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MSFT on Android Scenarios

Overview | Dec, 2017

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UPX0131
1:20-cv-03010-APM

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Microsoft is betting heavily on Android (& iOS) after sunseting Windows Mobile

"After missing mobile boat, Microsoft is now trying to sneak onto iOS and Android like a stealthy submarine."

When there are iOS or Android roadblocks, Belfiore [MS Mobile EVP] says MS will "do the best we can" to work around them. "We're going to try and build the best experience for the customers that have chosen that platform." (The Verge)

Android: Current position & recent moves

- Depreciated Windows Mobile
- Released **MS Launcher**: unified user experience linked seamlessly w/ PC, **2M** active installs
- **Betting on Cortana & Bing**: Edge browser on Android, integrated Cortana into Skype, Office; keyboard planned
- **Engaging OEMs for preloads** of Swift & Office
- **~1.7B active installs** of MS apps: **75% preloads** for Drive, Office, Skype & **25% user downloads** for Office, Skype, Outlook, LinkedIn

Potential leverage: Confidential

- **App preloads bundle** Confidential per app activation for Swift, Office, Skype, etc.)
- **RSA Buyout** (Bing monetization Confidential of Google)
- **Patents** (reduction of OEM royalty based on patent lawsuit settlement)
- **Jumpstart** Confidential OEM bounty for preloads & defaults on Win PCs can be bundled w/ Phones. Only relevant for *Lenovo & Asus*)

Launchers: Installing MSL completely changes user experience

Before: A1



After: DHS



- **Search**
 - Widget on all homescreens
 - Bing default but user configurable
 - *Doesn't respect default browser / renders custom disambiguation screen*
- **Icons**
 - Microsoft folder with links to quickly download apps
 - All non-hotseat icons removed / replaced
 - Microsoft apps placed in the hotseat if already installed
- **-1 Screen**
 - Replaced with Microsoft feed
- **Other**
 - Notifications to install more MS apps
 - Launcher asks to be set to default
 - Almost impossible to work out how to get back to the prior launcher
 - *"After you create the widget, Microsoft Launcher can access all data it displays"*

Agenda

App Behaviors	1 Launcher
	2 Other Apps
OOB Configuration	3 Search and Assistant
	4 Other Apps

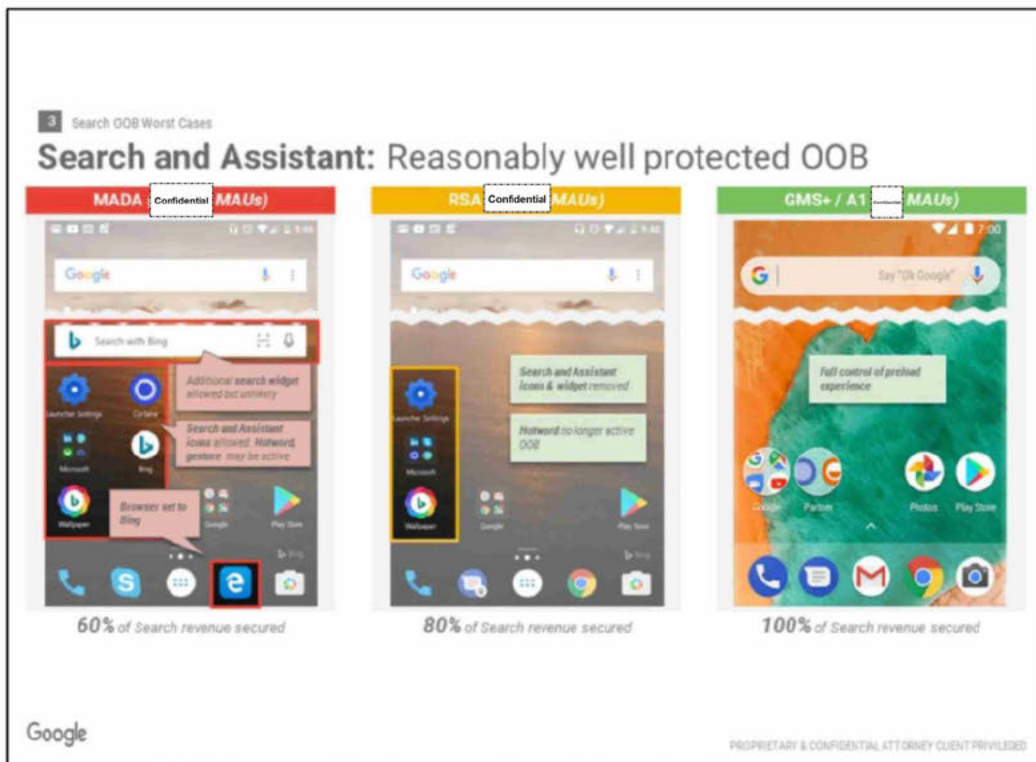
Google

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RSA:

EU: Bing, Edge, Skype, Cortana (no active gesture/voice) in folder

RoW: no Bing on device, Edge set to Google

Worst Case Scenarios - I. MADA Device

I. MADA Device with Full MFST Buy-out of w Launcher, Browser, Defaults

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Worst Case Scenarios - I. MADA Device

I. MADA Device with Full MFST Experience w Launcher, defaults & SAPs

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Product Deep Dive

Bing Key Risks:

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Partner Specifics

Samsung

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