

Message

**From:** John Yoo [PII]@google.com]  
**Sent:** 4/8/2019 5:47:22 PM  
**To:** Joshua O'Connor [PII]@google.com]  
**CC:** Mike Marchak [PII]@google.com]; Brian Brazinski [PII]@google.com]  
**Subject:** Re: Value of Play to Google via MADA and app distribution

Right now we require Play + other GMS apps. Yes we require Samsung to take all or nothing, but in this hypothetical world where Samsung no longer wants Play store, Maps and Youtube would be the apps that they would independently want out of the current MADA package.

Regards,  
John Yoo

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[PII]@google.com

[PII]

On Mon, Apr 8, 2019 at 10:44 AM Joshua O'Connor [PII]@google.com> wrote:

Thanks John. I don't fully understand what our MADA requires though. In your example, if Samsung hypothetically wanted only, say, Maps and You Tube, do we not require them to take the others as part of MADA?

On Thu, Apr 4, 2019 at 2:50 PM John Yoo [PII]@google.com> wrote:

Hi Mike,

As a thought exercise, in this scenario, Samsung would likely only want Maps and Youtube from the GMS bundle. Meaning, we would then likely lose distribution of other apps such as Duo, Drive, Gmail, photos, Play movies, music etc. Google would then probably respond with including some of these requirements in our revenue share agreement, which could increase distribution costs a bit. My take would be that for some of these apps, we would probably just drop (if low ROI).

Again, this is a very extreme and unlikely scenario unless Samsung would be willing to subsidize users who have spent \$\$ in the Play store, as there could be fairly large user migration. Another deterrent of this scenario would be that Carriers would probably not allow this on devices they range, blocking Samsung from doing this in US / JP / KR. Reason for this is because Carriers would then be out of DCB revshare, which they would not forego unless Samsung made them whole in some way.

Regards,  
John Yoo

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[PII]@google.com

[PII]

On Thu, Apr 4, 2019 at 11:40 AM Mike Marchak [PII]@google.com> wrote:

Ex. No.

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1:20-cv-03010-APM

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John -

What happens to that arrangement in a hypothetical future world where Samsung doesn't want the Play Store on their phones? I'd imagine distribution of our other services drops significantly and UA costs increase?

On Thu, Apr 4, 2019 at 11:14 AM John Yoo [PII] <[PII]@google.com> wrote:

Hey Josh,

Although I think there is near-zero probability of Samsung not wanting the Play store on their phone, I will say that there is value in the leverage that Play provides to get some of the non-critical GMS apps on a phone. What I mean by that, is that OEMs want the Play store on their phone, and in return we are able to get other apps like Google search and chrome, Maps and Duo, Youtube and Drive (for instance) on the phone as a result. It's tough to say though how much of that value is from Play vs. YouTube or Maps, etc.

Regards,  
John Yoo

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[PII] <[PII]@google.com>

[PII]

On Wed, Apr 3, 2019 at 4:03 PM Joshua O'Connor [PII] <[PII]@google.com> wrote:

Hi John,

would you know if we should value Play being a premier destination for app installs for other app distribution and MADA. For example, if Samsung were to no longer care about having Play on their phone, would that be bad for Google excluding the Play impact itself?

Thanks,  
Josh

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Mike Marchak | Google, Inc

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