From: Adam Taylor [adamt]
Sent: Thursday, November 11, 1993 11:19 AM
To: billp; bradsi; jonro
Subject: RE: URGENT: WSJ-- Ferengi article

ok

From: Bill Pope
To: Adam Taylor; Brad Silverberg; Jonathan Roberts
Cc: Bill Pope
Subject: RE: URGENT: WSJ-- Ferengi article
Date: Thursday, November 11, 1993 1:17PM

Privilege Material
Redacted

From: Adam Taylor
To: Bill Pope; Brad Silverberg; Jonathan Roberts
Subject: RE: URGENT: WSJ-- Ferengi article
Date: Thu, Nov 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 ll the Dells
and all the Gateways.

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

MS-PCA 2608541

CONFIDENTIAL

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. Jonl 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!colleenl
To: bobkr
Cc: PAMED; PAMK; CLAIRE; bradsi; collinsh; jefft; jonl; 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

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.