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todd@netscape.com (Todd Rulon-Miller), pcurrie, rick@netscape.com,
jsha@netscape.com
From: jbarksdale@netscape.com (Jim Barksdale)
Subject: MS visit

Need low level info on internet access for Rick

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We can discuss on Monday at estaff but I thought I would give you an update on my visit in Redmond.

Attendees: Dan Rosen head of industry relations?
Paul Maritz SVP Consumer Systems Div (platforms)
Nathan Myhrvold SVP Virtual World Group (applications plus MSN and the best title in the bunch)
Attitude: very friendly, non threatening, "you guys at Netscape have done a great job . . . .how can we work together".Discussion done with "Bill's blessings"

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Generally they want to find ways to work together.Under this pleasant enough goal they were open to many suggestions most of which they made. Examples:

1.Provide us with early disclosure of any "standards or protocols" that would allow us to improve our brouser so that it could view and work with any content that would reside on MSN, for example the extensions necessary to view Encarta.

2.The same sort of early stuff for the NT server platforms as #1.

3.We could be the preferred or perhaps exclusive developer of these sorts of products but would not have to agree to restrict ourselves in other "standards and protocols".

4.They would be willing to seriosly consider bundling our server software with NT for the customer to evaluate and then pay us directly.

5.They want to work with us to find a way that let's us both profit from our building successful enterprise applications as a priviledged ISV partner.

6.If any of the above turn us on theywould also like to make an investment in us.

7.The issue of STT was not discussed since their is a meeting already scheduled for next week but they understand our position that it must be open.

Random comments of interest that indicate where they are coming from:
"things like Java and viewers like Acrobat are not "(long term winning stratagies in the face of Window95).Therefore come join the winning team.

"the credit card companies want to continue to collect a transaction fee by controlling the standards process"

"it has not been made obvious (THATS AN UDERSTATEMENT) that MSN

GOVERNMENT EXHIBIT 26

NSMS 60813

content would be available just like the Mercurey News for a fee to anyone on the net even though they were not a subscriber to MSN or a Windows95 user.We only felt it necessary to build a network to handle the huge new volume created by Windows95 online traffic"I may be wrong but I think this was the most significant statement of the meeting and offers our greatest opportunity.They now have determined that they can't be THE network for the world because this damn Internet THING has snuck in out of nowhere and ruined the strategy.Therefore they are looking for another way to take advantage of this new opportunity.

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The next step,if we are interested, would be to get the three of them with Mike and Mark and me with each team having a list of items that they think would be necessary in order to develope this "preferred solutions provider".This meeting should take place as soon as possible.

This group of addressees needs to get together for 3-6 hours as soon as possible to discuss this as well as the current status of our product sytrategy.I'll set this up at estaff meeting.Please bring your calendars.

Questions? Comments?

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