

Message

From: Michael Murphy [Redacted @google.com](#)
Sent: 3/17/2020 11:14:47 PM
To: Ruth Porat [Redacted@google.com](#); Philipp Schindler [Redacted@google.com](#); Jerry Dischler [Redacted@google.com](#); Kent Walker [Redacted@google.com](#); Don Harrison [Redacted@google.com](#)
CC: Prabhakar Raghavan [Redacted@google.com](#); Joan Braddi [Redacted@google.com](#); Kristin Reinke [Redacted@google.com](#); Deal_review [Redacted @google.com](#); [Redacted @google.com](#); Jamie Rosenberg [Redacted@google.com](#); Mike Herring [Redacted @google.com](#); Adrienne McCallister [Redacted@google.com](#); Christian Cramer [Redacted@google.com](#); Anna Kartasheva [Redacted@google.com](#); Yuki Richardson [Redacted@google.com](#); Helen Tsao [Redacted@google.com](#); Matt Schwartz [Redacted @google.com](#); Jon Gold [Redacted@google.com](#)
Subject: BC Deal Review: Agenda for Thursday, March 19th at 11 AM PST

Privileged and Confidential

Philipp, Kent, Jerry, Don, Ruth,

We have one topic scheduled for BC review Thursday: a proposed update to the Revenue Share Agreement (RSA) structure for carriers.

We expect most attendees to join remotely, but we have reserved a room ([MTV-41-1-Lightning Bolt](#)) as a contingency in case anyone will join live. The GVC handle is updated on all calendar invitations.

Best regards,

Mike

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**1. US Carrier RSA Structure (materials)**

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- **Reason for BC review:** Non-standard incentives, x-PA Program Review
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- **Asks for BC:** Approve updated US carrier RSA structure that includes
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  - Fewer configuration requirements (shift from full search integration to Default Home Screen, or DHS)
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  - Reduced US carrier revenue share ([Confidential](#) status quo) on new devices (no change to installed base)
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  - Allows exception for Verizon only to allow Yahoo Home mobile app with Bing-powered Yahoo Search bar preloaded on +1 screen (not DHS)
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  - Delegation of authority to Platforms & Ecosystems Cross-Functional Deal Review (PEX) to determine how to utilize savings from reduced revenue share. Current plans include volume incentives for premium devices and longer term initiatives to drive Android share.
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Ex. No.  
UPX0293  
1:20-cv-03010-APM

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- **Deal Representatives:**

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- Jamie Rosenberg (VP, Android & Comms)
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- Adrienne McCallister (Senior Director, Global Partnerships)
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- Anna Kartasheva (Senior Manager, Platforms & Ecosystems Strategy)
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- Yuki Richardson (Director, Finance - Platforms & Ecosystems)
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- Helen Tsao (Senior Corporate Counsel)
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- **Rationale in support of deal:**
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- Incentive realignment appropriate given current trends whereby US carrier revenue share spend is growing Confidential YoY while Android is losing share Confidential Actives and Confidential on \$400+ shipment YoY
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- Savings from the new RSA structure can self-fund bounties in years 1-2 to drive targeted devices, and be redeployed in year 3+ to help grow the Android ecosystem
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- Search usage not expected to be materially impacted as long as Google retains placement on DHS; estimated revenue loss across US carriers is Confidential annually while saving Confidential through 2024
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- Relaxing configuration requirements to allow preloads of alternative Search apps helps ease regulatory risk and reinforces Google's principle to provide options to users
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- Carveout for Verizon allows partner to advance their current post-acquisition strategy for distribution of 1P applications across their user base



- **Michael Murphy**
- Deal & Spend Governance | Global Lead
- Redacted@[google.com](mailto:Redacted@google.com)