WORLDWIDE INTERNET ACCESS MARKET AND STATUS
Public Network Sales 6/13/96

	NORTH AMERICA Company	Subscribers	Company Category	Dial-IP Launch	Browser	Applicable Folder	Notes
1	America Online *	5,550,000	OLS		IE Preferred	OLS	In Nashville OLS Folder
2	CompuServe *	4,500,000	OLS		IE Preferred	OLS	In Nashville OLS Folder
3	Prodigy	1,300,000	OLS		proprietary**	OLS	** But signed deal with NSCP, not announced
4	MSN (U.S. & Canada)	872,131	OLS/IAP		IE Exclusive	OLS & ISP	MSN numbers as of 5/28/96
5	Netcom	440,000	IAP		Own/NSCP	ISP	Top target for ISP Referral in-the-box
6	AT&T	300,000	Telco		Navigator	ISP/OLS	Top target for ISP Referral in-the-box
7	AOL GNN	150,000	IAP		Navigator	ISP	Top target for ISP Referral in-the-box
8	I Star	150,000	IAP		IE Preferred	ISP	Top target for ISP Referral in-the-box
9	PSINet	130,000	IAP		Navigator	ISP	Top target for ISP Referral in-the-box
10	Earthlink	100,000	IAP		Navigator	ISP	Top target for ISP Referral in-the-box
11	IDT	100,000	IAP		IE Preferred	ISP	Top target for ISP Referral in-the-box
12	IBM Global Network	70,000	IAP		Navigator	ISP	Top target for ISP Referral in-the-box
13	Bell Canada	60,000	Telco	Now - Canada	Navigator	ISP	Top target for ISP Referral in-the-box
14	Netsafe	30,000	IAP	Now - regional	IE Preferred	ISP	
15	Pacific Bell Internet	30,000	Telco	Now - regional	Navigator	ISP	
16	Brigadoon	20,000	IAP	Now - regional	IE Preferred	ISP	
17	MCI	20,000	Telco		IE/Navigator	ISP	NSCP now, moving to IE pref., in-the-box target
18	US West	12,000	Telco	Sept - regional	Navigator	ISP	12,000 beta customers
19	GTE	10,000	Telco	July - national	TBD	ISP	10,000 beta users, top in-the-box target
20	Ameritech	-	Telco	Sept - regional	TBD	ISP	
21	Bell Atlantic	-	Telco	July - regional	Navigator	ISP	
22	BellSouth	-	Telco	August - regiona	Navigator	ISP	
23	SBC Communications	-	Telco	August - regiona	Navigator	ISP	
24	Sprint	-	Telco	August - nationa	Navigator	ISP	Top target for ISP Referral in-the-box
	TOTAL	13,844,131					

**** Total of 700 more ISPs have signed for IE preferred basis in North America

	EUROPE Company	Subscribers	Category	Country	Browser		Notes
1	DT	1,300,000	PTT/OLS	Germany	Navigator	OLS	Nashville OLS folder candidate
2	AOL	100,000	OLS	Germany	IE Preferred	OLS	In Nashville OLS Folder
3	Xlink	366,000	IAP	Germany	Navigator	ISP	
4	Compuserve	200,000	OLS	Germany	IE Preferred	OLS	In Nashville OLS Folder
5	Eunet	400,000	IAP	Germany	IE Preferred	ISP	
6	Vebacom	-	Telco	Germany	IE Preferred	ISP	

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7	MSN Germany	16,187	OLS/IAP	Germany	IE Exclusive	OLS & ISP	
8	Eunet	20,000	IAP	Switzerland	Navigator	ISP	Top target for ISP Referral in-the-box
9	MSN Switzerland	10,321	OLS/IAP		IE Exclusive	OLS & ISP	
10	Swiss PTT	-	PTT	Switzerland	none	OLS	Top target for ISP Referral in-the-box
11	Eunet Austria	22,000	IAP	Austria	Navigator	ISP	Top target for ISP Referral in-the-box
12	Radio Austria	30,000	OLS	Austria	Navigator	OLS	Nashville OLS folder candidate
		2,464,508	CENTRAL EUROPE TOTAL (NO EASTERN EUROPE)				
1	Compuserve	280,000	OLS	UK	IE Preferred	OLS	In Nashville OLS Folder
2	Demon	75,000	IAP	UK	Navigator	ISP	Top target for ISP Referral in-the-box
3	UUNET/Pipex	40,000	IAP	UK	Navigator	ISP	Top target for ISP Referral in-the-box
4	AOL	38,000	OLS	UK	IE Preferred	OLS	In Nashville OLS Folder
5	MSN UK	37,729	OLS/IAP	UK	IE Exclusive	OLS & ISP	
6	CIX	20,000	IAP	UK	Navigator	ISP	
7	Delphi Internet Ltd	15,000	IAP	UK	???	ISP	
8	Technocom	14,000	IAP	UK	Navigator	ISP	
9	BT's Campus World	10,000	Telco	UK	Mosaic	OLS	
10	Eunet GB	10,000	IAP	UK	TBD	ISP	
11	BT Internet	5,000	Telco	UK	Mosaic	ISP	Top target for ISP Referral in-the-box
12	Eireann		Telco	Ireland	TBD	ISP	
		544,729	UK TOTAL				
1	FTI	13,000	PTT/IAP	France	IE/Navigator	ISP/OLS	
2	MSN France	11,568	OLS/IAP	France	IE Exclusive	ISP & OLS	
3	Oleane	2,000	IAP	France	Navigator	ISP	
4	La Poste	-	OLS/Mail	France	IE Preferred	ISP	Top target for ISP Referral in-the-box
5	VOL	50,000	IAP	Italy	IE Preferred	ISP	
6	Infostrada-IOL	18,000	IAP	Italy	Navigator	ISP	
7	Telecom Italia	-	PTT	Italy	Navigator	ISP	
8	Portugal Telecom	15,000	PTT	Portugal	IE Preferred	ISP	
9	Telefonica	80,000	PTT/OLS	Spain	IE/Navigator	ISP/OLS?	Support both Navigator and IE
		189,568	SOUTHERN EUROPE TOTAL (INCL. FRANCE)				
1	NLNet	35,000	IAP	Holland	BD/IE Preferr	ISP	Top target for ISP Referral in-the-box
2	Planet Internet	35,000	IAP	Holland	IE/Navigator	ISP	
3	World Access	10,000	IAP	Holland	IE Preferred	ISP	Top target for ISP Referral in-the-box
4	World Online	10,000	IAP	Holland	IE Preferred	ISP	SIGNED ISP REFERRAL IN-THE-BOX DEAL
5	Eunet Belgium	12,000	IAP	Belgium	IE Preferred	ISP	
6	Innet	10,000	IAP	Belgium	IE Preferred	ISP	Top target for ISP Referral in-the-box
7	Belgacom/Skynet	5,000	PTT/IAP	Belgium	IE/Navigator	ISP	Top target for ISP Referral in-the-box
		117,000	BENELUX TOTAL				
1	Telecom Finland	40,000	PTT/IAP	Finland	IE Preferred	ISP	Top target for ISP Referral in-the-box

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2	Tele-2	20,000	Telco	Sweden	IE Preferred	ISP	Top target for ISP Referral in-the-box
3	Telia	20,000	PTT/IAP	Sweden	TBD	ISP	Top target for ISP Referral in-the-box
4	Telenor	20,000	PTT/OLS	Norway	IE Preferred	ISP/OLS	Top target for ISP Referral in-the-box
5	Teledenmark	15,000	PTT/IAP	Denmark	Navigator	ISP	
		115,000	NORDIC TOTAL				
		3,430,805	EUROPE TOTAL (NO EASTERN EUROPE)				

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	Company	Subscribers		Country	Browser		Notes
1	SuperNet	10,000	IAP	Hong-Kong	IE Exclusive	ISP	
2	Star Internet	10,000	IAP	Hong-Kong	IE Preferred	ISP	Top target for ISP Referral in-the-box
3	HKT IMS	10,000	PTT	Hong-Kong	Navigator	ISP	
4	Asia Online	9,000	OLS	Hong-Kong	IE Preferred	ISP/OLS?	1st ISP to deploy IE/BackOffice Logo
5	Vision Online	5,000	IAP	Hong-Kong	IE Exclusive	ISP	
6	Linkage OnLine	5,000	IAP	Hong-Kong	IE Exclusive	ISP	
7	HK Intcom	3,000	IAP	Hong-Kong	IE Exclusive	ISP	
8	HKNet	2,000	IAP	Hong-Kong	IE Exclusive	ISP	
9	Chevalier	2,000	IAP	Hong-Kong	IE Exclusive	ISP	
10	ABCNet	2,000	IAP	Hong-Kong	IE Exclusive	ISP	
	TOTAL	58,000					
1	Dacom Chollian (total)	455,000	OLS	Korea	proprietary	OLS	Top target for ISP Referral in-the-box
2	Dacom Internet	120,000	IAP	Korea	IE Preferred	ISP	
3	Hitel	300,000	OLS	Korea	Navigator	ISP/OLS?	
4	NowCom	200,000	OLS	Korea	IE Preferred	ISP/OLS?	
5	Samung/Unitel	140,000	OLS/IAP	Korea	IE Preferred	ISP/OLS?	
6	Hyundai/Ami-Net	20,000	IAP	Korea	IE Preferred	ISP	
7	KT (KORNET)	20,000	PTT	Korea	Navigator	ISP	
8	I-Net	10,000	IAP	Korea	IE Preferred	ISP	Top target for ISP Referral in-the-box
9	Advernet		IAP	Korea	IE Preferred	ISP	
10	Doosan IC (H&C Net)		IAP	Korea	IE Preferred	ISP	
11	Hansol PSI		IAP	Korea	IE Preferred	ISP	
	TOTAL	1,265,000					
1	HiNet	100,000	OLS/IAP	Taiwan	IE Preferred	ISP/OLS?	Top target for ISP Referral in-the-box
2	SeedNet	15,000	IAP	Taiwan	IE Preferred	ISP	
3	Dynavan	25,000	IAP	Taiwan	IE Preferred	ISP	Top target for ISP Referral in-the-box
4	Taiwan Telecom	3,000	IAP	Taiwan	IE Preferred	ISP	
5	Acernet	2,000	IAP	Taiwan	Navigator	ISP	
6	Supernext	1,000	IAP	Taiwan	IE Preferred	ISP	
7	Sysnet	5,000	IAP	Taiwan	Navigator	ISP	

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8	Ficnet	2,000	IAP	Taiwan	Navigator	ISP	
	TOTAL	153,000					
1	Fujitsu NiftyServe	1,500,000	OLS	Japan	Proprietary	OLS	Nashville OLS folder candidate
2	NEC PC-VAN	1,000,000	OLS	Japan	Proprietary	OLS	Nashville OLS folder candidate
3	IIJ	150,000	IAP	Japan	Navigator	ISP	Top target for ISP Referral in-the-box
4	Tokyo Internet	150,000	IAP	Japan	Navigator	ISP	Top target for ISP Referral in-the-box
5	MSN Japan	142,668	OLS/IAP	Japan	IE Exclusive	OLS & ISP	
6	NEC / C&C Mesh	30,000	IAP	Japan	Navigator	ISP	Negotating on IE preferred status
7	Fujitsu / InfoWeb	20,000	IAP	Japan	Navigator	ISP	Negotating on IE preferred status
8	NTT Data/InterVia	5,000	IAP	Japan	Navigator	ISP	Negotating on IE preferred status
9	NTT-PC/InfoSphere	3,000	PTT/IAP	Japan	Navigator	ISP	Negotating on IE preferred status
	TOTAL	3,000,668					
	GRAND TOTAL FE	4,476,668					

	ASIA PACIFIC						
	Company	Subscribers	Category	Country	Browser		Notes
1	OzEmail	60,000	IAP	Australia	Navigator	ISP	Top target for in-the-box deal
2	On Australia/Telstra	24,791	OLS	Australia	IE Exclusive	OLS/ISP?	
3	Access One	22,000	IAP	Australia	IE Preferred	ISP	
4	Compuserve	20,000	OLS	Australia	IE Preferred	ISP	Signed in USA
5	connect.com	15,000	IAP	Australia	Navigator	ISP	Hate MS, love Unix but interested in Win95 box deal
6	Microplex	12,000	IAP	Australia	IE Exclusive	ISP	
7	IBM Global Networks	8,000	IAP	Australia	???	ISP	Don't distribute, but demoing IE at shows
8	Dialix	4,000	IAP	Australia	???	ISP	Don't distribute a browser
9	Pegasus	3,000	IAP	Australia	???	ISP	Don't distribute a browser
10	Geko	3,000	IAP	Australia	IE Preferred	ISP	
11	TPG Internet	3,000	IAP	Australia	IE Preferred	ISP	
12	PowerUp	2,500	IAP	Australia	IE Preferred	ISP	
13	Ashburton	1,000	IAP	Australia	IE Preferred	ISP	
	TOTAL	178,291			*** 25 other Australian ISPs signed for IE preferred		
1	Voyager	5,000	IAP	New Zealand	IE Preferred	ISP	Signed for ISK/ Owned by OzEmail
2	The Internet Company	2,000	IAP	New Zealand	IE Preferred	ISP	Preferred browser
3	Comnet	500	IAP	New Zealand	Navigator	ISP	
4	IHUG		IAP	New Zealand	Navigator	ISP	
5	Telecom New Zealand		PTT	New Zealand	Navigator	ISP	Strongly Netscape and SGI
	TOTAL	7,500					
1	Pacific Internet	50,000	IAP	Singapore	Navigator	ISP	NSCP distl and Sun/SGI VAR. ISP in-the-box target
2	SingNet	35,000	PTT	Singapore	IE Preferred	ISP	Use MS HTML ext. & IIS. Priority for ISP in-the-box
3	Teleview	38,000	PTT	Singapore	Navigator	OLS	Singtel's videotext OLS. Normandy candidate

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4	CyberWay	3,000	IAP	Singapore	IE Preferred	ISP	Target for ISP in-the-box
	SINGAPORE TOTAL	126,000					
	ASIA PACIFIC TOTAL	311,791					

	LATIN AMERICA						
	Company	Subscribers	Category	Country	Browser		Notes
1	SatLink (Compuserve)	8,000	IAP	Argentina	IE Preferred	IAP	Target for ISP Referral in-the-box
2	Startel	7,000	IAP/Telco	Argentina	IE/Navigator	IAP/OLS	Hosting largest Newspaper/ Referral
3	ImpSat/Teledatos	3,020	IAP	Argentina	IE Preferred	IAP	Target for ISP Referral in-the-box
4	BR Home Shopping	10,000	IAP	Brazil	IE Preferred	IAP	Nation wide provider - Target for ISP in-the-box
5	Mandic	10,000	IAP	Brazil	IE Preferred	IAP	Access in 2 cities - Top target for in-the-box deal
6	Nutec	10,000	IAP	Brazil	IE Preferred	IAP	Nation wide provider - Target for ISP in-the-box
7	Uninet (unisys)	5,000	IAP	Brazil	none	IAP	Access in 2 cities - Top target for in-the-box deal
8	Brasil OnLine	-	OLS	Brazil	IE Preferred	OLS	Will start operations in July
9	Universo OnLine	-	OLS	Brazil	none	OLS	Will start operations in July
10	Reuna	2,100	IAP	Chile	IE/Navigator	IAP	Target for ISP Referral in-the-box
11	CTC-Mundo	2,000	IAP/Telco	Chile	Navigator	IAP	
12	RDC	2,000	IAP	Chile	Navigator	IAP	Target for ISP Referral in-the-box
13	Colomsat	6,700	IAP	Colombia	IE/Navigator	IAP	Target for ISP Referral in-the-box
14	Open Way	1,100	IAP	Colombia	Navigator	IAP	
15	Compuserve	12,000	IAP/OLS	Mexico	IE Preferred	OLS	Signed US
16	Infosel	6,000	OLS	Mexico	IE Preferred	OLS/IAP	Target for in-the-box deal
17	Datanet	4,000	IAP	Mexico	IE Preferred	IAP	Target for ISP Referral in-the-box
18	MPSNet	2,000	IAP	Mexico	IE Preferred	IAP	Larges MS distl/Target for ISP Referral in-the-box
	TOTAL LATIN AMERICA	90,920					

GRAND TOTAL WW INTERNET & OLS USERS

Region	Subs	# of Netops
North America	13,844,131	24
Europe	3,430,805	38
Far East	4,476,668	37
Asia Pacific	311,791	20
Latin America	90,920	17
GRAND TOTAL WW	22,154,315	136
Internet and Online Services Users		

63 Netops signed for IE as preferred browser

NON-INTERNET WW ONLINE SERVICES

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America Online *	2,944,000	WW	Assumes 50% Internet usage
CompuServe *	2,750,000	WW	Assumes 50% Internet usage
Fujitsu NiftyServe	1,500,000	Japan	
Prodigy	1,300,000	North Amer.	Assumes 30% Internet usage
NEC PC-VAN	1,000,000	Japan	
DT T-Online	910,000	Germany	
Dacom Chollian (total)	455,000	Korea	
Hitel	300,000	Korea	
NowCom	200,000	Korea	
GRAND TOTAL	11,359,000		

51% of total WW market shown above

Customer	1996	%	1997	Growth	New Subs	% New Subs
IAPs	7.1	29%	12.8	80%	5.7	41%
OLSs	14.9	61%	19.8	33%	4.9	36%
Telcos *	2.2	9%	4.4	100%	2.2	16%
Cable	0.05	0.2%	1.0	1900%	1.0	7%
Total	24.3	100%	38.0	57%	13.7	100%

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