

Message

**From:** John Yoo [PII]@google.com]  
**Sent:** 6/14/2019 11:47:59 PM  
**To:** Mike Herring [PII]@google.com]  
**CC:** Yuki Richardson [PII]@google.com]; Tristan Ostrowski [PII]@google.com]; Christian Cramer [PII]@google.com]  
**Subject:** Re: \*Privileged\* Philipp's feedback on GDAF framework ahead of BC

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[PII]@ Please opine from a legal perspective.

Hi Mike,

Thanks for the update - Very helpful feedback.

To date, we have been thinking about those questions in the following way:

1) How did we come up with the amount for Play?

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2) What regions are affected? What is the contagion risk? - The deal is to secure commitments on a Global basis. [PII] we believe there is a non-zero risk of the following scenario materializing:

- Huawei and Chinese OEMs begin pushing their app store on devices outside of China, taking share in India, Indonesia, Africa, and parts of Europe (they already have traction in IN and ID)
- At the same time, if we did not structure a deal with Samsung, they would continue to heavily promote their own app store, which would then start to grow in scale across Europe and Asia
- European carriers would then see an opportunity and invest, pushing their own Carrier app store which we know is preloaded on devices already in some markets
- The worst risk to come out of this is that Chinese OEMs and Samsung will no longer need the Play store for Apps on their phones, which would then weaken the leverage that MADA provides
- Without MADA, we would not be able to incentivize placement of the Widget, which drives [PII] of search revenue on a device and secures other IP apps like Chrome and Assistant

Happy to address any other questions or comments you may have. Hope everyone has a great weekend!

Regards,  
John Yoo

Android Partnerships Finance

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[PII]

On Fri, Jun 14, 2019 at 1:51 PM Mike Herring [PII]@google.com> wrote:

Thank you! Good discussion with Ruth, no big questions but things to consider:

- how did we come up with the percentage or amount for Play? why that and not less (or more)?

Ex. No.

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- what regions are affected? what is the contagion risk for other regions?

Thanks!

Mike Herring | Business Finance Officer | **PII** @google.com | P&E, EP and G&A

On Fri, Jun 14, 2019 at 11:57 AM Yuki Richardson **PII** @google.com> wrote:  
\*Privileged\*

Hi Mike,

We had a 90-min x-functional meeting yesterday with Philipp on GDAF; he was very engaged and pushed the team to focus on the revenues we will generate (or protect) in return for the additional spend.

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**Confidential**

○ We are still evaluating this option with the x-functional team and have a follow up meeting with Philipp on Tuesday

Please let us know if you have any questions ahead of the meeting with Ruth.

best,  
Yuki

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Yuki Sugawara Richardson  
Platforms & Services Finance, covering Android, Communications, Fi, Turquoise, Wireless  
**PII**