

Message

From: Anna Kartasheva [Redacted@google.com]
Sent: 11/5/2020 4:28:11 PM
To: Jamie Rosenberg [Redacted@google.com]
CC: Adrienne McCallister [Redacted@google.com]; Rosie Lipscomb [Redacted@google.com]; Kate Lee [Redacted@google.com]; Yuki Richardson [Redacted@google.com]
Subject: Re: Carrier RSAs

A/C Privileged and Confidential

Rosie, I would appreciate your advice on the below, as well as outside counsel perspective on this.

Thank you Jamie! I have been thinking about this a lot, and making sure we are not exposing Search/Assistant unnecessarily, and here is my argument in defense of [Redacted] revenue share. I looked at all the sources of traffic on the device, and what protections we have. I am working with Shuting on Yuki's team to develop this better, but here is where we were landing roughly:

- 1) MADA protects the **widget** on the device [Redacted]
- 2) [Redacted] RSA ensures **Chrome** is in **hotseat/set as default browser** on carrier devices as well [Redacted]
[Redacted]
- 3) Rest of the traffic is [Redacted], **which would be not protected** on carrier devices in the absence of RSA

This leaves, in the pretty generous case, only about [Redacted] of the search revenue of the device to any rival who wants to buy us out. Even if the rival monetizes as well as Google, it will be hard for them to overcome our [Redacted] rev share offer as they would have to give up at the minimum, [Redacted] of their monetization.

We also have a similar slide in the older BC decks, that also adds assistant considerations here, but still comes to the conclusion that at [Redacted] we are offering the most attractive deal to the carriers.

Please let me know if this makes sense

Thank you
Anna

On Thu, Nov 5, 2020 at 8:13 AM Jamie Rosenberg <[Redacted@google.com]> wrote:
ATTORNEY CLIENT PRIVILEGED
Seeks advice of counsel
(Rosie, kate, would be grateful for your thoughts here)

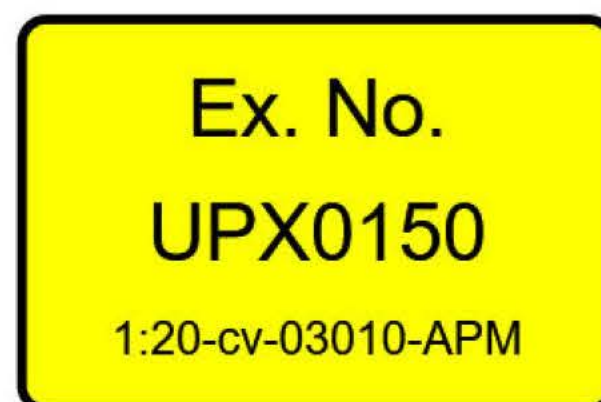
I've been thinking about our new approach to the US carrier RSAs, both in the context of today's BC review as well as the revised structures for [Redacted]

While we tweak the structures to solve for multiple things, one thing I want to make sure we don't lose sight of is the need to promote our search access points on new devices. This is also a question we'll get from the Search team. In that context, I'm wondering about the rationale for reducing new devices from [Redacted]

[Redacted] I think the Search team will say that's fine, as long as -- in the device-by-device world we're entering -- we don't increase the chances that our economics on those devices are not competitive vs. what rivals are offering.

Would be interested to hear your thoughts on that... it's been nagging at me.

Thanks,



Jamie

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Redacted

who/akartash