

EXHIBIT P

From: Bill Gates
To: Bill Bliss; Bob Muglia; Brad Silverberg; Brad Struss; Brian MacDonald; Chris Guzak; Chris Peters; Darryl Rubin; Doug Henrich; Erik Gavriluk; Jim Allchin; Joe Belfiore; Kurt Eckhardt; Leif Pederson; Mike Koss; Paul Maritz; Russell Siegelman; Satoshi Nakajima; Steve Madigan; Tom Evslin
Cc: Brian Fleming
Subject: Shell plans - iShellBrowser
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Its time for a decision on iShellBrowser.

This is a tough decision. The Chicago team has done some great work in developing a user interface that will be a big step forward for millions of people. The explorer is an important part of this because it provides a neat paradigm for finding interesting information. The shell group did a good job defining extensibility interfaces. It is also very late in the day to making changes to Chicago and Capone.

It is hard to know how much actual market benefit iShellBrowser integration would bring. I believe Chicago will be very successful either way. Unfortunately I don't think the integration will have a marked effect in terms of Capone competing with cc:Mail, so that battle will have to be won on other grounds. This is not to say that there was anything wrong with the extensions - on the contrary they are a very nice piece of work.

On the other hand, we are in a real struggle vs. Notes and the Office/REN team needs to move as quickly as they can to deliver really rich, unified views of information and to provide and exploit storage unification as systems makes that possible, and we need as clear a path as possible to allow them to do that. The Ren team has a lot of challenges and compatibility would be an extra effort for them of at least 5 man years. If we felt we could expand this team easily to help Office, beat Notes, be a source of future shell technology and be compatible then I would say the extensions are ok. However the Ren team will find it tough to deliver on all of these even without compatibility.

I have decided that we should not publish these extensions. We should wait until we have a way to do a high level of integration that will be harder for likes of Notes, Wordperfect to achieve, and which will give Office a real advantage. This means that Capone and Marvel can still live in the top level of the Explorer namespace, but will run separately. We can continue to use the iShellBrowser APIs for MS provided views such as control panel, and can use them for other MS-provided views that don't create a large compatibility or ISV issue.

I would also like to add a few words about the recent Shell re-organization. We have gone from three centers of UI innovation to two. There is a lot of pain in doing this. All 3 groups were doing excellent work and I hope the Cairo shell and Ren can come together to provide the best of both. I think there will be real benefits to be reaped. Having the Office team really think through the information intensive scenarios, and be a demanding client of systems is absolutely critical to our future success. We can't compete with Lotus and Wordperfect/Novell without this. Our goal is to have Office'96 sell better because of the shell integration work, and to have the Ren/Office effort yield technology that can be an integral part of the shell in Windows'97. I look forward to the Office team getting excited about using Component Forms, OLE automation, OFS, etc. in the future - and pushing systems much harder than before.

The Personal Systems team has many challenges ahead of it - they need to remain focussed on overall systems ease of use, and on being the conscience of the individual/home user - on thinking through integration of new opportunities opened by the Internet, by CD-ROM titles, etc. This means that we are still going to have to work together and deal with tensions as they arise, but we can't give up on either market, and there is a huge amount of creative work to be done. We need to allow for innovation in both Office and Windows, even if this makes the line between them hard to draw.

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