



From: Adam Taylor [adamt]
Sent: Thursday, November 11, 1993 11:21 AM
To: bradsi
Subject: RE: URGENT: WSJ- Ferengi article

You're right.
I'm working on getting the specific things that are broken.
We've mentioned both versions of MS-DOS before, but I will make that clearer, along with the other disk compression vendors.
We have been taking the less aggressive angle on royalty issues, as a ace in the hole when we finally decide how to attack. I will modify this to be more aggressive, but use only in press calls. I think it's safer for the field to be on the "no comment" type response. (that's what you'll see with comdex Q&A).

thx.

From: Brad Silverberg
To: Adam Taylor
Subject: RE: URGENT: WSJ- Ferengi article
Date: Thursday, November 11, 1993 12:17PM

i don't think this pitch is nearly compelling enough. we need to name broken apps, broken drivers!!!

also, why be so specific about msdos6.2? i've mentioned this to jonro many times yet it persists. by being specific, it's as if it's confined to the newest 6.2 release. it's not. it's msdos 6.0 and 6.2 -- anything using doublespace. not just that either, also stacker, and pcdos 6.1!

nor do you refute the royalty question. it's not all money in ibm's pocket, even in the most optimistic scenario to them!

From: Adam Taylor
To: billp; bradsi; jonro
Subject: RE: URGENT: WSJ-- Ferengi article
Date: Thursday, November 11, 1993 11:57AM

Here's the pitch we used yesterday with the press. This seemed to work well.

thx.

OS/2 IS CLEARLY ON A WINDOWS CLONING STRATEGY. Evidence is the decision to call this product "OS/2 for Windows." But when you're in the cloning business, you're constantly playing catchup. OS/2 has always been behind. IBM needed 18 months to get partial support for Windows 3.1, but they still don't have support for VxDs or Windows device drivers. Cloning huge support implications. Who will customers call when they have a problem?

NOW, IBM IS BEHIND ALL OVER AGAIN. OS/2 2.1 doesn't support WFW 3.11 and MS-DOS 6.2. They don't support the speed enhancements from WFW's 32-bit file access and network components. They don't work with DoubleSpace, or even PC-DOS 6.1 disk compression. WFW 3.11 will ship on over 6 million PCs in the next 12 months, or over 30% of the Windows total runrate. MS-DOS 6 has already shipped over 15 million units to date. OS/2 doesn't support all those PCs, which includes all the Dells and all the Gateways.

IBM'S TECHNOLOGY TREADMILL GETS WORSE. In the future, OS/2 won't

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|support emerging technologies such as OLE2, Win32 and PnP. This means
|they won't run all the new features of the latest Windows applications,
|like Office 4.0, or the new generation of hardware what supports Plug and
|Play.

| - CUSTOMERS HAVE CLEARLY DECIDED. Customers want to run Windows
|applications FAST. They want support for new applications and hardware
|standards. Windows ships over 1.5 million units every month and
|accounts for 99% of the market. Customers want Windows, even IBM has
|figured that out with their new product "OS/2 for Windows."

|From: Bill Pope
|To: Adam Taylor; Brad Silverberg; Jonathan Roberts
|Subject: RE: URGENT: WSJ-- Ferengi article
|Date: Thursday, November 11, 1993 12:55PM

**Privilege Material
Redacted**

|From: Jonathan Roberts
|To: Adam Taylor; Bill Pope; Brad Silverberg
|Subject: RE: URGENT: WSJ-- Ferengi article
|Date: Mon, Nov 8, 1993 6:36PM

|I've talked to Bobkr. He won't be responding. Joni or I will handle
|tomorrow. I am also trying to get Steveb to possibly respond. Claire,
|Adam, and I will determine tonight at 6:30 if Steve should call.

|Jonathan

|From: Brad Silverberg
|To: Adam Taylor; Bill Pope; Jonathan Roberts
|Subject: FW: URGENT: WSJ-- Ferengi article
|Date: Monday, November 08, 1993 5:23PM

|please handle

|From: wagged!or.wagged.com!colleen!
|To: bobkr
|Cc: PAMED; PAMK; CLAIRE; bradsi; collinsh; jefft; joni; martyta; paulma
|Subject: URGENT: WSJ-- Ferengi article
|Date: Monday, November 08, 1993 1:39PM

|Laurie Hayes--212/416-4369- is writing an article on IBM's Ferengi product
|and would like comment from Microsoft. Print date is scheduled for
|sometime

|this week and we believe the journal will play it up.

|Laurie has read articles in the trades, namely PC Week and understands
|there

|are potential legal issues with the product-- she mentioned JeffT's quote
|in

|PC Week re: Ferengi running Windows apps as an example. She would like to
|understand:

- > Microsoft's reaction to IBM announcing this product
- > How this affects the MS/IBM relationship
- > If there's a chance Microsoft will sue
- > Whether there been discussions between MS and IBM regarding Ferengi
|specifically

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Laurie was most recently the Moscow bureau chief for the Journal. She does not understand technology, so you'll want to keep the discussion at a very high level-- focus on strategy rather on technology. She'd like a call back

today, if possible. Let us know how it goes. Thanks.

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