Date: Mon, Jun 26, 1995 5:04 AM EDT
From: NaviSoft
Subj: Fwd: netscape info
To: TLWaldo

Posted on: America Online (using MAC 2.5.1)

netscape file

Forwarded Message:

Date: Fri, Jun 23, 1995 9:10 AM EDT
From: Bdunn1
Subj: Fwd: netscape info
To: Steve C, NaviSoft, Zgi

Posted on: America Online (using MAC (0cae))

FYI

Bill

Forwarded Message:

Date: Thu, Jun 22, 1995 6:19 PM EDT
From: david@wais.com (David Kaiser)
Subj: netscape info
To: Bdunn1

Posted on: America Online (using the Internet)

Microsoft was at Netscape yesterday. Dan Rosen was there, the guy that did
the UUNET deal. They wanted:
* equity

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* a board seat
* Netscape to renounce the network as a platform
* Netscape to disclose all plans to microsoft
* Netscape to limit access to API's

And in return, Netscape would be Microsoft's special partner, get inside information, etc... and if Netscape didn't do the deal, Microsoft would crush them. It was funny to listen to Marc take umbrage at "arrogant 25 year olds from the University of Washington."

Marc said severals times that they probably weren't looking for an investment but I had the feeling that he was mentioning it to keep the door
open.

He also said something like, "Well, if we were going to take money we'd rather have it be from you than Microsoft"

"Case seems fixated on $150m."

His view is that they've said no on NaviStuff ("Peter Curry was clear with Dave Cole") and that if Barksdale isn't being clear, it's just that he's being polite.

The last round (TCI, Knight Ridder, etc.) was at a valuation of about $140m, which is less than what I had heard.

On the IPO, Q: What do you think the valuation will be? A: We'd be crazy to take less than $300m or 400m...but we don't want to have too high a valuation and just slide..." In this context we talked about UUNET (crazy high valuation), General Magic, up, then down, then settled around the IPO price.

They are not doing service work-- in either the WAIS sense or the AOL Services sense. Occasional high level consulting, but no WAIS-like prodcution services jobs as has been reported. I'm meeting with LDS (Strum's source for this information) and will check it out. Companies are, of course, using Netscape software to create services, but Netscape is

neither doing it nor taking a contract and sub'ing it.

Willing to disclose us on more plans for the browser if GNN is serious about using it.

dhk

D. Kaiser
WebSoft, Inc., 415.356.5427

---------- Headers ----------

From david@wais.com Thu Jun 22 18:18:51 1995
Received: from wais.com by emin05.mail.aol.com with SMTP
(1.37.109.11/16.2) id AA242399531; Thu, 22 Jun 1995 18:18:51 -0400
Return-Path: <david@wais.com>
Received: from [199.221.45.138] by wais.com
(4.1/SMI-4.1/Brent-911016-WAIS)
id AA22775; Thu, 22 Jun 95 15:15:59 PDT
Message-Id: <ac0f586a00021004299c@[199.221.45.138]>
Mime-Version: 1.0
Content-Type: text/plain; charset="us-ascii"
Date: Thu, 22 Jun 1995 15:20:48 -0700
To: bdunn1@aol.com
From: david@wais.com (David Kaiser)
Subject: netscape info