From:	Mike Roszak Redacted@google.com]
Sent:	1/16/2016 3:02:53 AM
To:	Ben Friedenson Redacted@google.com]
CC: Subject:	Cristina Bita Redacted@google.com]; Patrick Orr Redacted@google.com] Re: Updated NYC Scenario Slides for Daniel
Subject.	ne. Opuated NTC Scenario Sildes for Daniel
If I remember correctly, we started anchoring on the confidential mobile (and not flexing it) when Amit said that was his best guess expectation of what would actually happen, so we started reflecting that scenario in most of our materials to show what he wanted to speak to.	
On Fri, Jan 15, 2016 at 7:00 PM, Ben Friedenson Redacted@google.com wrote: Hi Cristina,	
We have made	de the updates to the summary slide discussed, and you can find the revised slide here.
The 2 pieces which we still owe are:	
	summarizing why we chose confidential for desktop/confidential for Mobile in the confidential recovery case, and confidential recovery case.
o anything off	I will continue to dig to see if we have already laid this out in a slide, but have not found the shelf yet
0	With that said, I do see the following explanation as a note in the 2016 Search Plan review deck
for Ruth (lin)	<u>k</u>):
recovery on MacOS: Confidential US FireFox default revenue recovery, adjusted for higher GDN share ex-US & Safari user's higher propensity to query both organically and via default settings	
recovery on iOS: represents mid-point of best- and worst-cases below onfidential Best Case: onfidential US FireFox default recovery, adjusted for Safari user's higher propensity to also search on Google organically onfidential Worst Case: onfidential decline in iGMM usage following launch of Apple Maps	
o and am trying	I know that at some point we landed on always using for Mobile and flexing the desktop, g to pin down exactly when.
However, as a question for you: would it be ok to address our reason for using confidential Mac OS on the confidential scenario and confidential across the board in the confidential scenario via a footnote, rather than creating a fresh slide?	
• Slide	showing YoY Revenue Growth Rates by Month and Access Point
0	As noted, we'll add this Tuesday.
Please let us know if you have questions or further suggestions.	
Thanks, Ben	

 $\mathsf{Redacted}_{\underline{@google.com}}$

Ex. No. UPX1050 1:20-cv-03010-APM

Message

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Mike Roszak
Product Finance
Cell: Redacted

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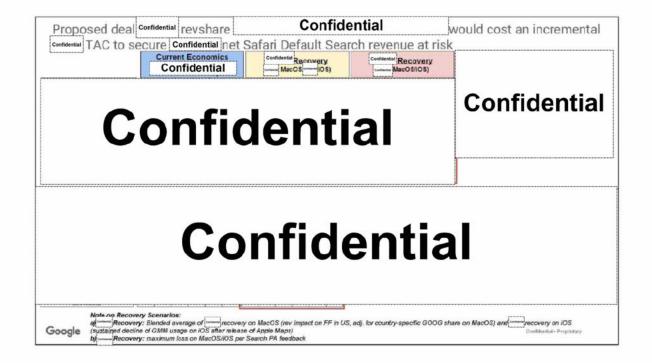
Attorney Client Privileged



NYC Scenarios

2016.01.14

Confidential - Proprietary



Default Search Recover Assumptions ontidential Safari Default Revenue Recovery Safari Default Revenue Recovery • iOS Recovery: confidential based on... iOS and MacOS Recovery: Assumes all Apple Maps: Google Maps lost confidential revenue subject to confidential recovery based confidential of active users following Apple Maps launch Worst case assumption that all Mobile Defaults: Defaults have more defaults observe similar losses and prominence in mobile due to screen same organic recovery as Maps size and UI MacOS Recovery: Confidential based on Confidential revenue loss following Firefox US default switch, adj for WW MacOS Google Share Total Recovery: confidential weighted average based on iOS-MacOS revenue mix Google Confidential + Proprietary