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IN THE COMPETITION
APPEAL TRIBUNAL

Case No: 1589/5/7/23(T),
1424/5/7/21(T), 1596/5/7/23

Salisbury Square House
8 Salisbury Square
London EC4Y 8AP
(Remote Hearing)

22nd June-31st July 2026

Before:

The Honourable Mr Justice Roth
Dinah Rose KC
Alasdair Smith

(Sitting as a Tribunal in England and Wales)

BETWEEN:

**INFEDERATION LIMITED (“Foundem”)
KELKOO.COM (UK) LTD & OTHERS (“Kelkoo”)
WHITEWATER CAPITAL LIMITED (“Ciao”)**

Claimants

- and -

GOOGLE LLC & OTHERS

Defendants

A P P E A R A N C E S

Colin West KC (instructed by Hausfeld & Co LLP) on behalf of Foundem

Daniel Jowell KC, Sarah Love KC, Hugh Whelan & Gianna Seglias (Instructed by Linklaters
LLP) on behalf of Kelkoo and Ciao

Meredith Pickford KC, Brendan McGurk KC, Julianne Kerr-Morrison, Emily Mackenzie, David Gregory & Alistair Holder Ross (Instructed by Herbert Smith Freehills Kramer LLP and Bristows LLP) on behalf of Google LLC & Others

1 Tuesday, 23 June 2026
 2 (10.15 am)
 3 (Proceedings delayed)
 4 (10.21 am)
 5 THE CHAIRMAN: Yes, Mr West.
 6 MR WEST: Should your Lordship give the usual warning before
 7 we begin?
 8 THE CHAIRMAN: Well, I am not going to give a warning every
 9 day in a case of this length. I might do it when we
 10 come to particular witnesses which might attract new
 11 viewers, but I hope — and there is, I think, a warning
 12 on the online feed for those who are watching remotely,
 13 a sort of banner on the screen anyway, so, what I said
 14 yesterday obviously applies throughout the trial.
 15 Opening submissions by MR WEST (continued)
 16 MR WEST: Very well.
 17 Before we look at how Algorithm A operated, can
 18 I just make two points by way of framing. The first
 19 concerns the effect of Algorithm A where it is applied
 20 to a site, and certainly where it applied at the level
 21 of the domain, so here, for example, Foundem.co.uk,
 22 the effect of an Algorithm A penalty was to remove
 23 the site from Google's results, certainly from
 24 the visible part of the results, down to perhaps number
 25 200 or thereabouts. That was so for all queries for

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1 which the site would otherwise have been relevant with
 2 the exception of queries taking the form of that site's
 3 name.
 4 So in my submission, this is a different situation
 5 from a normal ranking question where Google's algorithms
 6 have to grapple with the question whether site A is of
 7 better quality than site B, so that it should appear
 8 somewhat higher in the results by adding some points to
 9 its relevance score, for example.
 10 Where a site falls foul of Algorithm A, it is
 11 effectively removed from the results, and
 12 the justification for that is that the purpose of
 13 Algorithm A was, or was said to be, to catch spam. Now,
 14 there is no official definition of spam, so far as I am
 15 aware, but broadly speaking, I think it is common ground
 16 between the witnesses that "spam" means sites of no
 17 value to users which they do not wish to see, and indeed
 18 which usually appear in Google's results at all only
 19 because they have done something misleading, such as, in
 20 the case of a content site, copying all of its content
 21 from somewhere else. But in no sense, in my submission,
 22 could Foundem, or sites like it, be described as "spam".
 23 My second point is simply the position that Foundem
 24 found itself in in mid-2006. At that stage it was a new
 25 entrant to the vertical search market. It had its own

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1 innovative and indeed patented search technology. Its
 2 unique selling point was that its technology enabled it
 3 to build a search service for any so-called vertical,
 4 that is to say any specific topic. So whereas all of
 5 Foundem's rival CSSs were just CSSs, just in shopping,
 6 Foundem was also a travel search service, for example,
 7 and a job search service and so on, and it was the only
 8 site of that kind. It was launched in stages over 2025
 9 to 2026, as is normal with launching a website, and it
 10 originally —
 11 THE CHAIRMAN: 2000—and —
 12 MR WEST: Sorry, 2005 to 2006 and it ranked normally to
 13 begin, that is to say it appeared at various points
 14 within the visible part of the results for searches for
 15 which it was relevant. For example, as set out in
 16 Foundem's email to Google, which we do not need to go to
 17 now because we will in due course, initially seeking
 18 relief from the Algorithm A penalty in August 2006, for
 19 various product model number searches, it had ranked at
 20 1 or 5 or 6 in Google's results for those searches, but
 21 after 27 June 2006, its rankings deteriorated seriously
 22 and before long it disappeared altogether.
 23 But Foundem could see, by running searches for
 24 results which would otherwise be relevant to it, that
 25 its rival CSSs continued to appear within the results,

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1 other ones, like the ones we have mentioned so far,
 2 Shopping.com, PriceRunner, Nextag and so on.
 3 Kelkoo is in a slightly different position because,
 4 as Mr Hunt's analysis shows, it was in fact
 5 significantly penalised over this period, although it
 6 did not disappear entirely.
 7 MS ROSE: Can I just understand. I think you said that
 8 the application of Algorithm A meant that you were
 9 removed from the rankings, so how does that square with
 10 Kelkoo being penalised but still appearing in
 11 the rankings?
 12 MR WEST: There are a few explanations. One is that, whilst
 13 Foundem's site was demoted at the domain level, so
 14 the penalty was applied to Foundem.co.uk, some other
 15 sites were penalised at the sub-domain level, so only
 16 parts of their sites were penalised. Also whereas
 17 Foundem was penalised throughout the whole of
 18 the Pre-Decision Period without exception, some other
 19 CSSs were, it appears, only penalised on certain days or
 20 for certain periods of time within the Pre-Decision
 21 Period.
 22 MS ROSE: Which are you saying applies to Kelkoo?
 23 MR WEST: I think the position is both. So Kelkoo had, over
 24 some periods of time, a whole domain penalty and for
 25 some other periods of time a sub-domain penalty.

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1 MS ROSE: So how was it still appearing in the rankings when
 2 it had a whole domain penalty?
 3 MR WEST: Well, it wouldn't appear on those days or those
 4 periods of time. We will go into this in detail with
 5 the experts.
 6 So with that by way of preface, could we now look at
 7 Algorithm A, and I am afraid we will need to sit in
 8 private briefly to do this.
 9 THE CHAIRMAN: You would like to do that now, yes?
 10 MR WEST: Yes.
 11 THE CHAIRMAN: Very well.
 12 So could we ask — and this is LEO Confidential?
 13 MR WEST: It is, in part.
 14 THE CHAIRMAN: So all persons who are not in the inner LEO
 15 confidentiality ring, we have to ask you please to leave
 16 the court.
 17 (Pause)
 18 I imagine that those instructing you know who is in
 19 the rings and can just briefly check that there is
 20 no one remaining who should not be.
 21 If we pause the live feed, please.
 22 (In private)
 23 (In public)
 24 MR PICKFORD: Sir, might I take the opportunity, whilst
 25 people are coming back in, just to mention one concern

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1 that we have.
 2 THE CHAIRMAN: Yes.
 3 MR PICKFORD: On timing, if we were to finish at 11.30 this
 4 morning, that would have meant that the Claimants had
 5 45 minutes more than we would have unless we also have
 6 a 45-minute lunch and we also sit half an hour late. If
 7 they go beyond 11.30, then that becomes even worse. So
 8 I am not actually currently asking for a 45-minute lunch
 9 and sit half an hour late, I am not quite sure what
 10 progress I am going to make, but I am drawing attention
 11 to the desire on behalf of my clients to have equality
 12 of arms in that sense.
 13 THE CHAIRMAN: Yes. Thank you.
 14 MR WEST: Has the Tribunal formed a view when it would like
 15 me to sit down? I think I was supposed to have
 16 three hours, which would mean going on until 12, by my
 17 calculation.
 18 THE CHAIRMAN: Yes, well, you go on, take your three hours.
 19 Just to be — one thing you can help me on,
 20 Mr Pickford, is looking at our timetable, I see that
 21 Mr Stables — Dr Stables, I think, is due to start
 22 tomorrow, but is also all day Thursday.
 23 MR PICKFORD: (Off microphone) Yes.
 24 THE CHAIRMAN: How long in fact tomorrow? Because tomorrow
 25 is divided up, he is not all day tomorrow, so ...

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1 MR PICKFORD: (Off microphone) — No, so it was due to be
 2 that he would start after lunch — we would then have
 3 a day and a half (inaudible).
 4 THE CHAIRMAN: One and a half.
 5 MR PICKFORD: (Off microphone) — And we do need a day and a
 6 half.
 7 THE CHAIRMAN: Yes, one and a half days. Right, thank you.
 8 MR PICKFORD: (Off microphone) If necessary — it would be
 9 undesirable but, if necessary, that could carry over
 10 into (inaudible).
 11 THE CHAIRMAN: Yes.
 12 MR PICKFORD: (Off microphone) And we do have quite a lot
 13 of —
 14 THE CHAIRMAN: Yes, one and a half, that is what I wanted to
 15 know. Yes.
 16 MR WEST: If I could briefly just address in the context of
 17 the discrimination claim between Foundem and Google any
 18 suggestion that the difference in treatment between
 19 the two was justified by a difference of quality. That
 20 — the premise of that would be that Google's CSS, which
 21 of course continued to appear in the SERP, was of higher
 22 quality than Foundem's, which did not. But as we heard
 23 yesterday, in the Pre-Decision Period, Google's CSS was
 24 very low quality. For the Pre-Decision Period, mid-2006
 25 to the end of 2007, for about the first half of that

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1 period, Google's CSS was Froogle, which we heard about
 2 yesterday. It may just be worth explaining the name.
 3 You may be a bit confused by the name. I understand
 4 it is a pun on the word "Google" and word "frugal", if
 5 people were looking for cheap deals. But it was
 6 notoriously poor quality, the Commission found — at
 7 recital 490 {BA/2/154}, and it referred at recital 491
 8 {BA/2/155} to the document we looked at yesterday, where
 9 it referred to Mr Truher saying the results often
 10 "stink" and so on. Google accepts in its skeleton that
 11 Froogle was discontinued because it was not — it did
 12 not meet the competitive challenge at the time, that is
 13 paragraph 59 {A2/1/28}. Google also accepts, based on
 14 the evidence of its own witness, Mr Goodrow, that
 15 Froogle did not enable users to compare results on
 16 the page, all it provided was a list of links. If the
 17 users wished to compare the results, they had to follow
 18 the links and sort of keep a mental note of what they
 19 found on each of them.
 20 Then, in April 2007 or thereabouts, Froogle was
 21 relaunched as Google Product Search. But even over that
 22 period, Google Product Search continued to be very low
 23 quality. For example, in its early stages,
 24 Google Product Search provided no grouping
 25 functionality, that is it did not enable offers to be

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1 categorised into groups of the same offers so as to
 2 enable users to compare comparable products. Foundem's
 3 evidence is that that functionality was only introduced
 4 in April 2008, which is after the end of
 5 the Pre-Decision Period. Mr Goodrow says in fact it was
 6 a few months earlier, but on any view, for most of
 7 the period, that function, absolutely key CSS
 8 functionality, was absent. GPS, Google Product Search,
 9 also did not enable users to view results in a grid
 10 format at the time, and nowhere really in its skeleton
 11 argument does Google make any attempt to get to grips
 12 with this question of whether its own CSS suffered from
 13 the same or worse quality deficiencies as those which
 14 Google is perfectly happy to criticise others for.

15 Foundem in fact secured lots of positive feedback
 16 for its site which has been drawn together in a document
 17 at {M3/491}, and this goes on for many pages and it goes
 18 right back to the Pre-Decision Period, in fact prior to
 19 the Pre-Decision Period in early 2006. Just one
 20 example, number 8:

21 "Great, found the cheapest TV for me."

22 Which is similar again to what Mr Dave Williams had
 23 to say about how Foundem would enable one to save money
 24 by comparing results. But there are many, many pages of
 25 these examples of positive feedback.

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1 Now, Google no doubt will also point out that
 2 Foundem received some negative feedback as well, which
 3 is true, but what we say this positive feedback shows
 4 conclusively is that Foundem was not and cannot sensibly
 5 be regarded as a spam site, because the one thing a spam
 6 site never gets is anyone saying, "Thanks very much, how
 7 useful your site is".

8 Then, just running through Google's other criticisms
 9 of Foundem: no original content. Well, in fact, it did
 10 have some, as we have seen.

11 THE CHAIRMAN: Yes.

12 MR WEST: But Google's did not.

13 Pattern of outward traffic. Again, Google's pattern
 14 was likely the same. Indeed, so the Commission found,
 15 at recital 380 {BA/2/112}:

16 "... Google's own comparison shopping service is not
 17 subject to the same ranking mechanisms ... This is
 18 despite the fact that Google's own comparison shopping
 19 service exhibits several of the characteristics that
 20 make competing comparison shopping services prone to
 21 being demoted ..."

22 So the Commission is there making the point these
 23 same criticisms apply equally to Google.

24 Then ---

25 THE CHAIRMAN: But we have got the finding in the decision

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1 that Froogle's pages were unlikely to be ranked highly
 2 in generic search results on Google's general search
 3 results pages if it had been applied.

4 MR WEST: Yes, indeed ---

5 THE CHAIRMAN: (Overspeaking — inaudible) --- the ranking had
 6 been applied to Froogle and that is binding, so we do
 7 not have to labour that. But it seems to me that has
 8 been established that, if it had applied to Google's
 9 CSS, and that is obviously in the Decision Period, it
 10 was no better, as you have indicated, Pre-Decision
 11 Period, if anything it was worse, so Google's CSS would
 12 not have done well. So I think that is the baseline.

13 MR WEST: The other way we put our case is as lack of
 14 objective justification, but in a sense that is simply
 15 a different label on many of the same arguments.

16 THE CHAIRMAN: Yes.

17 MR WEST: So ---

18 THE CHAIRMAN: I think we want to move on really to
 19 the whitelisting. Do you want to say something about
 20 that?

21 MR WEST: Well ...

22 THE CHAIRMAN: Because ---

23 MR WEST: Can I address just briefly the relevance of
 24 the whitelisting material?

25 THE CHAIRMAN: Yes.

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1 MR WEST: It is primarily relevant, in my submission, to
 2 the other penalties claim pursued by Foundem. Google
 3 does not seem to be arguing in this case that an abuse
 4 can only be found against it where it has wrongly or
 5 unintentionally demoted a site where that site has
 6 pursued the proper appeal processes. That would, in
 7 theory at least, be available to it and one might have
 8 to then look at what Foundem did. In fact, Google does
 9 not seem to be saying that. Its case is: Foundem was
 10 properly penalised at all times until it was
 11 whitelisted. So that point does not seem to arise.

12 Foundem's position, by contrast, is that it was
 13 wrongly penalised at all times, and so, again,
 14 the appeal process point does not seem to arise there
 15 either.

16 But the detailed evidence about whitelisting is
 17 relevant to Foundem's case that Google had a strong
 18 motivation to ensure that Foundem continued to be
 19 penalised after it was notionally whitelisted from
 20 Algorithm A in December 2009. That is quite
 21 a complicated factual story which we are going to be
 22 going through with the witnesses. I have set out
 23 a summary of it, or the highlights of it, in my skeleton
 24 argument. I was not proposing to go through it in
 25 detail within opening unless the Tribunal would like

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1 me to, simply because it is quite a time-consuming —
 2 THE CHAIRMAN: Yes.
 3 MR WEST: — process.
 4 But in a nutshell, when Google eventually decided to
 5 whitelist Foundem in December 2009, what it did was to
 6 whitelist Foundem from its Algorithm A penalty, but that
 7 is not the story which it gave to the press and
 8 the world at large, which was instead that Foundem had
 9 made some changes to its site, as a result of which it
 10 had risen in Google's rankings. In fact, the only
 11 changes Foundem had made concerned the removal of some
 12 textual errors of the kind that we saw yesterday. So
 13 that story had two main problems. The first is that of
 14 course it was not true. But the other is that if
 15 Foundem's site had risen too precipitously in
 16 the rankings, going back to the sort of top five or top
 17 ten and receiving many millions of monthly visitors,
 18 the explanation that this is because it made some
 19 changes to textual amendments — to textual errors,
 20 rather, to its site would not have been credible. So
 21 that is what all of the — or that is the primary
 22 relevance, I suggest, of most of the evidence about
 23 the requests to seek whitelisting, and we are going to
 24 go through it with the witnesses.
 25 THE CHAIRMAN: Yes, I see.

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1 MR WEST: If I can briefly just address the other — or
 2 briefly address just some other points about the other
 3 penalties claim.
 4 Following whitelisting in December 2009, Foundem's
 5 traffic remained low. It had been even lower, of
 6 course, during the period of its Algorithm A penalty,
 7 but it remained low thereafter and continued to be such
 8 until it was hit by the Panda penalty, whereupon it
 9 reduced to almost nothing, certainly far lower traffic
 10 than Foundem's comparator sites were getting at the
 11 time. Foundem continued to rank very low on Google for
 12 most queries, lower than it had done prior to
 13 the Algorithm A penalty, and it ranked consistently
 14 lower on Google than it did on either Yahoo! or Bing.
 15 It is not obvious, we say, why Foundem would have done
 16 so much worse than other similar CSSs unless there was
 17 some further penalty that continued to apply. We have
 18 seen that Foundem had won many awards in the interim,
 19 including best CSS; it had significant commercial
 20 relationships with many major UK publishers, and
 21 therefore it is difficult to understand why, absent some
 22 other further penalty applying to it, it continued to
 23 fare so much worse.
 24 This claim is very important for the purposes of
 25 Trial 2 because, absent a finding that there was some

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1 other thumb on the scale, as it were, over this period,
 2 Google will no doubt say at Trial 2 that the traffic
 3 Foundem was getting in the interim period is to be
 4 regarded as the counterfactual traffic Foundem would
 5 have got if it had never been penalised, and that would
 6 mean Foundem would ultimately recover only a fraction of
 7 the damages it would have recovered if its
 8 counterfactual traffic was at the same level as people
 9 like PriceRunner or Shopping.com.
 10 Google's position on this issue is that its
 11 disclosure exercise has not identified any such further
 12 penalty which might apply. But as the Tribunal may
 13 recall from the PTR, Google submitted evidence at
 14 the disclosure stage of the case which stated in
 15 the most unequivocal terms imaginable that it would not
 16 necessarily be possible for Google to find any such
 17 record if one even existed. That is the statement,
 18 the second statement of Mr Kwok about whom the Tribunal
 19 has heard before, which is at {H3B/2}. Again, we have
 20 set out the key paragraphs of this in our skeleton
 21 argument, but the key is perhaps paragraph 18, if we can
 22 scroll through to that {H3B/2/7}, where he says:
 23 " ... I can categorically confirm that there is no
 24 single CMS ..."
 25 That is configuration management system:

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1 " ... that stores all algorithmic demotions that can
 2 be queried by the Penaltyserver and that not all
 3 demotion algorithms are associated with
 4 the Penaltyserver. It would accordingly be impossible
 5 to provide a comprehensive list of all demotion
 6 algorithms over time."
 7 PROFESSOR SMITH: That statement would imply that, at the
 8 time that Algorithm A was in operation, there may well
 9 have been other algorithms in operation at the same
 10 time.
 11 MR WEST: Undoubtedly.
 12 Nevertheless, Google's position at this trial,
 13 strongly advanced, is that because Google did not find
 14 a record of any further penalty when it did its
 15 disclosure on this point, that shows that there was not
 16 one.
 17 Google also says it is up to Foundem to identify
 18 what the other penalty was. Of course, that is outside
 19 Foundem's knowledge.
 20 Application by MR WEST
 21 I should mention at this stage a procedural issue
 22 which is just necessary to raise briefly before
 23 the Tribunal. The Tribunal may recall that at the PTR,
 24 Foundem withdrew its previous claim of abuse by means of
 25 an AdWords penalty, we did not pursue that as a separate

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1 abuse, and the pleadings had to be amended
 2 consequentially. The defence amendment can be seen at
 3 {C3/4}. I am afraid I do not have a page number, but it
 4 is paragraph 54A.7A.
 5 THE CHAIRMAN: You want 54A, paragraph ...?
 6 MR WEST: A.7A, I am afraid.
 7 THE CHAIRMAN: 7A, I think it is {C3/4/70}. Is that it?
 8 MR WEST: Yes. So pink is this round of amendments, and one
 9 sees the second sentence there:
 10 "It is ... noted that Foundem does not particularise
 11 or identify any other specific search penalty as having
 12 been applied to it ..."
 13 So Google made that point specifically in this round
 14 of amendments.
 15 The draft reply is not in the bundles yet because
 16 Google has not consented to one particular paragraph of
 17 it and so it is necessary for us seek permission for
 18 that paragraph now.
 19 THE CHAIRMAN: The paragraph you have just shown us is from
 20 an amendment of 28 May; is that right? That is the very
 21 recent amendment, this .7A paragraph?
 22 MR WEST: Yes.
 23 THE CHAIRMAN: The pink is the latest round?
 24 MR WEST: That is right.
 25 THE CHAIRMAN: Which seems to be 28 May.

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1 MR WEST: Sounds right, shortly after the PTR.
 2 THE CHAIRMAN: Yes.
 3 MR WEST: And paragraph 44 is the disputed paragraph, which
 4 is in blue. I believe everything else is agreed apart
 5 from this one paragraph.
 6 THE CHAIRMAN: It is paragraph?
 7 MR WEST: 49AA on page 44:
 8 "As to the plea in paragraph 54A.7A ..."
 9 That is the one we have just been looking at:
 10 "... that Foundem does not particularise or identify
 11 any other specific search penalty as having been applied
 12 to it, the identity of penalties that Google applied to
 13 Foundem's site without informing Foundem of the fact is
 14 necessarily a matter outside Foundem's knowledge.
 15 However, based on the disclosure in the case, in
 16 addition to a manually applied penalty, where it would
 17 be up to Google to decide whether to use an existing
 18 manual penalty that might be recorded, or a custom
 19 penalty, that would not, there are at least three
 20 algorithmic penalties which are candidates to be
 21 the other search penalty.
 22 "(a) the keyword 'stuffing penalty' which Google
 23 referred to in its November 2010 response to
 24 the Commission RFI noting it was subject to two
 25 algorithmically compiled exception logs containing at

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1 least 25 CSSs not including Foundem." [As read]
 2 So that is a whitelist for the keyword "stuffing
 3 penalty" which has got lots of CSSs on it.
 4 The draft goes on:
 5 "The fact it was necessary to whitelist a large
 6 number of other leading CSSs suggests that this penalty
 7 would otherwise tend to apply to CSSs. However, Foundem
 8 was not included on the list of excepted CSSs in
 9 Google's sent RFI response." [As read]
 10 Then there is another candidate identified at (b),
 11 the Anchor ++ penalty, and some further particulars, and
 12 another one at (c), the JS demotion or JavaScript
 13 penalty. So we have identified three possible
 14 candidates. None of that, of course, is within our
 15 knowledge, but doing our best based on the disclosure
 16 that we have received.
 17 Google does not accept — does not consent to that
 18 amendment, but I seek permission to make it, so if I can
 19 very briefly address that.
 20 Firstly, as the Tribunal has seen, it is
 21 a responsive amendment, responsive to the new 54A.7A.
 22 But secondly, it must be open to Foundem, in view of
 23 its pleaded other penalties claim, to identify with
 24 the witnesses what other Google penalties might have
 25 affected Foundem in the interim period. It must be open

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1 to us to investigate with them the disclosure we have
 2 received concerning Google's penalties to see whether
 3 any of these might have applied to Foundem. Indeed,
 4 these same candidates set out in this draft reply are
 5 addressed in Foundem's opening skeleton argument, and
 6 again I say it must be open to us to pursue those
 7 points.
 8 The allegation that Foundem was subject to one or
 9 more other penalties has been pleaded for many years.
 10 There has been no attempt to strike it out for want of
 11 proper particularisation, and as I have said, in any
 12 event, these are not matters within Foundem's knowledge
 13 as it depends on the operation of Google's penalty
 14 algorithms.
 15 We therefore say we do not actually need to plead
 16 this, and it appears that Google is not only objecting
 17 to this pleading, but it also seems to be seeking to
 18 prevent Foundem from investigating with the witnesses
 19 whether any of these candidate algorithms may in fact
 20 have applied. So Google's position seems to be that
 21 Foundem must identify the particular penalty that
 22 applied in order to satisfy the burden of proof, but its
 23 position is simultaneously that Foundem is to be shut
 24 out from doing so, and that, in my submission, cannot be
 25 right.

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1 There is correspondence about this which — I will
2 just give the Tribunal the references. The letter from
3 Google's solicitors of 10 June, {L4/11/1}, and another
4 one of 15 June, {L4/12/1}, and Hausfeld's response, that
5 is Foundem's solicitor's response of 19 June, {L4/13},
6 and Google ask that I bring those to your attention in
7 relation to this application.

8 Would that perhaps be a convenient moment for
9 a short break?

10 THE CHAIRMAN: Yes.

11 Can I just ask you before we take the break, in your
12 written opening, there is a quote at paragraph 30
13 {A1/2/12}. We need not look at it now, you can look at
14 it over the break. Can you just check the reference
15 that is given, the Opus reference for that quotation?

16 MR WEST: Certainly.

17 THE CHAIRMAN: It says "M1/233", but I wonder if that is
18 correct.

19 We will come back. How much more? You have made
20 this application; we obviously then have to hear
21 Mr Pickford on it.

22 MR WEST: I have few points to make just on the question of
23 the counterfactual and whether Foundem's position is
24 different in any respect to Kelkoo's. Unless those
25 behind me ask me to make any other points, that is all

21

1 I was proposing to address.

2 THE CHAIRMAN: We will consider the point about timing.

3 Thank you.

4 (11.32 am)

(A short break)

6 (11.46 am)

7 THE CHAIRMAN: Would it be sensible, Mr West, to deal with
8 that application now, as you have made it, straight away
9 and just hear from Mr Pickford?

10 MR MCGURK: There is two possible ways of dealing with this.

11 My learned friend has made his application on the back
12 of the other penalties.

13 THE CHAIRMAN: Could you just identify yourself for
14 the transcript.

15 MR MCGURK: Oh, I am so sorry, Brendan McGurk for Google.

16 THE CHAIRMAN: Yes.

17 Yes.

18 MR MCGURK: Yes, rewinding. My learned friend made his
19 application on the back of his submissions to you on his
20 other penalties claim, so he has had a bit of a run—up
21 to it. I can deal with this now. I was proposing to
22 deal with other penalties when you have got to
23 the Foundem—specific claims tomorrow, and I can deal
24 with it then, having had a run—up myself. If you want
25 me to deal with it now, I can do, but I would invite

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1 the Tribunal to read the letter at {L4/13}. My learned
2 friend fairly referred to it. That is a detailed
3 letter, it is our complete answer to the other penalties
4 claim and it disposes of this point in relation to
5 the new penalties that they are seeking to run in
6 paragraph 49AA.

7 So, before I say any more, I can either deal with
8 this as part of my submissions tomorrow, or I can deal
9 with it now on the basis that you could read that letter
10 before you decide.

11 THE CHAIRMAN: Yes. It is not going to really make much
12 difference to anyone in terms of preparation if we
13 decide this tomorrow rather than today, is it?

14 MR MCGURK: It will not.

15 THE CHAIRMAN: So in that case I think it is more sensible,
16 because we have just got the letters but we have not
17 read them and it will be much easier when we have read
18 the letters, and probably quicker. So in that case, if
19 that does not throw you out of course, Mr West?

20 No, well, we will do that, Mr McGurk, thank you.

21 MR MCGURK: I am grateful.

22 Opening submissions by MR WEST (continued)

23 MR WEST: So my final brief topic is the counterfactual and
24 whether Foundem's case is different in any respect to
25 Kelkoo's.

23

1 Foundem's primary case on the counterfactual is

2 the same as Kelkoo's, and I should say, by "Kelkoo",

3 I mean Kelkoo and Ciao. As Kelkoo explained yesterday,

4 its primary case is one in which both limbs of the abuse
5 are removed in the counterfactual meaning that CSSs are

6 no longer penalised within the organic results. That

7 corresponds to scenarios 1 and 2, and in both of those
8 scenarios, the selection and ranking of CSS results on

9 the SERP is in accordance with relevance. A number of

10 different images were shown to the Tribunal from

11 the most straightforward one, with all of the CSSs

12 appearing in the organic links together with other

13 results like merchant results, that is figure 11.1 in

14 Mr Hunt's report, or there are images 15 and 16 in

15 the images annex, which differ only in respect that

16 there are enhanced display features of some of

17 the results. Those are CSS results exclusively which

18 are allowed to display images. In one of the examples

19 they are scattered throughout the links and in another

20 they are drawn together in a box. But in either case

21 they are displayed in accordance with relevance.

22 THE CHAIRMAN: Sorry, images 15 and 16 in the images annex

23 to the Kelkoo skeleton opening —

24 MR WEST: Yes.

25 THE CHAIRMAN: — which are scenarios 3a and 3b? I thought

24

1 you were talking about 1 and 2, that is why I am a bit
 2 confused.
 3 MR WEST: Have I got the wrong reference?
 4 THE CHAIRMAN: It is {A1/3/17}.
 5 MR WEST: I said "15 and 16".
 6 THE CHAIRMAN: Well, that is the reference, but it is
 7 image 15.
 8 MR WEST: Sorry, I meant the page. The page reference, 15
 9 and 16 {A1/3/15–16}.
 10 THE CHAIRMAN: Ah. Yes, I see. Thank you. So, yes,
 11 I think it is images 13 and 14.
 12 MR WEST: 13 and 14, I believe. I believe it is right to
 13 say that the only results which have enhanced display
 14 formats are CSS results, so those images.
 15 One document the Tribunal may not have seen yet in
 16 this connection is Google's discussion paper, {J2A/54}
 17 where something very similar to these proposed
 18 counterfactuals was suggested by Google to
 19 the Commission. This was prior to any formal
 20 commitments offer being made. If one goes to the second
 21 page of the document {J2A/54/2}, one can see what it is.
 22 Page 2:
 23 " ... Discussion paper submitted by Google on
 24 the preliminary concerns identified by the ...
 25 Commission ..."

25

1 If one goes to {J2A/54/14}, one sees this proposal:
 2 "The operation of Google's proposed display of links
 3 to vertical search sites within Local and
 4 Product Universal Results would be subject to
 5 the following basic principles :
 6 "When Google displays Local or Product Universal
 7 Results that contain links to Local or Product Pages
 8 will display as part of such Local and Product Universal
 9 Results links for up to three rival vertical search
 10 sites that offer an alternative for the kind of review
 11 information displayed on Place and Product Pages, along
 12 the lines set out in the screenshot below."
 13 So one can see there results being displayed in
 14 the form of a box.
 15 Then underneath:
 16 "These links will lead, to the extent possible,
 17 directly to result pages of the alternative vertical
 18 search site for the query that the user entered on
 19 Google (rather than merely to the home page of the site
 20 where the user would have to reenter the query)."
 21 An example is given.
 22 Then if one goes over the page {J2A/54/15},
 23 the first bullet point:
 24 "For each relevant query, Google will
 25 algorithmically select for display three qualifying

26

1 sites based on their Web Search rank for that query ...
 2 For example, if a user enters the query [lcd TV] on
 3 Google and that query produces the display of
 4 a Product Universal Result with review links Google will
 5 identify qualifying vertical product search sites that
 6 rank among the top 100 Web Search results for the query
 7 [lcd TV] and will display as part of
 8 the Product Universal Result links to the three highest
 9 ranking, non—duplicate sites."
 10 Then one can turn to the next page {J2A/54/16}, one
 11 can see the fourth bullet point:
 12 "The mechanism for the operation of the solution is
 13 well defined and based on existing Web Search
 14 algorithms. It should therefore not raise problems in
 15 implementation, interpretation, or enforcement. Indeed,
 16 the Commission will easily be able to verify compliance
 17 by entering product and local queries on Google to
 18 confirm that Google displays the requisite links."
 19 Then finally over to {J2A/54/17}, the first bullet
 20 point:
 21 "By relying on the Web Search rank of vertical
 22 search sites for the query that the user entered on
 23 Google, the proposed solution reduces query latency,
 24 minimizes the risk of irrelevant results, and offers
 25 the most efficient engineering method for addressing

27

1 the Commission's preliminary concerns."
 2 So we see here Google itself proposing something
 3 very similar to scenarios 1 and 2, which are now
 4 advanced by Foundem and Kelkoo.
 5 In the event, this never formed part of any formal
 6 offer of commitments by Google but one can see from this
 7 discussion paper that Google found it or considered it
 8 trivial to implement and it would have achieved much of
 9 what we are seeking. Because the results in the boxes
 10 in such a case would be organic results, it follows that
 11 there would be no penalisation of CSSs within
 12 the organic results in this proposed solution. So we
 13 say that is the preferable approach, it is our primary
 14 case and we agree with Kelkoo about that.
 15 Scenario 3 is advanced only as an alternative case
 16 and it is advanced on the basis that the Tribunal does
 17 not agree with the primary case of both Foundem and
 18 Kelkoo that both limbs of the abuse have to be removed.
 19 The point under scenario 3 where Foundem may part
 20 company with Kelkoo concerns charging to appear in
 21 the box. In particular, Foundem does not agree that an
 22 auction to appear in the box would be a permissible
 23 counterfactual. Can I briefly explain why.
 24 Foundem does not say that no form of charge is
 25 allowed. A flat fee, for example, would be permissible.

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1 This ties in with the Commission's view when it rejected
 2 Google's third offer of commitments. All of Google's
 3 commitment offers were based on an auction mechanism.
 4 If we look at {J2A/15/2}, we see the Commission's
 5 response. Could we go over the page {J2A/15/3}. Sorry,
 6 it must be internal page 2.
 7 THE CHAIRMAN: Is it 15 you want?
 8 MR WEST: Sorry, it is {J2A/15/2}. Perhaps we need to look
 9 at {J2A/15/1} just to see what this is. Yes, so this is
 10 the email from the Commission to Google following
 11 the rejection of Google's third offer of commitments in
 12 2014.
 13 If we look at {J2A/15/2}, the first bullet point:
 14 "For Paid Rival Links, the auction should be
 15 replaced by a fixed fee of EUR 0.01 per click. As
 16 outlined above, selection and position must be
 17 determined by a neutral and objective mechanism (e.g.
 18 [predicted click through rate]."
 19 Of course, these two points are linked. If
 20 selection and position is determined by a neutral and
 21 objective mechanism, it cannot also be the case that it
 22 is determined by an auction, we say, because under an
 23 auction, relevance, objective relevance, is replaced by
 24 subjective ability to pay.
 25 The Commission said something similar in its

29

1 supplemental statement of objections {O/3/101},
 2 paragraph 180:
 3 " ... if the Commission were to conclude that Google
 4 and Alphabet could charge for the prominent positioning
 5 and display of [CSSs], a number of different scenarios
 6 could be envisaged regarding the amount of such
 7 a charge: (i) an amount corresponding to
 8 the operational/actual costs incurred by Google; or (ii)
 9 a nominal amount based, for instance, on the lowest
 10 reserve price for AdWords (at present EUR 0.01 per
 11 click)."
 12 So that was the Commission's opinion.
 13 THE CHAIRMAN: This document signed by the Commissioner for
 14 the Commission, this is the formal rejection of
 15 the commitments, or this is what?
 16 MR WEST: This is a supplemental statement of objections.
 17 The previous document we looked at was
 18 the correspondence following the rejection of the third
 19 offer of commitments.
 20 Can I just briefly explain why Foundem says an
 21 auction would not be consistent with the principles in
 22 the decision. Can we look at recital 529, so it is
 23 {BA/2}. Sorry, I do not have a page number.
 24 Recital 539.
 25 THE CHAIRMAN: 29 or 39?

30

1 MR WEST: 539.
 2 THE CHAIRMAN: 539, which is page {BA/2/178}.
 3 MR WEST: Page 178, I am very grateful.
 4 So this is the Commission's finding that:
 5 " ... the traffic diverted by the Conduct, i.e.
 6 generic search traffic from Google's general search
 7 results pages, accounts for a large proportion of
 8 traffic to competing [CSSs] ... and cannot be
 9 effectively replaced by other sources of traffic
 10 currently available to [CSSs] including AdWords, mobile
 11 applications, direct traffic ... "
 12 And so on.
 13 So we say that consistent with that, any remedy
 14 cannot turn free organic traffic into paid traffic and
 15 that would be inconsistent with the principles
 16 underlying the decision.
 17 Indeed, we will look at this with the experts, but
 18 because any auction is likely to be oversubscribed,
 19 the effect of an auction mechanism is to push prices up
 20 to the maximum bidders are prepared to pay, which is
 21 the same phenomenon as exist currently under
 22 the Compliance Mechanism and which has the effect that
 23 the vast majority of the economic benefit of clicks goes
 24 to Google. That was the position under
 25 the Shopping Units, it remains the position under

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1 the Compliance Mechanism, and Foundem says that it would
 2 be the position under any new box based on an auction
 3 and would therefore be inconsistent with the decision
 4 which specified that Google could not introduce new
 5 charging mechanisms which had the same or an equivalent
 6 effect to the infringement. That is recital 700(d),
 7 the same bundle, {BA/2/233}.
 8 MS ROSE: Can I just ask a question about 3a and actually
 9 also 3b? Those alternative counterfactuals both
 10 envisage a box or, in 3b, a series of boxes which
 11 the CSSs can bid for, but they do not appear to envisage
 12 the removal of Algorithm A and Panda from organic search
 13 results, as I understand it. Would it be possible to
 14 have a hybrid counterfactual where there was a box at
 15 the top to which all CSSs had equal access on the basis
 16 of an auction, but then generic search results ranked
 17 purely on the basis of relevance without the penalising
 18 algorithms, and would that be acceptable?
 19 MR WEST: It would certainly be possible. I would have to
 20 take instructions on whether that is something my
 21 clients would be comfortable with as a counterfactual.
 22 It would certainly be an improvement on the current
 23 scenario 3, because CSSs would not have to bid to appear
 24 on the page because they would appear in the organic
 25 results if they were relevant. So it would certainly be

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1 an improvement on the current suggestion of scenario 3,
 2 although it is not intrinsic in scenario 3 that there
 3 has to be an option; there could be another method of
 4 selection for inclusion in scenario 3 — in the box in
 5 scenario 3, such as relevance or proposed
 6 click-through rate plus a flat fee.
 7 Finally, just on the auction, I do not think we have
 8 looked yet at recital 630 of the decision, {BA/2/217},
 9 but it is a very important recital where the Commission
 10 says — this is concerned with the movement from
 11 product universals to Shopping Units, and Google argued
 12 that because a click on a link in a Shopping Unit went
 13 to the merchant, that could no longer be regarded as
 14 Google's CSS traffic. But the Commission says:
 15 "... clicks on links within the Shopping Units that
 16 lead the user directly to a webpage of a merchant should
 17 be counted as visits to Google Shopping because Google's
 18 [CSS] benefits economically from clicks on those links
 19 in the same manner as if the user had taken
 20 the intermediary step of going through the standalone
 21 Google Shopping website before clicking on the product
 22 of that merchant partner."
 23 So, the Commission says, clicks on the shopping box,
 24 although they take you to the merchant, continue to be
 25 Google Shopping traffic, and we say that establishes

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1 the principle that if the economic benefit of the click
 2 goes to Google, effectively one is replicating
 3 the effect of the abuse. So these two principal
 4 objections that all the money goes to Google and that
 5 there is no free organic traffic to CSSs are really just
 6 flip sides of the same coin.
 7 So we — I think the only part of anything Foundem
 8 said yesterday with which we part company with — sorry,
 9 the only element of what Kelkoo said yesterday with
 10 which we part company is whether an acceptable
 11 counterfactual is scenario 3 plus an auction. As
 12 I said, we accept there can be payment for inclusion in
 13 the box in scenario 3, but not an auction. Notably,
 14 Mr Hunt's position is not that an auction is
 15 permissible. He says at paragraph 472(b)(iii) of his
 16 report, which is {I2/1/212}, that a fee would be
 17 permitted only if it ensured:
 18 "... equal treatment, and ... did not have the same
 19 or equivalent object or effect as the infringement ..."
 20 Mr Hunt also raises the objection that Google's CSS
 21 could never participate in the auction on an equal basis
 22 because if Google's CSS participates then Google is both
 23 the bidder and the recipient of the bid which means that
 24 the bid is not a real economic cost for Google, which is
 25 another objection to any auction mechanism.

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1 Subject to the fact that I would like to be able to
 2 revert once I have taken instructions on the point about
 3 scenario 3 plus organic results, that is all I was
 4 proposing to say in opening.
 5 THE CHAIRMAN: Yes. Thank you.
 6 Were you able to check that reference?
 7 MR WEST: I am told that the reference is correct.
 8 THE CHAIRMAN: It is correct, is it?
 9 MR WEST: It is {M1/223}. I am told it is correct.
 10 THE CHAIRMAN: So, Mr Pickford, we do not want to sit late
 11 tonight, but we can start earlier tomorrow to make sure
 12 that you have the time that you need.
 13 MR PICKFORD: Thank you, Sir.
 14 THE CHAIRMAN: We can decide at the end of the day how much
 15 earlier.
 16 Opening submissions by MR PICKFORD
 17 MR PICKFORD: Thank you, Sir.
 18 Members of the Tribunal, I think as the transcript
 19 writer may have heard, my name is Meredith Pickford.
 20 I have to confess, I am unfortunately suffering from
 21 laryngitis at the moment. I went to the doctor and they
 22 said, "It is fine, just do not speak". I said, "Well,
 23 I am a barrister" and they looked slightly crestfallen
 24 at that. But what I am going to ask, if it is okay, is
 25 if my microphone could be turned up a little bit louder

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1 than usual. I am not normally accused of being quiet at
 2 all, but I spoke to the Tribunal, or rather my clerk
 3 spoke to the Tribunal and they said that that should be
 4 perfectly feasible, and that apparently they can ... —
 5 indeed, it sounds like it is getting louder already.
 6 Also, just on that topic, it was pointed out to me
 7 that in the transcript, yesterday, a number of
 8 the comments from the bench, I think in particular you,
 9 Sir, were lost and so it may be helpful for your
 10 microphone to be made louder too, potentially, I do not
 11 know.
 12 So in terms of the structure of submissions that
 13 I am going to be making —
 14 THE CHAIRMAN: Just on that, if it helps you to have a very
 15 short break, not our usual sort of 10/15 minutes, but
 16 a five-minute break at some point, because however
 17 the microphone is turned up, just continually speaking
 18 is obviously straining the larynx, just I am sure we can
 19 accommodate that.
 20 MR PICKFORD: I am very grateful, Sir, thank you.
 21 THE CHAIRMAN: So just you might want to think about doing
 22 that, saying: can we have five minutes.
 23 MR PICKFORD: Thank you.
 24 So Mr McGurk and I will both be making submissions
 25 on behalf of Google.

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1 First, I am going to provide an overview of our case
2 on the core issues in this case as advanced by Kelkoo.

3 Secondly, I am going to provide a broad overview of
4 how users make shopping journeys and where the various
5 participants in internet shopping fit in, and I am going
6 to show you a few documents in connection with that.

7 Third, Mr McGurk is then going to take you through
8 a more detailed factual background on Google's generic
9 and specialised results, Google's algorithms and
10 the shortcomings of some CSSs.

11 Then it is going to be back to me and I am going to
12 address you then on, in particular, what we can learn
13 from the decision with some limited reference to some
14 other points of law, because Kelkoo, remember, says that
15 its case merely implements the reasoning in the decision
16 into the post-Decision Period. Notably, Mr Jowell
17 largely stayed clear of the decision in his oral
18 submissions yesterday and we say a proper understanding
19 of the decision is crucial to understanding the evidence
20 that you are going to hear in this trial in its proper
21 context, and in fact it shows where the remedy is not
22 abusive.

23 So my fifth point will be I will then make good on
24 that and explain why we say the remedy is not abusive.

25 Then, sixth, I will address you again very briefly

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1 on some legal points in relation to counterfactuals
2 responding to Mr Jowell.

3 Then, seventh, I will go on to deal with
4 the counterfactual issue in the light of some of
5 the material that relates to that.

6 Then eighth and finally, Mr McGurk will address you
7 on the discrete issues that have been raised by Foundem.

8 Now, there is just one small point that arises out
9 of the submissions that we just heard from Mr West,
10 which is, as you would expect, there have been a very
11 large number of submissions and positions taken over
12 the course of this proceeding so far. We prepared for
13 this hearing on the basis of the parties' skeleton
14 arguments, obviously, because that is where they
15 synthesise and decide which of the points they are now
16 taking. Kelkoo did not pursue a number of points in
17 relation to the counterfactual. You will have heard
18 what Mr Jowell said yesterday on the counterfactual. In
19 their skeleton argument, Foundem do not advance any case
20 on the counterfactual at all, so the points that Mr West
21 made were news, as it were. Now, obviously I will
22 attempt to deal with them, but until five minutes ago,
23 I did not know I was going to potentially have to deal
24 with those, so I just lay down that small marker.

25 So turning then to the overview of our case.

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1 Google must now accept that although its conduct was
2 not part of any anti-competitive strategy, it did
3 nonetheless infringe competition law between 2008 and
4 2017 in its general search business because that
5 discriminated in favour of its distinct CSS business
6 which was to be found in a separate market. What Google
7 did, in effect, was to provide a privileged window from
8 its general results page through to its own CSS and
9 denied access to that window to other CSSs. Instead
10 they either used text ads or had to rely on generic
11 results, where, as we have heard, Google's algorithms
12 might demote them. Now, there have already been
13 consequences to that conduct and there may be more to be
14 determined at Trial 2. We do not shy away from that.
15 Obviously we cannot. However, the unlawful conduct came
16 to an end on 28 September 2017 with the remedy, which
17 was developed in close dialogue with the Commission and
18 for which the Commission never even opened
19 a non-compliance investigation, still less found an
20 ongoing breach.

21 Now, what the remedy does is it allows CSSs to bid
22 on behalf of merchants to place ads in a box of PLAs, as
23 we have heard, that appear on Google's search engine,
24 the SERP. Now, all rival CSSs are able to do this on
25 the exact same basis as Google's own CSS Google Search

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1 Europe, or the GSE as it is called. Now both GSE and
2 rival CSSs can use their relationships with merchants to
3 earn a fee whenever a user clicks on a PLA that has been
4 provided to Google's general search service and then
5 selected by Google's general search service in response
6 to a user query. Placement within the remedy box is
7 determined by algorithms that take account of bid
8 amount, expected click-through rate and ad quality and
9 they are entirely blind to the identity of the bidding
10 CSS. You will have also obviously noted that there is
11 organisational and financial separation between GSE and
12 the rest of Google so it is not given any advantages in
13 the auction.

14 Now, this case was, at the time it was brought,
15 the biggest case that the Commission had ever brought,
16 and we say that the idea that the Commission would have
17 happily allowed Google to implement an infringing remedy
18 in breach of the decision is not really that credible.
19 The Commission had all the power it needed to address
20 a continuing abuse if it thought there were one.

21 THE CHAIRMAN: Well, I do not know how much we can really
22 draw from that. The Commission has been asked about
23 this and has stated quite clearly that it has not taken
24 a position one way or the other and that is where it is.
25 So, equally, the Commission has started proceedings on

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1 the DMA, raising a similar kind of complaint, and that
 2 is based on the current practice of Google, which is
 3 the remedy. So I do not see that we can say one way or
 4 the other.
 5 MR PICKFORD: Sir, I do not say that you can draw any
 6 hard-edged legal inferences. I say as a matter of —
 7 well, in my submission, as a matter of common sense, it
 8 is unlikely that the Commission really — because we did
 9 negotiate — because there were negotiations with
 10 the Commission.
 11 MS ROSE: Why does it matter?
 12 THE CHAIRMAN: There are all kinds of considerations that
 13 can go into a negotiation. We have their letter, it is
 14 very clear what it says. It does not say: well, you can
 15 infer that we are not concerned about it. Equally, we
 16 know they have formally started proceedings under
 17 the DMA on a basis that almost word for word it appears
 18 to replicate the substance of what has been found to be
 19 an abuse. So I do not see how we can have any, not even
 20 legal, but inferential indication one way or the other.
 21 MR PICKFORD: I am very happy to demonstrate on the merits
 22 why the remedy solves the abuse.
 23 THE CHAIRMAN: Yes, I mean, that —
 24 MR PICKFORD: (Overspeaking) — And so I can move on.
 25 The reason why it does that is that it severed

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1 the privileged connection that had previously been
 2 afforded via the previous shopping boxes to the benefit
 3 of Google's CSS and Google's CSS alone. Now, today, and
 4 since September 2017, insofar as Google offers its own
 5 CSS promotional advantages from the SERP in terms of
 6 a place to show ads from merchants and to profit from
 7 that, and from associating its brand the "By Google"
 8 with shopping and having the possibility to have a link
 9 through to Google's CSS site, all of those advantages
 10 now can also be afforded to rival CSSs, whereas
 11 previously they were not. All of the advantages in
 12 the previous world all went to Google's CSS.
 13 Now, turning to the Claimants' case, there appear to
 14 be to us two central allegations which underpin it.
 15 The first one did not actually come through so loudly in
 16 Mr Jowell's submissions yesterday, but it is an
 17 important point in Mr Hunt's evidence and it amounts to
 18 this. Google's general search page, in essence, is
 19 a popular place for users to start product searches,
 20 because, of course, if people did not care about using
 21 Google to start product searches at all, none of this
 22 case would ever have arisen. We would not have been
 23 said to have the power that we did. Now, on that, as
 24 I will show you shortly, Google's SERP is not in fact as
 25 popular as the Claimants make out and it is notable how

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1 little of the Claimants' case pays attention to what we
 2 say is the shopping elephant in the room, namely Amazon,
 3 and I am going to come back to that, because that is an
 4 important point.
 5 However, what we can accept is this, that Google's
 6 general search page is a starting place for a material
 7 proportion, albeit a minority, of shopping searches.
 8 Now, that is not surprising, because Google is the most
 9 popular place in general terms for users to search
 10 the web at all. Why is that? Well, because Google has
 11 invested tens, if not hundreds of billions of dollars in
 12 that endeavour, and it has a resolute determination to
 13 be the best general search engine in the world. So, in
 14 my submission, that is an enviable place to be, it makes
 15 Google a powerful company, it makes Google a very
 16 profitable company. None of those are bad things and
 17 none of those things are things that it is required to
 18 share simply because someone else wants to cash in on
 19 that popularity.
 20 Now, competition law does, with great care,
 21 sometimes trespass into a dominant undertaking's right
 22 to use its assets for its own purposes, not the purposes
 23 of others. The leading, very well known case is
 24 the Bronner line of authority, where an input is
 25 indispensable to carry out a downstream activity and

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1 refusal to supply it would eliminate competition in
 2 the downstream market, then a downstream competitor may
 3 be able to require an upstream competitor to make
 4 supply, an upstream undertaking to make supply. But
 5 this is not a Bronner case, the Claimants do not say it
 6 is, they do not try and establish indispensability and
 7 they do not try and establish that competition from
 8 rival CSSs has been eliminated. Obviously, it has not.
 9 So where that leaves us is that they have no prima facie
 10 right to access Google's SERP. Their right derives from
 11 the way that Google treats its own CSS.
 12 THE CHAIRMAN: Well, that is — is that not — the Bronner
 13 line of authorities has explained and significantly
 14 narrowed by the Android case, has it not? Quite
 15 expressly narrowed, as explained by the Grand Chamber.
 16 This is the Google SERP has not been built and is not
 17 operated that only Google can be on the SERP; it is
 18 something that is expressly for a whole lot of third
 19 parties to appear on the SERP.
 20 MR PICKFORD: Yes.
 21 THE CHAIRMAN: Therefore Bronner just does not apply in
 22 terms of access.
 23 MR PICKFORD: Well —
 24 THE CHAIRMAN: We can look at — no doubt we will — at the
 25 Android Auto but there is a lot of discussion there

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1 explaining Bronner and how narrow the Bronner
 2 reservation in fact is .
 3 MR PICKFORD: I will come back to that later.
 4 The reason, we say, that there is a right of access
 5 in this case all derives from avoiding discrimination
 6 between Google's own downstream CSS and alternative
 7 rival CSSs. In my submission, and I anticipate I will
 8 obviously have to come back to deal with the Android
 9 point, Google is entitled to give preference to its own
 10 general search business when responding to users'
 11 general searches. So what I mean by that is that when
 12 someone inputs something into the SERP, what they see is
 13 always results that are exclusively chosen using
 14 Google's technology and presented in the format decided
 15 upon by Google, and that includes links to sites where
 16 users could go on to find different answers to their
 17 question, for instance by clicking on and going through
 18 to a CSS site.
 19 But Google's SERP does not ever present results
 20 chosen by Bing or by Yahoo!, it is choosing results
 21 using Google's algorithms, and we say nor should
 22 the SERP be controlled by the Claimants to present
 23 results using their algorithms. If that is what users
 24 want, they can navigate to the Claimants' site and get
 25 the Claimants' algorithms.

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1 Now, what Kelkoo says about that is that that set up
 2 means that Google extracts the vast majority of
 3 the economic value that the remedy generates. My
 4 response to that is: too right it does. Of course
 5 Google gets to earn the vast majority of economic value
 6 from a box of results on Google's SERP. That is because
 7 it is Google that owns the scarce resource, namely
 8 the SERP, and in particular the top of the SERP. That
 9 is the really valuable asset here. That is what Google
 10 has invested billions in creating and maintaining as
 11 a destination for high-quality results. Insofar as
 12 there is scarcity value associated with that, what
 13 the economists call "economic rents", I believe, it is
 14 Google that is entitled to that reward. Kelkoo and
 15 Foundem did not make the investments that enable Google
 16 to be the place where consumers naturally want to start
 17 their searches and they are not entitled to the scarcity
 18 value associated with the Google SERP.

19 Second key allegation, and this is one that was
 20 majored on yesterday, is that the remedy box is, as
 21 Mr Jowell put it yesterday, the manifestation of
 22 Google's CSS on the SERP, and they say, well, unless
 23 they get the same thing, well, that is discriminatory.
 24 That is the heart of their case now. I have got three
 25 points to make in response to that.

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1 The first involves examining what the remedy box
 2 actually is. Now, it is important to remember that
 3 general search and comparison shopping are in two
 4 separate markets. That lies at the very heart of
 5 the Commission's case, because of course, without that,
 6 there would not be any leveraging abuse from one market
 7 into another. So if the remedy box is, as we say,
 8 a legitimate part of Google's general search service and
 9 therefore not a manifestation of its CSS, that kills
 10 the Claimants' case, and yet I say, on inspection even
 11 of the Claimants' own case on what is and is not
 12 a legitimate general search result, that shows that
 13 the remedy box is indeed a legitimate part of a general
 14 search service.

15 So, first, the Claimants do not challenge Google's
 16 right to put product ads on its SERP. Indeed,
 17 the Commission made binding findings that that is
 18 a normal part of what a general search engine does, for
 19 the obvious reason, if you do not have some ads, you
 20 have not, ultimately, got a business. Text ads are an
 21 example.

22 Second, the Claimants do not object to Google being
 23 able to put attractive product pictures on the SERP.
 24 They are quite content for there to be such pictures if
 25 they lead users to CSSs. That is the essence of their

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1 counterfactuals 2a and 3. It would be helpful if we can
 2 go back to see the pictures there. It is {A1/3/15}. So
 3 I do not need to go into the detail of it. The simple
 4 point is this is said to be something that it would be
 5 legitimate for Google to present, namely pictures that
 6 have — there are attractive pictures of product on
 7 the SERP. So that of itself cannot be outside what
 8 a general search service does, because we will be doing
 9 it in their world. Nor do they object to such pictures
 10 being grouped to aid comparison, because that is just
 11 what they are doing here in this example. Indeed —

12 THE CHAIRMAN: Sorry, when you say no objection to them
 13 being grouped as in this example, but that does not mean
 14 that this is not a form of comparison shopping, does it?

15 MR PICKFORD: Well, if you bear with me on my argument, I am
 16 going to explain why it is not, because I have not got
 17 to the end of my point. But my point will be indeed it
 18 is not a comparison shopping service, because what this
 19 case really comes down to, or one of the really big
 20 issues anyway, at least on abuse, is working out
 21 the dividing line between what is a general search
 22 service and when does a general search service step over
 23 the line and stop being a general search service and
 24 start in fact sticking a comparison shopping service on
 25 the page. That is one of the core points that this case

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1 ultimately is going to turn on.
 2 My explanation is that let us just deconstruct and
 3 understand what it is that we can do as part of
 4 a general search service. We can obviously have ads,
 5 that is part of a general search service. We can have
 6 pictures. The fact that there are pictures on the page,
 7 that does not stop us being a general search service,
 8 obviously, because this is an example. The fact that
 9 they are grouped does not stop it being part — does not
 10 stop what we are doing being part of a general search
 11 service, because in this world, they say this is
 12 legitimate. So this cannot be a world where we are
 13 putting our CSS on the page. By definition, this is
 14 something that a general search service is apparently
 15 allowed to do. The difference, the core difference is
 16 that what they say we cannot do is have ads with nice
 17 pictures grouped together that lead through to merchants
 18 where we have chosen what the ad is, and yet they do
 19 accept that we can show links to merchants on the SERP,
 20 because obviously we do that in text ads and generic
 21 blue links.
 22 So to recap, we say ads, okay; with pictures, okay;
 23 grouped together, okay; containing information on offers
 24 with links to merchants, okay. Those are all features
 25 of a general search service. But what I have just

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1 described is the remedy box. There is not one aspect of
 2 that, of what is in the remedy box, that is outside
 3 something that a general search service is permitted to
 4 do.
 5 Now, as I said, what it comes down to is
 6 the claim: well, a—ha, if you are going to have all
 7 those things together, only we — by which I mean
 8 the CSSs, I am taking their voice now — only we,
 9 the CSSs, get to control that, and we say that is just
 10 a hugely self-serving carve-out from what a general
 11 search engine is allowed to do. The true distinguishing
 12 features that set apart a CSS from a general search
 13 service are these: comprehensive filtering tools; price
 14 comparison tools; detailed product information and
 15 reviews, at least on a good CSS; and an exclusive focus
 16 on the page on shopping rather than having other results
 17 too. Those four features, in my submission, are
 18 the differentiating features between general search and
 19 a CSS, because of course, they both —
 20 MS ROSE: How does that correlate with the Commission's
 21 definition of a CSS?
 22 MR PICKFORD: Well, the Commission did not define the CSS.
 23 THE CHAIRMAN: I thought they did.
 24 MR PICKFORD: They do not — the Commission does not —
 25 well —

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1 THE CHAIRMAN: We can look at that.
 2 MR PICKFORD: This was a point that came up in
 3 the Preliminary Issues Judgment, I believe, and there
 4 are different indications in the decision as to what
 5 a CSS really is or is not, because there is a footnote
 6 early on that contains one definition and then there is
 7 binding recitals later which are different. The binding
 8 recitals later say in terms that the Commission's case
 9 is that — is not that the box is itself a CSS. The box
 10 is not a CSS. What the Commission's case was was that
 11 the box was the means of favouring Google's CSS.
 12 MS ROSE: But did it not also say what are the key features
 13 of a CSS?
 14 THE CHAIRMAN: Yes, they did.
 15 MR PICKFORD: Yes, they do, and I am going to come back to
 16 this. But in my submission, the core features of a CSS
 17 as opposed to a general search service, as I am
 18 explaining them, are entirely consistent with
 19 the Commission's findings on this. I would like, if
 20 I may, because there is quite a lot of the Commission's
 21 decision that I would like to go through sequentially,
 22 if it is okay, I would like to come back to it, but
 23 I can assure the Tribunal I am not going to skip
 24 the elements of the decision which bear on this very
 25 point about what is a legitimate part of a general

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1 search service versus what is a CSS. I am going to come
 2 back to that, because I say the decision strongly
 3 supports our case.
 4 Can I, at this moment, pick up the Tribunal's
 5 invitation from previously to address you on
 6 the pictures, the picture annex?
 7 THE CHAIRMAN: Yes.
 8 MR PICKFORD: Because we do have some comments and indeed
 9 something of a complaint about the pictures annex
 10 provided by the Claimants.
 11 So if we could go, please, to — if we could start
 12 at {A1/3/8}.
 13 So this is said to be an illustration of the — what
 14 they call the Compliance Mechanism, what we call
 15 the remedy. What is important to observe about this
 16 picture, and I am going to show you one that rectifies
 17 it later, is it is devoid of all the context. It does
 18 not show you everything else on the SERP, and that is
 19 relevant because it is only general search results that
 20 show you a range of things, whereas CSSs are just
 21 focused on PLAs.
 22 If you go on to the next slide, please, {A1/3/9},
 23 this is a particularly, we say, grievous example of
 24 the cases having — sorry, the images having been
 25 somewhat misleadingly truncated, because this is

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1 a picture that is said to come from Google's standalone
 2 CSS, and on its face, it looks remarkably similar to
 3 what you saw on the previous page, and that is what they
 4 are trying to show you, they are trying to show
 5 that: look, there is just no difference between these
 6 things. But this image has been deliberately doctored
 7 and truncated so it does not actually show you a fair
 8 representation of what the CSS looks like. I am going
 9 to show you what it looks like in a moment, but the key
 10 point is — there are two key points, actually.
 11 Firstly, it is an entire page that is devoted to PLAs,
 12 it is not just a bar across the top. That is
 13 a difference. Secondly, there is a host of filters and
 14 key tools which are at core, they are at the heart of
 15 what comparison shopping services do as compared to
 16 a general search service and they are on the left, and
 17 I am going to come and show you a picture that does
 18 that.
 19 THE CHAIRMAN: I mean, we can — and I indicated this
 20 yesterday, if that can be done on the EPE system — go
 21 into Google and do this search for "Bialetti coffee
 22 maker" and we will then see, rather than having just
 23 screenshots, exactly what one gets, and that might be
 24 rather more effective, frankly, than getting a whole
 25 series of different pictures and people complaining

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1 about each other's.
 2 MR PICKFORD: It might well be, but can I — because I do
 3 not know if that is — sort of dealing with a child or a
 4 minor, given that I do not know exactly what we are
 5 going to see, can we —
 6 MS ROSE: Surely, Mr Pickford, you know exactly what you are
 7 going to see, you have been viewing all these results
 8 for months!
 9 (Simultaneous speakers — inaudible)
 10 MR PICKFORD: I think it would be very helpful, but if what
 11 we could do, first, is go to the images that we have
 12 done, because we have seen all the Claimants' images,
 13 and in fairness, I think it would be fair to show
 14 the defendant images as well.
 15 THE CHAIRMAN: But, I mean, if these are said to be
 16 truncated and yours are said to be whatever, the correct
 17 one, because this is the current Google Search engine —
 18 MR PICKFORD: Yes.
 19 THE CHAIRMAN: — is what we will all get simultaneously by
 20 doing the search.
 21 MR PICKFORD: Yes. Sir, I am very keen to do that, but
 22 there are various little things that I would like to
 23 pick out to be able to show you —
 24 THE CHAIRMAN: Yes.
 25 MR PICKFORD: — and I know that I can do that by reference

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1 to our images. One thing that I have discovered, I have
 2 to say, because I have done quite a few of these
 3 searches, is that sometimes, you know, you do not get
 4 exactly the same thing every time. I think the things
 5 that I am going to be showing you are consistent.
 6 However, I also want to show you not just things on
 7 Google, but things on Kelkoo and things on Amazon, and
 8 I would like to be able to make those comparisons, and
 9 that is just going to be slightly complicated for me to
 10 do live.
 11 THE CHAIRMAN: Well, for that, I can see. But on the point
 12 you were making, that this is misleading and truncated
 13 and this purports to be what you get — I mean, it is
 14 obviously not the full page, because the organic results
 15 will come below.
 16 MR PICKFORD: Yes —
 17 MS ROSE: And the ads.
 18 THE CHAIRMAN: And the ads maybe.
 19 MR PICKFORD: I can see — as long as I get an opportunity
 20 to go to my slides as well, if the Tribunal would like
 21 at this moment to go to a live version, let us do it.
 22 THE CHAIRMAN: Can we do that easily? Yes. That is
 23 wonderful. Because we all want to do the same thing, if
 24 we just bring up — here we are — Google, and we type
 25 in "Bialetti coffee maker". Do we type it, or you type

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1 it? I think we have to ask — yes, into the search,
 2 "Bialetti", B-I-A-L-E-T-I, "coffee maker", with a "B",
 3 "B" for "bravo", "coffee maker" — there we are — then
 4 we get this, and I think it is a carousel, so you can
 5 scroll along and you will get more, and scroll back, and
 6 there we are, something that looks rather like what we
 7 have seen. Then if we scroll down, you get this, and
 8 then you get these further product sites.
 9 PROFESSOR SMITH: But what we do not get further down is any
 10 CSSs.
 11 MR PICKFORD: No, you do. What was called, if we go back up
 12 a bit, "Product sites", that is CSSs. PriceRunner is
 13 a CSS.
 14 THE CHAIRMAN: Yes.
 15 MR PICKFORD: Kelkoo is a CSS, or it claims to be.
 16 MS ROSE: Which of these image rich boxes is the remedy?
 17 MR PICKFORD: Go up to the top. That one.
 18 MS ROSE: So "Sponsored products".
 19 MR PICKFORD: Yes.
 20 THE CHAIRMAN: As we have here.
 21 MS ROSE: That is where we see "By Google", "By Kelkoo"?
 22 MR PICKFORD: Exactly.
 23 If we go, the second along — in fact the first one,
 24 because Kelkoo is ... and if we go down to "By Kelkoo"
 25 and click on "By Kelkoo", we are now on Kelkoo's page,

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1 and so anyone that is interested in what Kelkoo can
 2 provide them, with one click, they are right here,
 3 the Bialetti coffee maker page, and they can choose from
 4 all of what Kelkoo provides.
 5 PROFESSOR SMITH: But we were told yesterday that fewer than
 6 1% of actual viewers of this page will click on any of
 7 these CSS links, including —
 8 MR PICKFORD: Indeed, yes.
 9 PROFESSOR SMITH: — Google Shopping.
 10 MR PICKFORD: Yes, and that is because what consumers most
 11 want is, generally, to go to an actual product page,
 12 somewhere where they can buy something, rather than go
 13 and go off on a deviation via a further search engine,
 14 unless what they are particularly interested in is
 15 the filtering tools, like being able to order by price,
 16 being able to filter down to a particular criterion.
 17 They can only get those tools by going through to
 18 a comparison shopping service.
 19 So it would appear from the data that most people do
 20 not value those tools sufficiently that that is what
 21 they are keen to click on, but they can, and that is
 22 the service that is on offer to them.
 23 PROFESSOR SMITH: But can I put it in slightly different
 24 words. When you say most people, when they look at
 25 the box at the top —

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1 MS ROSE: Can we go back to the general search page?
 2 PROFESSOR SMITH: — click on what they see — they can go
 3 along the carousel and look at the different things and
 4 then click on the one that looks most attractive to
 5 them. That does not mean that they do not value
 6 comparison, it is saying when a consumer is presented
 7 with this picture most consumers behave in a particular
 8 way, and it is suggesting, perhaps, one has to be
 9 careful of the use of words of "value". We are talking
 10 about people's behaviour, not necessarily what is in
 11 their best interests, or what — if they were presented
 12 the information in a different way, they might make
 13 their decisions differently.
 14 I am saying no more than that commercial
 15 organisations present information to consumers in ways
 16 that are effective commercially —
 17 MR PICKFORD: Yes.
 18 PROFESSOR SMITH: — and those do not necessarily correspond
 19 with what the consumers, if presented with information
 20 in a different way, the way they might make a different
 21 decision.
 22 MR PICKFORD: That is a fair point. I think my point was
 23 that there is a revealed preference here, and what is
 24 revealed is that, presented with these options, what
 25 consumers seem to be more interested in doing most of

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1 the time is clicking on the nice image as opposed to
 2 clicking on the option of then going off to a CSS site
 3 where they can perform all of the filtering. I think
 4 that is a fairly neutral way of putting it.
 5 THE CHAIRMAN: Yes. I think, qua Professor Smith's point,
 6 the whole of behavioural science is based on the notion
 7 that the way you present things to people will influence
 8 their behaviour, so their behaviour is conditioned by,
 9 or strongly influenced by the way things are presented.
 10 It does not mean, therefore, you can deduce from that
 11 there is really a higher value.
 12 MR PICKFORD: Well, I think —
 13 THE CHAIRMAN: Present it differently and you will get
 14 a different choice.
 15 MR PICKFORD: I certainly —
 16 THE CHAIRMAN: That is the whole of behavioural science,
 17 really.
 18 MR PICKFORD: I certainly agree with the proposition that
 19 behavioural science has a lot to tell us about how, if
 20 different things are presented — you know, if things
 21 are presented differently, then that may well lead to
 22 different outcomes. But I do maintain that if anyone
 23 with the slightest curiosity — and I have certainly
 24 done it, maybe because I have a particular interest in
 25 this case — clicks on the "By Kelkoo" link or

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1 the whatever link, they will discover that there is
 2 something different there, and it is not very hard, and
 3 what I am saying is that — I am not saying that those
 4 things are not valued. Indeed, I will come on to —
 5 I mean, again, it is the elephant in the room. The main
 6 reason why consumers do not actually use CSSs for those
 7 kinds of filtering is because they go to Amazon. Amazon
 8 has — and I am going to come on and show you this —
 9 filtering and tools, shopping tools, to pulverise
 10 everyone else into oblivion, and Amazon is the most
 11 popular place to start a shopping search on
 12 the internet, as I will also come on to show you. That
 13 is the real reason why people do not use CSSs any more
 14 particularly.
 15 MS ROSE: Can I just ask you a question about this results
 16 page? Can we just scroll down again to where we had the
 17 "Product sites". So what is this bar here that
 18 says "Product sites"?
 19 MR PICKFORD: So that is CSSs.
 20 MS ROSE: So Google is giving CSSs their own shop window
 21 here —
 22 MR PICKFORD: Yes.
 23 MS ROSE: — on the front page?
 24 MR PICKFORD: Yes.
 25 THE CHAIRMAN: Is this part of the remedy, or not?

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1 MR PICKFORD: No, it is not —
 2 THE CHAIRMAN: It is not.
 3 MR PICKFORD: — part of the remedy, but it is something
 4 that Google does. So we do not rely on it to say: look,
 5 this is a necessary component of what we do and
 6 therefore that is why you should find for us. My case
 7 is: look at that box at the top, that box at the top is
 8 on entirely equal terms and that is good enough.
 9 MS ROSE: Yes, but just going back to the product. So
 10 the "Product sites", does that mean then — so CSSs are
 11 no longer being demoted in generic search by Algorithm A
 12 and Panda because in fact they are all appearing in
 13 a group on the front page?
 14 MR PICKFORD: I do not know, because it is not —
 15 MS ROSE: You do not know if they all are?
 16 MR PICKFORD: — because it is not part of anyone's case —
 17 MS ROSE: Right.
 18 MR PICKFORD: — in relation to these, exactly what
 19 the algorithmic processes are behind the "Product sites"
 20 tab. I can no doubt take instructions —
 21 MS ROSE: But "Product sites" means CSSs?
 22 MR PICKFORD: Yes.
 23 THE CHAIRMAN: But do Algorithm A and Panda continue to
 24 apply?
 25 MR PICKFORD: I will have to take instructions on that,

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1 because that is not — it is not part of their case.
 2 The "Product sites" tab is not part of the fight between
 3 us. We are not relying on it positively, I do not see
 4 where it is identified as part of their case, and
 5 therefore I cannot give you an immediate answer to it,
 6 because what I am focused on is the points that have
 7 been —
 8 MS ROSE: But it would take the sting out of the demotion
 9 point, would it not, "Product sites"?
 10 MR PICKFORD: Well, it depends what you call "the sting".
 11 I mean, Mr McGurk is going to deal with algorithms, but
 12 I can address you in this way. We say that there is
 13 absolutely nothing wrong with either Algorithm A or
 14 Panda and we are not ashamed of them in any way. What
 15 they are doing is providing higher-quality links, and
 16 the way that they do that is by looking at signals that
 17 show what is most useful to users. They are good
 18 things.
 19 Also, they are no different, in reality, to all of
 20 the many hundreds of algorithms that Google uses. Every
 21 single algorithm that Google uses when it is choosing
 22 what results it is going to put on the page is a sorting
 23 algorithm. What it is intended to do is differentiate
 24 between different alternatives and decide what to put
 25 higher and inherently what to put lower. So if you do

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1 well on a particular algorithm, if it is a promoting
 2 one, well, then you will move up. But of course by you
 3 moving up, other people who did less well move down and
 4 vice versa. If you do worse on a demoting algorithm but
 5 other people do better relative to you, they move up.
 6 All they are doing is sorting.
 7 It is a deliberately pejorative approach that
 8 the Claimants have to say it is a demotion. I mean,
 9 yes, in a sense it is, but it is not more fundamental
 10 than just sorting everyone out.
 11 THE CHAIRMAN: We understand that, but clearly one of
 12 the aspects of the abuse was that, were these algorithms
 13 that apply to the third party CSSs and not to Google's
 14 CSS, Google still has something that I think you would
 15 recognise and accept is a CSS, if indeed that is
 16 the other picture that you just referred to on page 9,
 17 and I will come to that in a moment. So there is
 18 the question: do Algorithm A and Panda still exist, and
 19 do they apply to third party CSSs and do they apply to
 20 the Google CSS?
 21 MR PICKFORD: I can answer all those questions.
 22 THE CHAIRMAN: Yes.
 23 MR PICKFORD: So, yes, they still exist.
 24 THE CHAIRMAN: They do.
 25 MR PICKFORD: Yes, therefore, they would still apply

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1 inter alia to third-party CSSs in the types of links to
 2 which they apply, which is in particular just general
 3 organic blue links.
 4 THE CHAIRMAN: Yes.
 5 MR PICKFORD: No, they do not apply to Google's CSS. Why?
 6 Because Google applies a harsher algorithm to itself.
 7 It simply takes itself out of generic results all
 8 together. So the logic matrix is effectively this —
 9 and this is obviously not how Google works, but in terms
 10 of exposition or clarity, I think it would help to try
 11 to explain it in these simplified terms. You can
 12 imagine it in these terms. Google looks at a potential
 13 result. Is it a rival CSS eligible to be ranked but
 14 subject to — in generics, but subject to
 15 the algorithms? Is it Google's CSS? Does not — not
 16 eligible to be ranked, never gets a look in, simply
 17 outside of the scope of those results.
 18 So, in that context, there cannot be more favourable
 19 treatment by Google of itself relative to rivals.
 20 The more favourable treatment that was the concern of
 21 the Commission in the decision was not that within
 22 generics Google got a better deal. Google did not.
 23 Google simply was not there. Wiped out. It is like
 24 having a demotion of, you know, 100% at all times.
 25 The way that Google got a better deal is that there was

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1 a box on the page that was insulated from algorithms,
 2 the algorithms did not apply to that box, and that was
 3 what the complaint was by the Commission. They said:
 4 well, that is unfair, because you — because there is
 5 this box here and it is a means by which you favour
 6 yourselves, but —
 7 THE CHAIRMAN: It is because it is exclusive to you.
 8 MR PICKFORD: Yes, because it is exclusive to you, because
 9 although it is not itself a CSS, what it does do is act
 10 as a window onto your CSS, because all of the results
 11 that are in it, they have all just been basically taken
 12 up from your CSS, lifted, a section of them put into
 13 the box, and all of the links are only ever going to go
 14 your CSS, and it is only your merchants and so it is all
 15 bound up with just you, Google. They said, no, that is
 16 favouring. If you are going to have a box that is
 17 a kind of promotional box on your page, well, you have
 18 got to share that equally, and that is what we now do.
 19 So we have a promotional box, but every single CSS is
 20 entitled to use it in exactly the same way as Google's
 21 CSS.
 22 THE CHAIRMAN: You are not in the organic results?
 23 MR PICKFORD: We are not in organic.
 24 THE CHAIRMAN: But if we go back to the live experiment here
 25 and scroll back to the top of the page, in the tool bar

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1 at the top where it says "AI Mode", and then "All", and
 2 then "Shopping", if we click on "Shopping", which is
 3 the third one from the left, that takes you to
 4 the Google CSS, does it not? Is that not right?
 5 MR PICKFORD: I am sorry, my junior was just saying
 6 something to me and I am afraid I did not hear you.
 7 THE CHAIRMAN: What we have done, and it is being done again
 8 so you can watch it —
 9 MR PICKFORD: So, yes, we went to "Shopping"; is that right?
 10 THE CHAIRMAN: "Shopping", yes. You come through to
 11 the Google CSS exclusively.
 12 MR PICKFORD: Yes.
 13 THE CHAIRMAN: So you have got this window straight to
 14 the Google CSS. So when you say they do not appear in
 15 the organic results, they have been taken out of
 16 the organic results, well, they do not need to be
 17 because they have got this favourable link right at
 18 the top of the page.
 19 MR PICKFORD: Well, that is not part of the Claimants' case,
 20 it was never part of the Commission's case and —
 21 THE CHAIRMAN: No, because the Commission's case, you had
 22 the special — as you have explained, you had this high
 23 profile remedy box. But now, looking at where we are
 24 today, the point you were just making saying, "Oh, it
 25 does not matter that Google's CSS is not in Algorithm A

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1 because they are treated worse than everybody else, they
 2 do not appear in organic results at all" —
 3 MR PICKFORD: In the context of organic, they —
 4 THE CHAIRMAN: Organic, because they have instead — it is
 5 an answer to your point, it is not really a complaint.
 6 It is an answer to your point: well, they would not be
 7 because they have got this favourable position instead.
 8 MR PICKFORD: Well, it may be an explanation, it may be an
 9 answer, but certainly, Sir, it is not a legitimate
 10 complaint, because that tab has always been there and
 11 the Commission has never taken an issue with the tab
 12 right at the top where you get to choose — if you have
 13 gone to Google, it basically is allowing us — because
 14 Google does lots of different things, it is allowing
 15 people, if they want to, and I have no data on how often
 16 those are clicked because it is not part of anyone's
 17 case, but it is able to choose, okay, this Google
 18 service or this alternative Google AI service or
 19 whatever, because Google does lots of different things
 20 and it is a way of basically directing people to the bit
 21 of Google that they are most interested in.
 22 MS ROSE: Can I just ask a question? Can we just go back to
 23 the general results page. So looking at the toolbar, we
 24 were just looking at the "Shopping" one. If you go down
 25 to the end, after "Short videos", it says "Product

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1 sites"; do you see that?
 2 MR PICKFORD: Yes.
 3 MS ROSE: Is that the CSSs again? If you just click
 4 on "Product sites".
 5 MR PICKFORD: I think so yes. Yes, it is.
 6 MS ROSE: Does Google Shopping appear under "Product sites",
 7 or is that only the rival CSSs?
 8 MR PICKFORD: Rivals, yes.
 9 MS ROSE: So essentially you have got two tool bars at
 10 the top, one is for Google Shopping and one is for rival
 11 CSSs?
 12 MR PICKFORD: Correct.
 13 PROFESSOR SMITH: While we are on this page, can I ask
 14 a question? Can we go back to the "All" tab so we get
 15 back to the original. Have I understood you, earlier,
 16 Mr Pickford, you were saying this carousel of sponsored
 17 products at the top is not a CSS?
 18 MR PICKFORD: Correct.
 19 PROFESSOR SMITH: It is a general search result?
 20 MR PICKFORD: Yes.
 21 PROFESSOR SMITH: So this box is part of general search?
 22 MR PICKFORD: Yes, it is a specialised result. So, just,
 23 Sir, to be clear, it is a specialised result which is
 24 part of a general search service.
 25 PROFESSOR SMITH: Yes, so part of the general search

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1 service .
 2 My question is — and I will not try and remember
 3 which previous iterations of this box was called what,
 4 because I get confused, but would the same be true of
 5 the earlier versions of this shopping box, or is it only
 6 true of the remedy box? If we go pre-2017,
 7 the shopping box was then called Product Universal,
 8 was it? Is the Product Universal box also the result of
 9 a general search?
 10 MR PICKFORD: Well, this is where it gets complicated,
 11 because this is where we come into the question of
 12 whether it is a CSS in itself — no — or whether it
 13 favours Google's CSS. What the General Court held and
 14 the Tribunal adopted in its Preliminary Issues Judgment
 15 was the notion that in the pre-remedy world where you
 16 had two things, firstly, a separate CSS, and then,
 17 secondly, a privileged window onto that CSS, a kind of
 18 special billboard just, you know, these things might be
 19 better on the street, you have got your shop and then at
 20 the end of the street you have got this great big
 21 billboard saying, "Come to our shop", and what was said
 22 to be the case is that taken together, they were part of
 23 — the way it was put by the Tribunal was part of
 24 the ecosystem of Google's comparison shopping service
 25 because, we say, of that exclusive link. So in that

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1 world, it was not itself a CSS. How you define it in
 2 the market becomes quite muddled by the fact that it was
 3 doing this job of promoting Google's CSS.
 4 Does that answer your question?
 5 PROFESSOR SMITH: Well, it answers the question in the sense
 6 that you have clearly said this carousel here is
 7 the result of a general search, and asked does the same
 8 apply to Product Universal, you have not been able to
 9 say, "Oh, yes", it is more complicated than that.
 10 MR PICKFORD: Yes, it is more complicated than that.
 11 PROFESSOR SMITH: Okay. That is fine. That does answer my
 12 question. Thanks.
 13 THE CHAIRMAN: Would that be a sensible moment?
 14 MR PICKFORD: It would. Can I just say, obviously,
 15 hopefully I have been able to provide some illumination
 16 through this live experiment in terms of answers to
 17 questions. I am making relatively slow progress at
 18 the moment, because we have basically done a live
 19 experiment that I have been hosting, so —
 20 THE CHAIRMAN: Well, you did complain about the imagery and
 21 you were saying it was misleading.
 22 MR PICKFORD: I did, but I did not ask the Tribunal to look
 23 at them live. What I wanted to do was look at my
 24 images, which we have not looked at yet. It is not
 25 a complaint whatsoever, I am just saying that I am

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1 currently not making particularly good time because we
 2 have had what is hopefully a useful exchange and
 3 therefore we may need some of the same indulgences
 4 that —
 5 THE CHAIRMAN: Yes, we understand.
 6 MR PICKFORD: — my learned friends had.
 7 THE CHAIRMAN: But we have found it helpful.
 8 2.05.
 9 (1.08 pm)
 10 (The short adjournment)
 11 (2.10 pm)
 12 THE CHAIRMAN: Yes, Mr Pickford.
 13 MR PICKFORD: Thank you, Sir, members of the Tribunal.
 14 If I could begin with just a couple of points of
 15 nuance and clarification to some of the responses that
 16 I was giving to some questions about the application of
 17 algorithms and what still applies to what. So it would
 18 be strictly correct to say that Panda was succeeded by
 19 other algorithms which serve a substantively similar
 20 purpose. The reference for that, that can be picked up
 21 in, amongst other places, Mr Hunt's evidence at — I do
 22 not want to go there, but this is for your reference —
 23 paragraph 167(c) to (d) of his first statement and
 24 the reference for that is {12/1/80}. The details of
 25 that are confidential.

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1 In relation to Algorithm A, I am instructed that
 2 that still exists in name but obviously it does get
 3 updated over time, so perhaps it is more accurate to say
 4 a version of Algorithm A still exists today. One then
 5 is into the classic philosophical question that one
 6 I think is often asked of a bicycle, whether it is still
 7 the same bicycle after it has been altered a number of
 8 times.
 9 In relation to rival CSSs and the applicability of
 10 the algorithms, yes, as I said, in relation to generic
 11 results, those algorithms still apply in the manner that
 12 I have described to generic results. They do not apply
 13 to the comparison sites boxes that you saw in the live
 14 experiment.
 15 MS ROSE: The one that says "Product sites".
 16 MR PICKFORD: "Product sites", that is correct. Both
 17 the box and also the link right at the top of the page
 18 that you referred me to, those are 2024 developments on
 19 the SERP.
 20 Then the final point before I continue with
 21 the submissions that I was making before is there was
 22 a question, Sir, from you about the definition of a CSS
 23 in the decision. I do not want to spend a lot of time
 24 on that, but very briefly, it might be helpful to pick
 25 up the Preliminary Issues Judgment, which can be found

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1 in {E/2/17}.

2 So we see there is a section that begins:

3 "The meaning of Google's own comparison shopping

4 service."

5 Then at paragraph 43 of the judgment, about halfway

6 down, it is said that:

7 "As there is no definition of Google's CSS in

8 the operative part of the Decision, it is common ground

9 that [it] is necessary to rely on certain recitals of

10 the Decision as an aid to interpretation of this term."

11 So that is what the Tribunal then went on to do in

12 this section. I do not want to read all of this

13 section. Essentially what the Tribunal did is weighed

14 competing textual considerations.

15 MS ROSE: But that is Google's CSS. I think the question

16 related to a definition of a CSS.

17 MR PICKFORD: Oh, I beg your pardon. I am sorry.

18 I misunderstood. I will be coming on to that later.

19 The point that comes out of these paragraphs is that

20 when we get to the conclusion at paragraph 54, Google's

21 CSS is said to include the boxes in the specific context

22 of the favouring {E/2/19}. That is the point.

23 Okay, if I could then go back to some of the images

24 that we say —

25 THE CHAIRMAN: Yes.

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1 MR PICKFORD: — are helpful for the Tribunal to see.

2 Hopefully I can go swiftly through this because we have

3 had the delight of the live show.

4 But if we could go, please, to {A2/2/4}. The things

5 to draw out from this, which I think we did see in

6 the live presentation, are that there are a number of

7 different types of results on the page. It is a general

8 search results page. So we have got the box at the top,

9 but then we have also got then an organic link through

10 to Bialetti beneath that. We have then got questions

11 people ask often beneath that. We have then got another

12 website which seems to be another organic link to

13 Brew Italia, and then we have got the product sites that

14 we saw. So there is a whole range of different things

15 on the page.

16 The other point to note is that there is nothing

17 down the left—hand side. There is nothing in terms of

18 the whole host of tools that are one of the unique

19 features of comparison shopping services, the specific

20 tools that enable users to perform refinements,

21 ordering, etc.

22 So then if we go on to the next slide, please, which

23 is on {A2/2/5} of Google's annex, it is called

24 "Figure 7", and this is a search for Bialetti coffee

25 maker on Google Shopping, and what one sees here is that

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1 you have got a whole page, a continuing page of PLAs.

2 So you do not get a range of results any more of

3 different types, you just get PLAs, and what you also

4 get given, on the left—hand side, is the tools that

5 I mentioned that would enable you to do, for example,

6 some kind of filtering, including by price. So that is

7 an example of Google's CSS.

8 We have then got a similar one for Kelkoo on

9 the next slide {A2/2/6}, and again, it is in materially

10 similar terms to Google's one, a whole page of PLAs,

11 various tools on the left—hand side.

12 Then the next slide {A2/2/7} is Amazon, and again,

13 on Amazon you get a whole series of PLAs and you have

14 a set of filtering tools down the side, and in the case

15 of Amazon, those filtering tools are particularly

16 comprehensive, more so than on either of the CSSs' own

17 websites. One can also see that there is a — there

18 should be a "Sort by ..." button on Amazon, towards

19 the top. It is quite hard for me to see on here, but it

20 is sort of top right. I think it says there "Sort

21 by ..." is it "featured" or "relevance"?

22 MS MORRISON: (Off microphone) "Featured".

23 MR PICKFORD: Featured, thank you.

24 Then if you go back to Kelkoo {A2/2/6}, there is one

25 which is sort by "Relevancy". Google also —

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1 THE CHAIRMAN: Amazon is partly selling its own product, is

2 it not?

3 MR PICKFORD: Yes, it is.

4 THE CHAIRMAN: Yes.

5 MR PICKFORD: So Amazon is — well, it depends on

6 the products, but, yes, Amazon is a merchant platform

7 and so provides a place and a number of other services

8 on behalf of merchants, independent merchants, to sell

9 their products, and also it supplies products itself and

10 it supplies those products also through its own

11 platform.

12 The point of showing you this slide, Sir, is not to

13 demonstrate that Amazon is in the CSS market. I am not

14 trying to argue that. What I am trying to show you is

15 that there are other providers of services that are not

16 even in the same market but are actually closer to what

17 a CSS does than what Google Search does when it provides

18 the remedy box on its page. That is the point

19 underlying this.

20 For completeness, there is a filter by — sorry,

21 there is an "arrange by" — "Sort by" on the Google page

22 as well back on page 5 {A2/2/5}, but it is on

23 the left—hand side, not the right—hand side.

24 So those submissions conclude my first point

25 responding to the suggestion that what is on the page is

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1 inherently a manifestation of Google's CSS. It is not.
 2 It was not found to be by the Commission. I mean, if
 3 what is currently on the SERP in the form of the remedy
 4 box, if that is a CSS, that is very hard to reconcile,
 5 in my submission, with the findings, the binding
 6 findings in the decision that the shopping box and
 7 the Product Universal were not Google's CSS. That was
 8 not the problem. The problem was not that Google had
 9 literally put its CSS on the page. The problem was that
 10 it had given itself an unfair advantage in relation to
 11 its separate CSS by the way it was constructed and
 12 the exclusive window, effectively, that it gave to its
 13 own CSS. In my submission, that is a very important
 14 point to be clear on. Mr Jowell in his submissions,
 15 yesterday, made the submission that: you can see that
 16 the remedy box is a CSS today, just like it was found to
 17 be in the decision. That is wrong. It is not found to
 18 be a CSS in the decision, as we saw in the paragraph of
 19 the Preliminary Issues Judgment that I took you to.

20 The second main point in response to the Claimants'
 21 case is this. We say that there is an exceptional
 22 disregard in the Claimants' case for the legitimate
 23 interests of all the other internet shopping
 24 participants. So I begin with users. We say never mind
 25 that users can reasonably be assumed to come to Google's

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1 general search results to get results chosen by Google.
 2 According to the Claimants, that is just tough. Either
 3 Kelkoo and other CSSs get to choose the results using
 4 their algorithms that take users through to merchants,
 5 that is their 3b, or users do not get attractive links
 6 to merchants at all, because in all of
 7 the counterfactuals that you were shown yesterday, there
 8 is only one form of counterfactual where users still get
 9 the option of clicking to go through to merchants from
 10 the page and that is 3b. Every other option is — that
 11 possibility is removed. So if you end up clicking on
 12 a picture of a product, in all the other options you go
 13 through to a CSS. So we say that the first point is
 14 that the Claimants' case has no regard to the interests
 15 of users. It is entirely self-centred.

16 The next point: never mind also the interests of
 17 merchants, who would no doubt prefer to maximise
 18 the traffic that they get from the internet, but in
 19 Kelkoo's world, certainly in their option 2 and 3a, gets
 20 routed via a CSS first. Now, there is a big problem to
 21 being routed by a CSS which Kelkoo itself recognises,
 22 and I will show you this evidence a little bit later in
 23 my submissions. The point is that Kelkoo itself
 24 recognised that if, rather than merchants going —
 25 sorry, rather than users going direct to merchants from

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1 Google's page, if they went via a CSS, there would be
 2 a 60% attrition rate so that only 40% of the traffic
 3 that would have gone had it gone direct actually ends up
 4 with the merchant. So what that means is that Google's
 5 SERP is two and a half times more effective from
 6 a merchant's perspective than the same traffic then
 7 diverted off via Kelkoo, presumably because people do
 8 not really enjoy the Kelkoo site so much and, for
 9 whatever reason, it disappears. We will come back to
 10 deal with the detail of that in due course.

11 THE CHAIRMAN: Just so I understand your point, you say 60%
 12 attrition rate, you mean that 60% of the people who go
 13 on Kelkoo's site for a Nikon camera do not proceed to
 14 buy a Nikon?

15 MR PICKFORD: No, sorry, I am not talking about conversion
 16 rate, I am talking about the fact that on the box, if
 17 someone clicks on the box at the moment, unless
 18 something went wrong with their internet, 100% of
 19 the time they end up at a merchant. What happens
 20 thereafter is then another question.

21 THE CHAIRMAN: Yes.

22 MR PICKFORD: But they get to the merchant.

23 If they go via the routed journey, via an
 24 intermediary, so rather than going direct to
 25 the merchant they go off via Kelkoo's site, only 40% of

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1 that traffic ends up at the merchant.

2 THE CHAIRMAN: The rest of it ends up where?

3 MR PICKFORD: I mean, it just does not get to the merchant.
 4 It would be, for instance, a user who decides, you know,
 5 actually, this was a bit of a pain, I thought I was
 6 going to — you know, I was clicking on a kettle that
 7 I wanted from John Lewis, but actually now I have gone
 8 — you know, I now have a whole host of other things,
 9 you know, I am not doing that. I do not — the evidence
 10 that I am going to take you to does not explain exactly
 11 why users give up going via Kelkoo, albeit there was
 12 quite a lot of material in these proceedings from which
 13 you can draw inferences about why users give up when
 14 they go via Kelkoo and it is mainly to do with the poor
 15 quality of Kelkoo's site. As an example, something we
 16 will come on to, Kelkoo themselves recognise that when
 17 you search for a kettle on their site, you got one
 18 kettle, eight toasters and some things that have nothing
 19 whatsoever to do with sort of relevant product results
 20 at all. So that is some evidence, to answer your
 21 question, Sir, but the evidence that I was referring to
 22 does not go into precisely why consumers leave, it just
 23 recognises — Kelkoo recognises that if people come via
 24 Kelkoo, only 40% of them are actually going to go and
 25 end up going on to the merchant.

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1 PROFESSOR SMITH: But, of course, from the merchant's
 2 perspective, if the customer ends up going to
 3 the merchant but then dropping out, the merchant has not
 4 gained anything from that —
 5 MR PICKFORD: That — that is —
 6 PROFESSOR SMITH: — so you need to think about —
 7 MR PICKFORD: That is right, so —
 8 PROFESSOR SMITH: — the main(?) drop out rate.
 9 MR PICKFORD: You are quite right, Sir, you obviously also
 10 need — there are two levels here. I am talking about
 11 the first level. Ultimately, the question is: well, do
 12 they go on to buy? There is further evidence that we
 13 will come to in these proceedings about
 14 the preponderance of different users that come via
 15 different routes to going on to buy. The short answer
 16 is, traffic from Google's site has a relatively high
 17 level of preponderance to buy and it is not worse than
 18 traffic via CSSs' sites, indeed in many cases it is
 19 a lot better.
 20 So if you have got a 60% drop out and then you have
 21 got a similar conversion rate, basically, you have got
 22 — you have lost 60% of the value in those customers.
 23 There is users there who could have had their demands
 24 satisfied and they were not, and that is a loss to
 25 society if that happens, it is a loss to those users.

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1 The next point is another group that Kelkoo do not
 2 pay any regard to is other intermediaries, because in
 3 their world they are very keen on having this box which
 4 promotes CSSs in version 2, for free, at the top of
 5 the page. I am sure there are other intermediaries who
 6 would love to be told that as a matter of law they get
 7 that, from Which? to newspaper reviews, other
 8 publishers. No doubt they would say, "Well, why are we
 9 not entitled to the same privilege"? I say there is not
 10 a good answer to that.
 11 Then, finally, never mind that it is Google that
 12 made the huge investments in its SERP, built up its
 13 brand, built up all of the knowledge in using its
 14 technology in order to find the best results. On
 15 the Claimants' legal analysis, it faces a pretty
 16 invidious choice, because on the one hand, it can go
 17 down an option 3b route and allow Kelkoo and others like
 18 them to reap the rewards, we say, of Google's
 19 investments in what we say is ultimately a pretty
 20 extraordinary act of free riding, because they are
 21 saying that they should be entitled to be the people
 22 that choose the results on Google's general results
 23 search page, Google's SERP. That is one option. Or, as
 24 I mentioned before, it can just not serve the PLAs that
 25 users, it believes, want, that have been very popular in

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1 the market, that not only Google provides but we saw
 2 Amazon provides something very similar, and as I can
 3 show you later, Bing and Yahoo! and all other general
 4 services also provide these PLAs. But on the Claimants'
 5 case, unless the Claimants are allowed to effectively
 6 take over, Google cannot serve those kind of results any
 7 more, even though its rivals will be able to. We say
 8 that that really cannot be something that competition
 9 law requires, that Google uniquely is disentitled from
 10 serving up its own general search results in the same
 11 way as Bing does or Yahoo! does responding to users'
 12 needs and rather that has to be something that is only
 13 delegated to CSSs.
 14 THE CHAIRMAN: I see your point about delegate to CSS, but
 15 of course it is not at all unusual under competition law
 16 that a dominant company cannot compete in the way that
 17 the other companies, the non—dominant companies in
 18 the market, can.
 19 MR PICKFORD: No.
 20 THE CHAIRMAN: There is that, if you like, additional burden
 21 on the company.
 22 MR PICKFORD: I accept that. But nonetheless, in my
 23 submission, it would be a surprising result if something
 24 that is a standard part of normal competition, and, as
 25 I say, as I have tried to explain, is in fact just part

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1 of a general search service, was something that uniquely
 2 Google could not do.
 3 So we say, therefore, that the claims in this trial
 4 ultimately amount to an attempt to seize control of and
 5 the rewards from something that the Claimants just do
 6 not have an entitlement to in law, that is the inherent
 7 and very substantial value in Google's own SERP. I will
 8 come on, Sir, if I may, to the Android Auto point, but
 9 I have a response in relation to, Sir, the point that
 10 you put to me about that.
 11 Then the third point that we will be making is that
 12 once you have heard from Mr McGurk on some of
 13 the background facts, that if one analyses the decision
 14 properly, this claim is contrary to binding findings in
 15 the decision and I would like to go through that in due
 16 course with some care.
 17 So then, turning to the damages counterfactual, I am
 18 going to try to provide a response to our — response in
 19 a nutshell to this and somewhat more quickly, hopefully,
 20 than I was able to do on abuse.
 21 For the counterfactual for the Decision Period, we
 22 say that naturally follows from our case on abuse
 23 because we say what we did was perfectly lawful.
 24 The principal attack that we heard yesterday on that
 25 came from Mr Jowell in his submission, when he said,

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1 well, just because it is what you did in 2017, that does
 2 not mean it is what you would have done in 2008.
 3 Now, I quite accept as a general principle that may
 4 be true. If there is good evidence to suggest that we
 5 would have done something very different faced with
 6 the constraints that we now face, then he might have
 7 a good point. But there is no such evidence whatsoever.
 8 What the Claimants point to is they say: a—ha, well,
 9 look, in 2008, you had a unit, the Product Universal,
 10 that was free to merchants, and they say, so therefore,
 11 you know, logically, surely the box, the remedy box,
 12 would have been free to merchants as well. That
 13 overlooks a stark difference between the obligations
 14 that Google is now under in order to comply with
 15 the decision and what Google's reasoning was when it had
 16 the Product Universal in 2008, because in 2008, as has
 17 been now held against us, the Product Universal was
 18 a box that was dedicated to Google's CSS. So it was
 19 free to merchants, and the point of it was to build up
 20 Google's business, because only Google got to benefit
 21 from it. It was always clear that it was ultimately
 22 going to be monetised at some point in the future, but
 23 nonetheless, for a period, Google was willing to say:
 24 okay, well, let us have free results and we will build
 25 up our business and create relationships through that.

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1 That is a competitive strategy to gain an advantage over
 2 your rivals.

3 Now, the counterfactual that is envisaged by
 4 Mr Jowell, which is in — so it is in our world in
 5 the sense that a remedy could in principle be permitted,
 6 but he is saying: well, even if in principle it is okay,
 7 here is why you would not have done it on the facts,
 8 because you did something different in 2008. There are
 9 two key changes which he fails to take into account that
 10 are implicit in his case.

11 The first, of course, is that Google's CSS no longer
 12 gets the exclusive benefit of the box. In the remedy
 13 world, the whole point of the box now is that all CSSs
 14 get to benefit from it. So that immediately is going to
 15 change any calculus in relation to whether it is a good
 16 idea to have a free box, because it would be able to be
 17 used to build up all CSSs' businesses equally.

18 But there is a second and still worse problem in
 19 Kelkoo's world, which is, even if we do not charge —
 20 Google Search does not charge for the PLAs, entry into
 21 the box is no longer free to merchants, because in his
 22 world — in both of our worlds, CSSs are now
 23 the gatekeepers to the box. If you are a merchant, you
 24 cannot just put your PLA in the box, you have to go
 25 through a CSS. They are the gatekeepers. What that

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1 means, because the CSSs are not going to stop being
 2 profit making and wanting to earn a margin whenever they
 3 possibly can, merchants that go through all rival CSSs
 4 will inevitably need to pay to appear in the box, so
 5 the box stops being free. It is quite wrong for
 6 Mr Jowell to say, "Oh, look, you just do not have a free
 7 box". Not to merchants, we would not. What he wants is
 8 a box that is free to CSSs so that CSSs get to interpose
 9 themselves in the middle and cream off the margin.

10 Not only that. Because CSSs will inevitably charge,
 11 Google can itself offer its CSS services free to
 12 merchants even if it wanted to, because imagine we are
 13 now in a world where we have gone back to 2008 and it
 14 has put the remedy box on the page and it has said,
 15 "There is no auction for this, it is free". Then what
 16 happens is that CSSs, including Google, compete to put
 17 their merchants in the box. Now, if Google was
 18 competing to put its merchants in the box and Google's
 19 proposition to merchants was, "We will do it for free,
 20 come to us and you do not have to pay a things, you can
 21 get into the box for free", but the CSSs obviously
 22 cannot afford to do it for free, because they want to
 23 make money out of it, they are going to be margin
 24 squeezed.

25 So when one thinks through the implications of

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1 Mr Jowell's alternative counterfactual, where he says,
 2 okay, fine, maybe you could have had something like
 3 the box, but the box would have been free, he has not
 4 fully thought through that what really means. It is not
 5 going to be free to the merchants, and ultimately all
 6 CSSs, because Google could not margin squeeze everyone
 7 else out, are going to charge.

8 So where that leaves us is that in effect what he is
 9 saying is that Google would have taken — apparently
 10 taken the decision, notwithstanding it has this
 11 incredibly valuable real estate in the form of its own
 12 SERP, it will have said, "You know what, have that for
 13 free, you, CSSs, do what you want with that, go away, go
 14 and sign merchants up and come back to us and you get to
 15 earn the margin on it". In my submission, that is
 16 nonsensical. That is just commercially illiterate. No
 17 company would ever just give away the value in its core
 18 Crown jewel asset in that way. Still less, because what
 19 we do know in 2008 is that Google had text ads which it
 20 sold to CSSs and to merchants and they paid good money
 21 for. Of course they did, because being on Google's SERP
 22 is a great place to be. So what we are imagining now is
 23 a world in which Google provides something that has
 24 improved, it is better now than just a text ad, it has
 25 got pictures associated with it too, and according to

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1 Mr Jowell, in 2008, would have given that away for free.
 2 That simply makes no sense.
 3 THE CHAIRMAN: (Off microphone — inaudible) — the point
 4 about the auction.
 5 MR PICKFORD: Sorry?
 6 THE CHAIRMAN: The complaint about the auction to get in
 7 the box.
 8 MR PICKFORD: Well —
 9 THE CHAIRMAN: They should not bid to have a right to be in
 10 the box.
 11 MR PICKFORD: Sir, I apologise if I was not very — yes —
 12 clear about what part of the case I was addressing that
 13 we heard from yesterday. Yesterday, what I understood
 14 from Mr Jowell's case is he said: it is all very well
 15 you, Google, saying that you are going to have this box
 16 that you hold an auction for and that you charge for,
 17 and sure, maybe you would have done that in 2013,
 18 because that is what you did when you brought in
 19 Shopping Units, but I have seen what you did in 2008 and
 20 in 2008 your box was free. So he says because your box
 21 was free in 2008 and there were commercial reasons for
 22 having a free box in 2008, I am going to infer that
 23 means that you would have had a free remedy box in 2008
 24 too.
 25 I say that entirely overlooks the different legal

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1 constraints on the remedy box as opposed to what we did,
 2 because what we did offended competition law, because
 3 what we did was just a box that simply was free to
 4 merchants and only went to Google, so we could afford to
 5 do that. But if you change the rules and you say, as we
 6 must, for any counterfactual, no, you cannot
 7 self—preference any more, you have got to give rival
 8 CSSs exactly equal access to what you give your own CSS,
 9 then that change in the rules totally changes
 10 the commercial implications of giving the box for free,
 11 because, for a start, you do not get the benefit, all
 12 the benefit of it any more, but worse, because the rule
 13 now is that you cannot have a direct relationship
 14 between Google and Google general search and
 15 the merchant, it has all got to go through CSSs, it is
 16 the CSSs that would get to earn the margin, so you are
 17 just giving away your Crown jewels asset for free.
 18 So that is the counterfactual question on our case.
 19 PROFESSOR SMITH: You are not making a distinction in
 20 thinking about the counterfactual for the fact that
 21 the pictures were very different between 2008 and 2012
 22 from 2012 to 2017, you are saying the same
 23 counterfactual, the paid for shopping box but with other
 24 CSSs having access, would be the appropriate
 25 counterfactual from 2008 onwards?

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1 MR PICKFORD: That is our case. I mean, Sir, you have
 2 a point, that obviously —
 3 PROFESSOR SMITH: I was not making a point, I was just
 4 asking a question.
 5 MR PICKFORD: Okay. Yes, that is. Well, I think a point is
 6 that the pictures obviously get better over time,
 7 probably. The quality of the picture that one sees
 8 today is a better quality picture than one probably saw
 9 in 2008. But the essence of it is the same, yes.
 10 PROFESSOR SMITH: So between 2008 and 2012, or whenever in
 11 the counterfactual Google might have started to — or
 12 Google starts charging from 2008 in your counterfactual?
 13 MR PICKFORD: Yes.
 14 PROFESSOR SMITH: Yes, okay.
 15 MS ROSE: Um —
 16 MR PICKFORD: Can I — sorry. Just — well, I can take your
 17 question or I can respond to —
 18 MS ROSE: What I was going to just ask is, in 2012, what
 19 Google started charging for was access to
 20 Google Shopping?
 21 MR PICKFORD: Yes.
 22 MS ROSE: I am not sure if you have said whether, in your
 23 counterfactual, you would have charged for access to
 24 Google Shopping, because that is not quite the same
 25 thing as charging for access to the remedy box.

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1 MR PICKFORD: So if we are talking about the separate
 2 site —
 3 MS ROSE: I am talking about the separate site. If you
 4 decide you want to build up your market share, you know,
 5 you need more merchants on your dedicated shopping
 6 website, then you might attract them without charging
 7 them. But it does not necessarily follow, I think you
 8 would say, that you would offer free access to
 9 the remedy box?
 10 MR PICKFORD: Correct. That is exactly correct, because
 11 they are different — entirely different commercial
 12 decisions. This in many ways goes to the heart of one
 13 of the issues in this case, which is we have a CSS, just
 14 as the other Claimants have their CSS businesses, none
 15 of those CSS businesses, even including ours, is as
 16 inherently a valuable business as Google's SERP, because
 17 that is where people actually go to. If you want to do
 18 a search, people think, "I want to go to Google", go to
 19 Google. There is a reason for that. It is because of
 20 the incredible investments that Google has made in
 21 making it the best place to go on the internet to do
 22 a search, and there is an enormous value in that, and
 23 that is value that is attributed to Google as a general
 24 search engine. People do not, in the same way, navigate
 25 directly to Google Shopping, nor do they navigate

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1 directly to the other CSSs. In fact, where they do tend
2 to navigate — if they do not want to go to
3 Google Search, where they do tend to navigate to is to
4 Amazon, as I will come and show you.

5 THE CHAIRMAN: That is today, but back in 2008, they did
6 navigate to some of the —

7 MR PICKFORD: Yes.

8 THE CHAIRMAN: — comparison shopping sites.

9 MR PICKFORD: Yes, that is true.

10 So what I have been dealing with is a world where we
11 are right about abuse and that something along the lines
12 of our remedy box would have been permissible, but I was
13 responding to Mr Jowell's case, where he says, "I do not
14 care whether it was permissible, you would not actually
15 have done it, look at what you did in 2008".

16 What I now turn to is the flip side, which is
17 the world in which the Claimants are correct on abuse
18 and so we are not allowed a remedy box, and the question
19 is: what would we do then instead? They have advanced
20 their four different counterfactuals. Very briefly,
21 the first two involve us removing something that is of
22 itself not unlawful, which is our algorithms. That is
23 numbers 1 and 2. For reasons I will come on to explain,
24 as a matter of law, that is just wrong. We would not
25 have done that, it is not realistic, we were not

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1 required to do it and that is the end of options 1 and
2 2.

3 Option —

4 THE CHAIRMAN: When you say "not unlawful", the objection is
5 not, parking Mr West's particular point regarding his
6 application to found it through the algorithms, but that
7 the algorithms did not apply also to Google's CSS, that
8 was the point.

9 MR PICKFORD: In the box.

10 THE CHAIRMAN: No, generally. Algorithm A did not —
11 I mean, there are numerous things in the decision that
12 the Algorithm A did not apply to Google's CSS.

13 MR PICKFORD: Yes, but, Sir, we have to deconstruct that and
14 understand what does that mean. It did not apply in
15 generics, because it did not apply at all. So if you
16 are looking at generic results, we say that cannot be
17 discrimination of itself, because we were not treating
18 ourselves more favourably, because we excluded ourselves
19 all together from generic results. So, Sir, yes, it is
20 true as a bald statement that Algorithm A did not apply
21 to Google's general search in generic results because it
22 was not — but that is because it was not there at all.
23 So we say that cannot be the problem.

24 What the problem that the Commission identifies is,
25 and this goes back to the point that it is — it was

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1 only discriminatory, it was only a discrimination
2 problem because of the combination of the demotion
3 aspect and the promotion aspect. If you recall, we had
4 a discussion at the preliminary issue stage which Google
5 won, where the Claimants were saying Algorithm A, of
6 itself, abusive. We said, no, no, that is wrong, it is
7 only in combination with what we were doing in
8 promotions. This is the heart of the answer to you,
9 Sir, which is that it is not the algorithm per se that
10 is the problem. There are a number of recitals in
11 the decision that make that abundantly clear.
12 The problem was there was a special place in the SERP
13 where it did not apply, and that was a place that only
14 Google got the benefits from, it was the box, because
15 before we had the very — the increasingly complicated
16 options that we now have on the SERP, there were
17 basically two places where Google could have been. It
18 could either have been in generic results. It was not
19 there at all. Or it could have been in this specialist
20 box at the top. The problem was, that box was — for
21 good reason, it is not criticised that it was not
22 applying there, but it is just said, "You kept that box
23 to yourselves, and because you were the only people that
24 got the benefit of that special box and other CSSs are
25 outside, and they" — and so they are subject to two

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1 problems. One, they do not get all the benefits of
2 the box, and two, outside is not such a lovely place for
3 them to be, because actually quality algorithms may mean
4 that they do not score particularly highly and show
5 particularly highly.

6 THE CHAIRMAN: It was more than they are outside the box,
7 they are not above the fold.

8 MR PICKFORD: Yes.

9 THE CHAIRMAN: They are not within the first ten, because
10 they have been demoted so heavily, and there was no
11 demotion of Google's CSS.

12 MR PICKFORD: Because Google was not in them at all.

13 Basically, as regards the generics, it is like —
14 effectively we did apply demotion to ourselves, it was
15 100% infinity out of the bottom. We are just never
16 going to appear. We are never going to appear above
17 the fold, below the fold —

18 THE CHAIRMAN: Well, if it did not apply to you in the same,
19 you would not be in a box, you would be way down
20 the organic links.

21 MR PICKFORD: Well, there is a factual debate about that.

22 THE CHAIRMAN: (Overspeaking — inaudible).

23 MR PICKFORD: There is a factual debate about the extent to
24 which it would or would not have applied. Obviously
25 there is some evidence, there are some findings. I do

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1 not want really to dwell on those, they are really for
 2 more Mr McGurk.
 3 But what I am dealing with is the conceptual point
 4 about what the problem was, and the problem, the only
 5 discriminatory problem, was the fact that there was
 6 a special place. That is it. It was not — it could
 7 not sensibly have been it is discriminatory. So let us
 8 just put the box to one side for a moment and imagine
 9 that the box does not appear. We are in a situation —
 10 because the box does not always appear, so we are in one
 11 of those situations where the box did not appear. In
 12 that world, there is still a chance for good CSSs to
 13 appear on the page. Indeed, they will have done.
 14 Idealo is the ideal example we give of a good CSS and it
 15 did what it was supposed to do and people liked it and
 16 it regularly appeared. We simply would not appear. Our
 17 CSS does not get to take part in that at all in that
 18 instance. So that cannot be favouring us; that simply,
 19 we say, makes no sense. The only favouring is
 20 the special reserved area.
 21 MS ROSE: Is what you are saying that the analysis is that
 22 there is a single act of discrimination, which is
 23 the special box only accessible to Google, but the
 24 impact of that discrimination is greatly exacerbated by
 25 the application of the algorithms to the other CSSs,

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1 which mean that not only are they not in the box, but
 2 they are not even on the first page?
 3 MR PICKFORD: That is, I think, a very fair way of putting
 4 it.
 5 THE CHAIRMAN: Because otherwise we would not be concerned
 6 with the other algorithms at all.
 7 MS ROSE: No. No.
 8 THE CHAIRMAN: The Commission would have said there is
 9 a single act of discrimination, there is a box reserved
 10 for Google, and they would not even discuss
 11 the Algorithm A. But they did —
 12 MR PICKFORD: They did.
 13 MS ROSE: If there had not been the demotion algorithms but
 14 you had still had the shopping box, then you might have
 15 had a page that looked a bit more like the kinds of
 16 pages we have been looking at, where you might have had
 17 the Google Shopping results at the top and then you
 18 might have had, whether it is an other "Product sites"
 19 box or it could just be a list of results from other
 20 CSSs on the front page, and the Commission might have
 21 said that was an abuse of dominance, it might have said
 22 it was discriminatory, but it might have questioned
 23 whether that was going to have a very significant — or
 24 likely to have a very significant impact on competition.
 25 Depending on what the evidence showed, it might or might

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1 not have been capable of having an effect on
 2 competition. But the combination of those two puts it
 3 beyond doubt, because you are right up front because of
 4 being in the box, everybody else is nuked.
 5 MR PICKFORD: Yes. I mean, I think there is an interesting
 6 feature, actually, in this case, if I may, which is
 7 there is an asymmetry, because had we not had
 8 the algorithms but we had had the boxes, on
 9 the Commission's logic, there would still have been
 10 a problem because, just putting aside the algorithms,
 11 there is still this special place and we get
 12 the benefits from that, so that would have — we could
 13 not have got out of the problem by saying, "Okay, well,
 14 we will just take the algorithms away". It is not
 15 symmetrical, because if we completely took the boxes
 16 away, then because of the fact that we do not apply
 17 the algorithms to ourselves at all and because we do not
 18 appear in generics at all, there could not be any
 19 favouring any more. That is the point I was making
 20 before. Imagine a world without a box; does that deal
 21 with it without taking away the algorithm? Yes, it
 22 does, because the only people that you ever see then are
 23 rival CSSs, Google is simply off the map in that world.
 24 MS ROSE: Now, the only exception to that would be
 25 the Foundem complaint that the algorithm discriminates

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1 between CSSs.
 2 MR PICKFORD: Yes, that is true. I mean, Mr McGurk will
 3 deal with that in more detail, but, I mean, the essence
 4 of our answer to that is absolutely, of course it
 5 discriminates, but not in an unlawful sense. It
 6 discriminates in the other sense of the word, as in it
 7 is deliberately seeking to differentiate between
 8 different types of site, the neutral meaning of the word
 9 to discriminate, to enable them to be ranked. But that
 10 is not unlawful discrimination, because that is treating
 11 unlike situations differently, because the whole point
 12 is Foundem is not as good as Idealo and it does not
 13 deserve to be in the same place on the page as Idealo.
 14 It is subject to the same rule. That is the critical
 15 point. I think where Foundem gets really confused, if
 16 I may respectfully say so, is it gets confused about
 17 outcomes as opposed to rules. So the rule that applies
 18 is exactly the same rule for Idealo as it is for
 19 Foundem. The point is, Idealo is a good site that users
 20 seem to value. Foundem was not a good site and users
 21 did not seem to value it and so it led to different
 22 outcomes. What Foundem complained about is the outcome,
 23 but the outcome is entitled to be different.
 24 MS ROSE: But that begs the question whether
 25 the discrimination is justified, because if you have —

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1 if you are applying the same rule to people who are in
 2 different circumstances, that may be discriminatory if
 3 it is not justified. So what Foundem says is they are
 4 in a different situation because they are a new entrant,
 5 and because they are a new entrant, it is much harder
 6 for them to meet the confidential item that I will not
 7 mention. Question: in that situation, is that part of
 8 the rule that triggers the algorithm justified in terms
 9 of quality even when you are looking at a new entrant
 10 versus an established player?

11 MR PICKFORD: Well, I think we need to be very careful here,
 12 if I may, and I will give you my answer and then I will
 13 let Mr McGurk, later on in his submissions, give you
 14 his.

15 This is effectively an indirect discrimination point
 16 that is being put here, and of course, as good public
 17 lawyers, we are well aware of the context in which
 18 indirect discrimination can arise, particularly in
 19 relation to certain protected characteristics. So if
 20 there is a certain type of characteristic where someone
 21 is not entitled to be discriminated against, then you
 22 have to be very careful about discrimination, both
 23 direct and even indirect. Obviously it arises a lot in
 24 employment law, as one example.

25 In my submission, there is not quite the same

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1 parallel with this case for there being a protected
 2 characteristic of being a new entrant. Now, that does
 3 not — what I am not saying by that is that Foundem
 4 cannot say, "Oh, well, look, this is useless, this
 5 algorithm, because it is simply one that we are never
 6 going to get a look in because we are new entrants".
 7 I mean, they can come and say that if they want, but of
 8 course Google, in its algorithms, is not seeking for
 9 perfection, it is seeking to balance a host of competing
 10 considerations in trying to ultimately get the best
 11 results, and it may have some means of trying to allow
 12 people who are new to still rank. Indeed, I mean,
 13 again, it is difficult for me to go into the details,
 14 but it did. So it is not that it just said, "If you are
 15 new, you do not get on Google". I mean, that would be
 16 a pretty bad business if it did, because very, very soon
 17 Google will get overtaken by the people that kept with
 18 the times. So obviously it does not have algorithms
 19 that prevent people that are new from doing well.

20 It happens that, in this case, the signals were such
 21 that Foundem was not able to demonstrate the kind of
 22 positive signals that would have allowed it to progress,
 23 and we say, you know, I am afraid that is tough,
 24 ultimately, because we have to balance a whole host of
 25 considerations in order to give those results, and they

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1 are not perfect, and all we are ever doing is using
 2 effectively proxies to try to get the best result we
 3 possibly can, and, you know, we do do incredibly well.
 4 There is a reason why people still go to Google; it is
 5 because Google does an exceptionally good job at taking
 6 all those considerations together.

7 MS ROSE: I understand what you are saying on the facts, but
 8 just thinking about the legal analysis, if you are right
 9 and this is a case of indirect discrimination, where
 10 potentially there was the application of the same rule
 11 to people in different circumstances, i.e. new entrant
 12 versus established player, then, I mean, I suppose
 13 the first question is: is that rule being applied to
 14 those two groups? Yes, it is. Are those two groups in
 15 a materially different situation? I am not clear
 16 whether that has been clearly stated, i.e. is there
 17 evidence that it is systemically harder. The third
 18 question then would be: if that is right and they are in
 19 a materially different situation so that they are
 20 disadvantaged, is it nevertheless justifiable?

21 I think what you have just been saying goes to
 22 the question of, where there may be indirectly
 23 a discriminatory impact but not an engaged protected
 24 characteristic, what is the legal test for justification
 25 in that situation?

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1 MR PICKFORD: Well —

2 MS ROSE: What is the standard?

3 MR PICKFORD: It probably is dangerous for me to say too
 4 much, because, again, this is Mr McGurk's territory,
 5 ultimately. But, in my submission, in the competition
 6 law context, it is actually simpler than in a statutory
 7 discrimination context, because there is EU law that
 8 tells us time and time again that, in this competition
 9 context, what discrimination means is treating similar
 10 situations differently, or treating different situations
 11 the same.

12 MS ROSE: It is the second that we are really talking about.

13 MR PICKFORD: Yes. So —

14 MS ROSE: But then you come on to the question of whether,
 15 if there is difference in treatment, is it justified —
 16 or the same treatment?

17 MR PICKFORD: Well —

18 MS ROSE: If they are differently situated but you are
 19 treating them the same way, is that justified?

20 MR PICKFORD: Ah, there are two aspects — so there are two
 21 aspects of difference here, of course, and I think this
 22 is where it may — the analysis may get confusing.

23 So, we, Google, have focused on the difference in
 24 quality in —

25 MS ROSE: But that is part of the justification.

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1 MR PICKFORD: No, in my submission, we do not have to get as
2 far as saying there is a difference in treatment but it
3 is justified, because we say we are already in a world
4 where we are starting from different places. So they
5 are both CSSs and they are both subject to the same
6 rule, but they perform differently because they have
7 different intrinsic degrees of quality and different
8 intrinsic —

9 MS ROSE: They say that they perform differently not because
10 they have different intrinsic degrees of quality but
11 because one of them is a new entrant and therefore
12 cannot satisfy the —

13 MR PICKFORD: Okay, I will put it this way. We say they
14 have different intrinsic degrees to which users want to
15 — are going to find their results helpful. We have
16 a set of proxies —

17 MS ROSE: But I think they would dispute that.

18 MR PICKFORD: Well, they would, I am sure. They dispute it
19 on the facts.

20 MS ROSE: Okay, so that is a dispute of fact. Okay.

21 MR PICKFORD: Yes, they dispute the facts.

22 But we say there must be, in the context of
23 the imperfect world of search, in my submission, it
24 would not be the correct approach for this Tribunal to
25 seek to effectively say, "We think there is a better

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1 algorithm that you can use to differentiate between your
2 — the different services you are trying to rank".
3 That, in my submission, would be going too far. In my
4 submission, unless there is something that is very
5 obviously suspect and wrong about what Google was doing,
6 then Google was allowed to do it, because it is in
7 a domain that is simply not amenable, in my submission,
8 to that level of fine-grained supervision from a court.
9 That might be different in a case of indirect
10 discrimination in a statutory context where there is
11 a statutory obligation on a particular decision-maker
12 not to discriminate either directly or indirectly. In
13 that situation, in my submission, the courts are
14 unlikely to engage in a more intense review than is
15 appropriate in this competition law context, because
16 there is not the same obligation on Google.

17 THE CHAIRMAN: If Google were to say, "In our ranking
18 differentiation — to use a neutral word — which is
19 core to our business, we will give a low score to any
20 business that has not been trading for a year because we
21 think that is a proxy, we cannot see how reliable they
22 are, how many complaints there have been", and that
23 would therefore have a huge effect on people trying to
24 enter the market, because Google is such an important
25 and visible means by which people discover and access

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1 businesses, that could constitute, potentially, an abuse
2 in discriminating against new entrants to say: well,
3 Google has to be left to choose its means of
4 differentiation as best it thinks fit. If it operates
5 in a way that can be said to be manifestly unfair in
6 affecting competition, that is something that Google
7 could be restrained from doing.

8 MR PICKFORD: Yes, and the reason for that is —

9 THE CHAIRMAN: Even though it is a rule that applies to
10 everyone —

11 MR PICKFORD: The reason for that is, in EU law, another way
12 that the test for discrimination is sometimes advanced
13 is that the difference in treatment is arbitrary.

14 THE CHAIRMAN: Yes.

15 MR PICKFORD: So if it could be said that our approach was
16 arbitrary, then that might be one of those situations
17 where —

18 THE CHAIRMAN: No, it is not arbitrary, it is very clear.

19 MR PICKFORD: Yes.

20 THE CHAIRMAN: It is, everyone can understand it, you have
21 got to be in business for a year. You might be an
22 unreliable company and people might send you money and
23 you go out of business; that would be bad for — it
24 would not be a service to users. People would then
25 blame us for having listed you and so on. There are all

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1 sorts of reasons one could give. But if the effect was
2 so great that it was to exclude new entrants from
3 the market, if that was the potential effect of such
4 a policy, it could constitute an abuse.

5 MR PICKFORD: It might. I think it all — I mean, it would
6 all depend on all of the circumstances of this
7 particular hypothetical situation.

8 THE CHAIRMAN: Yes.

9 MR PICKFORD: It might be that those arguments that you were
10 suggesting that Google made were ones that ultimately
11 were fair and the ones that the court accepted. I mean,
12 I do not think it is — it is not, in my submission,
13 really amenable to some sort of hard-edged line where
14 I can say — and I am certainly not saying — there is
15 nothing that we can do that is so wild, you know, you
16 cannot touch us, it is our algorithms, go away. That is
17 not my submission. But what I have been trying to be
18 very careful to say, particularly in response to
19 Ms Rose's questions about indirect discrimination, is
20 nor should we import everything that we know about
21 discrimination in a public law — indirect
22 discrimination in particular, in a public law context
23 where there is a statutory requirement on someone to
24 avoid indirect discrimination into this scenario,
25 because in my submission, that would also be going too

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1 far in the opposite direction .
 2 THE CHAIRMAN: (Off microphone) I understand.
 3 MR PICKFORD: We have been having such fun that
 4 I momentarily lost my screens.
 5 Right, this might be a good moment to take a short
 6 break. I have to say, I do not know how much of
 7 Mr McGurk's submissions I have been helping him avoid
 8 later on. Obviously I am always delighted to assist
 9 the Tribunal in whatever manner I can. I am making,
 10 again, quite slow progress through my script, but that
 11 is not to say, hopefully, I am not making some progress
 12 in terms of explaining the nature of our case to
 13 the Tribunal.
 14 THE CHAIRMAN: Yes. How much more have you before you hand
 15 over to Mr McGurk, who I think was — on your roadmap,
 16 he was on point 2?
 17 MR PICKFORD: Yes, so I had just a few — we went off on
 18 something of a diversion. I was actually going to
 19 finish off, very briefly, some submissions why we say
 20 they are wrong on the counterfactual.
 21 THE CHAIRMAN: Yes.
 22 MR PICKFORD: On their case. I can do that probably in
 23 a few minutes.
 24 Then, after that, we are on to some relatively brief
 25 contextual, sort of overarching contextual points that

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1 I was going to make before I then handed over to
 2 Mr McGurk. But we are still — I certainly could not do
 3 that before —
 4 THE CHAIRMAN: Yes, we will finish off on the counterfactual
 5 and then we will have the break.
 6 MR PICKFORD: Thank you.
 7 So, before the discussion of the many interesting
 8 things that we have been discussing, I was making
 9 the submission that I have been addressing our legal
 10 world where we are right on abuse but what they say
 11 about the counterfactual, and now I am coming on to
 12 their legal world, when where they are right on abuse
 13 and what we say about their counterfactual.
 14 What we say about their counterfactual is, firstly,
 15 I made the point about 1 and 2 — I remember now why we
 16 got on to this, 1 and 2 simply do not work because they
 17 require us to do something that goes further than what
 18 we need to do in order to remedy the abuse. It would be
 19 an act of self—harm. If we put a box in place and that
 20 solves the abuse — and of course, Mr Jowell, it is
 21 worth remembering, Mr Jowell's case, he advances no case
 22 that, in relation to the period from 2017 onwards,
 23 the algorithms are inherently problematic. His case is
 24 simply: whatever they said in the decision, I extend it
 25 to the future. I have explained what the reasoning is

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1 in the decision and how there is in fact an asymmetry in
 2 the decision, and what that means is that if we
 3 addressed the abuse by putting in place
 4 a non—discriminatory box, obviously there is an argument
 5 between us about that, that is as far as, in any
 6 realistic counterfactual, we would go, because going
 7 beyond that is an act of self—harm. What we are doing
 8 at that point is not abusive any more, so why on earth
 9 do we imagine a world where not only have we solved
 10 the abuse, but we also take away something that we would
 11 have been entitled to have? That, in my submission,
 12 makes no sense and I can come back to that and expand on
 13 that a little bit later.
 14 Then we have got options 3a and 3b. 3a — I have
 15 dealt with all the problems, I think, in relation to 3b.
 16 We say that is basically usurping our control and our
 17 right to monetise our SERP. 3a means that everything
 18 now just gets sent to CSSs and not to us — sorry, and
 19 not to merchants any more. That was the old world. We
 20 say neither of those is at all attractive from Google's
 21 point of view commercially.
 22 The Claimants have their finger on it when, in their
 23 skeleton, they refer to experience in Turkey and they
 24 say in their skeleton in relation to Turkey {A1/1/57},
 25 actually, look at Turkey, Turkey shows you what we might

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1 do, we might turn off the boxes. That is what we — we
 2 agree with them, we would indeed, because that is what
 3 we did, that is what we did in Turkey when we were told,
 4 "You cannot have a remedy box". We say that is by far
 5 the best evidence as to what would in fact happen in
 6 a counterfactual world. The Claimants have gone very
 7 cold on Turkey in their oral submissions because they
 8 have realised they shot themselves in the foot by
 9 referring to it because it goes entirely against them,
 10 it does not support their case, it goes against them.
 11 So that is a summary of what we say on counterfactuals,
 12 and I can come back and deal with any points of detail
 13 in relation to that at the end of my submissions after
 14 the law.
 15 With that, that is all I need to say on that section
 16 of my submissions.
 17 THE CHAIRMAN: We will be back by 3.30.
 18 (3.21 pm)
 19 (A short break).
 20 (3.33 pm)
 21 THE CHAIRMAN: Yes, Mr Pickford.
 22 MR PICKFORD: So I am now going to turn to some high—level
 23 context for product search on the internet and I am
 24 going to cover three things fairly rapidly. First,
 25 the means by which users search for products. Secondly,

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1 a little bit on the evolution of Google general search,
2 because there will be more detail on that to come from
3 Mr McGurk. Then, thirdly, a high-level overview of
4 the commercial model of a CSS.

5 So starting then with how users search for products,
6 could I ask the Tribunal please to go to {13/1/13},
7 which is in the report of Mr Robin Noble.

8 So this is a schematic representation of users'
9 online shopping journey and the players involved. We do
10 not need to spend a lot of time on it, but what it
11 I think is, as I understand it, intended to illustrate
12 is that there are quite a number of different potential
13 search paths that one can go down when a user is
14 ultimately ending up buying a product. So one option is
15 the user just navigates directly to the merchant or
16 the merchant platform and buys the product via that
17 route. That is the most direct possible route.

18 The next route, which is the second most direct, is
19 that they first navigate to a search engine such as
20 Google, Bing or Yahoo!, and then there are different
21 types of results that they can get from that. Any one
22 of those could potentially take them on to a number of
23 different places. So they could get a generic result
24 that might take them through to a CSS, or it might take
25 them through to a merchant. Equally a text ad could do

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1 that. They could get a specialised organic result, or
2 they could get a specialised sponsored result, such as
3 the PLA box. Then, ultimately, they can either then go
4 from there on to merchant platforms, or they can go off
5 via a further level of complexity, which is they also go
6 via intermediaries, such as the publishers, product
7 review sites, content creators, etc, first.

8 Or indeed obviously, as shown in the pink line, if
9 they were particularly interested in those in the first
10 place, they might not have gone to Google at all, they
11 might go straight to — an example might be they might
12 be reading The Guardian, and then they go to some
13 reviews The Guardian did of some electronics and they
14 think, "You know what, I am going to click through
15 there", and they end up on Amazon. That would be
16 a classic way that does not involve Google at all, but
17 that someone ends up at a merchant platform.

18 That is a kind of schematic which I find helpful
19 sometimes just to go back to, just to sort of orientate
20 myself in terms of the different routes that one can go
21 down.

22 The key point probably to pick out that goes back to
23 my earlier submissions is that appearance on the SERP is
24 also a zero sum game. So to the extent that a CSS gets
25 more promotion, then another CSS will get less promotion

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1 or a merchant will get less promotion, or potentially
2 some product review site might get less promotion. So
3 everyone is always competing insofar as they are
4 appearing on Google's SERP for user attention, and in my
5 submission, it is important to remember it is not just
6 about CSSs and Google, it is actually about CSSs,
7 merchants and other intermediaries that also want to be
8 in that chain.

9 So I then turn to the relative importance of
10 different channels by which one ultimately gets to buy
11 a product, and what we have got in the bundle appears to
12 be snapshots from different surveys at different points
13 in time. I am going to show the Tribunal a number of
14 them. I am not saying that any one of those surveys is
15 the perfect survey from which the Tribunal should
16 conclude this is a definitive assessment of exactly who
17 was using which route at which time. What one does see,
18 from seeing a number of them, is a number of common
19 ideas and common threads.

20 So if we could start, please, with {J3A/1/4}.
21 I should also say, I hope this has been drawn to
22 the Tribunal's attention, all of the documents that I am
23 referring to should hopefully, if everything has gone
24 well, be in hard copy as well as soft copy, if you
25 prefer to look at them in hard copy. I am only looking

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1 at them in soft copy myself.

2 THE CHAIRMAN: Yes.

3 MR PICKFORD: So we begin, as I said, in bundle {J3A/1/4}.

4 This is a slide, it is an internal Google document.

5 It is LEO Confidential, and it sets out Google's
6 assessment of the market in 2008. Probably the easiest
7 way, without having to read the whole slide, to get
8 the essence of what one can draw from this slide is if
9 you see about four lines down, it says:

10 "Merchant site ..."

11 Then a figure in brackets.

12 Do you see that, Sir?

13 THE CHAIRMAN: Yes. "Merchant site", and it is — is it
14 39%?

15 MR PICKFORD: It is. I mean, to be honest, I am not sure
16 why — I am just going to take instructions briefly.

17 (Pause)

18 Okay, sorry, yes.

19 Thank you. I was being ultra cautious. I saw "LEO
20 Confidential" and there are some documents where
21 the whole document is LEO Confidential. This one, none
22 of this is. I was rather surprised as to why any of
23 this should be LEO Confidential. It is not, so I can
24 sort of read it out. It will be highlighted if it is.

25 So, yes, it shows you, in 2008, that 39% of users in

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1 the survey that this was based on were going directly to
 2 merchant sites. EBay took 20%; other referrers, 17;
 3 Google, 14%; and Amazon, I think it is 8 or 9, my
 4 eyesight is not quite good enough — 9%. So that is
 5 what the market, in a snapshot, looked like in 2008.
 6 The next slide that I have is from 2000—and —
 7 actually, the next one is not a slide, but a submission.
 8 The next one is from 2015, and that is to be found in
 9 {N/13/59}. If you look at paragraph 210. So this is —
 10 THE CHAIRMAN: This is also not confidential?
 11 MR PICKFORD: This is also not — so it says "LEO
 12 Confidential", but it is not because it is not
 13 highlighted. I am going to — yes, I think everything
 14 that I am referring to, it is only if it is highlighted
 15 that it is confidential.
 16 So, if one looks at paragraph 210, there is
 17 a reference — this is a Google submission to
 18 the Commission, but it references some market research
 19 from 2015, and we see things have changed a bit:
 20 " ... market research shows that roughly 33% of
 21 online shoppers start directly on Amazon, more than
 22 twice as many as those who start on Google."
 23 So it seems that Google has not really changed very
 24 much:
 25 "Amazon has worked hard to increase this trend by

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1 offering, in addition to just buy—and—sell information,
 2 product reviews and answers to ... questions."
 3 So we are seven years on and by this point Amazon
 4 appears to have overtaken Google and is now where 33% of
 5 users start their shopping journeys.
 6 If then we — the next snapshot that I have been
 7 able to find is 2016.
 8 MR JOWELL: Forgive me for interrupting, but just
 9 a technical question. If it could be specified what are
 10 the countries that these are referring to in these
 11 various — both the four—month graph and this one.
 12 MR PICKFORD: So I will not be able to tell you that
 13 directly from this particular page. Some of them are
 14 clear, some of them are US, some of the things I am
 15 going to show you are UK and some are Germany. I cannot
 16 immediately answer that for this one.
 17 I go back to the point that I made initially, which
 18 is I am not seeking to show — I am not seeking to rely
 19 on the precise numbers for particular dates in time.
 20 That is not the purpose of this. It is that what I have
 21 done is to try to find in the bundle illustrations,
 22 snapshots, of how the market was progressing over time,
 23 and obviously it will tend to vary from country to
 24 country. We do not have comprehensive information on
 25 Germany. We do not have comprehensive information on

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1 the UK. We do not have comprehensive information on
 2 the US. We just have to make do with what we — with
 3 what we can.
 4 THE CHAIRMAN: I think perhaps the point of Mr Jowell's
 5 intervention is the US in particular might be very
 6 different from Europe. But this was put in to
 7 the Commission, so one would expect it is more Europe
 8 focused.
 9 It does say at the top " ... SO 4 Countries", I do
 10 not know if that is relevant to — "SO" presumably being
 11 statement of objections, is it?
 12 MR PICKFORD: I am not going to be able to answer that
 13 question, right now. Obviously Mr Jowell wants to — we
 14 all have access to the same bundle. If he wants to make
 15 some submissions about it in due course, he is more than
 16 welcome.
 17 THE CHAIRMAN: Well, the quote comes from an article which
 18 is referenced, so perhaps overnight somebody can follow
 19 up —
 20 MR PICKFORD: Certainly.
 21 THE CHAIRMAN: — that link and it probably tells you.
 22 MR PICKFORD: I think I would accept, as a general
 23 proposition, that the United States tends to lead
 24 Europe. Overall, the trends that seem to be common
 25 indeed amongst many things is that things seem to happen

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1 first in the US, then typically in the UK, and then to
 2 some degree in Continental Europe. So to the extent
 3 that we have higher numbers in the US, then one would
 4 expect Europe to perhaps be a bit behind, but the
 5 overall trends are the same.
 6 So if we go, please, to the next slide, which is at
 7 {N/188/1}. This is the United States, because it is
 8 a survey of US consumers.
 9 We see that it is reported in this research that —
 10 so it is in 2016, which one can see, it is "the critical
 11 2016 holiday season", it says at the top:
 12 "Amazon has grown its lead as the place where
 13 consumers first search for products. Now 55 percent of
 14 consumers begin their search on Amazon when shopping for
 15 products online."
 16 That is obviously the US.
 17 Then there is an explanation below of the survey and
 18 that search engines and retailers have lost ground. So
 19 "Search engines" at this point are apparently 28% and
 20 then "Retailers", 16%.
 21 If I may, if that is convenient, I am going to go to
 22 the next slide that I have. That is to be found in J2B
 23 — or the next data point, {J2B/22/34}.
 24 So this is in fact a Foundem article where Foundem
 25 is quoting a Google blog post and then it goes on to

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1 critique what Google refers to in the blog post. I am
 2 relying on this for the purposes of the blog post that
 3 is cited at "4.10 Paragraph 10 ...". Again, it is just
 4 another snapshot, this time of the German market, and it
 5 says:
 6 "A third of online consumers go first to Amazon
 7 irrespective of where they ultimately make their
 8 purchases. Only 14.3% go first to Google, and only 6.7%
 9 to price comparison sites."
 10 So this is from 2016 and it is Germany. They then
 11 refer to what I think is actually the slide that I just
 12 showed you, the US slide.
 13 THE CHAIRMAN: Yes.
 14 MR PICKFORD: The next one, very briefly, is — so a US
 15 analyst called Raymond James to be found at {N/192}, and
 16 if we go to {N/192/7} of that.
 17 So we are back in the US now, and there is —
 18 the graph shows quite a clear trend over the three years
 19 to December '14, '15 and '16, and what it shows is
 20 Amazon is gaining ground and search engines are losing
 21 ground. So at the beginning of the period,
 22 search engines were doing better, and that is obviously
 23 largely Google, when it refers to that, but by the end
 24 of the period, they have lost a lot of ground and
 25 vice versa for Amazon.

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1 Then we have got a UK snapshot from 2022, if one
 2 goes to —
 3 THE CHAIRMAN: Sorry, the one you just —
 4 MR PICKFORD: I beg your pardon.
 5 THE CHAIRMAN: — Raymond James is — that is US?
 6 MR PICKFORD: Yes, that is US. It is US, 2017.
 7 Then if we go please to the bundle at {M4/128}, and
 8 this is a market research by a company called Remazing x
 9 Appinio. They seem to be consultants who advise
 10 merchants on Amazon. So obviously one can perhaps
 11 reasonably take from that that they are going to have
 12 a relatively pro—Amazon perspective, so I do note that.
 13 But nonetheless, from their review of the market, if you
 14 go to {M4/128/28} of that slide pack, this is 2022, UK,
 15 and it gives a split of 63% Britons being likely to
 16 start a search on Amazon as opposed to 37% being likely
 17 to start on Google.
 18 So what I draw from that very quick tour of
 19 snapshots is the following. The real success story in
 20 internet shopping in the US and in Europe, so we have
 21 seen Germany and the UK, in the last 20 years is Amazon.
 22 It has gone from, in 2008, being last place where people
 23 start their shopping journeys, and now, today, it is, on
 24 the evidence we have seen here, first place for where
 25 users start their shopping journeys. So that is the key

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1 market background that I say is relevant in the context
 2 of what is going on in this market.
 3 Secondly, Google seems to come second. Originally
 4 it was ahead of Amazon. These days it appears to be
 5 behind. Thereafter we have got merchants, who seem to
 6 come in third, and then you seem to have everyone else,
 7 including CSSs. This rising dominance of Amazon was not
 8 a surprise to Google because, even back in 2008, Google
 9 produced a paper analysing the impact of Product Search
 10 on Google.com's revenue. That is to be found in
 11 {M2/360}. The paper is entitled:
 12 "Product Search Impact on Google.com Ad Revenue."
 13 If you go to {M2/360/3}, please, and look at
 14 the second line from the bottom and on to the next page
 15 {M2/360/4}, there is a sentence which begins:
 16 "We are competing for product queries not so much
 17 with comparison shopping engines (Product Search is now
 18 the leading shopping engine in the US in terms of
 19 pageviews, according to [confidential], CUP, Nielsen,
 20 and ComScore), but with Amazon, eBay, and other merchant
 21 sites."
 22 So this is a confidential internal Google analysis,
 23 and in 2008, the people that they were worried about
 24 were Amazon and eBay and other merchant sites.
 25 So that is a very, very brief tour through the —

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1 a wider perspective on internet shopping in the last
 2 two decades.
 3 I then turn very briefly —
 4 THE CHAIRMAN: Just a second.
 5 MR PICKFORD: I beg your pardon, Sir?
 6 THE CHAIRMAN: Just one moment.
 7 MR PICKFORD: Yes.
 8 (Pause)
 9 THE CHAIRMAN: Did they not go on to say it is crucial to
 10 keep product queries going on Google general search?
 11 MR PICKFORD: Yes, because — and what they are worried
 12 about is them going instead to competitor sites such as
 13 Amazon. You see that in the fifth line of page 4. So
 14 absolutely, I do not demur from that at all. Google, in
 15 2008, was very strongly trying to be the place where
 16 consumers went to to begin their product searches. That
 17 is what it was aiming to do.
 18 THE CHAIRMAN: Yes.
 19 MR PICKFORD: Ultimately, it lost that battle to Amazon. It
 20 saw what was coming and Amazon got the better of it.
 21 So, Sir, the next very, very brief point is
 22 the evolution of Google. I think I can be probably very
 23 fast through this, because we have covered quite a few
 24 things in the discussions that we have had already.
 25 I think the point, hopefully, is well understood by now

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that Google was not gifted its position as the favourite place for people to go and search for, it ultimately was much smaller than its rivals when it started out in 1998. It got to where it has done by innovating and doing two things which are indeed the subject of — doing two things that are argued about, namely providing the highest quality results, and part of that is it used algorithms such as Algorithm A and Panda to do that, and that is one of the — we say those are pro-competitive, positive things that Google was doing, and it also provided attractively presented results on its page. The problem was, as we know, that there was a period when it gave itself, its own CSS, an advantage in relation to that, which it has now remedied.

I think I can leave the rest of the points that I was going to make there for Mr McGurk to pick up insofar as he needs to at all in his submissions, because I am trying to make sure that I get a move on.

So the next point then for me to make before Mr McGurk stands up is on the CSS commercial model and how that works.

What we say in relation to that is that the essential business model of a CSS is to gain clicks from Google and other sources at a lower cost than the price that they can then sell them on to merchants,

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who either contract directly with the CSSs or participate in affiliate programs, so where there is a merchant that says, "I want lots of users to come to my site", and then, on their behalf, third parties try and get those users, and therefore sometimes the CSS will sell directly to a merchant such as Amazon, or sometimes it will sell into an affiliate program and those clicks will ultimately go on to Amazon insofar as it was an Amazon affiliate program, but there is no direct contract in that context. They have relied on a heavy degree of automation to upload very large volumes of material, because, ultimately, if it is a business that is based on making sure that you get a margin between what you can buy in your click set and what you can sell them at, you are going to make most money by maximising your volumes.

Some CSSs, such as Idealo, invested in their sites and were comparatively high quality, and as we shall see — and quite a lot of this will come out during cross-examination because we do not have a chance to present all these documents now in opening — there are other CSSs that were much lower quality and the Claimants — the remaining Claimants fall into that category. We say that they presented often misleading or irrelevant information, there was a lack of human-led

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quality control, there was evidently insufficient capital investment, and ultimately what that meant is that they became more and more a model of pure arbitrage. They added less and less real value to users and were ultimately simply just trying to exploit the price differential I just mentioned.

An implication of that is the point that we addressed a little bit before lunch — I think it was before lunch — when what one found is that lots of users who go to a CSS page might not find it very satisfying, and so what they do is they potentially just bounce back to Google, or they exit all together without going through to a merchant. That is what explains the attrition rate that I was referring to before. I probably was not as helpful as I might have been explaining where those users go. I think, hopefully, I will be slightly clearer now, that sometimes they may just go back to Google because they go to the CSS, they think, "Mm, that is not very helpful, I'll go back and I'll continue on the way", or they might just give up. Both of those are means by which CSSs are not really assisting — they are situations where CSSs are not assisting their users and we are going to see quite a lot of evidence on that in this trial.

So we say that the reason why many CSSs have not had

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the kind of business success that they say they are entitled to is not a function of abuse by Google, it is a function of the fact that they are not as good as they say they are. When they point to — they say, "Oh, well, but we would have been better had Google not done what it had done", well, there may be an argument to be had there, but what one does see is that there are other CSSs that did a lot better and performed much more effectively in terms of the kind of quality scores and feedback they were getting from users.

One of the points that this leads to is Mr Hunt's evidence, because Mr Hunt has developed an economic framework where his third criterion for assessing whether there is competition on the merits is looking at the kind of margins that Kelkoo earns today, and he says that you are able to infer that there is an abuse of dominance if Kelkoo does not make the sort of margins that Mr Hunt thinks they should be making.

We say there is not any basis for that kind of analysis in law. Google is not under an obligation to ensure that Kelkoo is profitable. There are all sorts of reasons why Kelkoo may be not very profitable. In fact, it does make what we say is a material and reasonable profit, but that is not really the point. Even if it did not make a profit, one cannot infer from

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1 that that that reveals that there is an abuse of
 2 dominance today. It could well be — and we say there
 3 is strong evidence to show — it is because it is not
 4 a very good business.
 5 Now, with that introduction, if I may, I can hand
 6 over to Mr McGurk.
 7 THE CHAIRMAN: You say, not a very good business by
 8 comparison with, say, Idealo —
 9 MR PICKFORD: Yes.
 10 THE CHAIRMAN: — which you say is a good site.
 11 MR PICKFORD: Yes, and we will see copious evidence of how
 12 Kelkoo in particular, because there is quite a lot of
 13 disclosure on Kelkoo, compares to other CSSs and
 14 the many business problems that it had.
 15 THE CHAIRMAN: Though Idealo has also established abusive
 16 dominance in other proceedings.
 17 MR PICKFORD: Yes, indeed. I said at the outset, I am not
 18 saying we are not going to have a Trial 2.
 19 THE CHAIRMAN: Yes.
 20 MR PICKFORD: What I am saying is the abuse finished in 2017
 21 and we have to be very clear about what
 22 the counterfactual is, and those are the things we are
 23 arguing about now.
 24 So unless I can assist the Tribunal further, I was
 25 proposing to hand over to Mr McGurk.

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1 THE CHAIRMAN: Yes. Thank you.
 2 So Mr McGurk, we will sit for half an hour, if that
 3 is —
 4 MR MCGURK: Yes, thank you.
 5 THE CHAIRMAN: We will discuss when we start tomorrow.
 6 Opening submissions by MR MCGURK
 7 MR MCGURK: Thank you.
 8 Before I introduce what I want to cover, can I issue
 9 one correction. When we had our discussion this morning
 10 about my response to Mr West's application, I invited
 11 the Tribunal to read some correspondence. I gave you
 12 the wrong reference for what I particularly invite
 13 the Tribunal to read. It is {L4/11} and {L4/12} which
 14 we are most concerned that you have a chance to see.
 15 They cover our entire position on other penalties which
 16 might allow me to take that short tomorrow, which may be
 17 helpful for reasons of timing.
 18 THE CHAIRMAN: Yes.
 19 MR MCGURK: It also might allow me to take the response to
 20 Mr West's application short as well.
 21 THE CHAIRMAN: Yes. Well, we will read those overnight.
 22 MR MCGURK: Thank you.
 23 If convenient, I propose to address you on five
 24 topics. First of all, I want to make some introductory
 25 remarks about ranking, both in general and as undertaken

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1 by Google. Secondly, I will address you on
 2 the algorithms in issue in these proceedings. Third,
 3 I am going to address you on two discrete
 4 Google Shopping—related points and in response to
 5 observations made by Mr Jowell in opening yesterday.
 6 Fourth, and if time, I wanted to say something about
 7 the evolution of CSSs. Fifth, I am going to set out
 8 a number of the problems inherent within the Claimants'
 9 CSSs claims.

10 So starting with ranking, as Mr Pickford has already
 11 pointed out, ranking is inherently zero sum. If one
 12 website ranks higher and moves up, inevitable somebody
 13 else will move down. Now, in this regard, Foundem
 14 claims that ranking is done by reference to what it
 15 calls a "natural relevance score", which is premised on
 16 a suggestion that ranking can be done objectively, in
 17 a hard—edged way, such that looking at one set of
 18 results you could in fact say that is incorrectly
 19 ranked, whereas looking at another set of results could
 20 be regarded as correctly ranked.

21 Now, we say, with great respect, that is obviously
 22 wrong and a webpage can have no natural relevance score
 23 because there is no platonic ordering of the web waiting
 24 to be revealed, whether by the senses, the intellect or
 25 an algorithm, whether in response to a particular search

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1 query or in relation to the ordering of the web as
 2 a whole. It makes no sense because ranking is, as
 3 Mr Cutts says, inherently subjective and there are
 4 myriad ways in which general search engines might go
 5 about undertaking ranking. It is for that reason that
 6 the approach to ranking becomes the fulcrum of
 7 competition between general search services, and who
 8 does it well and who does it badly is precisely what
 9 drives competition.

10 So for that reason, a ranking on Bing or a ranking
 11 on Yahoo! cannot be held up as a benchmark or metric
 12 against which to assess results on Google, and that is
 13 particularly so where users have overwhelmingly opted to
 14 use Google as the starting point for their search
 15 queries.

16 Ranking is not set in aspic either, because webpages
 17 change in their content, user behaviour changes over
 18 time, new websites enter the market with new content
 19 that they want to rank in relation to, and in addition,
 20 problems emerge that require algorithmic responses,
 21 whether to avoid website owners, who we refer to in
 22 these proceedings as "webmasters", gaining what they
 23 discern to be the signals on which ranking takes place,
 24 or to deal with the new mischiefs that emerge online
 25 from time to time. So for these reasons, the idea that

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1 there is a pre—demotion natural ranking order is, with
 2 respect, hopelessly confused.
 3 Can we turn, please, to paragraph 95 of Mr Kim's
 4 first statement. It is {H3A/2/22}.

5 THE CHAIRMAN: Did you say paragraph 95?
 6 MR MCGURK: I think this is 3. H3A/2 —
 7 THE CHAIRMAN: 95?
 8 MR MCGURK: Yes.
 9 THE CHAIRMAN: I think that is page 26, is it not?
 10 MR MCGURK: There we are. Apologies:
 11 "There is [he says] no such thing as a 'natural
 12 relevance score'. In fact it is baloney — I want to be
 13 very clear about that. Ranking is determined by
 14 engineers, not by a universally understood or common
 15 [Information Retrieval] score."
 16 Now, just for your note, Mr Cutts addresses the same
 17 point under the heading, "No right answer in search
 18 rankings", at paragraphs 25 to 29 of his first
 19 statement. For your note, that is {H3A/5/9}.

20 Google's ranking process —
 21 THE CHAIRMAN: Just one moment.
 22 I mean, I think we have got your point. I do not
 23 think you need take us to a lot of material on it.
 24 MR MCGURK: What I was going to go to next is just how
 25 Google does ranking —

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1 THE CHAIRMAN: Yes.
 2 MR MCGURK: — and some of this is sensitive so I was going
 3 to take it cautiously, but hopefully quickly.
 4 If you have this, or I am otherwise boring you,
 5 please tell me to move on.
 6 THE CHAIRMAN: No, you are not boring us, but I am just
 7 saying because we want to concentrate on what troubles
 8 us or is most difficult or —
 9 MR MCGURK: Indeed.
 10 THE CHAIRMAN: We have read that, and take the point that is
 11 made and you do not have to reinforce it, as it were.
 12 MR MCGURK: Yes. Well, can I then start with {A2/1/19}. It
 13 is our written openings, and we give there a summary at
 14 paragraph 41 of how Google approaches ranking. Could
 15 I just invite you to read that paragraph.
 16 (Pause)
 17 THE CHAIRMAN: Yes.
 18 MR MCGURK: So that summary is explained diagrammatically in
 19 Mr Kim's first statement at figure 1, which is on
 20 {H3A/2/14}.

21 Now, this diagram is very sensitive, so I would just
 22 invite you to pause and have a look at that diagram. As
 23 you will have seen, some of the phrases have been
 24 treated as non—confidential in other parts of these
 25 statements, but when you put them all together in

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1 the context of explaining how a process works, it is
 2 extremely sensitive.
 3 (Pause)
 4 THE CHAIRMAN: Yes.
 5 MR MCGURK: I wanted just to explain where the things that
 6 matter in these proceedings fit into this diagram, but
 7 again, to do it cautiously.
 8 The signals and metrics against which ranking took
 9 place were in large part developed by two teams within
 10 Google, Mr Cutts' search quality team and in particular
 11 the webspam team which he was a member of and ended up
 12 leading, and the page quality team.
 13 Starting with the former, they developed
 14 the PageRank algorithm, which Mr Cutts explains at
 15 paragraph 23(b) of his first statement, that is at
 16 {H3A/5/8}.

17 He says:
 18 "The PageRank score was a measure of whether
 19 the webpage was reputable. PageRank measures
 20 a webpage's reputability based primarily on
 21 the importance of the inbound links to that webpage;
 22 the idea was to follow the quality trail from reputable
 23 sites. It is a model that therefore emerges from
 24 the link structure of the web."
 25 So PageRank was an early quality signal.

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1 Then dropping down to paragraph 28 on {H3A/5/10} of
 2 this document — this statement, picking it up ten lines
 3 down, you see Mr Cutts saying:
 4 "Crawling in PageRank ... is crucial because you're
 5 solving half the battle of spam by crawling the most
 6 reputable pages first."
 7 So PageRank was the practical response to that
 8 simple intuition.
 9 Now, in those early days, the search quality team
 10 developed further signals to address the relevance and
 11 usefulness of webpages via what were known as its ABCs:
 12 anchors, bodies and clicks.
 13 Can we go to Mr Kim's first statement. It is
 14 {H3A/2/16}.

15 Could I just invite the Tribunal to scan down
 16 paragraphs 67 to 72, please.
 17 (Pause)
 18 THE CHAIRMAN: Yes.
 19 MR MCGURK: It was the webspam team who then devised signals
 20 for spam and thin affiliate content, including
 21 Algorithm A, which I will address in detail in
 22 a few minutes. But just to help make sense of Mr Kim's
 23 diagram when we come back to it — there is a second
 24 version — for now, can we please go to Mr Cutts' first
 25 statement. It is {H3A/5/24}. It is confidential. Can

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1 I therefore invite the Tribunal just to read that
 2 paragraph 68.
 3 (Pause)
 4 On the establishment of the page quality team later
 5 on, they sought to identify additional quality metrics
 6 by which to assess the expertise, authoritativeness and
 7 trustworthiness for a webpage, and those page quality
 8 metrics are, for your note, discussed in paragraph 79 to
 9 84 of Mr Kim's first statement, that is at {H3A/2/18}.
 10 If I could just invite you to read 81, 82 and 83,
 11 please, that will take us back to the second diagram
 12 I wanted to show you.
 13 (Pause)
 14 THE CHAIRMAN: Yes.
 15 MR MCGURK: So Mr Kim brings these metrics back together in
 16 this second diagram, and again, to deal with this
 17 carefully, PageRank features at the point of the long,
 18 thin rectangle in the middle of the page. You see where
 19 the further metrics I took you through by reference to
 20 the witness evidence are dealt with and to what end at
 21 the bottom on the left side of the diagram on the page.
 22 Algorithm A applied at the box beside which you see
 23 the number 2. So too, initially, did Panda, but as
 24 Mr Kim explains at paragraph 214 of his first statement
 25 {H3A/2/49}, it now is applied in the fatter rectangle at

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1 the bottom of the page. It is slightly cryptic, but
 2 hopefully sufficiently clear by reference to what I have
 3 shown you.
 4 Just to finish this, you have seen the reference on
 5 that page {H3A/2/19} to "Navboost" and "Safe search".
 6 Just to show you what they both were, can we turn to
 7 {H3A/2/19}, which is paragraph 85 of Mr Kim's first
 8 statement.
 9 THE CHAIRMAN: Just below the diagram?
 10 MR MCGURK: Yes, we are in Mr Kim, so —
 11 THE CHAIRMAN: It is the next paragraph.
 12 MR MCGURK: — forgive me, yes.
 13 (Pause)
 14 THE CHAIRMAN: Yes.
 15 MR MCGURK: Thank you.
 16 So that is a general canter through how Google
 17 approached ranking.
 18 Can I turn then to Algorithm A, and I think I can
 19 probably do the first document I was going to cover
 20 before the guillotine comes down.
 21 Algorithm A was introduced in 2004 and was present
 22 throughout the pre-decision and Decision Periods. To
 23 address the mischief with which it was concerned, can
 24 I go, please, to {M2/122/1}, which is a "Web Spam"
 25 presentation from 2006. I was going to go to this

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1 anyway, but particularly, Sir, in light of, Professor,
 2 your discussion with Mr West this morning about
 3 the notion of web spam and how it is defined, how broad
 4 it might be, how it impacts on CSSs. The beginnings of
 5 the explanation are in this document.
 6 So can we go to {M2/122/2}, please.
 7 You see:
 8 "Google's mission is to organise the world's
 9 information and make it universally accessible and
 10 useful.
 11 "Web Spam is techniques (and sites) that interfere
 12 with our ability to organize."
 13 Then if we go over the page {M2/122/3}, we can see
 14 why web spam is a problem by reference to those four
 15 points:
 16 "1) Google's natural results ..."
 17 Pausing there. By "natural results" that refers to
 18 organic results, meaning results not influenced by ads
 19 or any form of monetisation.
 20 That those results:
 21 "... aim to be a meritocracy, not influenced by
 22 money or technical loopholes."
 23 What this means is that in relation to organic
 24 results, not the ten blue links, nobody can pay for
 25 placement. Point 2, web spam is a problem because:

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1 "Others determine relevancy, not Google."
 2 That occurs when webmasters have, for example, been
 3 able to gain Google's algorithms to suggest that a page
 4 is useful to a user entering a search query when it is
 5 not. A classic example of this is — type of gaming, is
 6 keyword stuffing, where a webmaster will fill their
 7 webpage with specific terms or key words in an attempt
 8 to appear relevant, or more relevant, to specific
 9 queries purely to attract users.
 10 Point 3, that obviously leads to a "poor user
 11 experience", because the user goes to a website
 12 expecting to get what they want and they do not.
 13 Point 4 notes that this can also:
 14 "... lead to a 'Lack of Diversity' in results."
 15 That is best explained by the worked example over
 16 the page on {M2/122/4}.
 17 This, again, is pertinent, Professor, to the point
 18 you were discussing with Mr West, and "lack of
 19 diversity", just to be clear, this is not a reference to
 20 the Diversity algorithm, this is referring to
 21 the problem that is the SERP being flooded with
 22 identikit results. We can see this pictorially on
 23 the page. The user in this example is searching for
 24 "shoes", and is given multiple websites in the search
 25 results, but all of which ultimately contain the same

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1 link to the same affiliate hub which might actually sell
 2 shoes to the user.
 3 This example that you see on the page recognises
 4 that this type of outcome on the SERP was often a result
 5 of affiliate programs, where a merchant or an
 6 intermediary on behalf of an affiliate hub signs up
 7 affiliate members, all of whom can make money by
 8 redirecting traffic to the affiliate hub. The problem
 9 is that each affiliate member, and in some programs, as
 10 we will come back to see, there were thousands of
 11 members receiving the same standardised product
 12 information and containing the same links by which they
 13 could seek to redirect users to the same place, and in
 14 this example it is to the same end hub, Zappos.com. So
 15 without doing more, every webpage linked into an
 16 affiliate network will serve users essentially identical
 17 results taking them to the same ultimate end point.
 18 Now, it is understandable that Google viewed this as
 19 a poor user experience and it was entitled to address
 20 that poor user experience and did so in part through
 21 Algorithm A.
 22 Now, I note that at least Kelkoo and Ciao seem to
 23 appreciate this issue. Mr Jowell, yesterday, in his
 24 opening remarks, said: for many users, the priority is
 25 the quality of the shopping experience and the diversity

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1 of the results they have access to. That was page 16,
 2 line 7 to 9. Google's focus was on assuring that its
 3 results were not filled with thin affiliates that simply
 4 served users with multiple results of the very same
 5 thing.
 6 Can we go over the page in this presentation to
 7 {M2/122/5}.
 8 Google further explain what properly meritocratic
 9 organic search results required. First, that
 10 meritorious results were not results you could pay for,
 11 and Mr Kim says more about this in his first statement
 12 at paragraphs 33 to 38, under the heading, "Honest
 13 results". That is just for your note and it is at
 14 {H3A/2/8}.
 15 Good links would arise through human—built
 16 directories and citations, meaning that the owner of
 17 website A specifically referred users to website B as
 18 containing useful content by including a link to
 19 website B on its own page. Those links are organic, and
 20 this is effectively the web version of word of mouth,
 21 and this of course is the intuition that sits underneath
 22 PageRank, as I have shown you.
 23 By contrast, bad links include things like bought
 24 links, and bought links are not as meritocratic on this
 25 analysis because users are not being referred to other

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1 sites primarily because of the content of that site but
 2 instead because they are receiving a payment to send you
 3 there.
 4 Then point 2 says that it wants:
 5 "Content that's generated by the site owner, or
 6 a unique value add [and to] (filter out duplicate
 7 content)."
 8 Page 6 {M2/122/6}, over the page, then reiterates
 9 what Google wants in its general search results.
 10 Importantly, for this case, again, "Unique content or
 11 added value", and gives the paradigm example of
 12 Wikipedia's creation.
 13 At page {M2/122/7}, turning over again, one of
 14 the things Google does not want in organic search is
 15 "scraped" or feed—based content, for the simple reason
 16 that it ends up duplicating original content and Google
 17 was keen to take you to the original creator of content
 18 that may have been duplicated on the web, not to
 19 the duplicates.
 20 Finally on this document, page {M2/122/38} deals
 21 specifically with the concerns around affiliate and
 22 pay—per—click content. Affiliate sites were defined as
 23 those:
 24 "... that offer very little or no value add while
 25 earning [revenue] from affiliate commissions or PPC ...

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1 revenue."
 2 Which would include affiliate networks or programs.
 3 So I hope, Professor, that shows you how that notion
 4 of web spam, the problems it created, bring us towards
 5 CSSs, certainly the poorer quality CSSs that we will be
 6 considering in this case, and Algorithm A was the —
 7 PROFESSOR SMITH: Just to make sure that I have understood
 8 what has gone on here, go back to page {M2/122/4}:
 9 "What is a 'lack of diversity'?"
 10 If we had in the box, "Query: 'shoes'", competing
 11 CSSs, they might well all legitimately be directing
 12 themselves — each of them might have a perfectly proper
 13 commercial relationship with a merchant, so there is
 14 the risk that they all directed customers to the same
 15 merchant, but there is nothing inherently surprising or
 16 damaging about that, or is it, you think —
 17 MR MCGURK: Well, let us take that in stages. The reason
 18 I went to Mr Jowell's remarks is because, first of
 19 all — and you see it in this case — there are some
 20 CSSs who had direct relationships with merchants, and as
 21 we will come on to see, one of upsides of that direct
 22 relationship is that you can take a data feed that is
 23 sui generis, that you can dictate in the terms you have
 24 with that merchant as to how often you get the data
 25 feed, the contents of that data feed, any bells and

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1 whistles you might want for your site, and you heard
 2 Mr Jowell also say yesterday that it involved a huge
 3 amount of negotiation through the sales and marketing
 4 team that they had in order to put those direct merchant
 5 relationships in place. But the upside of that is that
 6 you could potentially take a much better feed of product
 7 data.

8 What this is concerned with, on the other hand, is
 9 relationships not directly with the merchants but with
 10 an affiliate, and the affiliate in this example is
 11 Zappos, but you could take Amazon, for example, and as
 12 we will see in the witness evidence in this case,
 13 the problem with that is that if you sign up, and you
 14 could sign up for free, to become an affiliate member in
 15 a program, you would take a feed on terms dictated
 16 either by the affiliate themselves, if they were running
 17 the program, or an intermediary like Tradedoubler, which
 18 is an intermediary we will come back to, you took it on
 19 their terms, you took the data as you found it,
 20 the frequency with which you get it.

21 But, crucially, it is standardised, and in this
 22 example, all of these affiliate members of Zappos's
 23 affiliate program are getting that standardised feed.
 24 So if they do not do anything more to their page — and
 25 I take your point that they could, and they could make

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1 their page much more interesting, for example, by
 2 product reviews and so on, and differentiate themselves,
 3 but without more, if all they are getting is
 4 the standardised feed that everyone else who is an
 5 affiliate member is getting and they serve the same
 6 thing on their page, the users flicking down the ten
 7 blue links sees the same thing and ends up with each of
 8 those clicks going to the same place. That was
 9 the mischief that this presentation, and ultimately
 10 Algorithm A, was concerned with.

11 PROFESSOR SMITH: But if a number of bona fide CSSs have
 12 relationships with the same sets of merchants, genuine
 13 commercial relationships with the same kinds of
 14 merchants, are they at risk of — or are you saying that
 15 if they have individual relationships with merchants,
 16 they will be sufficiently differentiated in
 17 the relationship that they do not get caught by this, or
 18 are they still at risk of getting caught for a lack of
 19 diversity just because they are all — a number of them
 20 are dealing with the same merchant?

21 MR MCGURK: Oh, I see. We do not assess them collectively,
 22 we assess them individually by reference to the signals
 23 they exhibit on their own pages. So if, in your
 24 example, some of these on this list are not taking
 25 affiliate feeds, they are taking standalone data feeds

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1 which they have agreed with a merchant, they may end up
 2 showing something different on the page. If they say
 3 more about that and add original content, then that is
 4 a quality signal that will be reflected in
 5 the algorithmic score.

6 So there are various things they can do to ensure
 7 that what they are serving is differentiated, original,
 8 provides useful content to users and a helpful
 9 experience, but that is not what is being posited here.
 10 What is being posited here is the problem with just
 11 standardised content being served and taking people to
 12 the same place.

13 PROFESSOR SMITH: So the CSSs have to make a special effort
 14 to differentiate what they get from their merchants from
 15 what other CSSs get from the same merchants?

16 MR MCGURK: Well, if one CSS knows that another is, like it,
 17 just an affiliate member taking the same feeds, then
 18 that is — it is up to them to then seek to
 19 differentiate, but each of them are assessed by
 20 reference to the algorithmic signals.

21 Now, I note the time, and to give you a proper
 22 answer, I need to go to them and to explain what they
 23 can do by reference to those signals to ensure that they
 24 are not penalised by the algorithms, but that takes
 25 a little bit more work, which I need to come on to, and

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1 I am conscious that there is a hard stop.

2 THE CHAIRMAN: Can you, perhaps tomorrow, address my query
 3 on this? The content may not be original or have
 4 anything added, not even a star rating, but the value
 5 can be from the aggregation from a lot of different
 6 sources together, onto one page, of the prices of
 7 different suppliers.

8 MR MCGURK: Yes.

9 THE CHAIRMAN: Just the process of aggregating, rather like
 10 compiling a database which refers to lots of different
 11 sources but does not put any content, any additional
 12 content, is itself a mark of — could be a mark of
 13 quality and value, and how does that fit into this, in
 14 looking at sites?

15 MR MCGURK: Functionally, that is what CSSs do.

16 THE CHAIRMAN: Yes.

17 MR MCGURK: That is why, given the signals that we are
 18 considering in the context of this algorithm,
 19 the Commission noted that they were prone to being
 20 demoted. So nobody is denying that — I mean, take it
 21 back to 1995/2000, when some of these CSSs were
 22 emerging. What you had was an exponential explosion of
 23 websites creating significant new search costs for
 24 users, so in theory, there was room for a CSS to
 25 differentiate itself not just by functionally managing

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1 to bring in sources of product information and
 2 displaying it on a page, and there is of course a place
 3 for that, but the fact that there was an emergence of
 4 huge numbers of CSSs doing exactly the same thing
 5 created a problem for the user and the user experience
 6 if that is all they are getting.

7 So if there is going to be competition between CSSs,
 8 and bearing in mind Google's concerns, through
 9 the encoding of the signals and the intuitions they
 10 related to that were seeking to ensure their users were
 11 getting good results on the page, it was imperative for
 12 CSSs not just to be able to pull information together on
 13 the same page, and loads of them did, but to generate
 14 the diversity of result and to avoid the identikit ten
 15 links on the page, including taking you to the same
 16 result, there were things that they could do to improve
 17 the user experience, and the classic one, which we can
 18 talk about, hopefully, is original content through buyer
 19 guides, merchant ratings and so on.

20 THE CHAIRMAN: Thank you.

21 Housekeeping

22 Now, tomorrow, if we were to start — we are keen,
 23 particularly, that Dr Stables' evidence should conclude
 24 by the weekend, and you want a day and a half, so that
 25 means a long half day.

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1 MR PICKFORD: So by my calculations, we had this problem.
 2 The Claimants went over by approximately an hour and
 3 a half. Part of that time was achieved by sitting early
 4 and late yesterday and having a shorter lunch break.
 5 About 25 minutes of it was achieved from our time today.
 6 So that means that we started effectively about
 7 25 minutes late. We are also — we also need, I would
 8 say, a good hour and a half extra, because we are also
 9 running behind, given the helpful exchanges we have had.
 10 So that, in total, means we have got about an extra
 11 two hours that need to be found for submissions when one
 12 adds us starting later than we otherwise would, plus our
 13 extra hour and a half tomorrow.

14 So however early we start or however late we sit, we
 15 are not going to — still, in my submission, going to be
 16 able to get a further day and a half in before
 17 the weekend. Well, I mean, ultimately I am in
 18 the Tribunal's hands, but it is going to be quite a
 19 big —

20 THE CHAIRMAN: You need an extra two hours?

21 MR PICKFORD: It is going to be two hours, because we need
 22 our extra hour and a half and then we started late.

23 THE CHAIRMAN: Well, give me a moment.

24 (Pause).

25 Yes, the other thing we have to bear in mind is that

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1 there are potentially some transport problems tomorrow
 2 because of the excessive heat that is forecast, and we
 3 recognise some people may have difficulties — some
 4 difficulties getting in, so we do not want to start too
 5 early. If we were to start at 9.45 tomorrow and sit
 6 until 4.45, that will give you an extra hour, and we do
 7 the same on Thursday and you will then get your
 8 two hours.

9 MR PICKFORD: Thank you.

10 THE CHAIRMAN: We would otherwise have said 9.30, but we
 11 think we should build in a little bit of flexibility in
 12 case people are struggling to get in and no one with
 13 really predict that for the moment.

14 MR PICKFORD: Understood. I am very grateful. Thank you.

15 THE CHAIRMAN: Mr Jowell, we did want to ask you something
 16 about your case which I had omitted to do and that is
 17 this. Kelkoo, of course your client, is I think in this
 18 case 11 companies in the group in different countries.
 19 There is a Dutch Kelkoo, there is a German Kelkoo, there
 20 is a Danish Kelkoo and so on.

21 MR JOWELL: Yes.

22 THE CHAIRMAN: Have we understood this correctly, that
 23 the claim here is, to take the German Kelkoo, they are
 24 claiming for losses they have suffered presumably from
 25 their operation from Germany; is that right?

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1 MR JOWELL: Yes, I believe.

2 THE CHAIRMAN: Or is it limited to people in England who
 3 initially might have ended up somehow on the German
 4 Kelkoo site?

5 MR JOWELL: It is certainly not limited to those in England,
 6 it is a European-wide claim.

7 THE CHAIRMAN: Yes, and so it will cover people in Germany
 8 by your German Kelkoo?

9 MR JOWELL: Yes.

10 THE CHAIRMAN: So the damages will be in different countries
 11 in Europe?

12 MR JOWELL: Yes, indeed.

13 THE CHAIRMAN: It may not affect this trial at all, but

14 might eventually mean that will there be some issues of
 15 what law applies to certain aspects of the claim,
 16 insofar as there is any difference?

17 MR JOWELL: I think, yes. I mean, I think there is
 18 the default assumption, is there not, that if you do not
 19 plead a foreign law, then one assumes that English law
 20 applies, unless the other side plead back to say that
 21 some other law should apply. So I think we are all
 22 assuming that, at least unless there is an amendment to
 23 either our pleading or their pleading, that we will be
 24 applying English law.

25 THE CHAIRMAN: Is it that English law applies, or that any

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1 foreign law —
 2 MR JOWELL: Is assumed to be the same.
 3 THE CHAIRMAN: Which is not quite the same thing.
 4 MR JOWELL: No, that is right. I appreciate there is
 5 a recent case on it which suggests that that default is
 6 not quite as strong a default as it used to be
 7 considered, but nonetheless — I forget the name of
 8 the case now, but a recent decision —
 9 THE CHAIRMAN: Yes, but unless it is raised, one —
 10 MR JOWELL: No, typically —
 11 THE CHAIRMAN: — can take it that English law is to be
 12 applied, but it would be clear that a German user buying
 13 on German Kelkoo for delivery in Germany, the proper law
 14 of that transaction is not going to be English law, it
 15 seems to me.
 16 MR JOWELL: That is correct. I suppose the question is —
 17 and that is true. I suppose the actual ultimate
 18 question is what is the law as between us and Google?
 19 Now, that may turn on — if our damages are suffered by
 20 reason of loss of traffic in Germany, one can see there
 21 is an argument that German law could apply. But,
 22 equally, one could say that it is where we lose
 23 the clicks, which is somewhere in the ether, I suppose.
 24 It is a complex area, potentially, but we have proceeded
 25 on the assumption, largely simply for convenience, that

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1 English law applies.
 2 THE CHAIRMAN: Yes. Thank you.
 3 So 9.45 tomorrow morning.
 4 (4.45 pm)
 5 (The Court adjourned until 9.45 am on Wednesday,
 6 24 June 2026)
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