Sundar Pichai says the DOJ's antitrust plan could kill Google Search

Sundar Pichai, Google's CEO, took the stand on Wednesday during the remedies phase of the company's search antitrust trial, and offered a simple message. The US government's plan to rectify Google's search monopoly, he said, would be so crushing to Google Search that it might be hard to justify continuing to build a search engine at all.

Pichai was called by Google in its defense, the second witness in its portion of the trial after the Department of Justice finished more than a week of its own questioning. John Schmidtlein, one of Google's lead attorneys, first led Pichai through a tour of Google's R&D investments, asking him how much the company has spent on Search, AI, and other projects. (The answer: about $49 billion just last year.) Then he asked Pichai about the government's proposal to require Google to share much of its search data, and its search index, with competitors at a "marginal cost."

Pichai said the data-sharing proposal would be a disaster. He called it "far-reaching" and "extraordinary," appearing on the stand practically flummoxed by the very idea of the proposal. He said that requiring Google to give up all the data in its search index, and the ways it ranks all that data, "would allow anyone to completely reverse engineer, end to end, any part of our technology stack."

If Google were required to allow other companies to build exact copies of Google's search experience, while also giving them access to how the tech works, Pichai said more than once

he wasn’t sure how to justify continuing to invest so heavily in search. “It’s not clear to me how to fund all the innovation we do,” he told Schmidtlein, “if we were to give all of it away at marginal cost.”

The plaintiffs in this case, of course, argue that forcing Google to give away all its data is the only way to unwind Google’s otherwise unassailable advantage in search. Google has spent billions of dollars on prime placement and default status practically everywhere, has used its Chrome browser to further entrench itself, and has built a flywheel of data, money, and search quality that has made it practically unbeatable. Google calls this the “virtuous” cycle of search; the government calls it “vicious” and says it needs to be disrupted.

Pichai’s testimony also touched on many of the case’s other important remedy proposals, including the government’s desire to force Google to sell Chrome. OpenAI, Perplexity, Yahoo, and others have already lined up to say they’re interested. Before he was Google’s CEO, Pichai led the team that created Chrome in the first place, and he argued that there’s simply no other company in tech that will care for the browser — and the internet — the way Google will.

Google spent over a billion dollars on Chrome in just the last year, Pichai said, and tens of billions in the last decade. He noted that many other browsers run on the open-source Chromium infrastructure, and that Google is responsible for more than 90 percent of its code commits. Other companies can build browsers, Pichai said, “but no one has shown a commitment to the level of investment we put in.”

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One consistent point of questioning from the DOJ has been whether Google is the only company that can take care of its

users’ experience and privacy. (It’s mostly a tactic to force Google to say, no, of course not, over and over again.) But Pichai took issue with Veronica Onyema from the DOJ when she asked whether another company could manage Chrome’s security and privacy as well as Google. He cited “a cultural commitment” to Chrome and the web, and said that “I haven’t seen, since we built Chrome, any other company make the kind of investments” Google has. Even not knowing who might buy Chrome, he said he worries about what might become of the world’s most popular browser in any other hands but his.

Everyone asking questions of Pichai — Schmidtlein, Onyema, and even Mehta from the judge’s chair — wanted to know about AI. In part, this remedies trial has become about making sure the AI field stays competitive, and that Google can’t do again what it did in search. For his part, Pichai doubled down on his theory that AI has the potential to be more profound than fire or electricity, saying “I believe it even more now” than he did a few years ago. Schmidtlein and Mehta had several questions about how AI chatbots might replace search engines, to which Pichai was somewhat evasive; he said that there are certainly overlaps between chatbots and search engines, but also that “the opportunity space is expanding” and it’s not a zero-sum battle between the two products. AI technology in general, though, he said “is going to deeply transform Google Search.”

The deals Google makes for search placement have been a key factor in this trial, and of course Google’s relationship with Apple came up as well. Pichai argued that Google should be allowed to continue paying for placement, as long as its deals are not exclusive. Google has already begun changing its deals to that effect, including with Apple: Onyema asked Pichai to confirm that Google seeks to have a deal done to make Gemini one of multiple options in Apple Intelligence by “the middle of this year,” and a product out in market soon after, and Pichai said yes to both. Since Apple Intelligence already

integrates ChatGPT, this would be exactly the kind of multi-provider deal Google didn’t allow before.

Pichai’s testimony was Google’s argument in a nutshell. The company has held throughout this case that it has been successful not because of monopolistic actions but because it out-invested its competitors and simply built the best product. And now, Google says, the government wants to take the fruits of its labors and give them to anyone who asks.

The DOJ says, well, yes — that’s the only way to level the playing field. Pichai’s obvious goal was to convince Mehta that the proposed changes wouldn’t just prop up competitors, but would also make it impossible for Google to continue being an innovative company. “It’s not clear to me how we’d have any value for our IP,” he said, “if we had to share our IP at marginal cost.”

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