

Cloud and Competition Policy: Part VIII – Cloud Service-AI Partnerships: The FTC’s Section 6(b) Report and its Antitrust Implications in the Trump 2.0 Administration

WRITTEN BY

[Bradley C. Weber](#) | [Taylor Levesque](#)

The U.S. Federal Trade Commission’s Section 6(b) Report investigated three partnerships between major cloud service providers (Alphabet/Google, Amazon, and Microsoft) and leading AI developers (Anthropic and OpenAI). Conducted under the Biden administration, the report highlights previously non-public details on the structure and outcomes of these CSP-AI partnerships. It also identifies competitive dynamics, such as access to resources and information sharing, that could raise future competition concerns in the AI ecosystem. The significance of the report remains uncertain, as the Trump 2.0 administration’s emphasis on AI innovation and global AI dominance appears to be shifting the course of FTC enforcement priorities.

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