

COVER SHEET

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ANALYSIS OF GOOGLE'S STRATEGIC POSITION

OVERVIEW

Google is a company founded in 1998 by Larry Page and Sergey Brin. The company started as an online search engine with the objective of making accessible and organising information worldwide (Google 2018). Now, it offers more than 50 internet services and products (Hosch and Hall 2018).

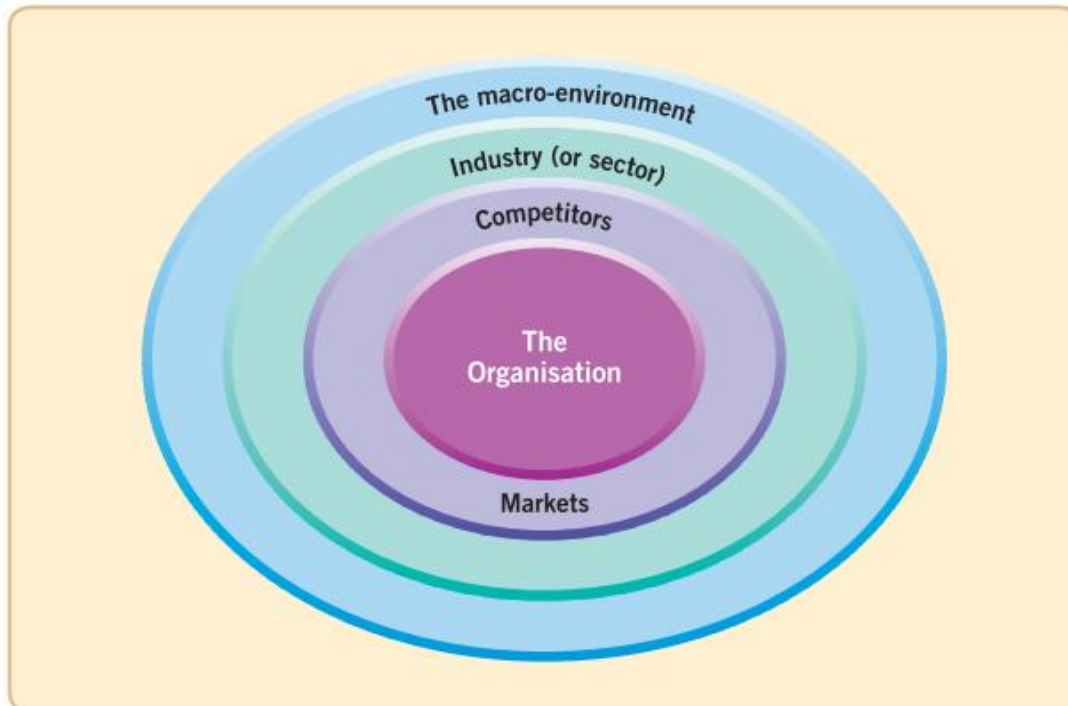
This report will analyse Google putting a particular emphasis on the developing countries (as defined by the UN 2014) and specially on the countries that Google considers vital for the "Next Billion Users", namely places like Brazil, Mexico, China, India, Indonesia and Nigeria (Sengupta 2018).

ANALYSIS OF GOOGLE

An analysis of the strategic position implies analysing the organisation's environment, the organisation's strategic capability (resources and competences), the organisation's goals and the organisation's culture (Johnson et al. 2014: 11-12).

This report will start by looking at the organisation's external environment, focusing on the macro-environment and on the industry Google operates in and will then look at the internal environment, namely the organisation and its competitors.

Figure 2.1 Layers of the business environment



(Johnson et al. 2014: 33)

EXTERNAL ENVIRONMENT

First, it is important to look at the macro-environment, which is composed by broad external environmental factors that can affect the organisation to some extent. The PESTLE (or PESTEL) tool will be used to look at how issues in the political, economic, social, technological, ecological and legal environments may affect Google (Johnson et al. 2014: 11-12)

	External factors to consider	Factors affected within my industry	Importance to organisation
POLITICAL	<ul style="list-style-type: none"> Government policy Political stability Tax Industry regulations Global trade agreements and or restrictions 	<p>State-involvement in Internet, Online Search Engines or Digital Advertising have been historically low but governments have started to regulate the sector further. In developed economies, the European Union has intervened to sanction Google and American politicians from both right and left distrust the company for being a corporate monopoly (The Economist 2018). Developing economies like China or Iran do not want their citizens to have unrestricted access to information and therefore have decided to censor Google (Halliday 2013; Martin 2018).</p>	Potential high impact
ECONOMIC	<ul style="list-style-type: none"> Exchange rates Globalisation Economic growth / decline Inflation Interest rates Cost of living Labour costs Consumer spending habits 	<p>As Google stashes cash abroad (Romans 2017), the exchange rates may represent a risk. Inflation may make the value of the company decrease. On the contrary, some developing countries where Google operates are suffering from stagflation or slow growth rates (e.g. Brazil).</p>	Minimal or low impact
SOCIAL	<ul style="list-style-type: none"> Consumer trends /tastes, Fashions Consumer buying habits Lifestyle factors Career attitudes Work-life balance Population demographics 	<p>The aging demographics of some countries may pose a problem as older generations may struggle to understand new Google services. Social opinions regarding a more rigorous policing of extreme content in the platform. Social views perceiving Google as a corporate monopoly, anti-competitive and damaging democracy (The Economist 2018). Social attitudes towards more privacy and revealing less information to the company. Some social habits that are growing like streaming content in platforms like Facebook or Netflix instead of searching in Google may also reduce user's usage of Google.</p>	High impact because of network effects

	External factors to consider	Factors affected within my industry	Importance to organisation
TECHNOLOGY	Automation Innovation Disruptive technologies Social networking Upgrades Robotics Artificial Intelligence Security	In emerging markets of Mexico, Brazil, India and Indonesia, the majority of Internet users connect themselves through their smartphones (Expansion 2017) The rise of smartphones and apps such as messaging apps Whatsapp or WeChat can satisfy consumers needs. New technologies to screen out undesirable content may help google (The Economist 2018). In developing countries like India, Internet penetration is still only 35% of the population, denoting an evident lack of adequate infrastructure (Pulso Social 2017).	High impact of infrastructure enabling internet access because Google is a mostly online business
LEGAL	Employment law Common law Local labour law Health and safety regulations	Anti-trust legislation : the EU Commission fined Google for hurting rival online shopping services; India's Competition Commission also fined google for abusing its dominance in online web search and online advertising markets (Kalra and Shah 2018). Laws making Google liable for the content published in the platform is a serious risk as well. Tax advantages and benefits passed by the current U.S. government may make the company focus on U.S. market, scale back projects in developing countries, repatriate profits from overseas.	High impact because of high costs of fines and litigation
ENVIRONMENTAL	Environmental restrictions imposed by in-country governments Sustainable resources CSR (Corporate social responsibility) Ethical sourcing Transportation Procurement Supply chain management	The rapid development of global warming and the awareness of the population regarding the need to fight climate change have resulted in some ecological alternatives to Google like Ecosia.	Low impact because Google is a mostly online business

Among these factors, it is important to identify the key drivers for change, namely the PESTLE factors that are more uncertain and that have a high potential impact on the business. Based on our analysis, state antitrust regulations and social attitudes towards privacy can be considered the most important external factors affecting the business. We can therefore develop a scenario analysis that can help the company plan according to the future evolution of the environment.

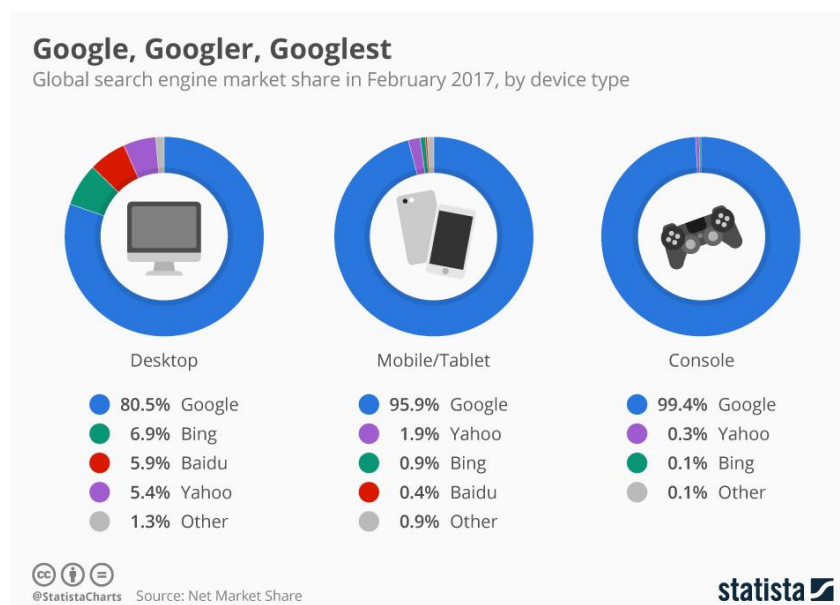
- Scenario 1: Anti-trust regulation toughens and states force Google to sell off companies like Double Click to avoid an over-dominant position in the market.
- Scenario 2: State regulation is light, and Google can continue acquiring ventures freely.
- Scenario 3: Societies no longer accept micro targeting and restrict Google's access to personal information.
- Scenario 4: Societies are open to reveal personal information to enhance a customized experience, willing to use Google services and reveal information to third-party sites and apps.

According to Porter, the "structure" of an industry can determine the profitability of a business. Therefore, it is interesting to apply Porter's Five Forces to Google to understand how competitive is the industry where Google operates.



Google is the undisputed global leader in search engines, with around 90% of the market share worldwide (Armstrong 2017). It is the first choice for users making internet searches across all platforms and devices. Regarding digital advertising, Google and Facebook attract 85% of global spending on digital advertising, placing them in a duopoly situation (Garrahan 2017). We can perceive that the most important threat to Google may come for substitute products or services: indeed, advertising is not an industry restricted to placing ads on the Internet and publishers can switch to other types of advertising without excessive difficulties. Moreover, publishers, that in the current situation do not have any bargaining power, may want to change their revenue model and not rely on advertising revenues but rather on subscription revenues and membership contributions (Davies 2018); which would damage Google.

From this analysis, we can conclude that the industries in which Google primarily operates are monopolistic or oligopolistic industries as only Google and a few firms dominate them and have great power over buyers and suppliers (Johnson et al. 2014: 47). This does not mean Google should not be wary: according to estimates, competitors Amazon and Snapchat are experiencing faster growth and are expected to gain market share (eMarketer 2018).



(Armstrong 2017)

INTERNAL ENVIRONMENT

The external environment does not determine on its own the profitability or performance of a business. Indeed, we have to take into account differences between companies in terms of strategic capabilities: the resources and competences they possess. A business can thus gain market share if it has distinctive capabilities that form the basis of a competitive advantage over competitors. A SWOT analysis can help us summarize the key strengths and weaknesses of Google, as well as the opportunities and threats of the environment, some of which were already discussed in previous sections.



The **VRIO framework** allows us to distinguish the criteria to achieve a competitive advantage: capabilities need to have **value, rarity, inimitability and**

organisation support (Johnson et al. 2014: 76).

V	Value: Do capabilities exist that are valued by customers and enable the organisation to respond to environmental opportunities or threats?
R	Rarity: Do capabilities exist that no (or few) competitors possess?
I	Inimitability: Are capabilities difficult and costly for competitors to obtain and imitate?
O	Organisational support: Is the organisation appropriately organised to exploit the capabilities?

In the case of Google, it is the massive amount of information on people that permits micro targeting or personalized advertising and represents a competitive advantage. Indeed, Google has a personalised advertisement profile on every individual containing their location, gender, age, hobbies, career, interests, relationship status, weight and income (Curran 2018). They have partnerships with millions of third party sites and apps to personalise advertising. Google has all the search history of users across all devices and all their activity in general (use of apps, frequency of utilisation, time of utilisation). This can be considered valuable as users appreciate the fact that they can have personalised information on the weather, news, events, restaurants or shops nearby based on their location or advertisements of products that fit their interests and hobbies. Furthermore, no competitors possess this amount of information and it is hard for them to replicate Google's model because of the vast amount of partnerships with third party sites. As far as organisational support is concerned, one of the strengths of Google is scale so the business is fully equipped to deal with a wide range of information (Coventry University 2018).

As for the **opportunities** identified, the most important may be considered the Google digital literacy projects in developing countries, like its partnership with Tata to help rural women in India (Mehta 2016). The lack of adequate infrastructure enabling good internet accessibility may be seen as a potential threat but we consider it here an opportunity for Google to develop further its physical presence in developing countries with projects like Google Station in India, Indonesia, Mexico, where it provides high speed internet access via Wi-Fi hotspots in public places (Damani 2018; Fermon 2018); or Project Loon, which is a fleet of balloons that aims to extend Internet connectivity to people in rural and remote areas worldwide (X Company 2017).

Otherwise, the fact that smartphone penetration in emerging markets occurs mainly through low-end devices is seen as an opportunity for Google to advance further its products of “Android Oreo GO”, which are optimized apps that take less space and load faster, designed for low-end Android devices (Bhattacharya 2017). On the same note, in emerging markets of Mexico, Brazil, India and Indonesia, the majority of Internet users (66% in Mexico) connect themselves through their smartphones, having prepaid data plans in most cases (Expansion 2017). However, data packs in emerging countries are expensive, confusing and difficult to control (Riquelme 2017). Google has seen this as an opportunity to advance its products and developed an app called Datally to help minimize data consumption (Expansion 2017).

Furthermore, according to estimates, by 2021, there will be 536m Indian-language internet users in India (KPMG and Google 2017). Google can see this as an opportunity to offer personalised content in local Indian languages using its Google Translation technology and artificial intelligence.

As potential threats, apart from the already detailed anti-trust laws of states and the societal attitudes towards privacy, laws making Google liable for the content published in the platform can represent a burden as well. For instance, Germany can now impose fines if flagged content is not taken down within 24 hours (The Economist 2018) : other countries can take this legal approach which would involve more costs for Google.

Regarding the **culture and communication** at Google, it has been at the centre of public attention and we can here offer two contrasting views. On the one hand, it is noted that Google has a friendly and open type of internal communication. Indeed, Google preserves informal communication habits that stem from its time as a start-up like weekly stand-up meetings or snippets - namely one or two sentences that explain what happened last week inside your work group and what’s happening this week. (Coventry University 2018). This enables a culture of collaboration between groups and the whole company and an easier cooperation between divisions and departments. “Thank God It’s Friday” are also informal meetings where “cool” new products are talked about or when legal groups talk about what is happening in the political and legal world. Google complements these informal meetings with formal all-hands meetings and forums happening monthly, quarterly

and semi-annually (Coventry University 2018).

Contrastingly, Google has had disruptive employees in the past that have created crisis in the ethical and value base of the company. A software engineer expressed that women are unsuitable for technology-related roles because of biological factors such as anxiety and stress at work and that Google silences people whose political views differ from the liberal mainstream. This resulted on the company sacking him and on more controversy on how a so called “champion” of free expression and access to information handled different political viewpoints inside the organisation (The Economist 2017). Furthermore, investigations of the Department of Labour of the United States revealed that Google has “systemic compensation disparities” against women and sexual harassment complaints from female employees have emerged (Levin 2017). Men still occupy four-fifths of Google’s technology-related roles, and 91% of its employees are either white or Asian; denoting a critical lack of cultural diversity inside the company (The Economist 2017).

Critique of analytical tools

Tools such as PESTLE should be seen with a critical eye, as the analysis is carried out at a point of time and external factors are likely to change, specially taking into account the uncertain nature of politics. It is also risky to prioritize factors that may be considered important and overlook others that will gain influence in the future. As for the scenario creation, it is tempting for managers to choose one and plan accordingly but they should avoid to do so. In the case of Google, Porter Five Forces are difficult to implement because Google operates in many industries and has ventures in very divergent types of businesses. Furthermore, this tool examines the current situation of the industry but not how it may evolve: it should be complemented by an industry life cycle analysis. A more detailed analysis of competitors should also be undertaken with other tools such as strategic canvas and “Blue Oceans”. Regarding a SWOT analysis, it is a summarized and oversimplified analysis: it should not be taken as a substitute for in-depth analysis. It may be too general and not give the underlying reasons for the strengths and weaknesses or achieve comparisons with other companies (Johnson et al. 2014:

92). It is highly subjective with personal judgments as to what may be considered a strength or weakness, an opportunity or a threat.

Needs

Even though Google may want to find the best ways to monetise content for publishers in developing countries, the company needs to tackle broader issues first: the problem of digital literacy among the population of those countries and the problem of internet connectivity. Indeed, for the population to use its products and monetise content, Google needs them to have internet access and to have digital literacy skills. Other problems concerning transparency, ethics, culture and its position as a monopoly will be tackled in the next section, where recommendations for the company will be provided.

RECOMMENDATIONS TO GOOGLE

- **Enhance digital literacy projects.** As the most difficult challenge to Google in developing countries can be considered digital illiteracy, it is recommended to Google to expand further projects like the one with Tata to the rest of India and other countries like Brazil or Indonesia in order to digitalise and educate the population. It is recommended to work with public schools to promote technology learning through news curriculums and vocational programmes specialised in digital literacy skills (Udo 2018). As it already does in some countries of the Arabic-world, Google could provide training for social media, video, online marketing and e-commerce (Krishna 2018). It is recommended to organise free Google Digital Garages, which already exist in the UK, that would enable publishers to build online presence and digital marketing plans, advertise videos, understand the statistics and analytics of Google Adwords (Google Digital Garage 2018).
- **Increase physical presence of the business,** expanding infrastructure projects related to Internet access like Google Station or marketing consumer electronics affordable for developing countries.

- **Enhance transparency towards users and the public.** To retain users, Google has to make sure that it is fully transparent as to what information it has on users and how exactly it uses it. Google already offers a “takeout service” which lets users export a copy of their data (The Economist 2018). However, Google has to improve data portability as the current service is not sufficiently visible and it is not an option frequently suggested to users. So, it is recommended to create a new platform that would be more accessible, visible across all other services and make it more straightforward to cancel sharing data or to export it.
- **Enhance ethical values and cultural diversity.** Google needs to avoid being seen by society and regulators as an anti-competitive corporate monopoly that cares only about profits. Indeed, Google has to take more responsibility for the content it hosts: content like sex trafficking, pornography, violence, terrorism should be policed more effectively. Policing content like videos or images will represent a major challenge in the developing world : moderators have to be hired and artificial intelligence technologies have to be improved to detect extreme content and censor it more rapidly. In order to promote good content over fake news or extremist content, Google needs to shift its priorities from monetising content without any attention to the actual message of the content. Google has to be more transparent in revealing the pay gap of employees and implement a plan to promote women in the workplace.
- **Avoid being an over dominant monopoly.** Before regulators act and force it to make changes or to sell assets, Google needs to act on its own. Google should refrain itself from making any big acquisition. It should sell a company that does not contribute significantly to its competitive advantage. Otherwise, it could be forced to split from Youtube or spin off Double Click, a company that places ads across Internet (The Economist 2018).

IMPLEMENTATION

This section will explain how the company should implement the recommendations in terms of the leadership style it should adopt, how it should communicate and interact with stakeholders and how the leadership strategy impacts on the organisational direction.

Leadership style is “the manner in which managers exercise their authority in the workplace and ensure that their objectives are achieved” (CMI 2018). Leadership means inspiring people to do their best to achieve a desired result. It involves developing and communicating a vision for the future, motivating people and securing their engagement. Several authors have identified different styles of leadership: charismatic, visionary, transformational, transactional or authentic (CMI 2018).

Regarding Google, it is recommended to implement transformational leadership and authentic leadership. The need to educate and digitise the population in emerging countries requires a transformational approach, with significant changes in the manner the organisation operates and approaches governments, schools, and the population at large. Indeed, transformational leaders are able to make significant changes in the behaviour of their followers in order to achieve the leader’s vision or goals. Google should make employees feel inspired by this new vision of educating and digitising the developing economies. This is not an easy task: it requires a shift in the mind of the employees from seeing the organization as a for profit company that seeks results in monetary terms in the projects undertaken to an organisation that seeks educational benefits, the common good and is almost a “public” body.

To make this vision and projects work effectively, Google needs to engage key stakeholders. A stakeholder is “any group or individual who can affect or is affected by the achievement of the organization's objectives” (Freeman 1984:46). Google stakeholder group includes users, governments, educational institutes, academics, newspapers, influencers, bloggers, youtubers, and much more: since the problem tackled by the organisation is a broad one, it potentially impacts many people. To identify the most important stakeholders, Mitchell, Agle and Wood (1997) use 3 key attributes: power, legitimacy and urgency. In the context of Google literacy projects, the “definitive” stakeholders can be considered governments, schools and teachers

as they have the power to make changes, they are legitimate because they are the relevant and skilled authorities and they have the urgency to reform education. Google employees should provide free digital literacy courses in cooperation with schools and educational bodies: they have the power to make structural changes in the curriculum of students and to create new programmes at schools. On a micro-level, Google should provide free training to teachers in order to ensure that these changes are implemented on a long-term basis. Google should also work with higher educational bodies like colleges and universities, providing free optional courses on video advertising, image marketing and digital marketing. To reach not only students but the population at large, Google should also build Digital Garages like in the U.K, where anyone can sign up for free sessions on digital marketing. Nonetheless, it is advised to locate these Garages not only in city centres like in the U.K but also in the rural areas of developing countries.

However, Google employees have to incorporate the new vision and not try to push Google products, because this may make the transformed vision lose credibility in the eyes of public authorities and society.

This strategy and vision are also applicable for the projects on infrastructure improvements regarding internet connectivity in developing countries such as Google station. As this task is usually reserved for public authorities, it is essential that Google works in cooperation with the relevant local and national governments to sign joint infrastructure developments or projects. It is crucial that governments see it as an ally to work with rather than an external corporate entity that seeks profit. Furthermore, these projects can serve as a message to users that Google is not a tool to use once one has internet connection but also a company that facilitates internet connectivity for the whole population.

Authentic leadership is also crucial to enhance transparency and stress the values of the organisation. Authentic leaders focus on being genuine, honest and trustworthy (CMI 2018). In dealing with the data of users, it is important for the organisation to be straightforward with them and not try to hide in any way how personal information is used by Google and other sites to target personalised advertisements. It is also recommended to clearly recognise the diversity issue and inequality between men

and women inside the organisation and tackle it through measures such as salary hikes for all female employees, getting more persons involved in the hiring process to avoid bias, engaging in structured and standardized interviews.

As for stopping new acquisitions of ventures, it may involve a change in the mind of managers or in the strategic direction of the company. Indeed, even though acquiring more businesses may increase the presence of Google across the world and subsequently improve the profitability of the company, managers and employees have to understand it is not beneficial for society that a company concentrates so much economic power. They have to acknowledge their position as a monopoly and adapt their behaviour accordingly: Google is not a startup anymore and cannot buy ventures freely without any possibility of being singled out by antitrust authorities. This position is a difficult one to communicate to shareholders, who are stakeholders with significant financial power on the business, but it has to be framed as a position that is compulsory or otherwise regulators will toughen their stance on the company, including fines and burdensome regulation.

Summary

This report analysed Google's strategic position first looking at the external environment of the company: an analysis of the macro environment identified key drivers for change (antitrust regulation and societal attitudes on privacy) and an analysis of the industry revealed the dominant position of Google over its competitors, its power over clients and suppliers as well as the threats coming from potential entrants and substitutes. A study of the internal environment recognized the strategic capabilities and resources generating a competitive advantage, the company's strengths and weaknesses as well as the opportunities and threats it faces.

Based on this analysis, a set of recommendations were given, including enhancing the digital projects of Google and improving the internet connectivity infrastructure in developing countries. Subsequently, the leadership style that should be adopted to

implement the recommendations and the manner in which Google should engage stakeholders were explained.

Critical reflection (Gibbs 1988)

Description

This reflection exercise relates to the CMI module, where I attended 4 workshops, interacted with 5 online learning journeys and wrote a consultancy report for Google. The main topics of the module are consultancy, strategic analysis, leadership, creativity, communication and culture.

Feelings

At the time of workshops, I sometimes felt distant regarding the topics covered as I felt they were not related to my area of study (Sports Management). I felt teachers tried to make the subjects interesting, so it made me more engaged. I felt happy to participate in some debates (such as “are leaders born or made”) that led me to think and to interact and get to know students from other cultural and academic backgrounds.

Evaluation

What is positive about the module in my opinion are the presentations done in workshops that can enhance my personal presentation skills. The learning journeys are too burdensome. The assignment is highly demanding in terms of words and companies analysed, which is not proportionate to the relevance of the module for my studies.

Analysis

At the end of the CMI module I understand some tools explained during workshops and their use during the assignment may be useful in the future for analysing companies of the sports industry as well. I already understood the concepts of strategic analysis, but it was interesting for me to also include the leadership styles and communication in such an analysis which I never did in the past. In a possible

future as a manager it could help me to understand how leaders behave and the different styles of leaderships. The module also helped me to clearly articulate recommendations which could be helpful for progressing in hierarchical ladders of sports organisations.

Conclusion

I could have tried to interact further with the teachers or use the tools explained in a sports organisation in order to understand better the relevance for my course. I could have undertaken reflective exercises for every workshop and learning journey to understand their relevance for my future career.

Action plan

For the next time I take modules about leadership or strategic analysis I will undertake some literature research about these concepts within my sports industry. I would also discuss with teachers more extensively the relevance of the module or the point of view of the university that made the module obligatory for everyone.

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