Market Share - *Netscape makes a number of claims about market share:*

"Two recent studies show that Netscape Navigator is the most popular Web browser. International Data Corporation (IDC) reported that more than 87.6 percent of all Web surfers use Netscape Navigator. IDC reported that the nearest competitor has 2.6 percent. In a similar study, Dataquest reported that Navigator has a 84 percent market share. "*

Browser share is generally disputed so we point to two real world sites for an independent assessment. Two such sites that measure browser preference are Webtrends and Browserwatch. The data is reproduced below. Averaged, Microsoft Internet Explorer has over 29 percent share in August, with Netscape about 63% compared to approx. 16% (IE) and 73% (Navigator) just one month prior.

http://www.interse.com/webtrends

Interse	August-96	July-96	June-96	May-96
Netscape (all platforms)	62.7%	72.6%	78.2%	83.2%
Microsoft	29.1%	15.8%	8.3%	7.0%
NCSA	0.2%	0.7%	0.4%	0.4%
All Others	7.9%	10.9%	13.1%	9.4%

http://browserwatch.iworld.com/report-table-browser.html

BrowserWatch	8/8/96	8/1/96	7/16/96
Netscape Navigator	73.8%	75.7%	76.7%
Microsoft Internet Explorer	15.3%	14.3%	13.1%
Lynx	1.3%	1.2%	1.3%
QuarterDeck Mosaic	1.6%	1.6%	1.7%
NCSA Mosaic	0.3%	0.5%	0.4%
All Others	7.6%	6.7%	6.8%

The key point on browser share, and with Internet Explorer overall, is that with the delivery of Internet Explorer 3.0, customers now have a very compelling alternative to Netscape Navigator. With the release of Internet Explorer 3.0, users have a choice. We believe Internet Explorer is a step ahead, and hope users will decide for themselves.

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Open Standards and ActiveX

Open Standards - Netscape published an "Open Standards Commitment" in their Reviewer's Guide, pledging their fealty to "open" standards. The concept of "openness" is open to interpretation, but Netscape offers the following definition:
"Open standards are defined as published specifications that enable multiple vendors to create independent implementations of a given technology."

"Netscape is committed to continuing to deliver all of its products based on open standards."

Netscape does not completely live up to their own standard of openness, despite frequent claims to the contrary:

- **HTML** - Hypertext Markup Language is the most fundamental data format of the Internet. HTML is defined and evolved by the Worldwide Web Consortium (W3C), which is lead by Tim Berners-Lee, the inventor of the World Wide Web. Netscape repeatedly has introduced its own proprietary enhancements to HTML and refuses to submit these enhancements to the W3C.

- **Stylesheets** - the W3C has defined stylesheets to provide a way to create very small but very sophisticated web pages. Netscape says they will support stylesheets "once they are finalized". The stylesheets standard is complete and supported in Internet Explorer 3.0 today. Despite public announcements of support for the stylesheets specification, Netscape has introduced several proprietary HTML tags (<SPACER> and <MULTICOL>) that actually undermine the stylesheets standard.

- **PICS**- the Platform for Internet Content Specification, also defined by the W3C, allows parents to control what content their children can access over the Internet. Despite Netscape's involvement in defining PICS, they have not supported it.

- **JavaScript** - when Netscape announced JavaScript, they promised it would be open and they would provide a complete specification, submit it to standards bodies, provide source code and license JavaScript to all licensees of Java. None of these things have happened.

- **Plug-ins** - Netscape has not published any specifications for how any other vendor can host plug-ins.

- **Security** - the SSL standard is not freely documented, despite industry-wide demand to publish this specification.

- **Certificates** - Netscape does not document how any application can access security certificates. It is Microsoft's opinion that certificates belong to users and that users should not be locked into a single application.

- **Conferencing** - the protocols for CoolTalk are not published and do not interoperate with any other products

Microsoft issued a pledge to respect and implement HTML standards as defined by the W3C. Microsoft challenged Netscape to make a similar pledge, but they have refused to make a commitment to open, industry-approved standards.

Netscape frequently claims, despite their "open standards commitment", that standards bodies do not move fast enough to keep up with the pace of innovation in the industry. In fact, the opposite is true. Netscape is not keeping up with the standards body, having not yet implemented standards like stylesheets, PICS or T.120.

ActiveX - Netscape's response to ActiveX is interesting, because they say:

1. Navigator supports ActiveX through the Ncompass plug-in
2. Netscape ONE is a better solution than ActiveX
3. It is better to support ActiveX through a plug-in than natively
4. ActiveX is proprietary

Let's examine these points one by one.

1. *Navigator supports ActiveX through the Ncompass plug-in*

The ActiveX plug-in from Ncompass allows Navigator users to use ActiveX components, although not with the performance or functionality they would get from Internet Explorer or any other application that supports ActiveX natively. This plug-in at least offers Navigator customers some of the benefits of ActiveX.

2. *Netscape ONE is a better solution than ActiveX*

Netscape ONE is Netscape's recently announced software component architecture. Because they have yet to deliver any components of ONE beyond a white paper, it is impossible to compare the

two technologies head to head. We can, however, look at the scale of the investment required to develop ActiveX and the breadth of industry support it has today.

ActiveX is third generation software component technology and represents years of concerted development effort. ActiveX lets developers build small pieces of code that can be easily integrated with one another. Component technology is extremely complex and is not easily developed in a couple months. Component-based software development has been a dream of the software industry for over a decade, and ActiveX is the first and only component technology to make the leap from a theoretical exercise to thriving business. Other component technologies such as CORBA, the technology Netscape is basing ONE on, have not achieved critical mass despite years of effort and investment by the UNIX community.

ActiveX is the basis for an industry. Hundreds of developers are delivering and selling thousands of ActiveX components today. Giga Information Group estimates the market for ActiveX components at over $200 million today, growing to over $2 billion by the turn of the century. Further, ActiveX is supported by all major development tools vendors, making it easy to create components in a variety of programming languages. Finally, the whole premise of a component architecture is to let you development components once and reuse them as broadly as possible. Not only can you run ActiveX components within Internet Explorer, but also within many of the most popular and widely used applications such as Lotus Notes, Lotus SmartSuite, Microsoft Office and Borland Delphi. A component model that only works within one application, the browser, does not provide much leverage for developers.

3. *It is better to support ActiveX through a plug-in than natively*

Netscape says ActiveX adds size and overhead, is complicated, is only on two of the 16 platforms Netscape supports, and lacks protection. Given Netscape has yet to introduce any component technology it is impossible to evaluate the size and complexity of ActiveX against the Netscape alternative. ActiveX will be available on 99% of all computer platforms this year, while it is not clear when Netscape will deliver their component technology.

As for ActiveX's ability to "do malicious things" to the client system. This is a characteristic of all downloaded code, including plug-in's. Recognizing this, Microsoft had taken the lead in creating technology and infrastructure - Authenticode™ - to support the signing of code to allow for accountability of the created component.

4. *ActiveX is proprietary*

ActiveX is hardly proprietary. It is supported and distributed by literally hundreds of companies, at no charge to those supporters. ActiveX is also fully documented. It is possible for any vendor to build a component or an application to host the component. It is worth noting that Netscape does not offer documentation for how applications can host plug-ins.

To remove any doubt about the future direction of this standard, Microsoft has announced that ActiveX will be administered and controlled outside of Microsoft in the future. We are not "wavering" on this commitment. Given the hundreds of stakeholders in ActiveX, we are being very conservative in evaluating our options to administer this technology going forward. We will announce specifics about this plan in the near future.

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Futures: Great Sequels are Coming Soon

Netscape devoted significant space in their reviewer's guide to how great their future products will be. In order to match Internet Explorer, Netscape has to catch up on features like stylesheets, ratings, standards-based conferencing, as well as completely re-architect their browser to support a component architecture. Needless to say, Microsoft will not be standing still. We are already hard at work on future versions of Internet Explorer. While it's early to be talking about new releases of our products, customers can rest assured that the investments they make in using Internet Explorer

3.0 **today** will pay off going forward. Microsoft supports the latest HTML standards **today**. Microsoft is shipping a component architecture **today**. Microsoft is shipping multi-point application sharing **today**. Microsoft has integrated existing Intranet documents with the web browser **today**. Microsoft has faster Java support **today**. Microsoft is already ahead on key Internet and Intranet technologies, and Internet Explorer 3.0 is only the starting point.

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