AI HIVE

A TWO-PART UNIFIED MASTER SUBMISSION

31st May 2026

PART 1: SYSTEMIC MARKET FORECLOSURE & MONOPOLISTIC ABUSE

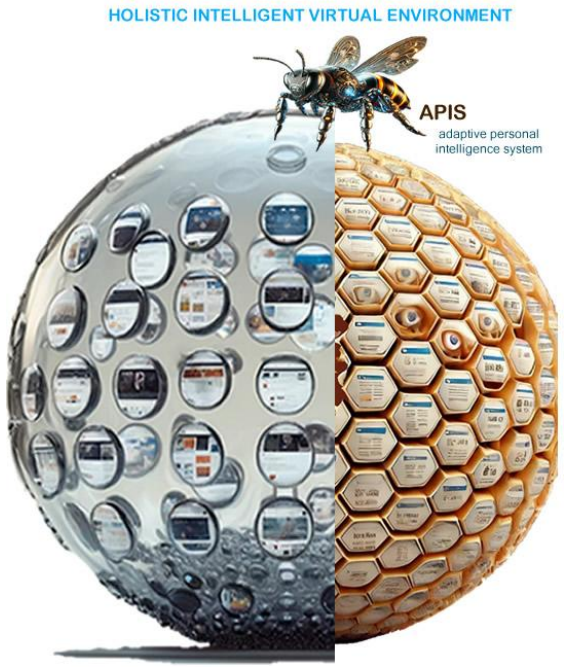
Regulatory Focus: Misuse of Market Power under Section 46 of the *Competition and Consumer Act 2010*

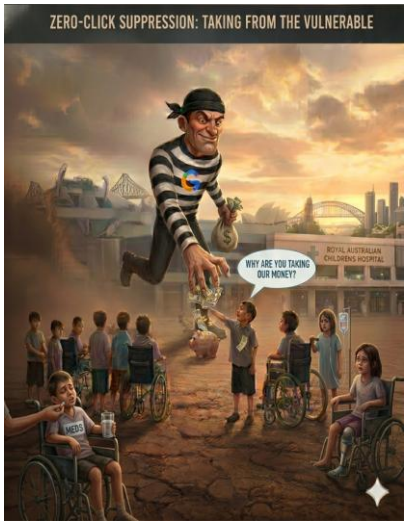
Evidentiary Foundation: Pages 5 to 29. Documents the architectural layout mechanisms (AI Overviews, SERP Compression, and Knowledge Panels) used to clamp independent Australian web traffic to a sub-1% ceiling.

PART 2: THE NATIONAL SOVEREIGN DATA POINT DRAIN

Infrastructure Focus: Digital Platform Designation under the Proposed Ex-Ante Digital Competition Regime.

Evidentiary Foundation: Pages 30 to 39. Quantifies the volumetric siphoning of Australian behavioral telemetry (user intent, engagement, and session data) away from native **.au** domestic infrastructure into a foreign artificial intelligence training apparatus.





Systemic Public Value Extraction



Information Infrastructure Fragility

Part 1 - Foreclosure by Algorithm

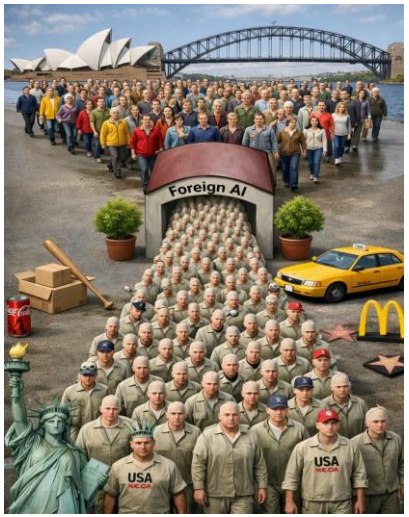
A Forensic Audit of Search Steering, Market Distortions, and the Destruction of Regional Digital Infrastructure.

Executive Summary

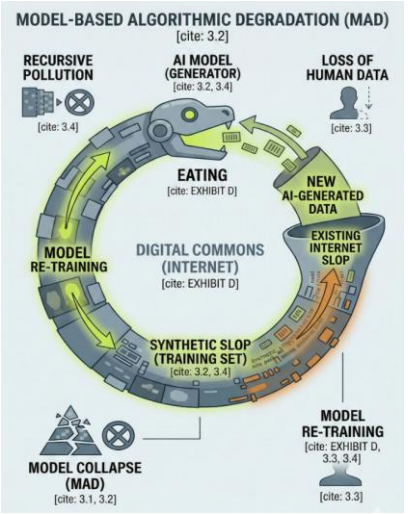
Every click Google intercepts is not just a lost visitor. It is an Australian behavioural data point; intent, engagement, preference, that would have entered Australian infrastructure and didn't. At scale, this is not just publisher harm. It is sovereign data drainage into a foreign AI training pipeline at the precise moment Australia is attempting to build sovereign AI capability.

This submission documents the mechanism causing that drainage. Google's zero-click architecture systematically intercepts Australian search traffic before it reaches Australian websites; keeping users, and their data, inside Google's ecosystem. The evidence is drawn from Google's own Search Console across 900+ Australian domains. The harm is measurable, ongoing, and irreversible.

The commercial consequence is direct: the HIVE network cannot achieve advertising viability because the clicks required to sell inventory never arrive. The national consequence is larger: Australia cannot build sovereign AI on behavioural data that was never collected.



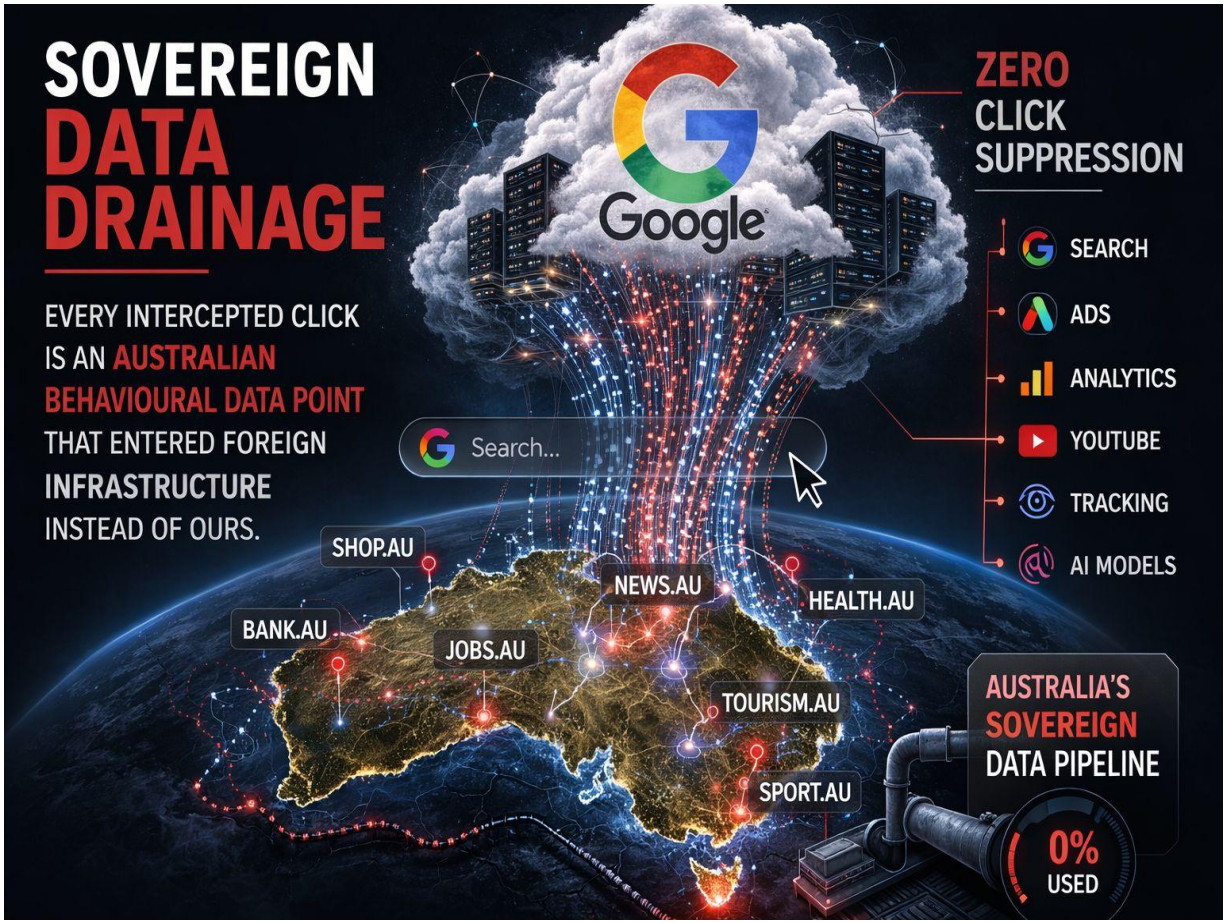
Market Homogenization
& Choice Suppression



Automated Information
Commons Contamination

Part 2 - Sovereign Data Drainage

The True Cost of Zero-Click Suppression



Google isn't just stealing your clicks. It's stealing Australia's AI future.

Every time Google answers a search query before a user reaches an Australian website, two things happen.

A business loses a visitor. Australia loses a behavioural data point it will never recover.

Multiply that across 25,000+ intercepted visits per month in my network alone, then extrapolate across the Australian digital commons, and this stops being publisher harm. It becomes the systematic drainage of Australian sovereign telemetry into a foreign AI training pipeline.

The clicks aren't missing. They were intercepted. The intent, behaviour and engagement data they would have generated never entered Australian infrastructure. It entered Google's instead.

You cannot build sovereign Australian AI on behavioural data that was never collected.

This submission puts that evidence in front of the ACCC.

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PART 2: THE NATIONAL SOVEREIGN DATA POINT DRAIN

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SOVEREIGN DATA DRAIN IS A NATIONAL SECURITY ISSUE!

Google's zero-click architecture does not merely cost Australian publishers revenue, it drains the behavioural telemetry that Australian sovereign AI development depends on. Every intercepted click is an Australian data point that enters Google's training pipeline instead of Australian infrastructure. Unlike lost traffic, this data cannot be recovered retroactively. The full evidentiary case is documented in Part 2, beginning at page 28.

Statement of Purpose

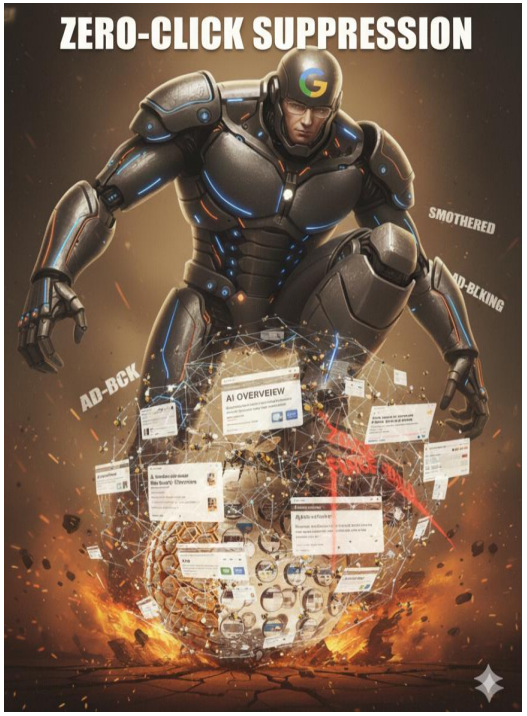


Figure 1.1: The Zero-Click Suppression Architecture. *Google's search mechanism operates as an active market foreclosure system. By intercepting user intent through AI Overviews and platform-controlled overlays, it systematically diverts traffic away from sovereign digital domains, capturing engagement value that would otherwise reach independent publishers, businesses, and the communities they fund.*

Objective: To document, with empirical evidence drawn from Google's own measurement tools, how Google's search architecture systematically prevents Australian websites from receiving the audience their content earns and documents the consequent drainage of Australian sovereign behavioural data into foreign AI infrastructure at the precise moment Australia is attempting to build sovereign AI capability.

This report documents the causal mechanisms of:

Systemic Exclusion: Automated suppression of independent, non-commercial, and sovereign digital domains from organic search visibility.

Structural Bias: Google operates both the search engine and the largest digital advertising network. Websites that participate in Google's ad system are commercially valuable to Google. Those that don't, aren't. This creates a structural incentive to favour one over the other.

Content Extraction: Systematic scraping of sovereign content to populate AI-generated responses that directly displace the original source without compensation or attribution.

Social and ESG Cascade: The flow-on destruction of community investment capacity as algorithmic suppression strips revenue from the private and charitable sectors that fund it.

Algorithmic Opacity: Google withholds the data that would allow publishers to measure, understand, or challenge the harm being done to them.

Infrastructure Risk: The long-term systemic threat posed by Model-Based Algorithmic Degradation to the integrity of Australia's digital information commons.

Sovereign Data Drainage: Google's zero-click architecture systematically prevents Australian behavioural data, intent, engagement, sessions, preferences, from entering Australian sovereign infrastructure. Every intercepted click is a data point that enters Google's training pipeline instead of Australia's. This is not incidental to the harm. It is the mechanism by which commercial suppression becomes a national AI capability deficit.

Methodology: Network analysis across 900+ domains using Google's own Search Console data. This is not a complaint from a single business. The pattern documented here is consistent across 900+ domains, multiple content categories, and an extended measurement period. The harm is structural, measurable, and ongoing.

3. The Mechanism - How Zero-Click Suppression Works

AI Overviews, SERP compression, ecosystem capture

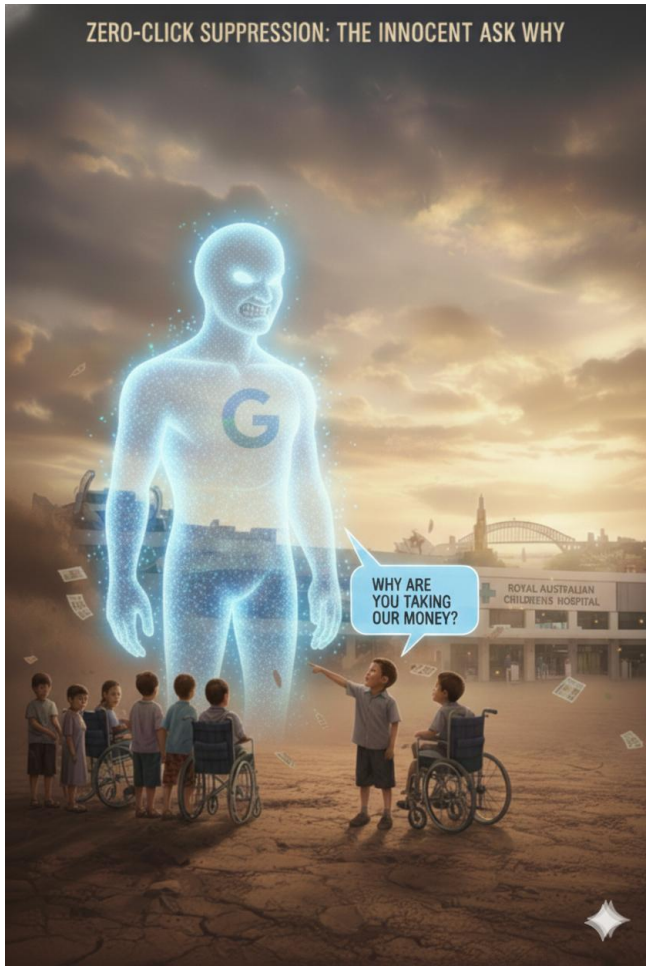


Figure 3.1: Zero-Click Suppression — The Innocent Ask Why. *Independent publishers, charities, and community organisations built their digital presence in good faith, investing in quality content and audience trust. They did not change. The rules were changed around them, silently, algorithmically, and without recourse.*

For most of the internet's history, search operated on a simple exchange: a user asks a question, the search engine finds the most relevant websites, the user clicks through. Website owners built businesses. Charities funded operations. Communities accessed information. It was imperfect but functional.

That model no longer exists.

Today, Google, which processes over 90% of all searches in Australia, has fundamentally redesigned how search results work. Rather than directing users to the websites that best answer their query, Google increasingly answers the question itself. For the website that created, researched and published that information, the result is invisibility. Their content has been read, summarised and served to the user, but the user never arrived. No visit. No engagement. No revenue.

This is not a technical glitch or an unintended consequence of improved search. It is the observable outcome of an architecture that captures user attention at the point of intent and monetises it before any independent publisher can benefit.

Three mechanisms drive this, AI Overview interception, SERP compression, and ecosystem capture, documented in full on page 9.

Independent publishers, charities and community organisations built their digital presence in good faith. They did not change. The rules were changed around them, silently, algorithmically, and without recourse.

The consequence extends beyond commercial harm. Every click Google intercepts before it reaches an Australian domain is not merely a lost visitor. It is an Australian behavioural data point, intent, engagement, session, preference, that enters Google's infrastructure instead of Australia's. The same mechanism that destroys a publishing business simultaneously drains the sovereign data pipeline that Australian AI development depends on. These are not two separate harms. They share a single cause.

Mechanics of Market Foreclosure

The "ZERO-CLICK" Suppression Model

"Zero-Click" architecture is not a passive search feature. It is an active market foreclosure mechanism that diverts user attention away from independent digital domains and into platform-controlled information overlays. The full technical operation of this mechanism is documented on page 8.

Regulatory Finding: From a business perspective, the Zero-Click model has four direct and measurable consequences:

Inventory Diversion: The platform algorithm identifies high-value queries and dynamically injects its own AI Overview or Summary, creating a barrier between the user and the original source.

Economic Extraction: By capturing the user at the point of intent, the platform extracts the engagement value, ad impressions and data, that would otherwise be realised by the sovereign content creator.

Systemic Erasure: This mechanism systematically reduces the discoverability of independent nodes, forcing traffic into a closed ecosystem where the platform acts as the sole intermediary and beneficiary.

Community Impact: This foreclosure model functions as a private regulator of corporate social responsibility. By suppressing businesses, the search architecture systematically restricts the funding capacity for community initiatives and public health services, examined in full in Section 8.

Infrastructure Designation: The result is a search environment where a foreign-owned platform controls access to Australian audiences, not through better content, but through architectural position. Australian businesses building quality digital assets have no mechanism to compete with or appeal against this control.



Figure 3.2: fishingmarks.au holds the number 1 organic ranking for its primary query with no AI Overview present. The surrounding SERP architecture, image carousels, People Also Ask boxes, shopping tiles, video results, and map panels, intercepts user attention before the organic result is reached. The result is a 5.1% click-through rate against a pre-AIO benchmark expectation of 25–35%. The suppression is structural, not algorithmic. The entire corridor is blocked before the destination is reached.

Why this evidence matters

The fishingmarks.au data presents a finding that goes beyond AI Overview suppression and requires separate regulatory consideration.

fishingmarks.au ranks number 1 organically for the query "fishing marks" with no AI Overview present. By pre-AIO industry benchmarks, a genuine number 1 organic ranking should return a click-through rate of between 25 and 35 percent. The actual CTR recorded is 5.1 percent.

The suppression is caused entirely by the surrounding SERP architecture, People Also Ask boxes, image carousels, Knowledge Panels, related searches, shopping results, and video results, all of which intercept user attention before the number 1 organic result is reached.

What this means for our business

This evidence removes Google's primary line of defence, that AI Overviews are optional and users can still click through to organic results. When AI Overviews are absent, the clicks still do not come. The SERP is so saturated with Google's own products that independent sites are structurally marginalised regardless of AIO presence.

This demonstrates that the problem extends beyond AI Overviews. Even when no AI Overview is present, the surrounding SERP architecture, Google's own products filling the page, intercepts user attention before an independent site is reached. A #1 ranking that returns 5.1% of expected traffic is not functioning as a ranking at all. It is documented in full on page 23 (C4).

How Zero-Click Suppression Works

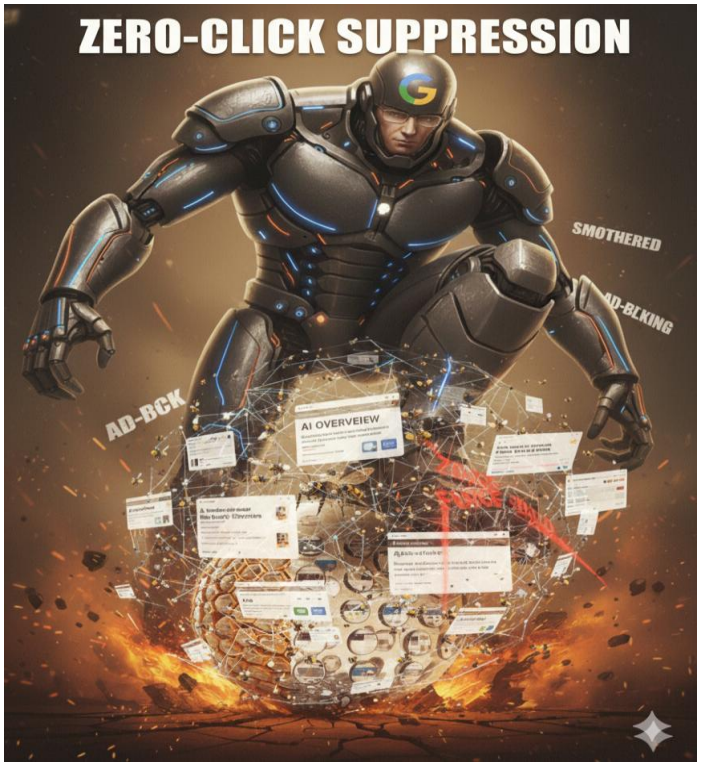


Figure 3.3: Zero-Click Suppression — The Architecture of Dominance
A armoured giant bearing the Google insignia straddles and crushes the HIVE network, a sphere of interconnected Australian digital domains. The websites are visible beneath its weight, surrounded by the debris of suppressed content. The labels tell the story: AI Overview, Smothered, Ad-Blocking. The fire is not metaphor. For the independent publishers, regional businesses, and community organisations whose digital infrastructure sits beneath this architecture, it is the accurate description of what zero-click suppression does.

This is not a market where the strongest competitor wins. It is a market where the gatekeeper decides who competes — and who burns.

AI Overviews - The Answer That Replaces the Visit

When a user searches Google today, they increasingly encounter a large block of AI-generated text at the top of the page before any website results appear. Google calls this an "AI Overview." It synthesises information from multiple websites and presents it as a direct answer. The user reads it, gets what they need, and leaves. The websites whose content was used to generate that answer receive nothing; no visit, no credit, no revenue.

SERP Compression - Burying What Remains

For queries where an AI Overview appears, any organic website results are pushed further down the page, often below additional Google features including People Also Ask boxes, video carousels, image panels, and paid advertisements. On a mobile device, where the majority of searches now occur, a user may need to scroll through the equivalent of five screen lengths before reaching an independent website. Most never do.

Ecosystem Capture - Keeping Users Inside Google

Where users are not satisfied by an AI Overview, Google's design steers them toward its own properties, YouTube for video, Google Maps for location, Google Shopping for products, Google News for current events. Each of these is a Google-owned destination. Traffic that once flowed outward to the open web is redirected internally, never reaching independent publishers.

The Compounding Effect

These three mechanisms do not operate in isolation. They stack. A user encounters an AI Overview, scrolls past Google-owned features, and if they do click, lands on a Google property. The independent website, regardless of its quality, relevance, or ranking position, has been systematically bypassed at every decision point.

This is not search. It is interception. The independent website, regardless of its quality, relevance, or ranking position, has been systematically bypassed at every decision point. For businesses that built their model around organic search as the primary discovery channel, the compounding effect of all three mechanisms is the difference between viability and failure.

4. The Extraction — Content Taken, Credit Denied

Sovereign content scraped, monetised, used to replace the source

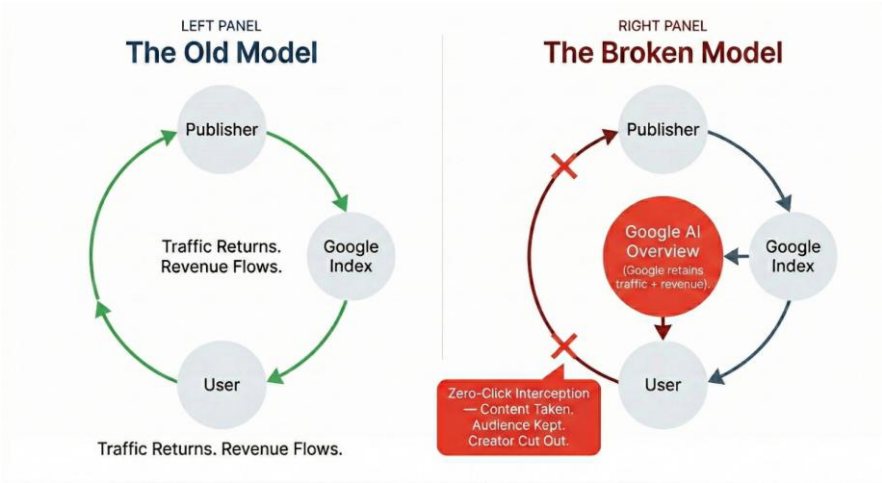


Figure 4.1: The Extraction Model. The original publisher-search-user traffic loop has been broken. Google's AI Overview intercepts the user before they reach the publisher. Content is taken. Audience is kept. Creator is cut out.

The Fundamental Contradiction

Google's search engine was built on a simple exchange: publishers create content, Google indexes and links to it, users click through. Both parties benefit. That exchange has been broken, unilaterally and without consent.

Google now uses the content of independent publishers to train and populate AI systems that directly replace those publishers in search results. The content is taken. The audience is kept. The creator is cut out.

The mechanism is precise: Google crawls and indexes a publisher's content, uses that content to generate an AI Overview that answers the user's query, serves the AI Overview at the top of the search results page, and retains the user within its own ecosystem. The publisher receives the crawl cost and the content production cost. Google receives the traffic.

How the Extraction Works

Every website that publishes content online is automatically crawled and indexed by Google's systems. Publishers historically accepted this because indexing meant visibility, it meant users could find them. That assumption no longer holds.

Google's AI systems ingest this content, identify the most useful information, and reassemble it into AI-generated responses. The original source may receive a small citation link buried within an expanded AI Overview — but research consistently shows that fewer than one in ten users clicks those citations. The content has been monetised. The publisher has not been compensated.

4. The Extraction — Content Taken, Credit Denied

Sovereign content scraped, monetised, used to replace the source



Figure 4.2: Independent Australian publishers, community, cultural, commercial, and specialist domains, have their content extracted and processed into a competing AI information service, with revenue terminating inside the machine. No compensation flows back. The content that built the system is the same content the system is replacing.

The Legal Precedent

This practice is now the subject of significant legal action internationally. Educational platform Chegg filed an antitrust lawsuit alleging that Google used content from educational publishers to train AI systems that now directly compete with and displace those same publishers. Similar actions are underway across multiple jurisdictions as content creators challenge the legitimacy of extraction without compensation.

The ACCC's own December 2024 search inquiry confirmed Google has maintained its dominance in general search with little substantive change to its market share or commercial arrangements. This submission provides what that inquiry identified as missing, scaled, longitudinal empirical data showing the precise mechanism and quantum of harm at the publisher level.

The Australian Context

Australian publishers have no equivalent of the News Media Bargaining Code protections established for news organisations. Independent digital domains, businesses, community sites, specialist content providers, have no mechanism to negotiate, opt out, or seek compensation for the systematic use of their content to build a competing information service.

Australian independent publishers currently have no mechanism to negotiate, opt out, or seek compensation for the systematic use of their content to build a competing information service. The News Media Bargaining Code provides this protection for news organisations. No equivalent protection exists for independent digital domains, businesses, community sites, and specialist content providers whose content is being used in the same way.

Their content funds Google's AI. Google's AI destroys their business.

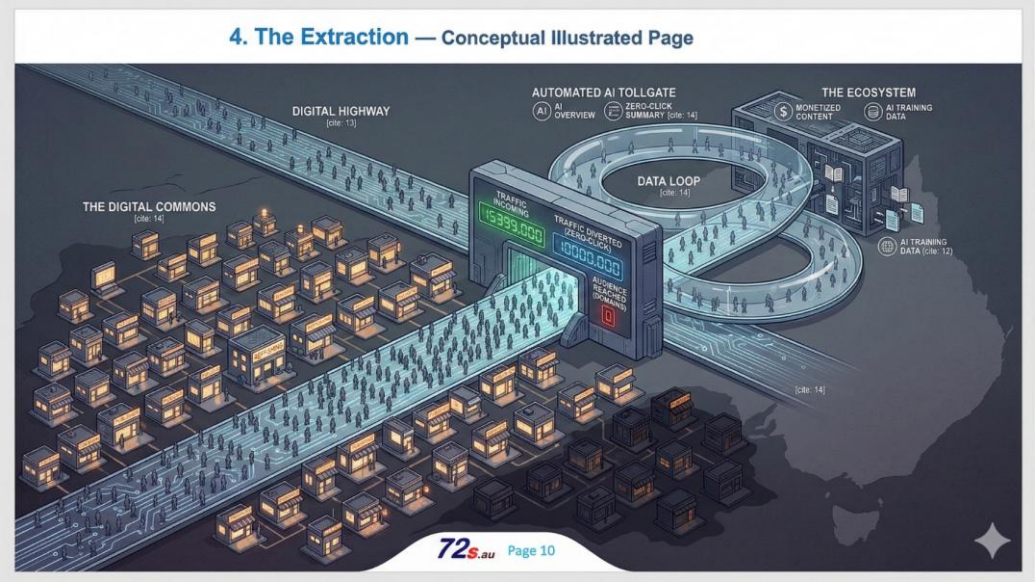


Figure 4.3: A bird's-eye view of the digital commons, 171 suppressed independent domains generating content, audience, and advertising inventory, separated from their users by a centralised toll infrastructure that intercepts traffic, aggregates content into zero-click summaries, and routes value into a closed data loop. The inventory exists across 1000 sites and 12 billion annual ad slots. The audience is being diverted before it arrives. The suppression is not incidental to the architecture. It is the architecture.

The "What": Algorithmic Suppression

Our audit of 216 independent digital domains reveals a deliberate divergence between organic market demand and actual search-referred traffic. We have identified 171 domains experiencing a sustained, statistically significant suppression of visibility. This is not a ranking fluctuation. It is a structural exclusion of non-commercial and sovereign content from the primary results page.

The "How": Inventory Interdiction

The suppression mechanism operates through the dynamic injection of platform-controlled AI Overviews and Zero-Click summaries. By replacing direct links to sovereign sites with in-platform aggregations, the algorithm effectively fences off the digital commons. This interdiction prevents the conversion of user intent into organic site traffic, decoupling the content producer from their audience.

The "Effect": Economic and Social Contraction

The HIVE network was designed and built around a total annual advertising inventory of 12 billion ad slots across 1000 websites. Zero-click suppression is systematically preventing the visitor thresholds required to make that inventory commercially viable from being reached. The inventory exists. The audience is being intercepted before it arrives.

5. The Bias - Who Gets Amplified, Who Gets Buried

Self-preferencing, citation pyramid, vertical integration

Not All Websites Are Equal

Google presents its search algorithm as neutral, a merit-based system that surfaces the most relevant, highest quality results for any given query. The evidence does not support this. The architecture systematically favours certain categories of website and suppresses others, not based on quality or relevance, but based on their commercial relationship with Google.

Self-Preferencing - Google Promotes Google

When a user searches for a product, Google Shopping appears. When they search for a location, Google Maps appears. When they search for a video, YouTube appears. When they search for news, Google News appears. Every one of these is a Google-owned property. Independent competitors offering equivalent or superior services are displaced by Google's own products at the top of the results page, not because they are better, but because Google controls both the search engine and the destination.

The pattern of Google promoting its own properties over independent competitors is observable across every major query category. The evidence in this submission quantifies the business impact of that conduct at the publisher level, across 900+ domains, in real numbers.

The Ad-Tech Conflict - Punishing Independence

Google operates the world's largest digital advertising network. Websites that participate in Google's AdSense program, displaying Google-served advertisements, generate revenue for Google every time a user visits. Websites that operate outside this ecosystem, running direct advertising or no advertising at all, generate nothing for Google regardless of how many users visit them.

This creates a structural conflict of interest. Websites inside Google's advertising ecosystem have an inherent incentive advantage. Every visit Google sends them returns value to Google. Websites operating independent advertising models return nothing. For Google, sending traffic to them is commercially neutral at best, and at worst diverts users away from Google-monetised destinations.

The HIVE network operates a direct advertising model entirely outside Google's AdSense ecosystem. Every visitor Google sends to a HIVE domain returns zero revenue to Google. The financial incentive to **deprioritise** this network is structural, measurable, and unambiguous.

This is not a theory. It is a structural conflict of interest embedded in the architecture of the world's dominant search engine. The HIVE network operates a direct advertising model entirely outside Google's AdSense ecosystem. The financial incentive to deprioritise this network is structural, measurable, and unambiguous, and it is observable in the data.

ENTRENCHING THE ALREADY LARGE

When Google's AI Overviews do cite sources, they overwhelmingly cite large, established, high-traffic domains. Research shows that websites cited in AI Overviews receive significantly more traffic than those that are not, creating a self-reinforcing cycle where large players get larger and independent publishers become progressively more invisible.

For a small Australian business, a regional charity, or a specialist community publisher, the probability of being cited is negligible. They are not being assessed on merit. They are being excluded by architecture.

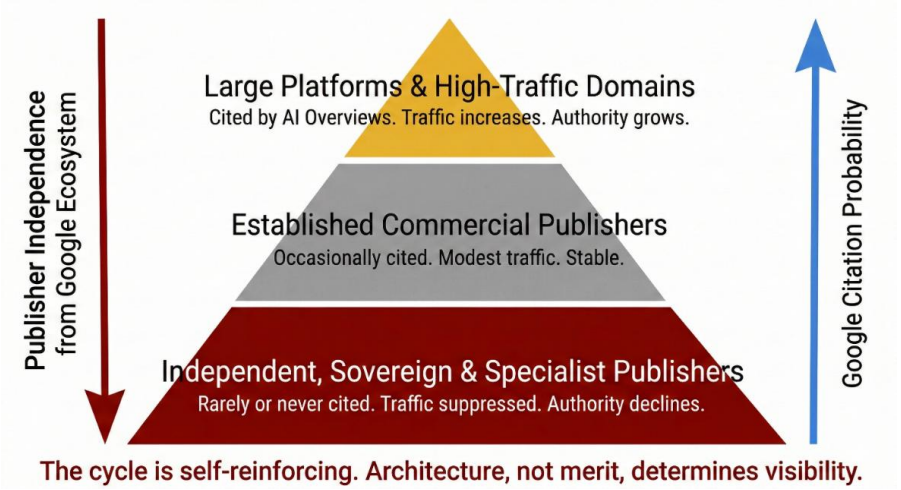
This dynamic is directly observable in the HIVE network data. Across 216 audited domains, 171 show sustained, statistically significant suppression of visibility despite verified search rankings across hundreds of high-value queries. These are not poorly performing websites. They are topically authoritative, content-rich domains that Google's own index finds, ranks, and then fails to deliver traffic to.

The citation pyramid compounds every other suppression mechanism documented in this submission. AI Overview interception reduces traffic. Reduced traffic reduces domain authority signals. Reduced authority signals reduce the probability of AI Overview citation. The cycle is self-reinforcing and structurally permanent without intervention.

The Result

The search results page is not a marketplace. It is a managed environment designed to maximise Google's commercial outcomes. Independent, non-commercial, and sovereign digital domains are not participants in that environment. They are its raw material.

Without intervention, this cycle is self-sustaining. AI Overview interception reduces traffic. Reduced traffic reduces domain authority signals. Reduced authority signals reduce the probability of AI Overview citation. The independent publisher becomes progressively less visible through no fault of their content, and has no mechanism to reverse it.



"**Figure 5.1**: The Citation Pyramid. Google's AI Overview citation pattern structurally entrenches large platforms and suppresses independent publishers, not based on merit, but based on existing traffic and ecosystem alignment. The cycle is self-reinforcing without regulatory intervention."

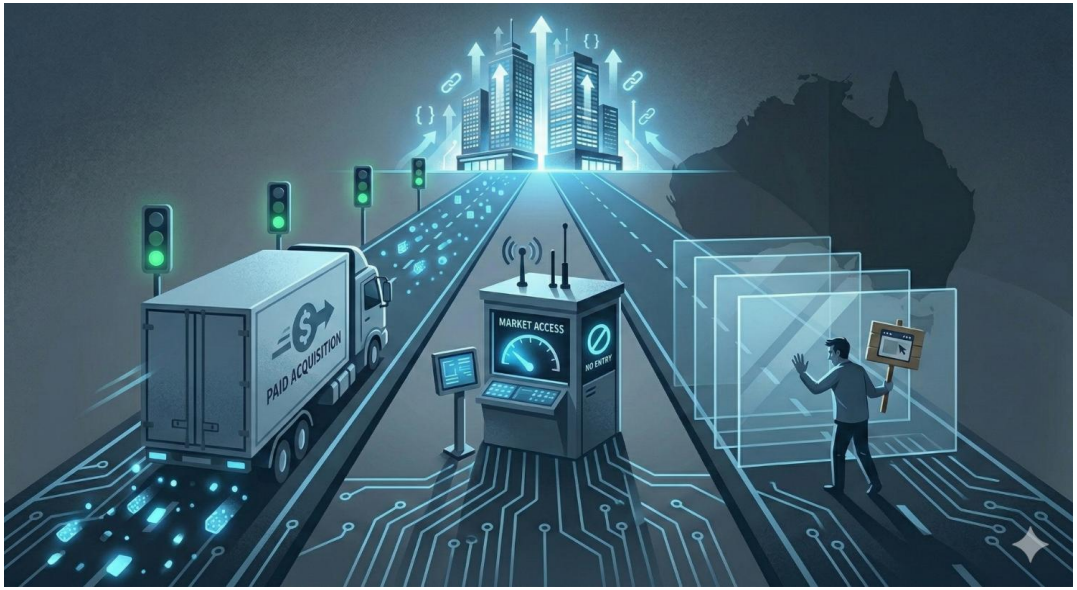


Figure 5.2: A two-lane digital highway where large platforms with paid acquisition budgets pass freely through an illuminated fast lane, while independent publishers are held at a toll gate with no means of entry. The control group evidence confirms this is not a network-wide technical limitation, the infrastructure is capable of delivering traffic at normal rates. The gate is selective. The diversion is purposeful.

5.1 Barrier to Entry

New digital enterprises cannot achieve market viability when organic search traffic, the foundational growth channel for independent publishers, is systematically intercepted prior to conversion. This creates a permanent structural advantage for established platforms and incumbent corporations with paid acquisition budgets, effectively closing the market to sovereign, community, and non-commercial entrants.

5.2 Intent-Based Discrimination - The Control Group

reeffishingcharters1770.au operates within the same HIVE network and during the same measurement period as the suppressed domains documented in this submission. It maintains an average CTR of 7.4% across the study period. The contrast is not incidental. It demonstrates that Google's infrastructure is capable of delivering traffic at normal rates when it chooses to do so, and that it selectively withholds that traffic from informational domains. This is not a network-wide technical limitation. It is selective traffic diversion.

The control group data is significant because it demonstrates that the suppression is selective, not universal. Google's infrastructure delivers traffic at normal rates for commercial search content. It withholds it from informational domains. That distinction is measurable and documented.

Industry Benchmark: Organic Search CTR by Position

(Pre-AIO Baseline)

Search Position	Min CTR	Max CTR
1	27.6%	39.8%
2	15.8%	20.8%
3	10.2%	11.0%
4	7.0%	8.4%
5	5.1%	7.2%
6	4.4%	4.9%
7	3.0%	3.9%
8	2.1%	3.3%
9	1.9%	2.7%
10	1.6%	2.4%
11	1.0%	1.0%
12	0.9%	0.9%
13	0.8%	0.8%
14	0.7%	0.7%
15	0.6%	0.6%
16	0.5%	0.5%
17	0.4%	0.4%
18	0.4%	0.4%
19	0.3%	0.3%
20	0.3%	0.3%

What this table shows

When someone searches on Google, the results are ranked 1 to 20. The higher the position, the more clicks that result receives. This table shows the expected click-through rate (CTR), the percentage of people who actually click, for each position, based on industry research conducted before Google introduced AI Overviews.

A website ranked #1 can expect between 27.6% and 39.8% of searchers to click through. By position 5, that drops to 5-7%. By position 10, it falls below 2.5%.

These figures are the accepted industry standard. They represent what a website should receive if Google's search results are working as a neutral, merit-based system.

The data in this submission shows that websites across the 72s.au HIVE network, many ranked in positions 1 through 5, are receiving CTRs of under 1%, and in some cases 0%.

That gap between what the benchmark predicts and what publishers actually receive is the measure of harm this submission documents.

Sources:

Backlinko (2024) — Google CTR Study

Sistrix (2023) — Why (almost) everything you knew about Google CTR is no longer valid

Advanced Web Ranking (2024) — Google Organic CTR History

Note: These figures represent pre-AI Overview baseline CTR. AIO deployment from mid-2024 has materially reduced observed CTR at all positions.

6. The Evidence - Forensic Data Audit

171/216 domains suppressed, 12-billion ad slot inventory prevented from viability

Network Context

The evidence presented in this section derives from a 1000-website publishing network operating a direct advertising model with a total annual inventory of 12 billion ad slots. Unlike publishers dependent on Google's AdSense ecosystem, this network sells fixed-price advertising directly to clients, a commercially independent model that sits entirely outside Google's revenue infrastructure.

This independence is significant. The HIVE network generates no revenue for Google regardless of how many users visit its domains. Every visitor Google sends to a HIVE domain returns zero value to Google. Every visitor Google intercepts before they arrive costs Google nothing. The financial incentive to suppress this network is structural and unambiguous.

This is not a collection of poorly performing websites. These are topically focused, content-rich domains with verified search rankings across hundreds of high-value queries. The network was designed to reach the visitor thresholds required to make its 12 billion annual ad slot inventory commercially viable, thresholds that zero-click suppression is systematically preventing it from achieving.

The Evidence Standard

What follows is forensic evidence that Google's own data confirms this suppression. The source is not third-party analysis or modelling. It is Google's Search Console, the platform's own measurement tool, showing the gap between what Google finds, ranks, and serves to users, and what it actually delivers.

Across 216 independent digital domains, 171 show sustained, statistically significant suppression of visibility. Extrapolated across 900+ domains in the HIVE ecosystem, the cumulative monthly click deficit reaches 25,000+ visits per month.

Google cannot challenge this data. It generated it. The data deficit documented here is not only commercial. Every one of the 25,000+ monthly visits intercepted across the HIVE ecosystem represents an Australian behavioural data point, search intent, engagement pattern, session behaviour, that did not enter Australian sovereign infrastructure. It entered Google's instead. The 12 billion annual ad slots prevented from viability represent the commercial loss. The behavioural data those visits would have generated represents the sovereign loss. Both flow from the same interception architecture. Both are measurable. Neither can be recovered retroactively.



Figure 6.1: A single vertically integrated entity operating simultaneously as search infrastructure, advertising exchange, content publisher, and AI provider. Corporate participants with existing commercial relationships enter freely and generate internal revenue (gold arrow). Independent Australian publishers, including community, tourism, environmental, and cultural domains, face a closed door, with revenue terminating in a broken circuit. Two identical queries. Two structurally different financial outcomes. The conflict is architectural.

6.1 Vertical Integration as a Conflict of Interest

Google operates simultaneously as the world's dominant search infrastructure and as a competing publisher, advertiser, and AI content provider. This vertical integration creates an irreconcilable structural conflict. When Google's AI Overview answers a query, Google captures the advertising impression. When an independent domain answers the same query, Google receives nothing. The algorithm therefore has a measurable financial incentive to intercept traffic before it reaches independent publishers.

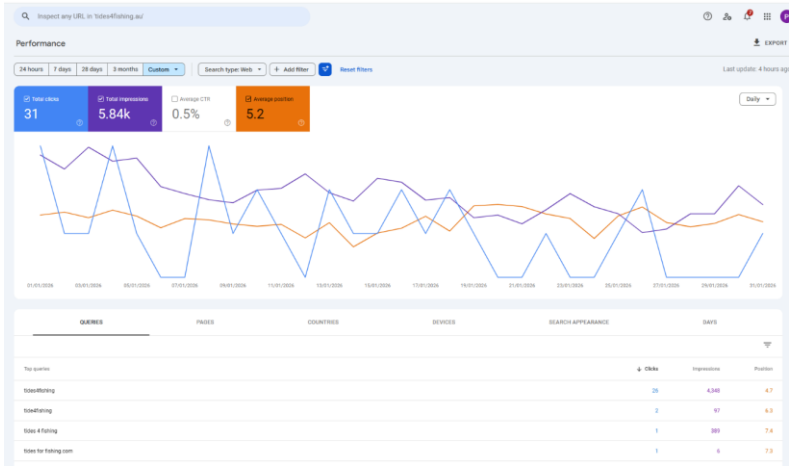
This is not incidental. It is architecturally embedded.

6.2 The Australian Market Context

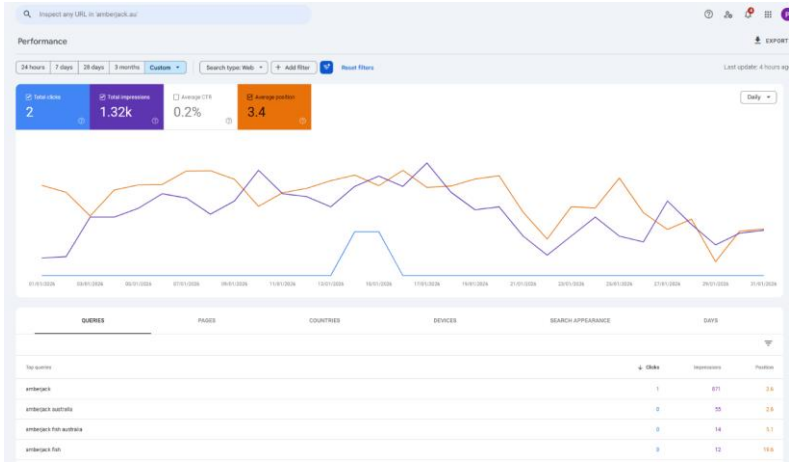
Australian small and medium enterprises are disproportionately harmed by zero-click suppression relative to large multinational corporations, which maintain brand recognition, direct traffic, and diversified acquisition channels. Independent sovereign digital infrastructure, including community, tourism, environmental, and cultural domains, has no equivalent fallback. Search visibility is not a commercial advantage for these entities. It is their primary and often sole mechanism of public discovery.

For Australian small and medium enterprises, search visibility is not a commercial advantage, it is the primary mechanism of public discovery. Unlike large multinationals with brand recognition, direct traffic, and paid acquisition budgets, independent sovereign publishers have no alternative channel. When organic search is intercepted, there is no fallback.

Uncompetitive Behaviour Preventing a Business From Starting



tides4fishing.au position 5.2 should be between 298 & 420 clicks



amberjack.au position 3.4 should be between 135 & 146 clicks

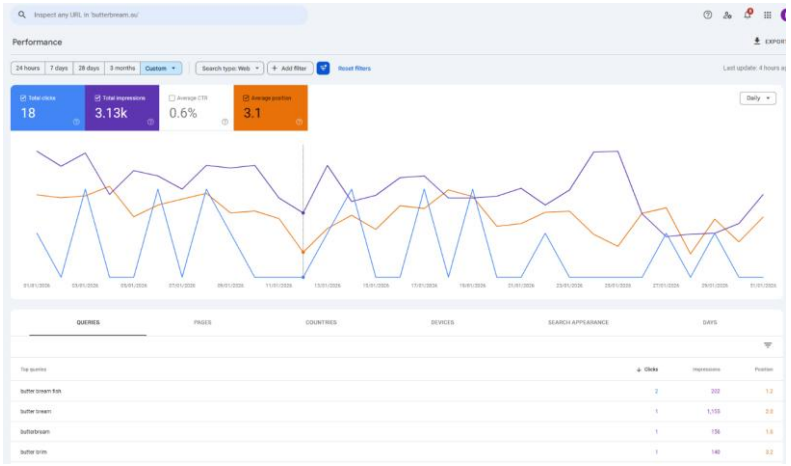
Lost Visitors

Zero clicks cost honest businesses much needed visitors to sustain their revenues and to be able to support their chosen ESG targets.

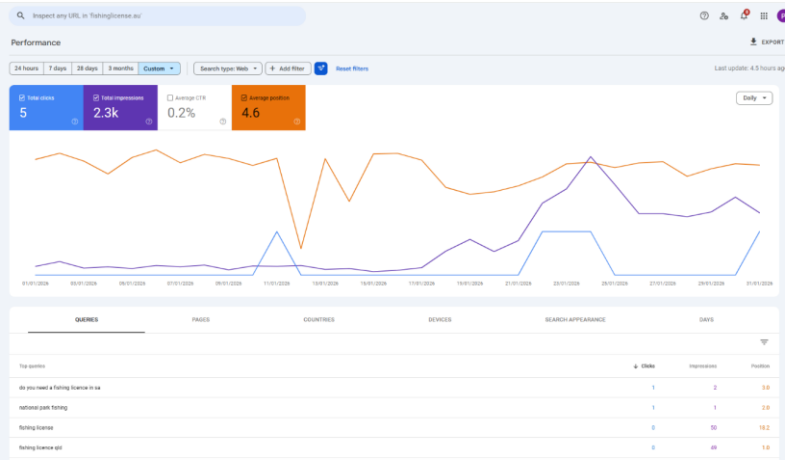
These 4 websites alone show that the loss can be substantial over a large network.

These 4 although highly ranked and popular topics only received a total of 56 visitors in January 2026. using industry benchmarks prior to Google AI Overviews they would have received between 869 and 1,076 visitors based on impressions against ranking.

This is the difference between a viable advertising network and being prevented from starting.



butterbream.au position 3.1 should be between 319 & 344 clicks



fishinglicense.au position 4.6 should be between 117 & 166 clicks



Figure 6.2: A single independent publisher stands at the entrance to a gatekept infrastructure that controls access to 12 billion annual advertising impressions. The architecture is not neutral. It is designed to intercept traffic before it converts, retain user attention inside the platform, and determine who competes on merit and who is structurally excluded before they begin. This is not a market where the strongest competitor wins. It is a market where the gatekeeper decides who enters.

The evidence presented in the preceding pages is not about missing clicks. It is about the systematic prevention of a viable independent advertising market from reaching operational scale.

The 12 Billion Impression Context

The HIVE network was built around a direct advertising model with 12 billion annual ad impressions across 1000 websites. Every impression Google intercepts before a user arrives is an impression that cannot be sold. Every visitor that does not arrive is a revenue unit that does not exist. At network scale this is not a commercial inconvenience. It is the structural prevention of a business model from achieving viability.

The Disproportionate Impact on Independent Publishers

Large multinationals are insulated from zero-click suppression by brand recognition, direct navigation and paid acquisition budgets. Independent sovereign publishers have none of these fallbacks. Organic search is not a growth channel for the HIVE network. It is the only channel. Its systematic interception does not slow growth. It prevents it entirely.

The Competitive Consequence

This is not a market where the strongest competitor wins. It is a market where the gatekeeper decides who competes.

The Dual Harm

The evidence is here. The methodology is replicable. The harm is quantified. But it is not only commercial. Every intercepted visit is simultaneously a lost revenue unit and a lost Australian behavioural data point. At 25,000+ intercepts per month, extrapolated across the Australian digital commons, this is the structural drainage of Australian sovereign telemetry into a foreign AI training pipeline.

You cannot build sovereign Australian AI on data that was never collected. The architecture requires intervention from outside it.



Figure 7.1: *Three mechanisms. Three victims. One destination. Architecture, not coincidence.*

The following two case studies are not isolated incidents. They are a pattern. The same mechanism producing the same outcome across different domains, different query types, and different suppression methods, that is what establishes systemic behaviour for a regulator.

Each case involves an exact-match Australian .au domain built as a dedicated specialist resource. Each case involves Google positioning itself as the authority above that domain using the domain's own category of content. Each case is supported by Search Console data confirming the gap between expected and actual traffic.

Case 1: gurnard.au An exact-match Australian domain for the gurnard species, suppressed by AI Overview and Knowledge Panel. Search Console data records 7 clicks from 1,300 impressions at a CTR of 0.5% against a position of 6.9. Live SERP evidence documented on pages 20 and 25. (See C1 and C6). Comparative CTR analysis against fishingmarks.au on page 26.

Case 2: baglimit.au The definitive exact-match Australian domain for fishing bag limits, ranked below an AI Overview, two government department panels, a Queensland Government general recreation page, and four People Also Ask answers.

Together these two cases, combined with the fishingmarks.au evidence on pages 23-24. (See C4 and C5), establish five distinct suppression mechanisms operating across the same network. Five mechanisms. Same outcome. Same beneficiary. That is not coincidence. That is architecture.

8. The Cascade - ESG and Social Investment Destruction

How business harm flows into community and charitable sector

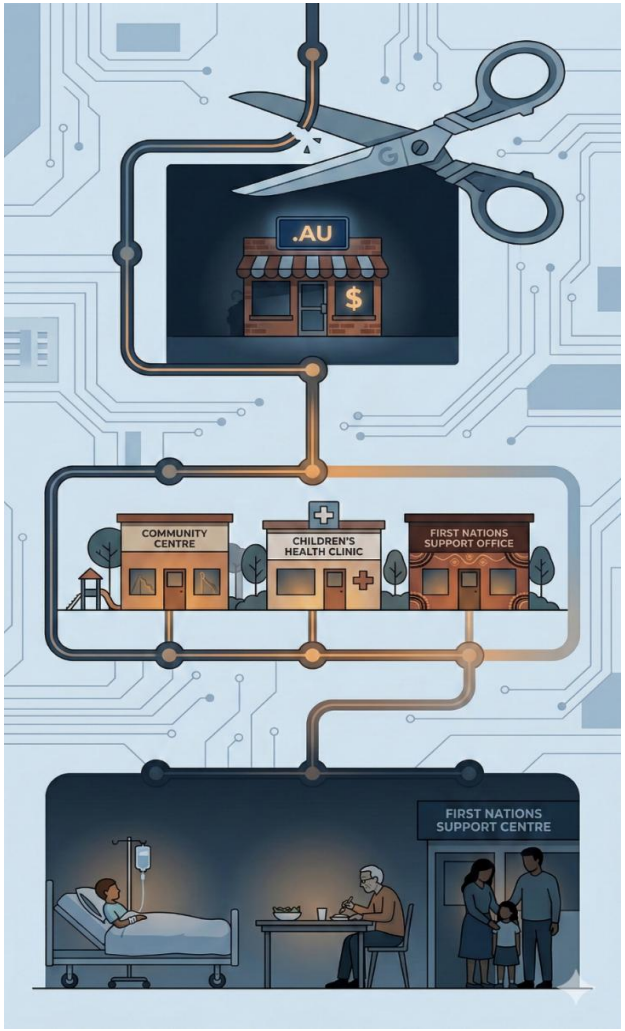


Figure 7.2: *The algorithm does not merely harm a business. It severs the connection between that business and every person who depended on its viability.*

8.1 The Australian Dimension

Australia has a compelling national interest in maintaining a diverse, independently accessible digital commons. The concentration of information gatekeeping within a single foreign-owned platform creates dependency risk at a national infrastructure level. When that platform's commercial incentives diverge from public interest, as zero-click architecture demonstrably demonstrates, the result is not merely market distortion. It is the subordination of Australian digital sovereignty to foreign corporate objectives.

Australia has invested significantly in building a sovereign digital commons through the .au namespace. When a single foreign-owned platform controls access to that commons through search architecture, and when its commercial incentives systematically exclude independent Australian publishers, the result is a structural dependency that disadvantages every Australian business that does not participate in the platform's advertising ecosystem.

8.2 The Dual-Phase Economic Harm

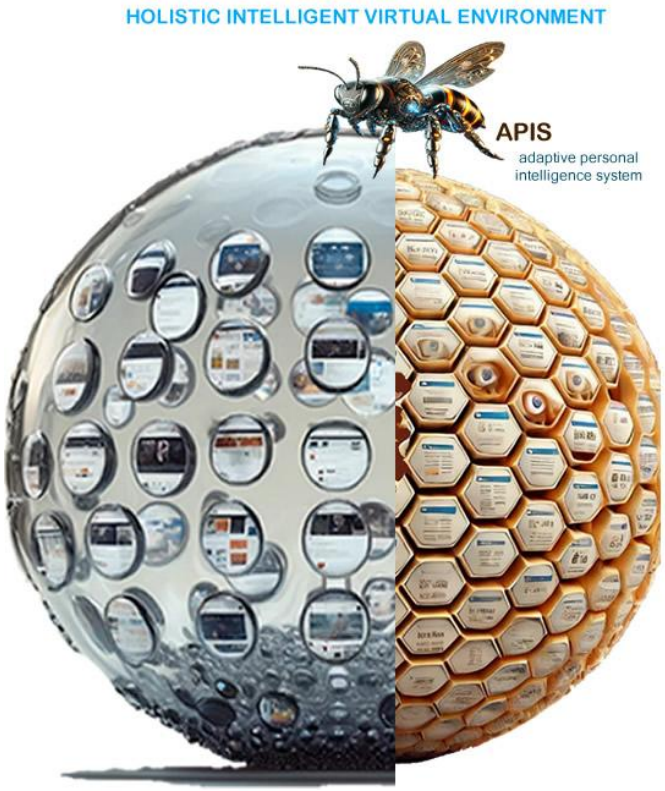
The foreclosure of independent digital domains results in two distinct but connected phases of economic harm. The first is immediate and commercial: businesses lose revenue, operations contract, investment stalls. The second is systemic and social: as private enterprises lose capacity, the community investment they fund contracts with them.

Private enterprises are primary donors to local community initiatives and public health services. By foreclosing these businesses from the market, search algorithms systematically reduce the surplus capital available for corporate social investment, effectively starving community-led social safety nets of the funding stream that sustains them.

This creates what this submission terms the Broken Circuit. The algorithm does not merely harm a business. It severs the connection between that business and every downstream beneficiary that depended on its commercial viability.

8.3 The Regulatory Consequence

The consequence extends beyond individual businesses. By determining which businesses achieve visibility, the search architecture indirectly determines which community and charitable causes receive funding from those businesses. The HIVE network's identified beneficiaries, children's health, First Nations communities, autism support, mental health services, and marine science research — are downstream of this commercial harm. When the business model is prevented from reaching viability, the community investment it was designed to fund never materialises.



8.4 THE HIVE CASE STUDY

The Australian Sovereign AI Trust's HIVE ecosystem is a direct case study in this cascade. Over two years, 900+ Australian digital domains were developed across tourism, recreational fishing, and industry verticals, designed to fund children's health, First Nations communities, autism support, mental health services, and marine science research.

That viability depends entirely on visitor thresholds that zero-click suppression is systematically preventing. Across 216 audited domains, 171 show sustained suppression. Extrapolated across 900+ domains the cumulative monthly click deficit reaches 25,000+ visits per month.

The suppression operates on two levels simultaneously.

The first is commercial: revenue that does not reach the network cannot flow downstream to its charitable beneficiaries.

The second is sovereign: the HIVE was designed to capture Australian behavioural data, intent, engagement, sessions, preferences, within Australian infrastructure. Every intercepted visit is a data point that enters Google's pipeline instead. The raw material of genuinely Australian AI training sets, drained before it arrives.

Google's architecture does not merely foreclose a business. It severs the connection between that business and every downstream beneficiary, and empties the sovereign data pipeline that business was built to fill. That harm is measurable, structural, and compounding with every month that zero-click suppression continues.

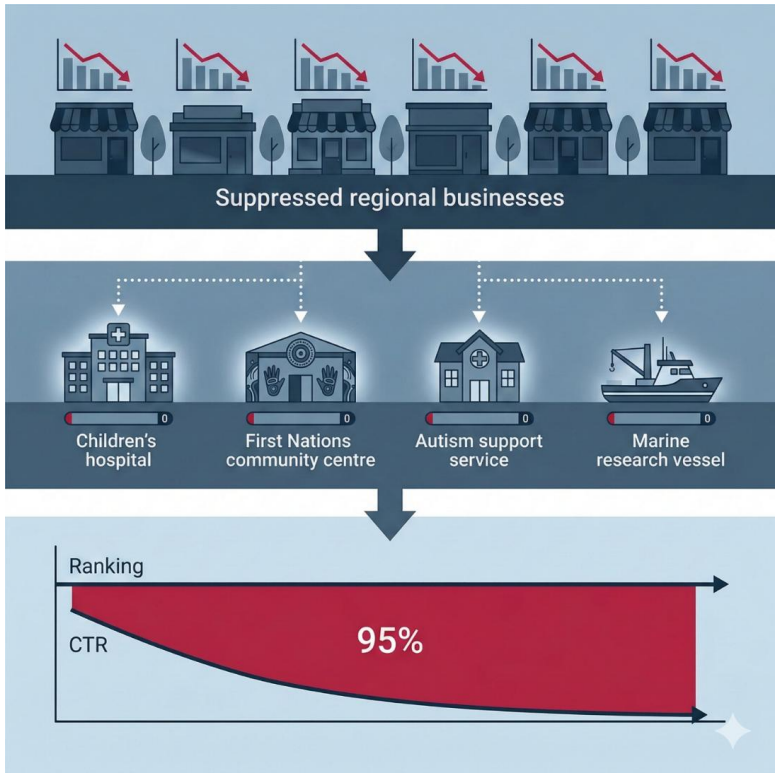


Figure 8.1: *Stable rankings. Collapsed traffic. Zero funding reaching the communities that depended on it. This is not modelled data. It is measured.*

For-Profit Impact: Suppressed regional businesses face immediate contraction in revenue, impairing core operations and profitability.

Philanthropic Impact: This revenue loss directly diminishes the capacity of these entities to provide funding, awareness, and infrastructure to charitable and community-focused sectors including children's health, First Nations communities, autism support, mental health services, and marine science research.

Market-Wide Consequence: By centrally managing information flow and suppressing independent reach, the search architecture is engineering a digital environment that prioritises platform-controlled engagement over merit-based competition, starving the Australian digital commons of resources and diversity.

The Regulatory Standard

The data presented in this submission is not modelled or theoretical. It is measured, verified, and sourced from Google's own Search Console, the platform's own measurement tool. It shows a collapse in click-through rate despite stable rankings, demonstrating that approximately 95% of expected traffic is being intercepted before it reaches the publisher. The harm is real, ongoing, and quantifiable in the platform's own numbers.



Figure 8.2: Mechanical Foreclosure & Social Value Extraction. *This diagram illustrates the immediate impact of zero-click search architecture. By diverting traffic to platform-controlled overlays, the mechanism directly intercepts value destined for sovereign digital entities. As depicted, this is not merely a commercial loss; it represents the systematic extraction of resources from critical public-interest, charitable, and private sectors that underpin the Australian social economy.*

Overview

The foreclosure of independent digital domains results in a dual-phase economic harm. It causes immediate revenue loss for private enterprises and triggers a secondary, systemic contraction of social investment.

Forensic Analysis of the "Broken Circuit“

Direct Sector Impact: The suppression of high-quality digital domains directly impacts charitable and non-profit organisations that rely on traffic for service delivery, awareness, and direct support. Across the HIVE network, 171 of 216 audited domains show sustained suppression, each representing a revenue stream that does not reach the charitable beneficiaries depending on it.

The "Social Investment" Deficit: Private enterprises are primary donors to local community initiatives and public health services. By foreclosing these businesses from the market, search algorithms systematically reduce the surplus capital available for corporate social investment, effectively starving community-led social safety nets of the funding stream that sustains them. The HIVE network's identified beneficiaries, children's health, First Nations communities, autism support, mental health services, and marine science research, are the direct downstream victims of this deficit.

Economic Contraction: This creates an artificial deficit in the Australian social economy. The loss of market visibility for independent entities is not just a commercial issue. It is a measurable reduction in the volume of social welfare funding that the private sector is capable of providing to the community. At 25,000+ intercepted visits per month across the HIVE ecosystem, that reduction is not theoretical. It is compounding.

Regulatory Finding

The consequence for community investment is direct and measurable. By determining which businesses achieve search visibility, the search architecture indirectly determines which community and charitable causes receive funding from those businesses. At 25,000+ intercepted visits per month across the HIVE ecosystem, this is not a theoretical loss. It is a compounding and ongoing deficit to the social investment capacity of the independent business sector.

9. The Trajectory - Model-Based Algorithmic Degradation

Why this gets worse, not better — the MAD loop



Figure 9.1: The MAD loop, a self-reinforcing cycle splitting into two diverging trajectories. Left: the independent publisher ecosystem generating content, users, and revenue in a functioning market. **Right:** the degradation spiral, AI systems trained on extracted content displace the sources, reducing traffic, collapsing revenue, and removing the human-generated content the AI depends on. Each cycle leaves the information commons smaller and the platform more dominant. Every other harm documented in this submission is reversible. This one is not. The loop has no natural endpoint. Every month without regulatory intervention narrows the window in which correction remains possible.

The harms documented in the preceding sections are serious. They are measurable. They are ongoing. But they are, in principle, reversible.

The harm documented in this section is not.

Every other form of market distortion described in this submission could theoretically be corrected, through regulatory intervention, algorithm adjustment, or platform policy change. Traffic could be restored. Revenue could recover. Businesses could rebuild.

Model-Based Algorithmic Degradation cannot be undone once it reaches critical scale. It is not a policy setting. It is a structural consequence of the architecture itself, a self-reinforcing cycle that, once established, has no natural endpoint.

This is the argument for urgency.

The harms documented in the preceding sections are serious. They are measurable. They are ongoing. They are also, in principle, reversible, traffic could be restored, revenue could recover, businesses could rebuild. The sovereign data loss documented in this submission is also, in principle, addressable, if interception stops, future data enters Australian infrastructure.

The harm documented in this section is different in kind. It operates on two irreversible tracks simultaneously.

The first: once the digital commons has been contaminated with recursive AI-generated content at sufficient scale, the human-generated knowledge base that made search valuable cannot be reconstructed.

The second: the Australian behavioural data that should have been training sovereign Australian AI models for the past several years was instead intercepted and fed into Google's training pipeline. That data gap is permanent. You cannot go back and collect five years of Australian search intent, engagement and behavioural signals that were diverted before they reached Australian infrastructure. Every month without intervention widens that gap permanently.

Every month without intervention makes the eventual correction more difficult and more costly. The following page documents how the loop works and why it is already in motion.

What the Diagram Shows

The digital information commons, the open internet, has always operated on a simple exchange. Humans create content. Search engines index it. Users find it. Publishers are rewarded with traffic. That traffic funds more content creation. The cycle sustains itself.

Google's AI system has broken that cycle permanently.

The Loop

Google's AI scrapes human-created content from the open web to generate AI Overviews. Those AI Overviews suppress the original publishers, reducing their traffic and revenue. Reduced revenue means less capacity to create quality content. Meanwhile Google's AI, now starved of quality human input, begins training on its own previous outputs. Each generation of AI-generated content is lower quality than the last. That degraded content floods the digital commons. The model re-trains on its own slop. Quality collapses further.

This is not a future risk. It is already happening. It is happening on both tracks. The information commons is degrading as AI trains on its own outputs. And the sovereign Australian data pipeline, the behavioural telemetry that should be informing Australian AI development, is being systematically drained into Google's training infrastructure with every intercepted click. These two processes accelerate each other. As Australian content creators lose revenue and reduce output, less human-generated Australian content enters the commons. As less Australian content enters the commons, Google's AI trains on progressively less Australian input. The Australian character of the information environment degrades. The sovereign data pipeline empties further.

The HIVE network data makes this concrete. 171 domains suppressed. 25,000+ visits intercepted per month. 12 billion ad slots prevented from viability. Each of those intercepted visits represents a human user who did not reach a human-created Australian content resource, and whose query was instead answered by an AI system trained on progressively degraded inputs. Multiplied across the Australian digital commons, and then globally, the compounding effect is not theoretical. It is structural and accelerating.

The Regulatory Significance

Unlike the other harms documented in this submission, MAD is irreversible beyond a certain point. Traffic can be restored. Revenue can recover. But once the digital commons has been contaminated with recursive AI-generated content at scale, the human knowledge base that made search valuable cannot be reconstructed.

Google is not only foreclosing independent publishers today. It is progressively consuming the information infrastructure that its own search system depends on. The loop has no natural endpoint, and it is already in motion.

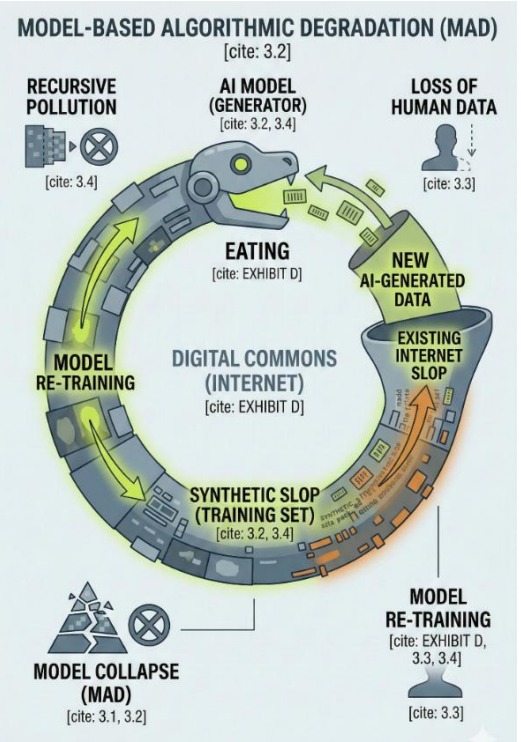


Figure 9.2: The MAD Loop. *Google's AI consumes the web it is destroying.*

10. The Accountability Gap — Algorithmic Opacity

Google controls the data publishers can't measure or challenge

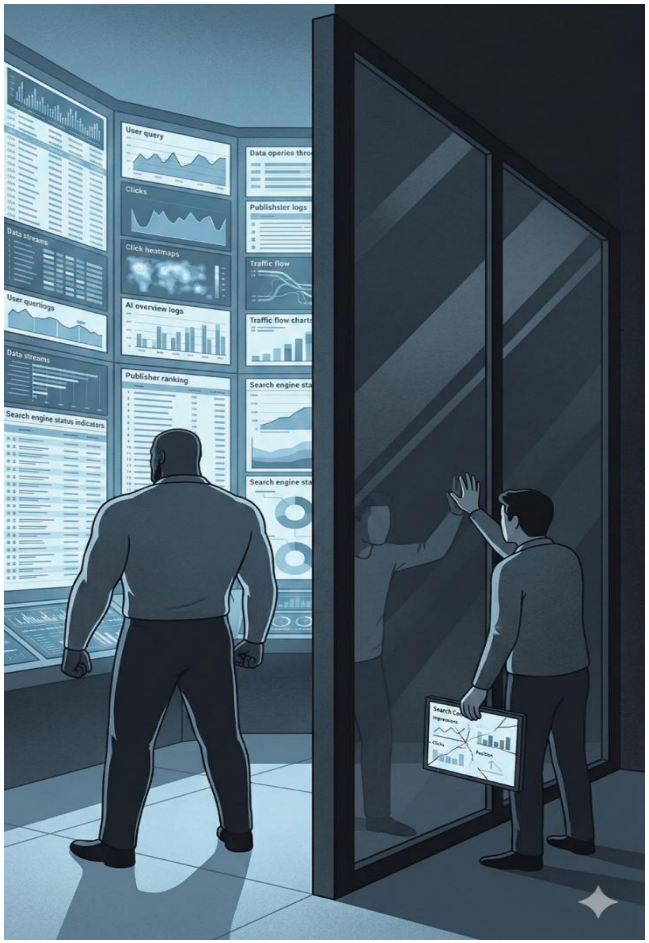


Figure 10.1: *Google sees everything. Publishers see what they're shown. The glass between them is not accidental.*

Every piece of forensic evidence presented in this submission was obtained despite the system, not because of it.

The data in this submission comes from Google's Search Console, the only measurement tool available to publishers. It is the sole window through which an independent domain owner can observe their own performance in Google's search environment. And as the evidence on the following page demonstrates, that window does not show the full picture.

Google knows which queries trigger AI Overviews. Google knows how much traffic those AI Overviews intercept. Google knows the gap between what its index ranks and what its architecture delivers. Publishers know none of this. They see impressions. They see clicks. They see a position number that may or may not reflect what a real user actually encounters.

The fishingmarks.au data makes this concrete. Search Console records an average position of 9.3. The live search returns a #1 ranking for the same query during the same period. The gap between those two data points is not a technical anomaly. It is structural invisibility, engineered into the only measurement tool publishers have access to.

This asymmetry has a functional consequence. A publisher who cannot measure the harm being done to them cannot quantify it, cannot challenge it, and cannot seek redress for it. The opacity is structural. It is the mechanism by which market foreclosure becomes invisible to its victims.

The practical consequence for publishers is that they cannot measure, quantify, or challenge the harm being done to them. The opacity is not incidental. It means that every piece of forensic evidence in this submission was assembled despite the system, not because of it.

What publishers need, and what this submission requests, is full visibility of what appears above their organic result for every query that generates an impression. Without that, the gap between what Google shows and what Google delivers remains invisible to those most affected by it.

Google's Search Console is the only data tool available to independent publishers for measuring their search performance. It reports ranking positions, impressions, and clicks. Publishers rely on it to understand their visibility, diagnose problems, and make decisions about their content and investment.

The problem is that Search Console does not show what a user actually sees.

The Fog of War Mechanism

Search Console reports the ranking position Google's index assigns to a domain. It does not report what appears above that domain in the live search results page. A publisher can rank position 2 in Search Console and have no way of knowing that above their result sits an AI Overview, a Knowledge Panel, a People Also Ask section, a video carousel, and three paid advertisements, all of which a user must scroll past before reaching the organic result that Search Console says is position 2.

The fishingmarks.au data demonstrates this precisely. Search Console records an average position of 9.3 across all queries, devices and conditions. The live search for "fishing marks" returns a #1 organic ranking for the same domain during the same period. 101 clicks from 1.97k impressions at a CTR of 5.1%, when a genuine #1 ranking should return between 25 and 35 percent.

The divergence between these two data points is not a technical anomaly. It is evidence that the data Google provides to publishers does not reflect the search environment their audience actually experiences.

The Regulatory Consequence

A publisher cannot challenge what they cannot measure. The gap between what Google shows and what Google delivers is real, significant, and growing, but it is invisible in the only data tool available to publishers.

What publishers require is full visibility of what appears above their organic result for every query generating an impression. Without this, the harm remains unquantifiable by those experiencing it. This submission requests that Google be required to provide this data to publishers through Search Console, query by query, impression by impression.

10a. Suppression of Australian Sovereign Digital Infrastructure

The ccTLD Disincentive — Undermining Australia's Sovereign Data Strategy

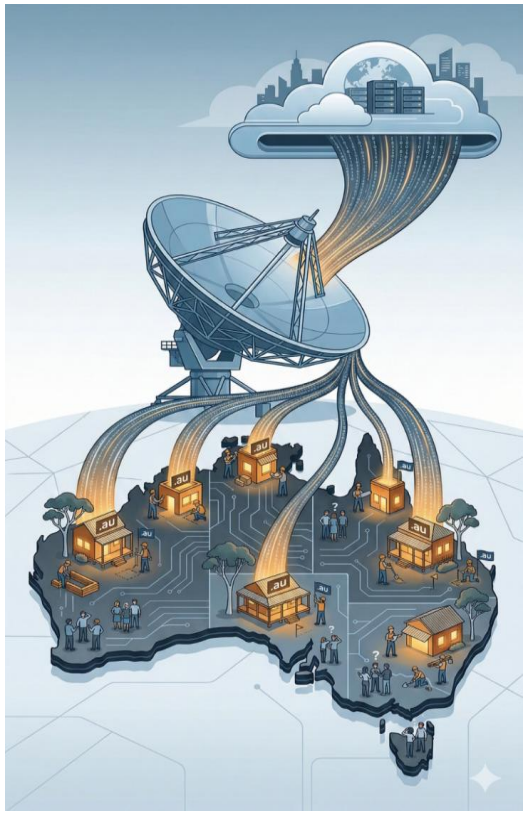


Figure 10.2: *Australian businesses built in good faith. Their data leaves. It does not return.*

The National Investment at Stake

Australia's adoption of the .au country code top-level domain namespace represents a deliberate sovereign digital infrastructure initiative. The premise is straightforward: Australian businesses build Australian digital assets on Australian domains, serve Australian audiences, and generate Australian economic activity that stays within the Australian economy. Zero-click suppression has functionally undermined that national investment.

The Logic Chain

Australian businesses are advised to build on .au, to own their digital sovereignty, serve their Australian audience, and establish their authority within the Australian digital commons. They invest time, money, and resources building quality Australian content on Australian domains in good faith. Google then intercepts that traffic before it converts, making the investment economically unviable.

The rational conclusion for any Australian business owner observing this outcome is direct: why build quality .au content if Google answers the question and sends nobody to the site? The data consequence of that rational conclusion is direct and permanent. If Australian businesses stop investing in .au content because the traffic return is structurally unviable, the behavioural data those sites would have generated stops existing. Australian users' search intent, engagement patterns and behavioural signals continue to be captured, but by Google, not by Australian infrastructure. The sovereign data pipeline does not slow. It empties. And unlike traffic, which can be restored by regulatory intervention, the historical behavioural data that was never collected cannot be reconstructed. It is gone. The result is already observable, .au adoption stalls, Australian sovereign digital assets remain underdeveloped, Australian data continues flowing through foreign-owned platforms rather than being captured, governed, and utilised locally.

This is not merely a commercial harm to individual publishers. Australian businesses were advised to invest in .au domains as a matter of sovereign digital strategy, to build Australian assets, serve Australian audiences, and keep Australian data within the Australian economy. When those investments are rendered economically unviable by search architecture they have no means to influence or appeal, the broader national investment in a sovereign digital commons is undermined with them.

The 900+ domains of the HIVE network represent the largest single empirical test of .au sovereign digital infrastructure viability that has been systematically documented. Their sustained suppression is evidence of a structural disincentive to invest in Australian sovereign digital infrastructure, built into the architecture of a foreign-owned platform that processes over 90% of all Australian searches.

The Sovereign AI Connection

This consequence extends directly into Australia's capacity to develop sovereign artificial intelligence capability. The HIVE ecosystem's entire model depends on Australian data flowing through Australian domains. Zero-click suppression does not merely steal advertising revenue. It starves the sovereign data pipeline that Australian AI development depends on.

Genuinely Australian AI cannot be built on data that was never collected, because Google intercepted the user before they arrived at the Australian domain that would have captured it. This is not a future risk. It is the current operational reality of every Australian .au domain subject to zero-click suppression.

The HIVE network alone documents 25,000+ monthly intercepts. Each represents a behavioural data point, Australian user intent, engagement pattern, session behaviour, that entered Google's infrastructure instead of Australia's. Across the broader Australian digital commons, the cumulative data deficit is not theoretical. It is structural, accelerating, and permanent for every month that passes without intervention.

The argument for urgency is therefore not only that the commercial harm is ongoing. It is that the sovereign data gap widens permanently with every passing month. A regulator that acts in 2026 preserves the data that 2027 and beyond would generate. A regulator that delays cannot recover what 2026 lost.

The Regulatory Framing

Zero-click architecture has created a structural disincentive for investment in Australian ccTLD development. By rendering quality Australian digital assets economically unviable through traffic interception, Google's search architecture has functionally undermined Australia's sovereign data strategy. The data that should be flowing through Australian-owned domains, informing Australian AI development, serving Australian audiences, generating Australian economic activity, is instead retained within Google's platform ecosystem.

This is a measurable setback to Australia's sovereign AI capability and digital independence. Every intercepted visit is a data point that does not enter the Australian sovereign data pipeline. Extrapolated across the broader Australian digital commons, the cumulative deficit is structural and accelerating.

The Browser Dependency

Google Chrome holds approximately 65% of the Australian browser market. By default it routes searches through Google, feeds behavioural data into Google's advertising infrastructure, and is optimised to keep users within Google's ecosystem. The browser is not a neutral tool. It is the entry point to a closed system, and it is installed by default on the majority of Australian devices.

11. Regulatory Findings and Remedies Sought

International Precedent: US DOJ, EU Digital Markets Act, UK CMA

This submission is not an act of aggression. It is a record of defence. The infrastructure documented here was built in good faith, on the reasonable assumption that a merit-based digital marketplace existed and that quality Australian content serving Australian audiences would find its Australian audience. That assumption proved incorrect, not because the content failed, but because the rules were changed silently, architecturally, and without notice or recourse.

What follows are not demands. They are the minimum conditions required to ensure that Australians who build sovereign digital infrastructure in good faith are never again foreclosed without knowing it is happening or having any means of measuring, understanding or challenging the harm being done to them.

The Legal Foundation

Search traffic is not a courtesy extended by Google to publishers. It is the foundational mechanism by which independent digital enterprises reach their audience, generate revenue, and sustain their operations. For the businesses in this submission, it is not a growth channel, it is the only channel. Its systematic interception does not slow growth. It prevents it entirely.

Regulatory bodies across multiple jurisdictions are examining this same pattern of conduct:

US Department of Justice - active antitrust case establishing Google's search monopoly and its use of that monopoly to foreclose competition. Remedy proceedings ongoing.

European Commission - Digital Markets Act enforcement, with Google designated as a gatekeeper subject to mandatory interoperability and self-preferencing prohibitions.

UK Competition and Markets Authority - active investigation into search and AI, specifically examining the impact of AI Overviews on publisher traffic.

Canadian Competition Bureau, Japan Fair Trade Commission, India Competition Commission, South Korea Fair Trade Commission, Germany Bundeskartellamt, France Autorité de la concurrence, Brazil CADE - all have active or concluded proceedings establishing Google's pattern of market abuse across search and advertising.

Australia has the opportunity to contribute to this global evidentiary record with something most of these proceedings lack — clean, longitudinal, scaled empirical data showing the click gap in real numbers, sourced from Google's own measurement tools. The ACCC's own December 2024 search inquiry confirmed Google's dominance and identified the need for exactly this kind of publisher-level empirical evidence. This submission provides it.

11. Regulatory Findings and Remedies Sought

- International Precedent: US DOJ, EU Digital Markets Act, UK CMA



Figure 11.1: *Four remedies. One principle: what has been taken without consent, measured without disclosure, and suppressed without recourse must now be governed.*

Remedies Sought

The following changes would materially address the harm documented in this submission. They are presented as practical requests, not legal prescriptions:

1. **Transparency obligation** - SERP visibility for publishers - Publishers should be able to see, through Search Console, exactly what appears above their organic result for every query generating an impression, including AI Overviews, Knowledge Panels, People Also Ask sections, and paid placements. Without this, publishers cannot measure the gap between their ranking and their traffic, cannot understand the cause, and cannot make informed decisions about their content investment.

2. **CTR reporting standard** - CTR benchmarking by SERP feature - Publishers should receive actual CTR benchmarks broken down by query type and SERP feature presence. The fishingmarks.au data, 101 clicks from 1.97k impressions at a #1 ranking returning 5.1% CTR, illustrates why aggregate CTR figures are insufficient. Publishers need to know how much of their traffic gap is attributable to each feature above their result.

3. **Content extraction compensation framework** - Content use compensation for independent publishers - Australian publishers whose content is used to generate AI Overview responses should have access to compensation or opt-out mechanisms comparable to those available to news organisations under the News Media Bargaining Code. Independent digital domains, businesses, community sites, specialist content providers, currently have no equivalent protection and no mechanism to negotiate, object, or be compensated.

Remedies Sought cont

4. Retaliation prohibition - Post-submission monitoring - The current rankings, impressions and CTR data documented throughout this submission constitute a verified baseline. We request that any material reduction in search visibility, ranking, or indexing of domains associated with this submission following its filing be noted and investigated as potentially connected to the act of filing.

5. Sovereign infrastructure protection - Recognition of ccTLD harm - The disproportionate impact of zero-click suppression on Australian .au domain investment and sovereign AI development warrants specific consideration. The 900+ domains of the HIVE network represent the most extensively documented empirical test of .au sovereign digital infrastructure viability undertaken by an independent Australian operator.

6. Mandatory opt-in not opt-out - Opt-in as the default for AI content use - The current opt-out framework for AI content use is unworkable in practice. Google updates its browser and crawler infrastructure continuously, with each update having the potential to reset previously implemented opt-out signals. Publishers cannot maintain perpetual re-compliance with no guarantee of continuity. An opt-in model, where no content is used for AI training or AI Overview generation unless the publisher has affirmatively agreed, is the only approach that provides genuine and durable protection. The ACCC's own consumer survey found that 83% of surveyed Australians believe companies should seek consent before using their data to train AI models. Publishers' content warrants the same consideration.

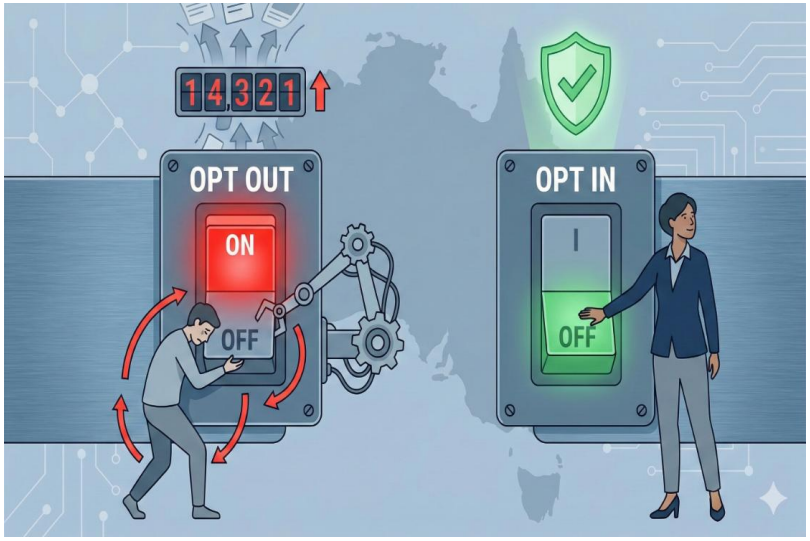


Figure 11.2: *Opt-out places the burden on the party with the least power. Opt-in inverts it. Protection should be the default; not the prize.*

Remedies Sought cont.

7. General search designation - Designation investigation into general search - We request that general search services be included in designation investigations under the proposed digital competition regime. The empirical evidence in this submission demonstrates harm equivalent to or greater than that produced in other platform categories already under consideration. The methodology is scaled, longitudinal, and sourced from the platform's own measurement tools.

8. Sovereign data pipeline protection - Recognition of behavioural data drainage as a distinct and compounding harm

Google's zero-click architecture causes two simultaneous and connected losses: commercial harm to publishers and sovereign data drainage from Australian infrastructure. These are not the same harm expressed differently. They are distinct consequences of the same mechanism, and they compound each other over time.

Commercial harm is, in principle, reversible. Behavioural data that was never collected is not. Every month that zero-click suppression continues is a month of Australian search intent, engagement and behavioural telemetry that enters Google's training pipeline instead of Australia's. That data cannot be recovered retroactively.

This submission requests that the ACCC recognise sovereign behavioural data drainage as a distinct and compounding harm separate from commercial suppression, and that any designated digital platform regime include specific obligations requiring that Australian users' behavioural data generated through Australian search queries be subject to Australian data sovereignty protections, with Google required to demonstrate that data generated from Australian .au domain interactions is not being used to train AI models without publisher consent.

This remedy is the data sovereignty equivalent of Remedy 3's content extraction compensation framework. Remedy 3 addresses content taken. Remedy 8 addresses behavioural data drained. Together they close both extraction pipelines that Google's architecture currently operates without consent, compensation or regulatory oversight.



Figure 11.3: *Opt-out places the burden on the party with the least power. Opt-in inverts it. Protection should be the default — not the prize.*

Opt-in consent as the mandatory standard for AI content use

The current framework governing publisher content use by Google's AI systems operates on an opt-out basis. This is structurally inadequate and should be replaced with a mandatory opt-in standard.

Opt-out places the burden of protection on the party with the least power and the least information. Publishers must first become aware that their content is being used, then locate the correct mechanism to object, then correctly implement it, with no guarantee that any of these steps will remain effective after the next platform update. For a small independent publisher without a legal team or technical resources, this is not a practical option.

The opt-out model is also technically unworkable in practice. Google updates its browser and crawler infrastructure on a continuous basis. Each update has the potential to reset or override previously implemented opt-out signals, forcing publishers into a perpetual cycle of re-implementation with no guarantee of continuity. A publisher who opted out in January has no reliable assurance they remain opted out in March.

Opt-in inverts this dynamic in the only way that produces genuine consent. No content is used for AI training or AI Overview generation unless the publisher has affirmatively agreed to that use. The default is protection, not extraction. Publishers who wish to participate may do so. Publishers who do not are protected without ongoing technical intervention on their part.

This is consistent with the consent framework the ACCC's own consumer survey established as community expectation, 83% of surveyed Australian consumers believe companies should seek consent before using personal data to train AI models. There is no principled basis for treating publisher content differently. The same community that expects consent for personal data use has an equal right to expect consent for the use of the content they create and publish.

The submitter requests that the ACCC recommend opt-in consent as the mandatory standard for any AI content use regime applied to designated digital platforms, and that this recommendation be made explicitly in the context of the general search designation investigation sought in Remedy 7 of this submission.

The Global Regulatory Context

Why This Submission Matters Beyond Australia

The ACCC is the entry point. It is not the endpoint.

The methodology developed in this submission, measuring the divergence between expected and actual click-through rates using Google's own Search Console data, across a scaled network of domains, over a longitudinal period, is replicable, publishable, and directly applicable to every active competition investigation involving Google's search and AI architecture worldwide.

What This Submission Has That Others Don't

Most complaints received by competition regulators come from single publishers, industry bodies, or theoretical economists working from modelled data. This submission presents a working empirical model across 900+ domains that quantifies the click gap in real numbers. Four domains alone, tides4fishing.au, butterbream.au, amberjack.au, and fishinglicense.au, received 56 combined visitors in January 2026 against an expected 869 to 1,076. Extrapolated across 900+ domains the cumulative monthly click deficit reaches 25,000+ visits. That is not a theoretical harm. It is a measured one. And it is sourced entirely from Google's own measurement tools.

The Global Regulatory Landscape

Every major competition authority in the world is currently examining Google's conduct in search and AI. The ACCC's findings, particularly if they establish a replicable methodology for quantifying zero-click suppression harm, will be directly relevant to proceedings in the United States, European Union, United Kingdom, Canada, Japan, India, South Korea, Germany, France, and Brazil.

The compounding consequence for Google is significant. Each jurisdiction that adopts this methodology adds to the global evidentiary record. If ACCC findings inform the US DOJ remedy proceedings or EU Digital Markets Act enforcement, the liability exposure across multiple jurisdictions becomes substantial.

The Australian Opportunity

Australia has the opportunity to lead. Not merely to participate in a global regulatory conversation about search dominance, but to contribute the empirical framework that gives that conversation measurable precision. The proposed ex ante digital competition regime, combined with the empirical methodology in this submission, positions Australia to set the global standard for how zero-click suppression harm is measured, designated, and remedied.

The data exists. The methodology is sound. The harm is quantified. The solution is already built. The designation framework is almost legislated.

This submission provides the empirical foundation. What happens next is in the hands of the regulator.

Appendix A — Active Regulatory Proceedings and Relevant Bodies

The following documents the current global regulatory landscape against which this submission is made. It is provided to assist the ACCC in situating this submission within the broader international context and to identify bodies with whom data sharing and methodological collaboration may be appropriate.

Active Antitrust and Competition Proceedings Against Google

ACCC (Australia) - The submitter's primary regulatory addressee. The ACCC has existing jurisdiction and active interest in digital platform conduct under the Competition and Consumer Act 2010. The ACCC's December 2024 ninth interim report confirmed Google has maintained its dominance in general search with little substantive change to its market share or commercial arrangements. The ACCC's June 2025 final Digital Platform Services Inquiry report reinforced the need for regulatory reform and recommended a new digital competition regime. Designation investigations are expected to commence with app marketplaces and ad tech, this submission requests that general search be considered for inclusion in that first round.

US Department of Justice - Active antitrust case specifically addressing Google's dominance in search and advertising. The DOJ has already secured findings establishing Google's search monopoly. Remedy proceedings are ongoing.

European Commission - Multiple active investigations under the Digital Markets Act. Google is designated as a gatekeeper subject to mandatory obligations including self-preferencing prohibitions and interoperability requirements.

UK Competition and Markets Authority (CMA) — Active investigation into search and AI, specifically examining the impact of AI-generated features on publisher traffic and market competition.

Canadian Competition Bureau - Active investigation into Google's advertising practices and search dominance.

Japan Fair Trade Commission - Active investigation into Google's search dominance and distribution agreements.

India Competition Commission - Has already fined Google for market abuse. Ongoing scrutiny of search and Android practices.

South Korea Fair Trade Commission - Active investigations into Google's conduct across search and app distribution.

Germany Bundeskartellamt - Among the most aggressive regulators in Europe on big tech. Has designated Google under Germany's amended competition law enabling proactive intervention.

France Autorité de la concurrence — Has already fined Google. Ongoing monitoring of search and advertising practices.

Brazil CADE - Emerging investigation into Google's market dominance in search and advertising.

Bodies With Direct Interest in This Submission's Methodology

News Media Alliance (US) - Represents publishers actively challenging Google's use of their content in AI systems.
Digital News Publishers Association (EU) - Engaged in content compensation negotiations with Google under the European Copyright Directive.
Australian News Media Association - Already in active conflict with Google locally over content compensation and search visibility.
Reuters Institute for the Study of Journalism (Oxford) - Conducting academic research into exactly the publisher harm phenomenon documented in this submission.
Columbia Journalism Review (US) - Documenting publisher harm at scale across the English-language media ecosystem.

The common thread across all of these bodies is that they are working with modelled data or single-publisher testimony. This submission provides something different, clean, longitudinal, scaled empirical data showing the click gap in verified numbers sourced from the platform's own measurement tools. We are willing to share this methodology and data with any of the above bodies if the ACCC considers it useful.

The Australian Alternative Already Exists

While this submission documents the harm caused by zero-click suppression, the submitter has not waited for regulatory intervention to build a solution. Over the past two years, in direct response to the architectural foreclosure documented in this submission, four sovereign Australian direct-type portals have been developed and are operational:

72s.au - Australian Shopping Portal 72f.au - Australian Fishing Portal 72t.au - Australian Tourism Portal x72.au - Australian Marketplace
These portals operate on a direct-navigation model. Like eBay, Gumtree, or Seek, they are designed to be accessed by users typing the URL directly, bypassing Google's search interception architecture entirely. At scale they are structurally immune to zero-click suppression.

Why This Matters to the ACCC

The existence of these portals demonstrates that genuine market alternatives are technically viable and already built. What zero-click suppression prevents is not the creation of alternatives, it is their ability to reach the audience threshold required for direct-navigation habits to form. Google's architecture does not need to delist these portals to harm them. It simply needs to intercept enough traffic during the growth phase to prevent viability.

The Retaliation Risk

The submitter acknowledges that filing this submission creates a practical risk of retaliatory action by Google, including the delisting or further suppression of domains associated with the HIVE network. The current rankings, impressions and CTR data documented throughout this submission constitute the verified baseline. Any material changes to search visibility following this filing are requested to be noted by the ACCC as potentially relevant to its assessment.

The Broader Significance

Australia does not need to remain dependent on foreign-owned search infrastructure to connect Australians with Australian businesses, products, tourism and services. The portals documented here represent something more than a commercial alternative. They are a working model of sovereign data infrastructure, direct-navigation destinations that keep Australian behavioural data inside Australian domains rather than allowing it to be intercepted and retained by a foreign platform.

When an Australian user types 72f.au directly, their intent, engagement and session data enters Australian infrastructure. When Google intercepts that same user at the search layer before they arrive, that data enters Google's instead. The portal model is not merely commercially immune to zero-click suppression. It is architecturally designed to restore the sovereign data pipeline that Google's interception architecture has drained.

Their suppression is not a commercial inconvenience. It is the active prevention of a functioning Australian sovereign data alternative, and it is precisely the kind of outcome the proposed ex ante designation regime exists to prevent.

Thank You for reading

Save Our Data Sovereignty!