

HIGHLY
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Morgan Stanley Technology Conference
Proposed Keynote Address Outline

CLIENTS AND SERVERS CREATE A NEW PLATFORM. Client plug-ins, server suites, relational databases etc. all contribute to this notion of an emerging platform from NSCP's suite of software.

2. INCREASED APPLICATION DEVELOPMENT FOR THIS NETWORKED PLATFORM. Thousands of successful developers are working to develop a new breed of applications for this new networked platform at the expense of old platforms. As an example, a few months ago it was estimated that there would be hundreds of applications available within a short time for the Win95 platform. Instead, they're being built for the Web. Features include: Content, Database access, Communication and dynamic, instantly updatable capabilities.

3. OPEN STANDARDS ARE NECESSARY TO SUCCEED. Expensive, proprietary systems like MSN, Imagination Network and Lotus Notes will become obsolete by the advantages that come with adapting to cross-platform technology. Innovation is critical in this open standards market and developers are adopting it.

4. HIGH BANDWIDTH. The impact of cable modem technology on the enterprise will be tremendous. Whenever and wherever they are deployed, they will unleash a flood of demand that will begin--not end--a revolution. NSCP software can only benefit from higher bandwidth and the success of products which enable it.

5. ONLINE PUBLISHING WILL HAVE TROUBLE ON THE NET. (This is one Marc has not yet introduced to the world outside NSCP). For basic reasons of cost structure--ie the availability of quality material at no cost, ads everywhere and not only in publications--large publishing houses will see a slow-down in their subscriber base. Smaller publishing companies will also compete in this narrowing space.

6. THE INTERNET REVOLUTION IS HAPPENING SIMULTANEOUS TO ANOTHER DEMOGRAPHIC REVOLUTION. Before, a generation grew up with PCs. This enabled the success of platforms that are dying. Now, we're growing up with networks and find working with them preferable and natural. Granted, PCs play a role here, but the central point is that they're networked. 3-D (both in software and hardware terms) and networked games will be huge in the new consumer market. TV's, magazines and newspapers could ultimately suffer in this landscape. In addition this is quickly becoming a global arena, users are able to access information from many angles and from many locations.

7. COMMERCE. As the enterprise begins to adopt to the Internet/Intranet, corporations will come to rely on the network for commerce. With the enterprise market facilitating online transactions, the consumer market will also develop quickly. With this focus on commerce, security will only become more important.

8. TELEPHANY. In the past, there have been some attempts to integrate the telephone into the computer. NSCP now sees this integration as a critical element in the evolution of the Internet/Intranet. We are working closely with many developers to insure that this technology succeeds.

9. DUMMY/X TERMINALS. One of the bigger predictions this year was the rise of dummy terminals leveraging a networked platform. Along with the rise of dummy terminals comes the introduction of the 'skinny' client. While NSCP does not consider its client line 'fat', we will rely on an increasing amount of memory to operate all functionality and plug-ins that we see markets for.

10. LIVE CONTENT. Content contains programs. The lines between content and applications are blurring. Rather than writing/creating code, programmers will use content with built-in code for their tasks. HTML acts as the framework for this transition; Java and JavaScript act as examples of languages. No longer will programmers design/run software programs, instead they will be using content.

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