not just from Google’s competitors, but Google itself — is the exact opposite of what the European Union is pushing for, which is product stasis. I think the E.U. is mistaken for the exact same reasons I think Judge Mehta is right. There’s also the political point: I am an American, and I share the societal sense of discomfort in dominant entities that made the Sherman Antitrust Act law in the first place; yes, it’s possible this decision doesn’t mean much in the end, but it’s pushing in a direction that is worth leaning into. This is why, ultimately, I am comfortable with the implications of my framework, and why I think the answer to the remedy question is an injunction against Google making any sort of payments or revenue share for search; It has been very profitable to be Google’s friend; I think consumers — and Google — are better off if the company has a few more enemies.

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Primary Topic: Innovation/Research

Topics: Cronyism, Innovation/Research, Op-Ed/Blog Post, Productivity

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