

**From:** Doug Miller  
**Sent:** Monday, August 28, 2000 12:03 PM  
**To:** Stephanie Wettstein (Waggener Edstrom); Katrina Bush (Waggener Edstrom); Chuck Humble (Waggener Edstrom); Steve Aeschbacher (LCA)  
**Cc:** David Martin (WINMKTG); Adam Sohn; Vivek Varma; Brian Schuster; Dan Neault; Dan Crouse (LCA); Tom Burt (LCA); Chris Meyers (LCA); Lisa Tanzi (LCA); Kim Akers (WINDOWS); Tom Phillips; Carl Stork; Mike Porter; Bill Veghte; Brian Valentine; Jim Ewel; Vivek Varma  
**Subject:** FW: OSDL PR Plan - attorney client privileged

attorney client privileged

Stephanie / Kate / Chuck, please find attached the PR response plan for the anticipated OSDL announcement. As discussed in our PR meeting this morning, David & I have spoken with Maureen O'Gara (based on go ahead from BrianV) and planted the story. She has agreed to not attribute the story to us. WaggEd actions include reviewing the positioning, review the proposed buddy mail, review Q&As, etc.

**Privilege Material**

**Redacted**

We expect this to leak later today. At that point we

will proactively respond or contact press with our positioning points.

### OSDL PR Response Plan

#### Situation:

Microsoft expects

1. The public announcement (8:30am Wed Aug. 30 2000) of the following structure (referred to as OSDL) that is a consortium between Intel, RedHat, IBM and HP
  - Independent, limited # of employees, non-profit entity.
  - Participating companies contribute equipment and money.
  - Two levels: (i) founders/steering board, big \$ contributors, (ii) general members not steer but contribute technology, benefit from "the IP protection"
2. OSDL's operations guidelines will be to develop a set of infrastructure for open source development projects, claim that target is very high end space competing against UE10000.
3. OSDL to provide:
  - IP buffer for the Open Source community – "solving the IP problem of the GPL" – "to get around GPL issues".
  - Linux primary beneficiary, other OSS projects could benefit.
4. OSDL's possible goals include:
  - IP buffer: Ship GPL code unchanged without donating via GPL patents in that code.
  - Chip demand increase
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  - "Planned" releases, coordination, obvious OSS inertia and royalty savings c.f. Windows
  - Undifferentiated "subsidy" foundation for their "expensive" proprietary, add-on products
  - "Industry standard" APIs for add-on products, (i) mitigating risk of drawing of value-add products into the GPL, (ii) direct focus of OSS energy towards slowing how much code flows into the GPL to preserve opportunity for expensive add-on products.

#### Objectives:

Reduce potential negative PR to Microsoft, reinforce our messages that we are here now with customer solutions and question the customer value of this announcement.

#### Actions:

##### Positioning:

1. The drive to build the Next Generation Internet is happening now
  - Microsoft always welcomes fair competition, as in the end this benefits customers
  - Microsoft is in the best position today, to go after this business and solve real customer business problems
  - Microsoft focuses on customer solutions, rather than "fashion" technologies
  - We have good relationships with Intel, IBM, HP and others who are having great success solving business

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**customer needs today with Windows 2000.**

2. Bad news for Sun & GPL
3. Old UNIX guard attempting to hijack Linux to go after Sun
  - This will drive a wedge between the original Linux champions who are for "free" software and the established commercial UNIX "old guard" further confusing customers
  - Old UNIX guard want to adopt the UNIX business model where they provide proprietary differentiation on top of a common base as they realize they can't add any competitive differentiation under the GPL
  - Appears to be business as usual for the fragmented UNIX market and very reminiscent of previous UNIX alliances.
4. These types of alliances ultimately do not benefit customers and have historically been prone to failure (OSF all over again for example)
  - Customers want solutions today and clearly it will take a long time for this new group to produce viable production quality, custom-ready solutions.
  - Linus Torvalds, the creator of Linux, himself recently said Linux was 5-10 years behind Windows.
  - Linux and Open Source are supposed to be all about "free" technology and no one group having competitive advantage. This new alliance seems to go against these principles.
  - What about HP-UX, IBM AIX and the IA-64 Monterey project? Are these now dead? HP and IBM have said in the past that those platforms are what they are using to target the high-end UNIX segment.

Tactics:

- Confirm Compaq and Dell are not part of this announcement and are informed of Microsoft's position. Owner: Compaq - jime, Dell - adamso
- Inform Maureen O'Gara (Senior Editor Client Server News / LinuxGram) or John Markoff (NYT) of announcement on Aug 28, 2000. Owner: dougmil (Approval received from BrianV to proceed)
- Contact Eric Raymond, Tim O'Reilly or Bruce Perrins to solicit support for this going against the objectives of the Open Source movement. Owner: dougmil [Doug Miller]. Note that I will not be doing this. Maureen O'Gara said she was going to call them so it looks better coming from her.
- Issue "buddy mail" to target press list at the time of the announcement and begin to proactively call-down to editors immediately after announcement made. Owner: davidmar
- Contact analysts (Summit Strategies or Creative Strategies) for their assessment of implications. Owner: davidmar

Publication call-down:

potential press list only - confirmation required by Waggener Edstrom



Contacts.xls

Buddy Mail:



Old UNIX guard  
hijacks Linux

Rude Q&A:

Q: So what does Microsoft think of this announcement?

A: Microsoft welcomes healthy competition but we don't see how this will benefit customers. Groups like these typically take years to get their act together - for example OSF, the Open Group, IABI, the ACE initiative, the UNIX SVR4 "Destiny" project, etc. Microsoft has solutions for customers today.

Q: What does this say about your OEM relationships?

A: Microsoft has healthy relationships with IBM, HP, Intel and have they substantial successful businesses based around Windows solutions. I'm sure their commitment to Microsoft technologies will not be affected by this announcement.

Q: Is Microsoft developing a version of Office for Linux?

A: No. We have not seen volume demand for this in the commercial marketplace.

Q: There seems to be momentum behind Linux based on research from IDC and Netcraft.

A: Netcraft recently revised their methodology to more accurately describe sites actually being used by customers. Windows and Linux have approximately the same number of active sites however the big news is Microsoft technology is running half of the servers that power the Internet. Many of these servers are predominantly deployed within the Fortune 500 and other major businesses around the world. IDC's recent research highlights the number of

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copies of Linux distributed - however given that Linux is free, this by no means represents real-world usage of Linux as a production operating system.

Q: Does Microsoft have plans to open source any of it's products?

A: Microsoft have a number of source programs today for customers and developers. We are continually listening to feedback from customers on how best to help them provide great solutions on Windows platforms.

Questions for the press to ask OSDL:

Q: What about other UNIX offerings (AIX, HP/UX, Monterey) from the participants?

Q: How does this play versus all the other announced initiatives (LSB, GNOME Foundation, Trillian, etc...)?

Q: This sounds like a closed club - we thought the whole point of open source was is open for anyone to join?

Q: Isn't OSDL simply another well-funded Redhat?

Q: Does this indicate that RedHat's existing business model is untenable?

Q: Did OSDL founders consult Linus Torvald, Eric Raymond, Bruce Perens, et al. re appropriateness and objectives of OSDL formation?

Q: What is the corporate structure of OSDL? Who owns it? Who controls it? Will OSDL make the agreements between its founding members public?

Q: Can other companies join OSDL and, if so, what types of participation are possible?

Q: Would OSDL consent to OSS community oversight?

Q: Who will control the work done by OSDL? Will OSDL work be "open" to public inspection, i.e., conducted on the web with unrestricted public access? If not, why not?

Q: Who will have ownership of IP relevant to code developed by OSDL? What about code contributed to OSDL?

Q: Will all code released by OSDL be released under the GPL? If not, what code will be subject to different terms/conditions, what terms/conditions will apply, and who will decide what code to except from the GPL?

Q: How can OSDL avoid the code it releases being subject to the GPL if OSDL is modifying GPL code?

Q: Will OSDL provide any representations/warranties/indemnification that code released by OSDL is free from infringements?

—  
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ABCNews.com	Press			Johathan	Dupe	jon.dupe@corp.abc.com		
Aberdeen	Analyst			Jee	Clabby	cedwards@abc.com		
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AP	Press			Michael	Hartinez	quinterof@abc.com		
AP	Press			Martha	Mendoza	phillips@abc.com		
AP	Press			David	Ward	phillips@abc.com		
Bloomberg	Press		Balanced	Hilwatha	Bray	bray@bloomberg.com		
Boston Globe	Press		Balanced	Nike	Berman	berman@boston.com		
Business Week	Press		Negative	Chennis	Wildstrom	wildstrom@businessweek.com		
Business Week	Press			Steve	Greene	greene@businessweek.com		
Business Week	Press			Jarve	Hamm	hamm@businessweek.com		
Business Week	Press			Steve	Hamm	hamm@businessweek.com		
Business Week	Press			Kathy	Rebello	rebello@businessweek.com		
Business Week	Press		Negative	Shankland	Stephan	stephan@businessweek.com		
Business Week	Press		Balanced	Jessica	Hiles	hiles@businessweek.com		
Business Week	Press			James	Branson	branson@businessweek.com		
Business Week	Press			Polly	Coates	coates@businessweek.com		
Business Week	Press			Renny	Schneider	schneider@businessweek.com		
Business Week	Press		Balanced	Paula	San Miguel	sanmiguel@businessweek.com		
Business Week	Press		Balanced	Barb	Darrow	darrow@businessweek.com		
Business Week	Press		Balanced	John	Rooney	rooney@businessweek.com		
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Business Week	Press		Balanced	Charlie	Pece	pece@businessweek.com		
Business Week	Press		Balanced	Hick	Railsback	railsback@businessweek.com		
Business Week	Press		Balanced	Stanley	Wagner	wagner@businessweek.com		
Business Week	Press		Balanced	Stanley	Turner	turner@businessweek.com		
Business Week	Press		Balanced	Stanley	Piller	piller@businessweek.com		
Business Week	Press		Balanced	Stanley	Holmes	holmes@businessweek.com		
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Went to Turbo Linux

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Recommended by Mike Prettyjohn (Netcraft)

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Mega	Analyst	Doug	Lynn	martyn.walker@msnbc.com	lynne@keyhans.com
Mega	Analyst	Peter	Firstbrook		lynne@keyhans.com
MSNBC	Press	Bob	Sullivan		lynne@keyhans.com
MSNBC	Press	Natty	Wolk		lynne@keyhans.com
Network Computing	Review	Art	Wittman		lynne@keyhans.com
Network Computing	Review	Fritz	Nelson		lynne@keyhans.com
Network Computing	Review	Ron	Anderson		lynne@keyhans.com
Network Computing	Review	Peter	Montross		lynne@keyhans.com
Network World	Press	John	Fontana		lynne@keyhans.com
Network World	Review	Lee	Duchinger		lynne@keyhans.com
New York Daily News	Press	Nancy	Lohn		lynne@keyhans.com
New York Times	Press	Steve	Lehr		lynne@keyhans.com
New York Times	Review	John	Mackoff		lynne@keyhans.com
PC Magazine	Review	Mike	Lewis		lynne@keyhans.com
PC Magazine	Review	Ben	Rigney		lynne@keyhans.com
PC Magazine	Review	David	Gottesman		lynne@keyhans.com
PC Magazine	Review	Steve	Lidsky		lynne@keyhans.com
PC Magazine	Review	Larry Seltzer	Miller		lynne@keyhans.com
PC Magazine	Review	John	Taschek		lynne@keyhans.com
PC Week	Press	Pankaj	Chowdhry		lynne@keyhans.com
PC Week	Review	Henry	Baltasar		lynne@keyhans.com
PC Week	Review	Grant	Dubois		lynne@keyhans.com
PC Week	Press	Harry	McCracken		lynne@keyhans.com
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PC World	Press	Dick	Strauss		lynne@keyhans.com
PC World	Press	Chris	Stetelmicz		lynne@keyhans.com
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PC World	Press	Christine	Claudio		lynne@keyhans.com
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PC World	Press	Josh	Quilley		lynne@keyhans.com
PC World	Press	Susan Gregory	Thomas		lynne@keyhans.com
PC World	Press	Bruce	Selamien		lynne@keyhans.com
PC World	Press	David	Schwartz		lynne@keyhans.com
PC World	Press	Lee	Hamilton		lynne@keyhans.com
PC World	Press	David	Gomes		lynne@keyhans.com
PC World	Press	Walt	Mossberg		lynne@keyhans.com
PC World	Press	David	Streitfeld		lynne@keyhans.com
PC World	Press	John	Cherneck		lynne@keyhans.com
PC World	Press	Chris	Gartner		lynne@keyhans.com
PC World	Press	Chris	Jones		lynne@keyhans.com
PC World	Press	Eric	Oakes		lynne@keyhans.com
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**Subject:** Old UNIX guard hijacks Linux

**Editor:**

No doubt you have already heard the announcement of the latest Linux consortium (ODL) between Intel, Red Hat, IBM and HP.

The purpose of this mail is to give you Microsoft's perspective on ODL:

1. The drive to build the Next Generation Internet is happening now
  - Microsoft is in the best position today, to go after this business and solve real customer business problems
  - Microsoft focuses on customer solutions, rather than "fashion" technologies
  - Microsoft welcomes fair competition as in the end this benefits customers
  - We have excellent relationships with Intel, IBM, HP and others who are having great success solving business customer needs today with Windows 2000.
2. Bad news for Sun & GPL
3. Old UNIX guard attempting to hijack Linux to go after Sun
  - This will drive a wedge between the original Linux champions who are for "free" software and the established commercial UNIX "old guard" further confusing customers
  - Old UNIX guard want to adopt the UNIX business model where they provide proprietary differentiation on top of a common base as they realize they can't add any competitive differentiation under the GPL
  - Almost business as usual for the fragmented UNIX market and very reminiscent of previous UNIX alliances.
4. The consortiums ultimately do not benefit customers and have historically been prone to failure (OSF all over again for example)
  - Customer want solutions today not have to wait for protagonists, politics and glacial inefficiencies
  - Linus himself recently said Linux was 5-10 years behind Windows.
  - Linux and Open Source are supposed to be all about free technology and no one group having competitive advantage
  - What about HP-UX, IBM AIX and the IA-64 Monterey project? Are these now dead? HP and IBM have said in the past that those platforms are what they are using to target the high end UNIX segment.

Please let me know if you have any questions or would like to speak with a Microsoft spokesperson. I would be happy to arrange this.

Best Regards,

**MS-PCA 2599425**

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**From:** Doug Miller  
**Sent:** Friday, August 25, 2000 6:05 PM  
**To:** Steve Aeschbacher (LCA); David Martin (WINMKTG); Mike Porter; Bill Veghte; Brian Valentine; Jim Ewel; Adam Sohn; Vivek Varma  
**Cc:** Brian Schuster; Dan Neault; Dan Crouse (LCA); Tom Burt (LCA); Chris Meyers (LCA); Lisa Tanzi (LCA); Kim Akers (WINDOWS); Tom Phillips; Carl Stork  
**Subject:** OSDL PR Plan - attorney client privileged

Attorney Client Privileged

Attached is our PR plan to address the OSDL announcement next week.

**Privilege Material  
Redacted**

All, please review and provide comments.

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## OSDL PR Response Plan

### Situation:

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potential press list only - confirmation required by Waggener Edstrom



Contacts.xls

Buddy Mail:



Old UNIX guard  
injects Linux

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Questions for the press to ask OSDL:

- Q: What about other UNIX offerings (AIX, HP/UX, Monterey) from the participants?
- Q: How does this play versus all the other announced initiatives (LSB, GNOME Foundation, Trillian, etc...)?
- Q: This sounds like a closed club - we thought the whole point of open source was is open for anyone to join?
- Q: Isn't OSDL simply another well-funded Redhat?
- Q: Does this indicate that RedHat's existing business model is untenable?
- Q: Did OSDL founders consult Linus Torvald, Eric Raymond, Bruce Perens, et al. re appropriateness and objectives of OSDL formation?
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—  
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Publication	Type	Position	Disposition	First Name	Last Name	e-mail address	Phone	Notes
ABCNews.com	Press			Jonathan	Dupe	john.dupie@corp.gd.com		
Aberdeen	Analyst			Joe	Clabby	cebrax@at&t.com		
AP	Press			Michael	Edwards	edwardm@at&t.com		
AP	Press			Martha	Hartinez	mhartinez@at&t.com		
Bloomberg	Press			David	Mendoza	dmendoza@at&t.com		
Boston Globe	Press			Mike	Ward	wardm@at&t.com		
Business Week	Press		Balanced	Denise	Krieger	denise.krieger@businessweek.com		
Business Week	Press		Balanced	Mike	Berman	mberman@businessweek.com		
Business Week	Press		Negative	Jay	Widstrom	widstromj@businessweek.com		
Business Week	Press			Steve	Greene	stevengr@businessweek.com		
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CIO Magazine	Press			Polly	Coates	pschneider@cio.com		
CNBC	Press			Remy	Schneider	rschneider@cnbc.com		
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Computer Reseller News	Press		Negative	John	Rooney	johnrooney@crn.com		
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Computerworld	Review		Negative	David	Edgar	edgar@cw.com		
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**Subject:** Old UNIX guard hijacks Linux

**Editor:**

No doubt you have already heard the announcement of the latest Linux consortium (ODL) between Intel, Red Hat, IBM and HP.

The purpose of this mail is to give you Microsoft's perspective on ODL:

1. The drive to build the Next Generation Internet is happening now
  - Microsoft is in the best position today, to go after this business and solve real customer business problems
  - Microsoft focuses on customer solutions, rather than "fashion" technologies
  - Microsoft welcomes fair competition as in the end this benefits customers
  - We have excellent relationships with Intel, IBM, HP and others who are having great success solving business customer needs today with Windows 2000.
2. Bad news for Sun & GPL
3. Old UNIX guard attempting to hijack Linux to go after Sun
  - This will drive a wedge between the original Linux champions who are for "free" software and the established commercial UNIX "old guard" further confusing customers
  - Old UNIX guard want to adopt the UNIX business model where they provide proprietary differentiation on top of a common base as they realize they can't add any competitive differentiation under the GPL
  - Almost business as usual for the fragmented UNIX market and very reminiscent of previous UNIX alliances.
4. The consortiums ultimately do not benefit customers and have historically been prone to failure (OSF all over again for example)
  - Customer want solutions today not have to wait for protagonists, politics and glacial inefficiencies
  - Linus himself recently said Linux was 5-10 years behind Windows.
  - Linux and Open Source are supposed to be all about free technology and no one group having competitive advantage
  - What about HP-UX, IBM AIX and the IA-64 Monterey project? Are these now dead? HP and IBM have said in the past that those platforms are what they are using to target the high end UNIX segment.

Please let me know if you have any questions or would like to speak with a Microsoft spokesperson. I would be happy to arrange this.

Best Regards,

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