Erik Stevenson (LCA)

From: Brad Silverberg [bradsi]
Sent: Friday, January 12, 1996 2:09 PM
To: cameronm@microsoft.com
Subject: FW: AOL intelligence from bill hawkins

From: Ben Slivka[SMTP:bens@msg.microsoft.com]
Sent: Wednesday, January 10, 1996 6:43 PM
To: Brad Silverberg (Xenix); John Ludwig; Paul Maritz (Xenix); Thomas Reardon
Cc: Steve Ballmer
Subject: AOL intelligence from bill hawkins

Dateline: The W3C Advisory Committee meeting, Paris.
Summary: If AOL gets it's logo in Windows box, they will use our technology. For me, it's obvious that having AOL on our side (as opposed to Netscape's side) is worth this cost -- we get folks who have been very successful marketing to consumers endorsing our technology. That gives us AOL, CIS, and MSN selling our client technology -- just like we had Compaq and IBM in the early MS-DOS days. Having AOL steer there 4-5 million customers to Netscape is a scary thought.
Details: Hawkins is the guy who founded Booklink (we tried to license their web browser but AOL bought them) -- he has ~50 people in Needham, MA now: 20 SDEs and 22 STEs.

He works for Mike Connors who owns ANS (the tcp/ip network) -- says they are spending more than $150 million/year rolling that out.

He said that paulma/johnlu offered to make ANS the preferred network provider (vs. UUNET) for MSN -- that was very, very enticing to Connors. Hawkins and Connors(?) think AOL at heart is a network services company (like MCI, he said!).
BUT, Steve Case thinks AOL is an entertainment company.

Hawkins confirmed the sticking point on using MS technology for AOL client is getting the AOL icon (signup, etc.) into Windows -- this is almost an emotional thing with Case. Other complication is John Doer (sp) of Kleiner, Perkins -- the VC folks who are on board of Netscape, Sun, AOL, Cisco, ... KP have in some sense established a virtual company with many assets in the same areas as MS. KP have been orchestrating (puppetmastering?) Netscape, Sun, Java, TCI's @Home, etc.

Hawkins heard that Case was flying out to Redmond to meet with billg this Friday. He sure hopes Case & Gates can strike a deal!

Hawkins is a big fan of working with MS as opposed to Netscape. He was asked by Case and others who he thought would win the internet technology wars in 3-5 years, and he said MS. I think

PENGAD-Bayonne, N.J. GOVERNMENT EXHIBIT 811

MS66010709
CONFIDENTIAL

there is a bit of "halo effect" to MS for Hawkins -- he hinted that he may have been so pro-MS that his credibility may have suffered with Case.

Hawkins would love to work with us on 16-bit (and Mac?) versions of Sweeper. Has been doing some thinking about Java. Thinks we can do Java right, especially on the tools front. Wants to use our HTML extensions and work with us on defining those. He said he could throw 10 developers on stuff to help AOL & MS work together. His guy Ed Puckett has the real hots for the Sweeper stuff, also too much in love with C++ for Hawkins' taste.

He mentioned "just in time" compilation of Java, I hinted we were doing work on that, *he* asked if we knew Colusa -- says they are talking to Sun. Claims the Colusa VM would give better performance than the current Java VM.

--bens

P.S. I actually met him back in 1988 briefly (he says, I don't remember) when he was at Interleaf and I went their with an IBM guy to sell them on doing 32-bit OS/2 development (I was the OS/2 group program manager for 1st half of 1988 -- not my most effective 6 months). I guess he formed a good impression of me then (I'm not sure why) -- he said when he heard I was leading the IE effort that he thought "bill is applying his big guns..." and taking the Internet seriously.
<end>

MS66010710
CONFIDENTIAL