

Message

From: Michael Murphy Redacted @google.com]
Sent: 11/11/2020 8:37:45 PM
To: Kristin Reinke Redacted@google.com]; Philipp Schindler Redacted@google.com]; Jerry Dischler Redacted@google.com]; Halimah DeLaine Prado Redacted@google.com]; Don Harrison Redacted@google.com]
CC: Prabhakar Raghavan Redacted@google.com]; Joan Braddi Redacted@google.com]; Deal_review Redacted@google.com]; Redacted @google.com; Adrienne McCallister Redacted@google.com]; Yuki Richardson Redacted@google.com]; Kate Lee Redacted@google.com]; Jamie Rosenberg Redacted@google.com]; Anna Kartasheva Redacted@google.com]; Steve Fieler Redacted@google.com]; Richard Turner Redacted@google.com]; Marie Mackey Redacted @google.com]
Subject: Re: BC Deal Review: Agenda for Thursday, November 12th at 11 AM PST

Hi BC constituents,

Upon request, we've rescheduled the carrier RSA topic to BC next week (Thursday 11/19). We've released tomorrow's hold on your calendar.

Philipp, Kristin, Don, Jerry - friendly reminder that there is one additional topic pending your review via email in your inboxes: *[BC Deal Review] Email Approval Requested: Feet on Street.*

Please feel free to let me know if you have any questions or concerns.

Best regards,
Mike

On Tue, Nov 10, 2020 at 6:14 PM Michael Murphy Redacted @google.com> wrote:
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Philipp, Halimah, Jerry, Kristin, Don,

We have one topic scheduled for BC review Thursday, a proposed update to the partnership approach for the Revenue Share Agreements (RSAs) with AT&T and Verizon.

Best regards,

Mike

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**1. AT&T and Verizon (materials)**

- **Reason for escalation:** Top Partner, Revenue Share, Total Payout
- **Ask:** Approval for updated economics/model for Google Mobile Revenue Share Agreement ("RSA 3.0") for AT&T and Verizon
  - Up to a full [redacted] search rev share equivalent in US across 2 deals, estimated [redacted] over [redacted] years
  - Deal 1: [redacted] search rev share for Core tier, [redacted] for Preferred tier. Reduce search revshare to [redacted] net for current install base
  - Deal 2: Fixed payments worth up to remaining [redacted] net to incentivize Android device share and ensure distribution for Messages app and Pixel ranging
- **Deal Representatives:**
  - Jamie Rosenberg (VP, Android)
  - Adrienne McCallister (Sr Director, Global Partnerships)
  - Yuki Richardson (Director, Finance)
  - Anna Kartasheva (Senior Manager, Platforms & Ecosystems Strategy)
- **Context:**
  - RSA 2.0 deals have been extended for [redacted] while negotiating RSA 3.0

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UPX2097  
1:20-cv-03010-APM

- Deal 1 combines previously approved Optimized tier and Preferred Device configuration into one revshare tier
- Both deals are expected to be signed by Carrier concurrently (but note there is no contingency between the deals being contemplated).
- **Rationale:**
  - The new structure will help improve the health of the Android ecosystem in the US while ensuring the carrier is incented to improve their performance metrics across Android
  - Breaking out into two deals enables Google to right-size search revenue share specific to Search & Assistant placement obligations
  - Google is at a critical phase with respect to Messaging in the US. With uncertainty around the Cross Carrier Messaging Initiative (CCMI), moving decisively with AT&T and Verizon will help secure distribution
  - Pixel distribution will help Google achieve its top 5 priorities for 2021, and US Carriers' commitment to Pixel benefits the Android ecosystem
  - [REDACTED]



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