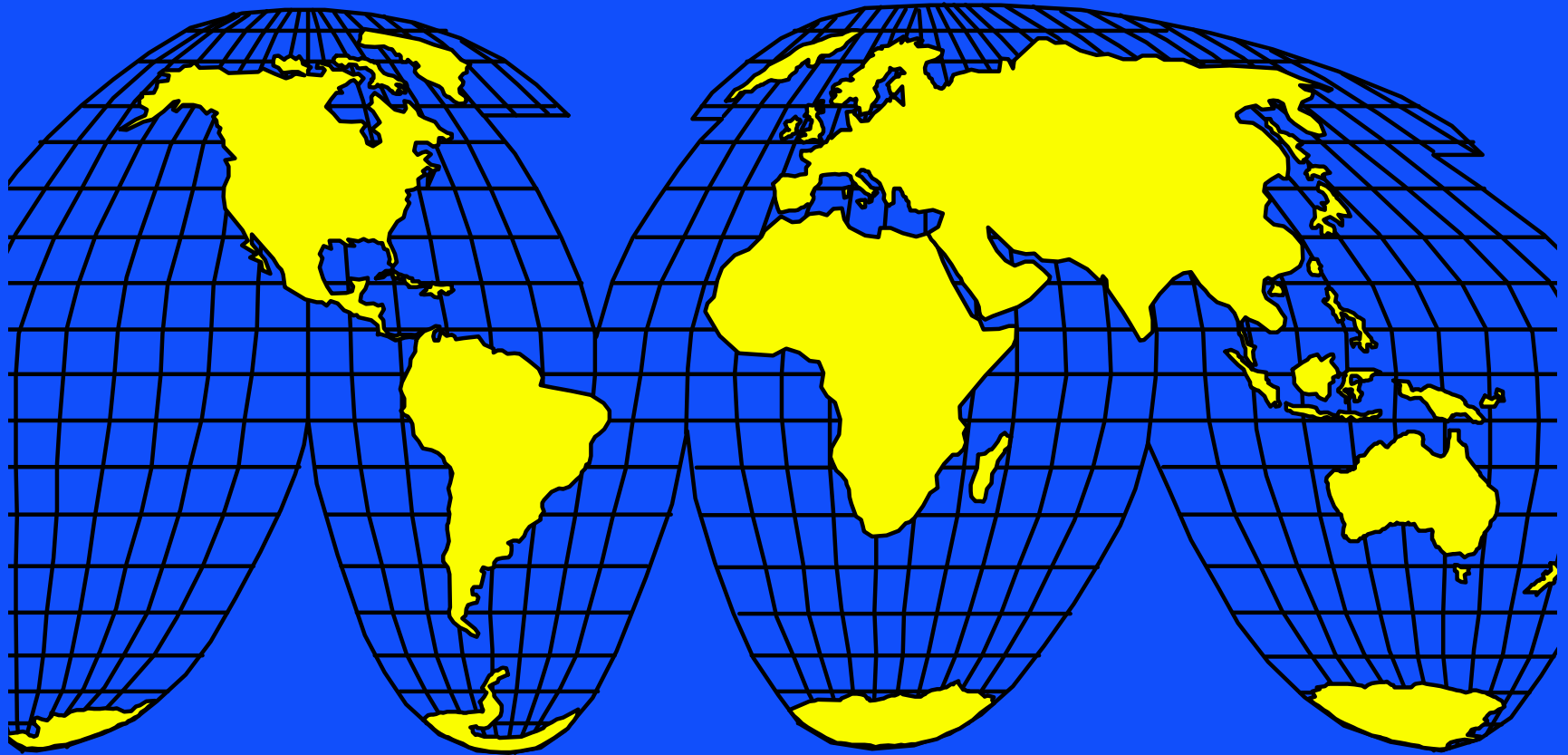


Presente y Futuro de Internet

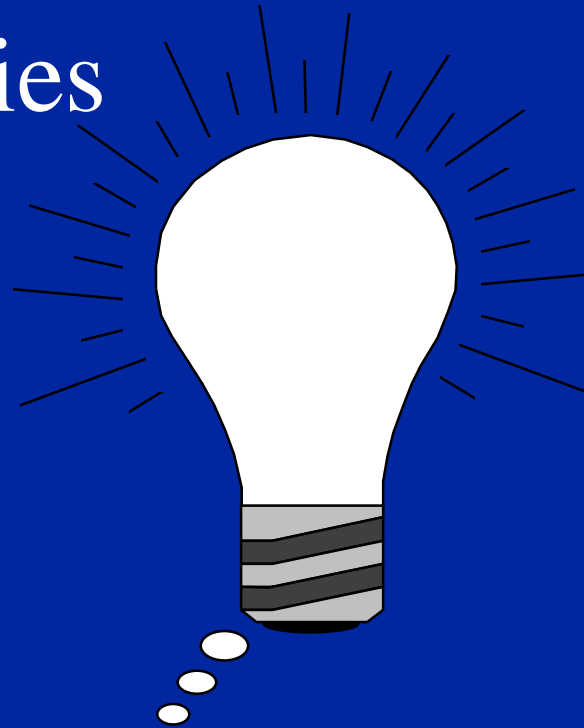
(Titulo a propuesta de Rafael Calvo)

ATI Barcelona

15 November 1995



1968
NPL U.K.
Donald Davies



1969
RAND U.S.
Paul Baran

September - December 1969



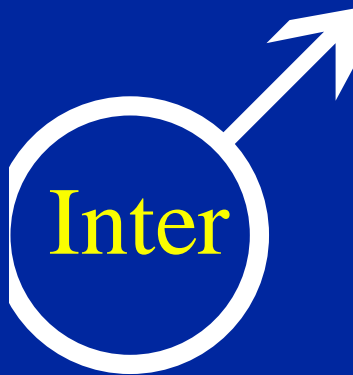
UCLA

SRI

50 KBS

UCSB

University of Utah



NCP

ARPAnet

1971 - 15 nodes

1972 - 37 nodes



Internet

1980-1981

August 1981

BITnet

213 hosts

CSnet

1 January 1983



TCP/IP

August 1983

562 hosts



1986 NSFnet T-1



November 1986 - 5.089 hosts

October 1989 - 159.000 hosts

October 1991 - 617.000 hosts



1992 - NSFnet T-3



October 1992 - 1.136.000 hosts

October 1993 - 2.056.000 hosts

October 1994 - 3.864.000 hosts



1995



July 1995 - 6.642.000 hosts

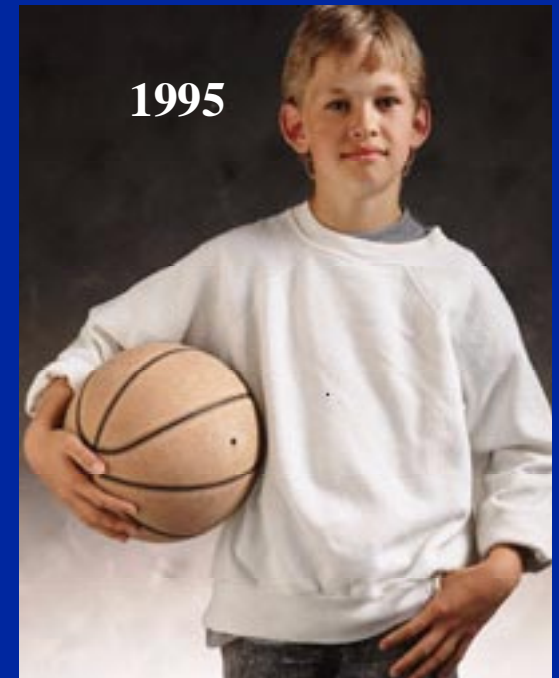
1983

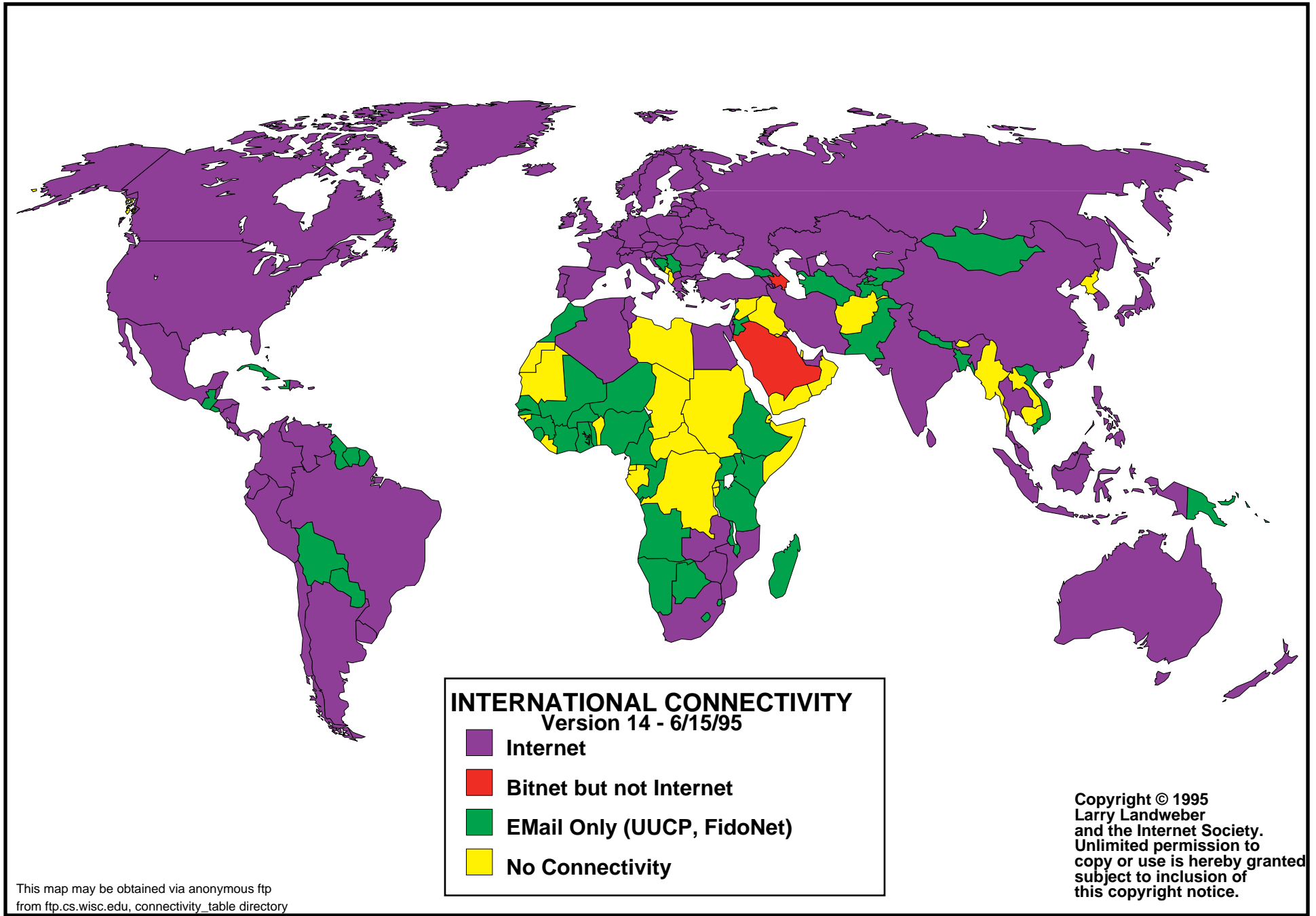


Internet Family Album



1995

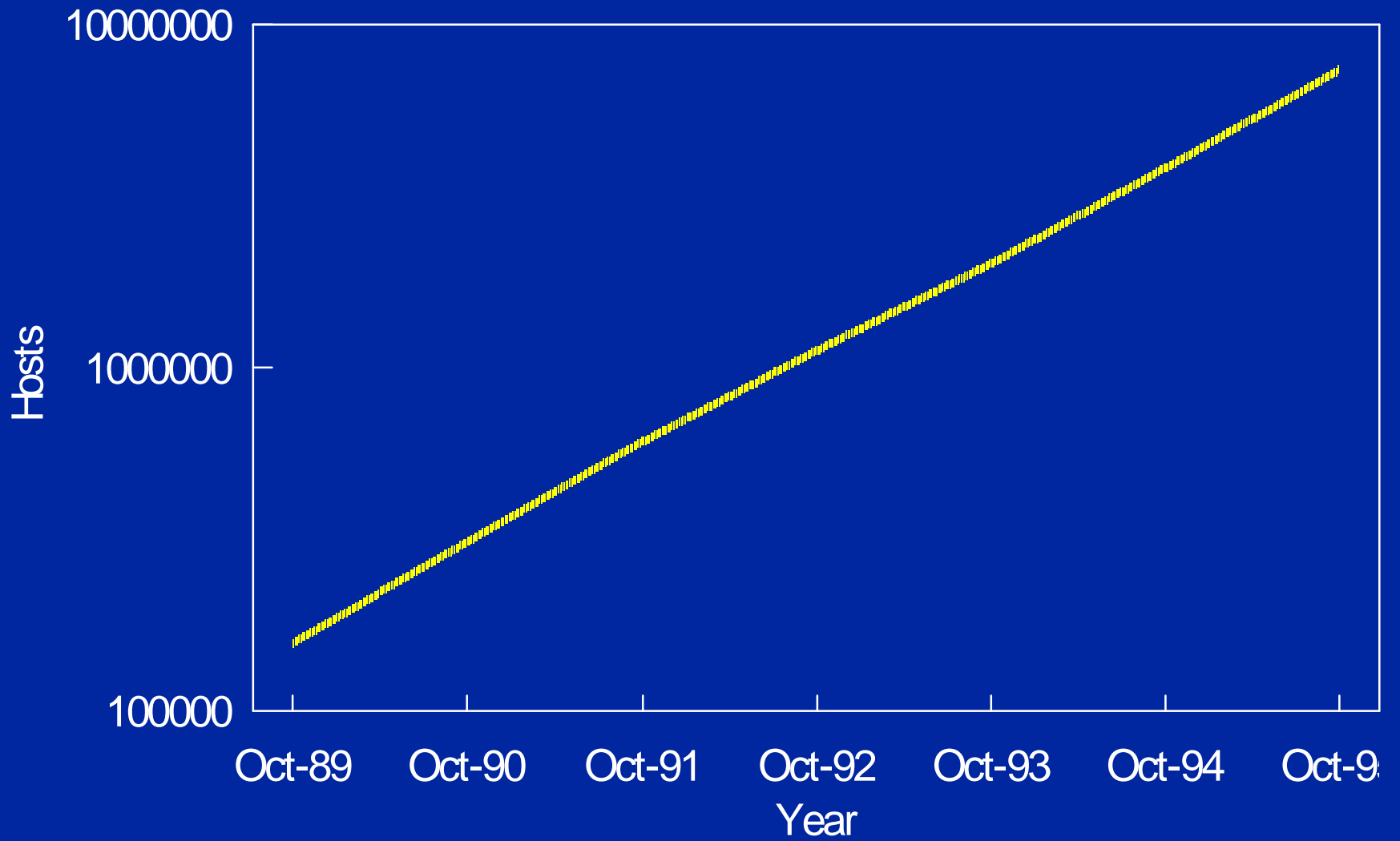




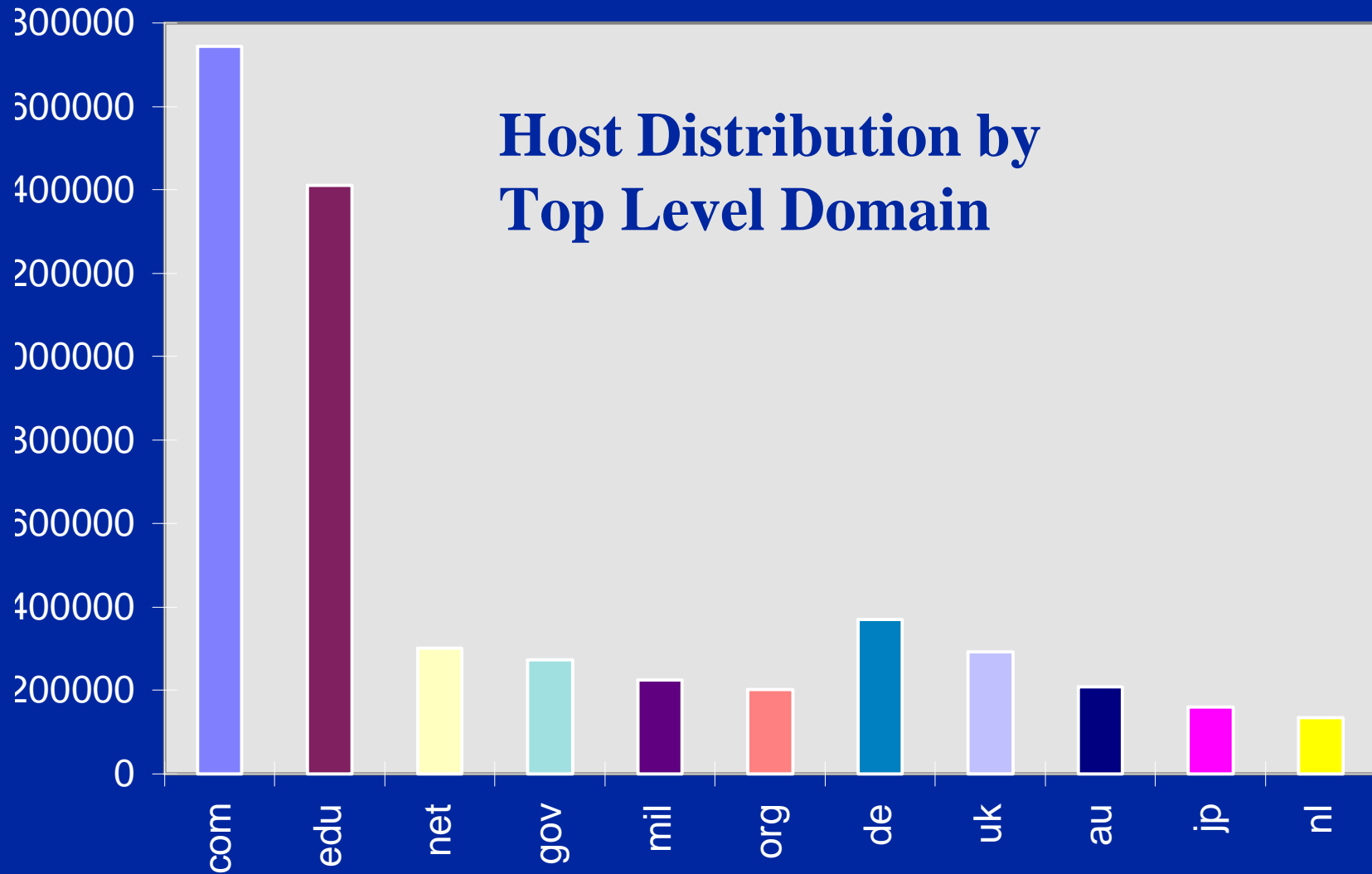
This map may be obtained via anonymous ftp
from ftp.cs.wisc.edu, connectivity_table directory

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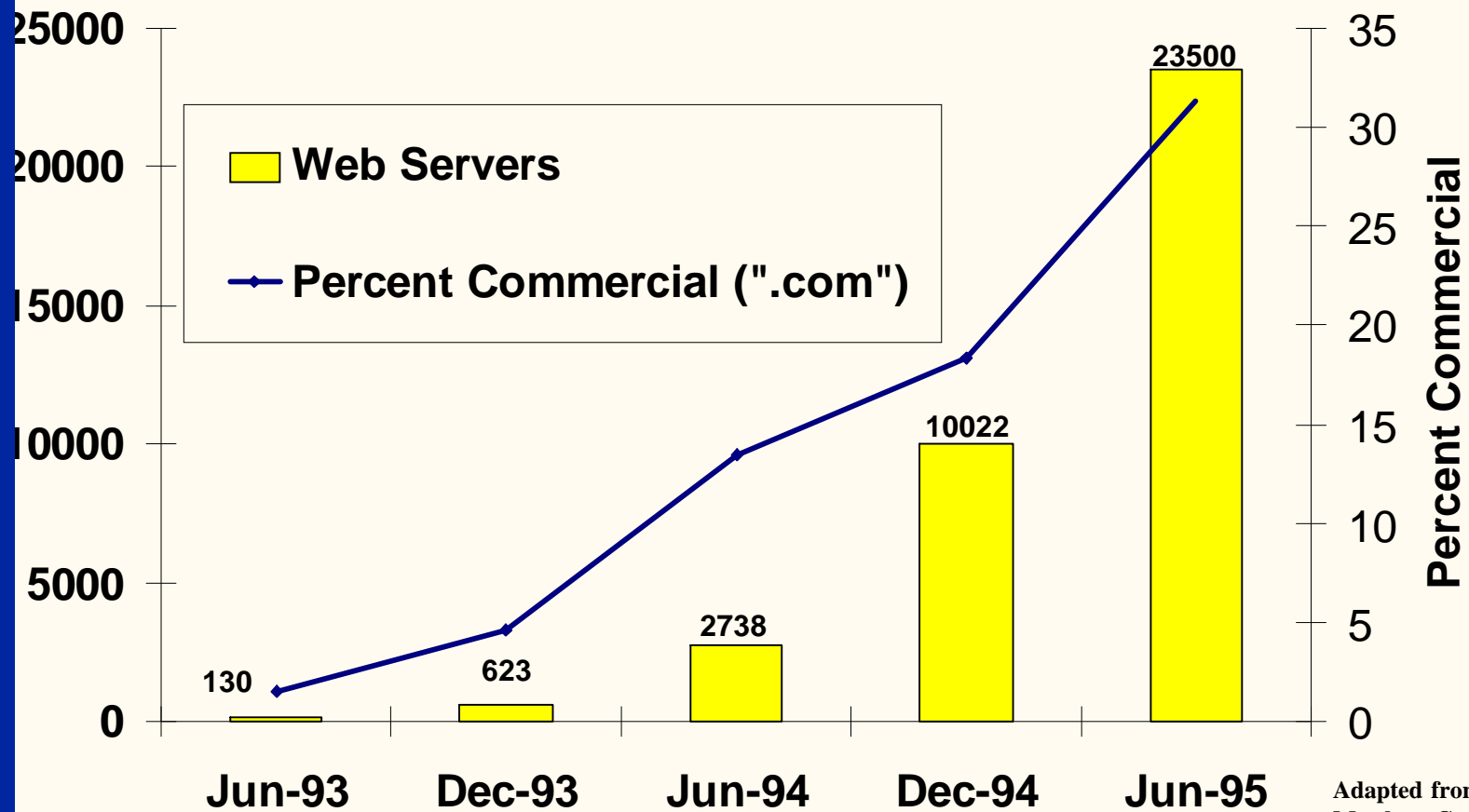
Internet Host Growth



Host Distribution by Top Level Domain



WorldWide Web Growth



Adapted from
Matthew Gray's Wanderer



Why is it growing?

- Low cost for
 - vendors
 - consumers
 - wide choice of gui software
- Ubiquity of tcp/ip
- Standards process
- Ease of use
- Telecommunications technology
- Competitive forces

Low Cost

- Vendors
 - leasing
 - web space
 - server
 - owning
 - capital
 - access
 - authoring
- Consumers
 - access from work
 - access from home
 - information providers
 - Internet service providers
 - access from school
 - wide choice of gui software
 - Internet in a Box
 - Internet Chameleon
 - Trumpet
 - Dozens of others

Ubiquity of tcp/ip

- DOS
- Macintosh
- Windows
 - Windows 95
- UNIX
- VM
- MVS

Standards Process

- Internet Engineering Task Force
- WWW Consortium
- *De facto*

Ease of Use

- Netscape
- Mosaic
- Lynx
- University of Florida VM browser
- Web Explorer
- Web Surfer
- Netshark
- CompuServe
- America Online
- Prodigy
- Delphi

Telecommunications Technology

- Analog modem (28.8 KB/S)
- ISDN (128 KB/S)
- T-1 (1.544 MB/S - *U.S.*)
- T-3 (45 MB/S)
- Cable (> 10 MB/S)

Competitive Forces

- Cost too low to risk not being there!
- Snowball effect
 - 8% -10% per month growth in commercial servers
 - in 1995 Internet presence is as important as having facsimile

Is Anyone Making Money?

- Telephone and cable companies
- Hardware
- Internet Service Providers (ISPs)
- Information Providers
- Internet related businesses
- Other businesses
 - Is this the right question?
 - Revenue sources

Telephone and Cable Companies

- Telephone companies
 - profitable but facing pressure from cable companies and, perhaps in the long run, voice over the Internet
- Cable companies
 - nascent industry for Internet access
 - PSI in Cambridge
 - TCI in Michigan

Hardware

- Sun Microsystems (servers)
 - 1 in 250 hosts on the Internet is a Web server
 - just announced 2 for 1 stock split
- CISCO (routers)
- Modem sales
 - 29.000.000 in 1995

Internet Service Providers

- United States
 - UUNET
 - Nine months ending 30 September LOSS of \$750.000 compared with LOSS of \$4.7 million for the same period in 1994. Revenue up 302 %.
 - PSI
 - Nine months ending 30 September LOSS of \$23,4 million compared with LOSS of \$3.8 million for the same period in 1994. Revenue up 140%.
- United Kingdom
 - PIPEX
 - LOSS of £1.09 million on revenue of £3.76 million



Information Providers

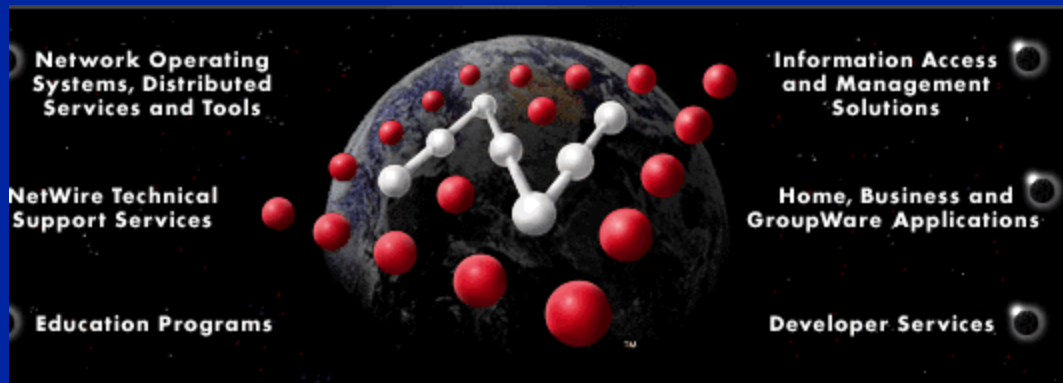
- CompuServe
 - PROFIT \$44 million
- PRODIGY
 - LOSS
- America On Line (AOL)
 - Accounting process changed LOSS to PROFIT
- All plan to offer full Internet access
 - AOL (GNN) went online in October

Internet Related Businesses

- Netscape
 - First profitable quarter
- YAHOO
 - Profitable from advertising revenue
- Infoseek
 - Revenue from services and advertising
- Netmanage
 - Profitable

Other Businesses

- Is this the right question?
 - the point of sale is irrelevant
 - the point is to make a sale
 - enhanced marketing
 - Reebok 
 - enhanced customer support
 - Novell 



Other Businesses

- Revenue sources
 - Advertising
 - Fee for service
 - Fee for content
 - Direct sales

Revenue Sources

- Advertising
 - 1995 expenditures for WWW advertising
 - \$10.000.000
 - 2000 expenditures for WWW advertising
 - \$2.2 thousand million
 - Pricing is highly variable
 - Netscape - \$15.000 to \$30.000 per month
 - HotWired - \$15.000 per month
 - DealerNet - \$995 + \$500 per month

Revenue Sources

- Fee for service
 - INSWEB - \$2,50 per request
 - InfoSeek - \$9,95 per month for 100 searches
 - Industry.Net - \$3.000 to \$8.000 a year for electronic storefront
 - Electronic Newstand - retains from \$5 to \$10 for every subscription sold

Revenue Sources

- Fee for content
 - San Jose Mercury News - \$1 to \$5 per month
 - USA Today - \$13 per month
 - NewsPage - \$3 per month basic
 - \$5 per month premium
 - Successful Farming - \$40 per month
 - Encyclopædia Britannica - \$150 per year

Revenue Sources

- Direct sales



Hotels



Flowers



Food



Clothing



Computers

Examples

- Advertising
- Fee for service
- Fee for content
- Direct sales

Advertising



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Saturday	8:30am - 4:30pm

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Lamborghini Diablo VT



A Blending of World Class Style, Performance and Luxury

In the tradition of manufacturing extraordinary grand touring automobiles, Automobili Lamborghini has once again demonstrated that pairing old-world hand craftsmanship with state-of-the-art engineering technology delivers world-class results. The latest testament out of the Sant'Agata facility is the 1994 Lamborghini Diablo VT.

The magnificent Diablo (so named after the legendary and ferocious fighting bull that fought an epic battle in Madrid in 1869) has been significantly reengineered since its introduction in 1990. In total, nearly 25 percent of the 6,000 components comprising a Diablo VT have been either redesigned or modified for the 1994 model. This is a bold statement on behalf of the engineers who endlessly strive for superiority.

The most distinguishing trait of the aluminum-bodied Diablo VT is in its use of an original four-wheel traction system. The Viscous Traction (VT) feature increases the performance in conditions of low ground adherence which would normally render the vehicle less efficient with only rear-wheel drive capabilities.

Based on the relationship between the grip and torque, when the rear wheels begin to spin the surplus torque is automatically transferred to the front axle. This allows the Diablo VT to maintain itself into four-wheel drive when the rear-wheel drive alone reaches its natural limit of adherence.

The viscous drive unifies the functions of torque differential and anti-slip offering superb traction in all conditions and, as a result, safer and better handling. Thus, the tendency to oversteer when cornering at the limit, a characteristic of most rear-wheel drive vehicles, is greatly reduced by this traction system. The driver will immediately notice that driving the Diablo VT is more relaxing and less demanding.

The Diablo VT is able to effortlessly adapt from a comfortable luxury vehicle at low speeds into a competitive high performer

capable of stable cornering and astonishing acceleration and top-end speeds.

As with the earlier Diablos, the source of pride in ownership rests in the secure knowledge that the generous 5.7-liter, 492-horsepower V-12 powerplant sits mid-longitudinally and generates 428 lbs./ft. of torque at 5200 rpm.

The Diablo VT has a recorded top speed of 201.9 mph and 0-60 mph times of 4.09 seconds.

Dramatically improving driver comfort and handling, the Diablo VT incorporates active suspension and powered rack and pinion steering. Fully adjustable, the active suspension when engaged in the automatic mode is governed completely by the vehicle's speed. The damping program is chosen automatically from predetermined maps based on tests involving varying road conditions. In manual mode, the driver can choose one of the damping programs through the console.

Naturally, safety aspects take priority. If the driver selects a "soft ride" program but exceeds acceptable programmed speeds, the computer will automatically adopt a stiffer, more sporty program for the increased performance. This remains inserted until the speed is reduced to more acceptable levels at which point the originally chosen ride is readopted.

Power steering, an infrequent feature in high performance sports cars, also significantly improves driver comfort of the Diablo VT without sacrificing safety. Its action is also speed sensitive so that the steering is "hardened" as speed increases. This offers the driver maximum sensitivity and precise control at higher speeds, yet will allow light and easy maneuverability at lower speeds.

Slight styling modifications inside the all-leather cabin has noticeably improved visibility and ergonomics. The classic polished gate serves as the centerpiece among such luxury appointments as air conditioning, AM/FM/CD stereo and power windows to increase driver pleasure for everyday driving.

Numerous alternations have been made on quality, many of which can be seen. Other, certainly no less important, remain hidden and relate to improvements to the engine cooling system, timing system to reduce noise, improvements to the dashboard for visibility and ergonomics, improvements to the recirculation of air within the passenger compartment and improvements to the electrical harness which is due to the union of various electrical circuits that are led to a centralized control device that serves as a "body computer."

Ensuring a smooth and safe ride at all speeds, the Diablo VT is equipped with Pirelli P-Zero tires mounted on 17-inch aluminum OZ wheels.

The sleek, curvaceous lines of the Diablo are reminiscent of its Lamborghini predecessor, the highly acclaimed Countach. The slight similarities are no coincidence when one spots the identifying signature plaque of designer Marcello Gandini that adorns each Diablo.

"The Diablo VT is undoubtedly the finest exotic sports car on the market," says Robert A. Braner, president and COO of Automobili Lamborghini USA, who added that in terms of performance, aesthetic qualities and in driver friendliness, the Diablo VT is unparalleled.

\$\$\$\$

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- Each document retrieval counts as 1 transaction.
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-----	-----
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InfoWorld	\$5 per 100
Computer Select	\$5 each

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Restrict to documents published the last

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InfoSeek Titles

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Titles: 1 through 12 of 12

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Teléfono: 34-1-589.16.62
Fax: 34-1-589.13.15*



A continuación se listan los valores que forman el índice IBEX35, con los datos relativos a la sesión en curso. Estos valores son los más líquidos de la bolsa española. Los precios están retrasados 15 minutos.

Sesión del día 3-11-1995

Valor	Ant.	Último	%Dif.	Volumen	Máx.	Mín.	V.Efec (m)	Hora
● ACERINOX	12.670	12.600	-0,55	36.927	12.750	12.500	466.317	17:00
● ACESA	1.165	1.155	-0,86	184.226	1.170	1.145	212.946	17:00
● AG. BARCELONA	3.360	3.340	-0,60	9.500	3.350	3.300	31.598	17:00
● AMPER	1.645	1.620	-1,52	59.425	1.650	1.610	96.708	17:00
● ARGENTARIA	4.335	4.260	-1,73	631.293	4.350	4.200	2.694.926	17:00
● AST. ZINC	1.090	1.070	-1,83	32.388	1.090	1.065	34.830	17:00
● AUMAR	1.415	1.430	1,06	58.532	1.450	1.415	84.098	17:00
● B. BILBAO-VIZ	3.740	3.750	0,27	138.855	3.750	3.725	519.331	17:00
● B. CENT. HISP.	2.550	2.530	-0,78	146.482	2.550	2.520	371.449	17:00
● B. POPULAR	19.330	19.350	0,10	27.013	19.350	19.260	521.677	17:00
● BA. SANTANDER	5.330	5.330	0,00	215.122	5.350	5.270	1.142.771	17:00
● BANESTO	827	825	-0,24	201.955	827	820	166.370	17:00
● BANKINTER	10.660	10.650	-0,09	8.826	10.680	10.610	94.127	17:00
● CANTABRICO	3.700	3.730	0,81	38.928	3.740	3.700	144.936	17:00
● CONTINENTE	3.000	3.020	0,67	35.489	3.050	3.000	107.435	17:00
● COR. ALBA	6.800	6.750	-0,74	112.403	6.850	6.700	758.664	17:00
● COR. MAPFRE	6.260	6.100	-2,56	22.270	6.250	6.100	137.508	17:00
● CUBIERT. MZOV	7.100	7.010	-1,27	8.682	7.150	7.010	61.520	17:00
● DRAGADOS	1.645	1.600	-2,74	96.561	1.645	1.600	156.535	17:00
● ENCE	2.260	2.225	-1,55	114.023	2.290	2.200	254.795	17:00
● ENDESA	6.050	5.980	-1,16	210.369	6.050	5.970	1.265.832	17:00
● FCC	8.670	8.940	3,11	15.194	8.950	8.730	133.716	17:00
● FECSA	739	740	0,14	79.176	745	735	58.685	17:00
● GAS NATURAL	16.770	16.950	1,07	17.665	16.990	16.810	298.128	17:00
● IBERDROLA	930	938	0,86	1.598.120	941	934	1.498.397	17:00
● INM. METROVAC	3.785	3.790	0,13	13.788	3.810	3.700	51.939	17:00
● PRYCA	2.575	2.565	-0,39	55.173	2.610	2.550	142.158	17:00
● REPSOL	3.625	3.625	0,00	404.779	3.650	3.615	1.470.481	17:00
● SEVILLANA	807	802	-0,62	111.340	809	802	89.762	17:00
● TABACALERA	4.200	4.200	0,00	28.439	4.240	4.160	119.358	17:00
● TELEFONICA	1.555	1.540	-0,96	1.768.883	1.555	1.540	2.735.754	17:00
● UN. FENOSA	586	591	0,85	595.283	593	585	350.740	17:00

● URALITA	1.260	1.255	-0,40	115.273	1.285	1.230	144.875	17:00
● VALLEHERMOSO	1.990	1.990	0,00	43.446	2.020	1.960	86.574	17:00
● VISCOFAN	1.560	1.600	2,56	95.920	1.650	1.565	153.280	17:00

Notación Empleada:

Valor: nombre del valor
 Ant.: precio del día anterior en pts
 Último: precio último en pts
 Dif%: variación entre el precio anterior y el último en porcentaje
 Volumen: no de títulos negociados del valor
 Máx.: precio máximo durante la sesión
 Mín.: precio mínimo durante la sesión
 V.Efec(m): volumen efectivo negociado en el valor en millones de pts
 Hora: hora de la última negociación

\$\$\$\$

For

Content



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November 03, 1995

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| Energy | Environmental Services |
| Healthcare | Insurance |
| Media & Communications | Transportation and Distribution |
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Internetworking



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Internetworking Hardware Overview

November 03, 1995

- [RADVision and Silicon Graphics collaborate on LAN/WAN videoconferencing gateway; resulting solution will enable Silicon Graphics' InPerson users to communicate with H.320 systems](#)

RADVision Inc. and Silicon Graphics Inc. announced that they have signed an agreement which will enable Silicon Graphics InPerson desktop conferencing system software users to access ISDN through their LAN to communicate with any H.320 videoconferencing station ... [Business Wire, 524 words]

- [Cabletron releases correction](#)

Cabletron Systems today reported that its news release of October 30, 1995, announcing that Cabletron products received NEBS certification from Bellcore was in error. Bellcore has not certified any Cabletron product. [Business Wire, 221 words]

- [CONTROL DATA SYSTEMS ANNOUNCES DEC GATEWAY FOR MAIL*HUB MESSAGE INTEGRATION SOLUTION 1992-Compliant X.400 Gateway Provides Seamless Connectivity to Mail*Hub Standards-Based Backbone](#)

Control Data Systems, Inc. today announced it has developed a message router gateway to support the DEC ALL-IN-ONE E-mail system in the company's Mail*Hub message integration solution. [PR Newswire, 429 words]

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Revenue Sources

- Direct sales



Hotels



Flowers



Food



Clothing



Computers

Awards :-)



Top 5% of all sites on the internet by [Point Review](#).

"Hello?
Holiday Inn®?
I need
a room."

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"Tell me more about the [different kinds of Holiday Inn hotels](#)."

"I travel a lot... tell me about the [Holiday Inn Priority Club® program](#)?"

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"[What's new](#) at Holiday Inn?"

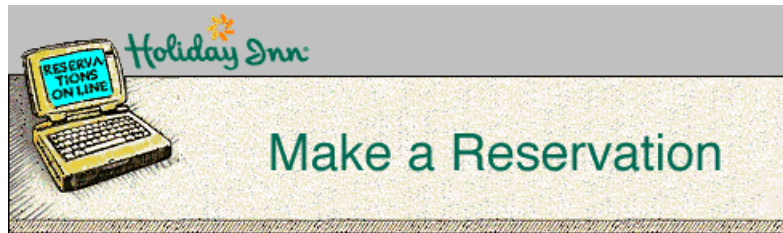
"I need to make a [reservation](#)."

"What does Holiday Inn have to [offer me](#)?"

"Is the [Chairman](#) in?"



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Where do you want to go?

Select a location from the list or map below:



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Countries outside the US and Canada.

Select the country you wish to visit:

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Singapore	
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South Africa	
Spain	
Sri Lanka	
Switzerland	
Taiwan	
Thailand	↓

Select a country and press :

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We make your trip easy.

Find your Holiday Inn hotel by choosing the city you wish to visit, the highway on your travel route, or the attraction you wish to stay near (*usually only one hotel per attraction is listed*).

NOTE: You may choose by multiple criteria. However if the criteria is not applicable, you will receive an error message. Not all countries have multiple criteria.

[Spain](#)

[Spain]



List 1 - City



List 2 - Attraction

Choose a **City** and/or **Attraction** you would like to visit:

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Your Hotel Selections

We have 1 hotel(s) in the area you have selected:



Madrid

Address - Plaza Carlos Trias Bertran, 4
Madrid, Spain, SPA
Spain
28020
Phone No - 15970102
Fax No - 15970292

Features of this hotel:

- Whirlpool
- Pets allowed
- Suites Available

Earliest check-in time - 2 PM
Check-out time - NOON
Nearest downtown - Downtown Madrid
Nearest airport - Barajas Int Airport
Distance from airport - 13.00 KM Short direction - Access Orense 24. City

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Fill in availability requirements

(Only 50 weeks in advance booking is allowed)

Madrid

Arrival date (Month/Day/Year):	July	10	1995
	August	11	1996
	September	12	
	October	13	
	November	14	

Number of nights:

Number of rooms:

Number of adults:

Room preference:

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This service is unavailable at this time. If you like to make a reservation, please call the [reservation office](#) nearest you.



For reservations you can also call **1-800-HOLIDAY** if you are calling from the US, Canada, Puerto Rico or the US Virgin Islands. Elsewhere, call your [nearest Holiday Inn Reservation Office](#).

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Grant's Florist & Greenhouse

Branch Information Services is pleased to present Grant's Florist & Greenhouse, the *first* Internet flowershop. With a color screen and a recent version of Mosaic or Netscape, you can view and then order FTD (tm) flowers for delivery anywhere in the US and Canada. Please consider using our free [reminder service](#) or write down our address: <http://florist.com/>

Return to the [Branch Mall](#)

General Information:

We offer a service where you can view and conveniently order fresh flowers that will be delivered by a florist local to the recipient. One common concern with flowers is price and availability. Different areas of the country sometimes have different prices or may be unable to supply certain flowers. For example, New York City has high rents and costs of doing business, so flowers are more expensive there. Some areas charge an additional \$1-\$4 delivery charge. We have been providing quality flowers since 1947 and always work to get you the arrangement closest to your order at the lowest price. We ask that you give us some leeway and we will call you if flowers in that area cannot be purchased for the maximum amount you specify on the order form. All prices are in US dollars and do not include the \$3 wire service charge. Items may not be exactly as shown.

Click on the highlighted text to view a picture.

- [BFL033](#): One dozen boxed long stem roses. A fragrant classic. \$49.95 to \$99.95.
- [BFL001](#): A happy birthday or general purpose bouquet containing carnations, daisys, liatris, mini carnations, statice, sweetheart roses, lilies, and monte casino in a basket with an optional happy birthday insert. \$40.
- [BFL002](#): A happy birthday or general purpose bouquet containing mums, mini and standard carnations and statice in a basket with an optional happy birthday insert. \$30.
- [BFL003](#): A get well soup cup containing button mums, daisys, mini carnations, standard carnations, monte casino, statice and a package of chicken soup. \$26.
- [BFL004](#): A bit of cheer containing daisys, large carnations, mums and statice in a colorful mug and plastic bag. \$25.
- [BFL006](#): An all occasion arrangement containing daisys, statice, monte casino, mini carnations, large carnations, red roses

and lilies in a glass vase. \$60.

- [BFL008](#): A congratulations on the baby bouquet containing daisys, mini carnations and standard carnations in a basket along with Gerber baby products. \$30.
- [BFL009](#): A large sympathy arrangement containing a dozen roses, carnations, cushion mums and a ribbon in a vase. \$115.
- [BFL016](#): A large fruit basket containing a variety of fruit, candy, wine, cheese, and crackers. \$65.
- [BFL029](#): A happy birthday arrangement with a balloon. Contains heather, daisys, carnations, statice, and golden aster. \$62.

Coming soon, dozens of additional arrangements and bouquets. Please check back.

See also [Exotic Flowers of Hawaii](#)

[Press here to order.](#)

Grant's Flowers 313-769-6055, fax 313-769-0525

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Return to the [Branch Mall](#)



BFL033: Dozen Red Roses: \$49.95 to \$99.95. 1 Dozen boxed long stem fragrant roses.

[Press here to order.](#)

Go back to [Grant's Flowers](#)

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Flowers Order Form

If you have the Netscape browser, version 1.0 or later and the key at the bottom is broken, you can [encrypt](#) your order for the latest in privacy and credit card security.

To order with this form, you must use a browser with online form features, such as XMosaic2.x. If boxes to enter your answers do not appear, your software is too old to use this form. Instead, please [press here](#) to see an order form that you can cut and paste or mail to us.

When you have filled out the form to your satisfaction, click on the `SEND` button at the bottom of the form to enter your order.

- Item code (BFLxxx)
 - Alternate choice item
-

Information in case we need to contact you:

- Your Name
 - Email address
 - Phone
 - Alternate phone
-



Information about the recipient:

- Name

- Street Address
 - City
 - State/Province
 - ZIP/Postal Code
 - Country
 - Phone
 - Alternate Phone
 - Email address
 - Special Instructions
-



Information about the order:

- Note on enclosed card
- Name on enclosed card
- Occasion
- Date to deliver

Please note: Normally we can fill most orders in 24 hours, but occasionally in some areas of the world it will take slightly longer. Please call if you need something quicker. 313-769-6095. We generally cannot deliver on Sunday. Credit card type: VISA
Mastercard Discover

(Credit card concerns)

- Credit Card #
- Name on card
- Expiration Date
- Price \$
- Max \$ over standard price

Plus \$3 wire service charge and possible \$1-\$4 delivery charge. Orders delivered to non US/Canadian locations have a \$10 delivery charge.

- Where did you find the address for this service?

- *(select to send order)* - *(select to clear the form)*

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The Future

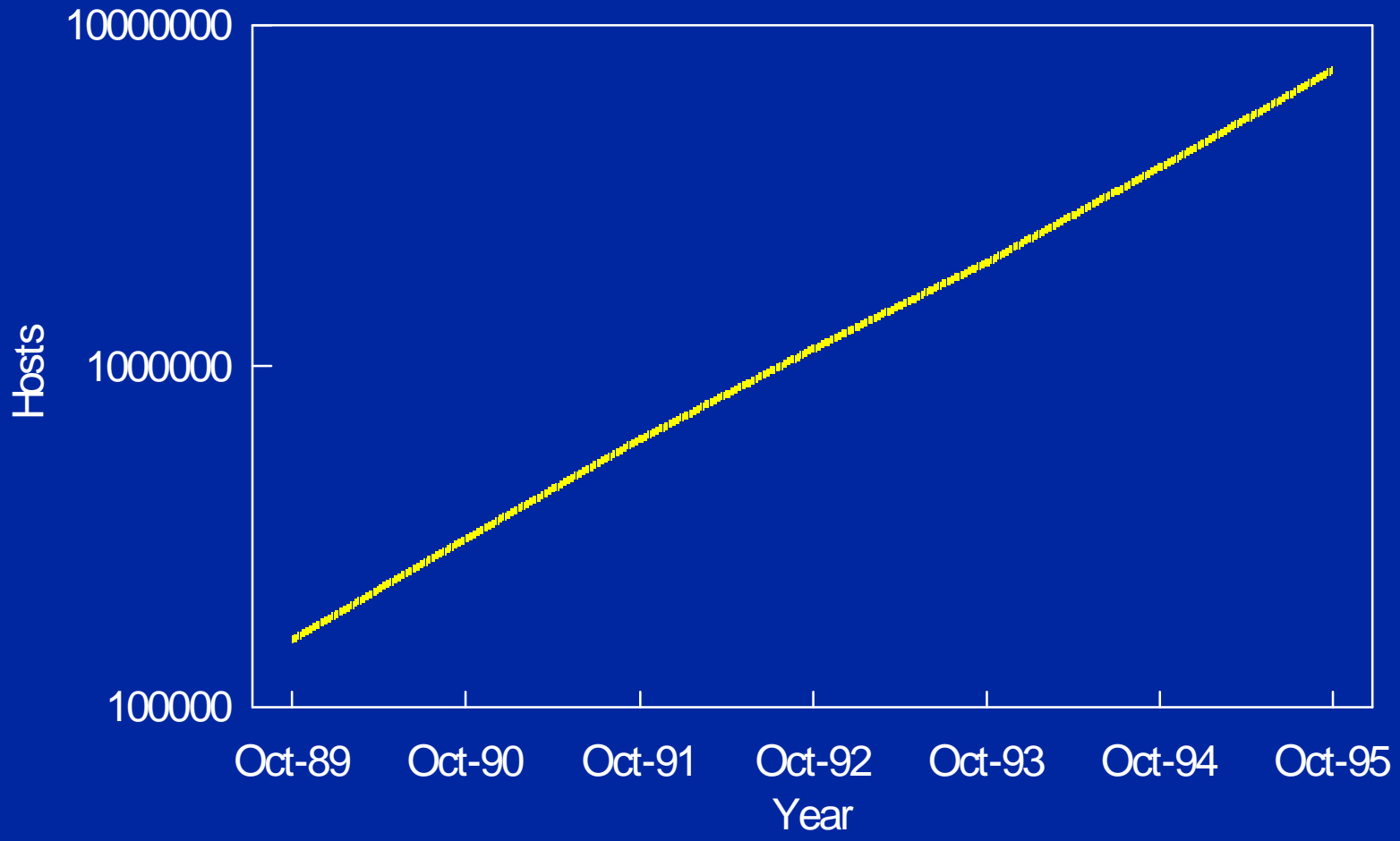


Forecasts

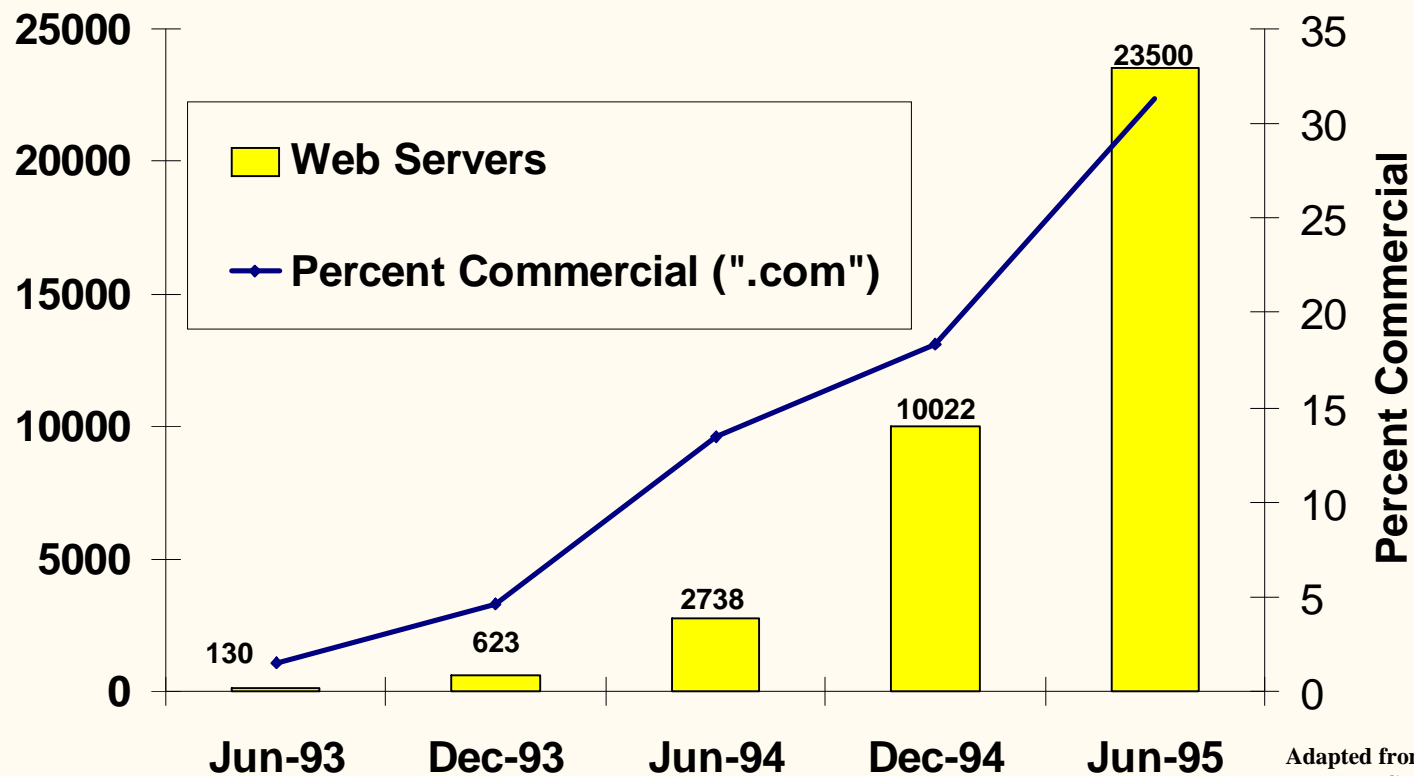
- AT&T
- Bell Laboratories
- DEC
- General Motors
- IBM
- Marconi



Internet Host Growth



WorldWide Web Growth



Adapted from Matthew Gray's Wanderer



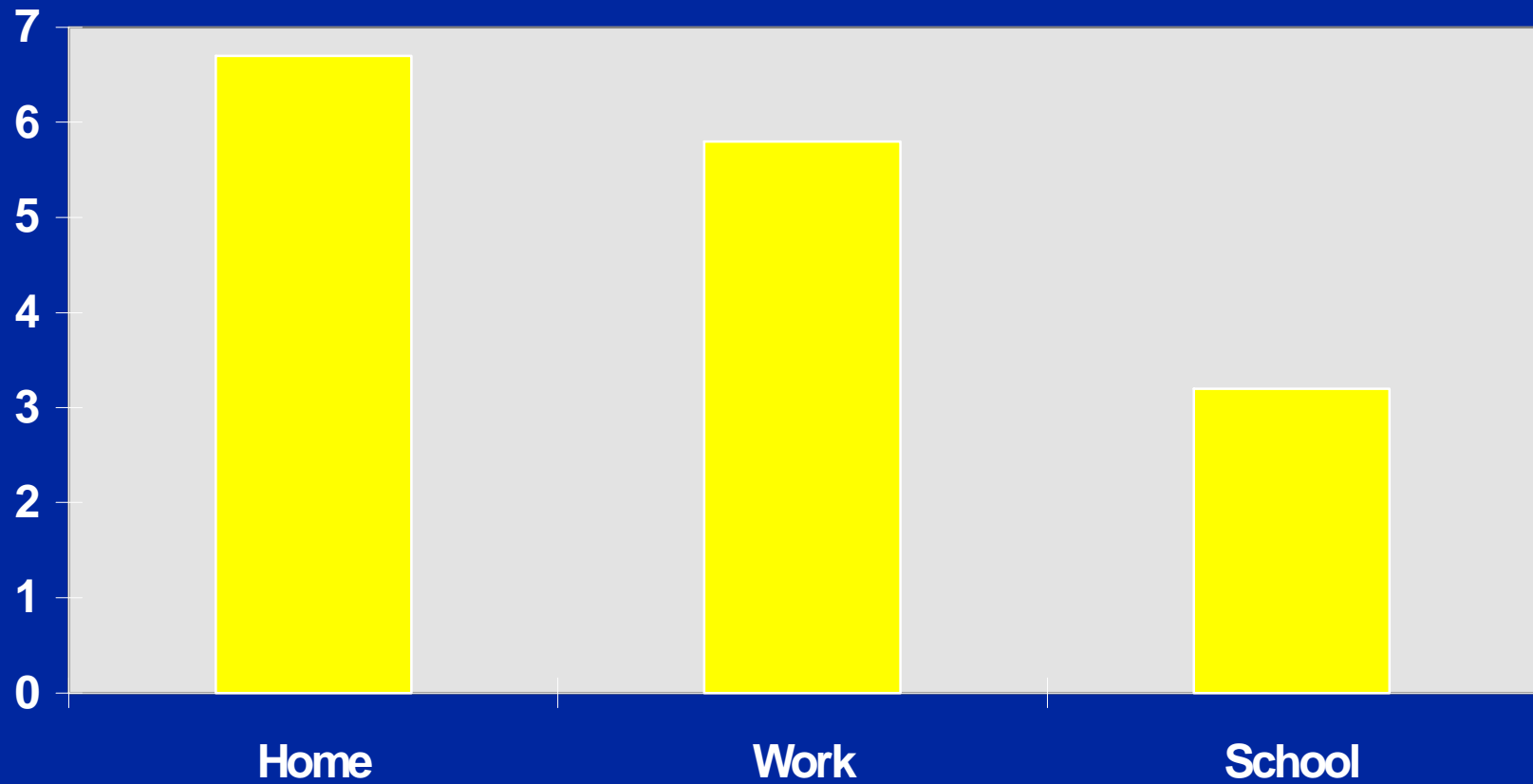
Survey Data

U.S. and Canada

- 17% have access to Internet
- 11% have used Internet in the past 3 months
- 8% have used WWW in the past 3 months
- Average time spent on Internet
 - 5 hours 28 minutes per week
- 20% of WWW users have income > \$80K
- 14% of WWW users have made online purchases
- 64% have college degrees



Percent of Population Having Internet Access by Location (U.S. and Canada)



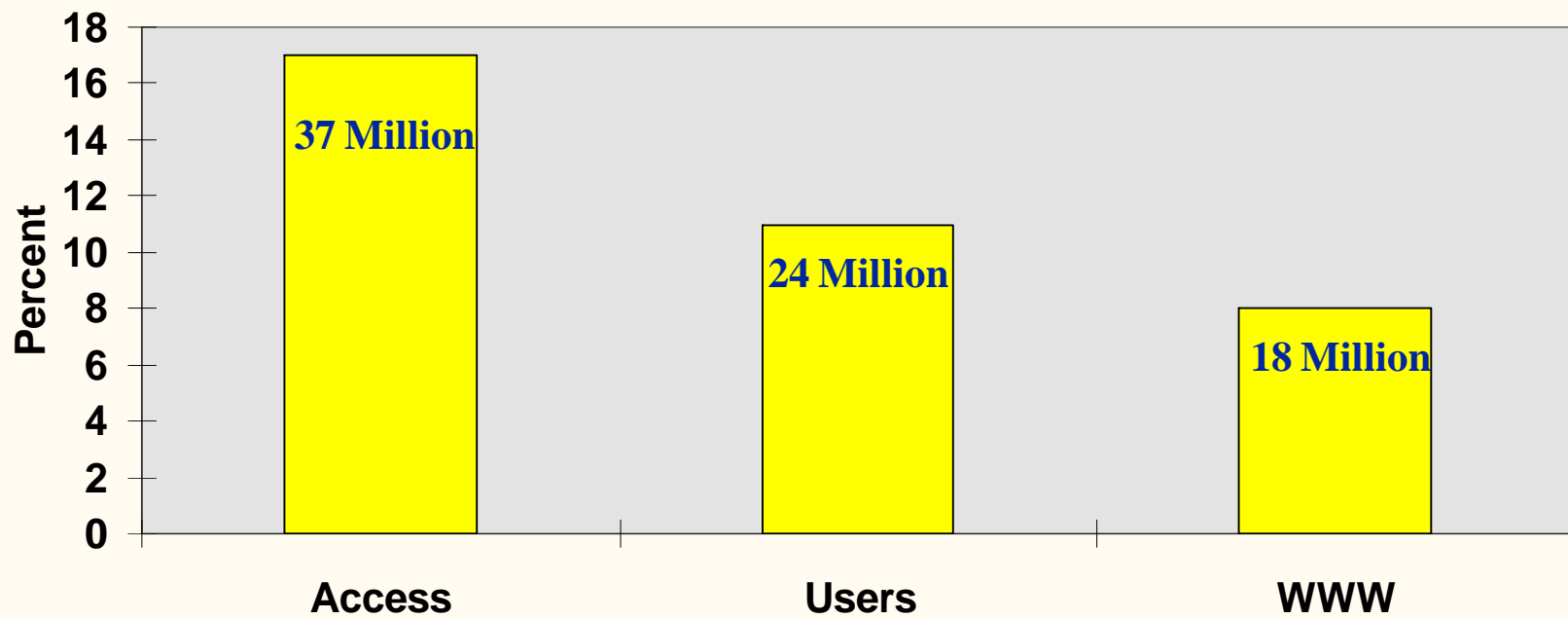
Percent of Accesses



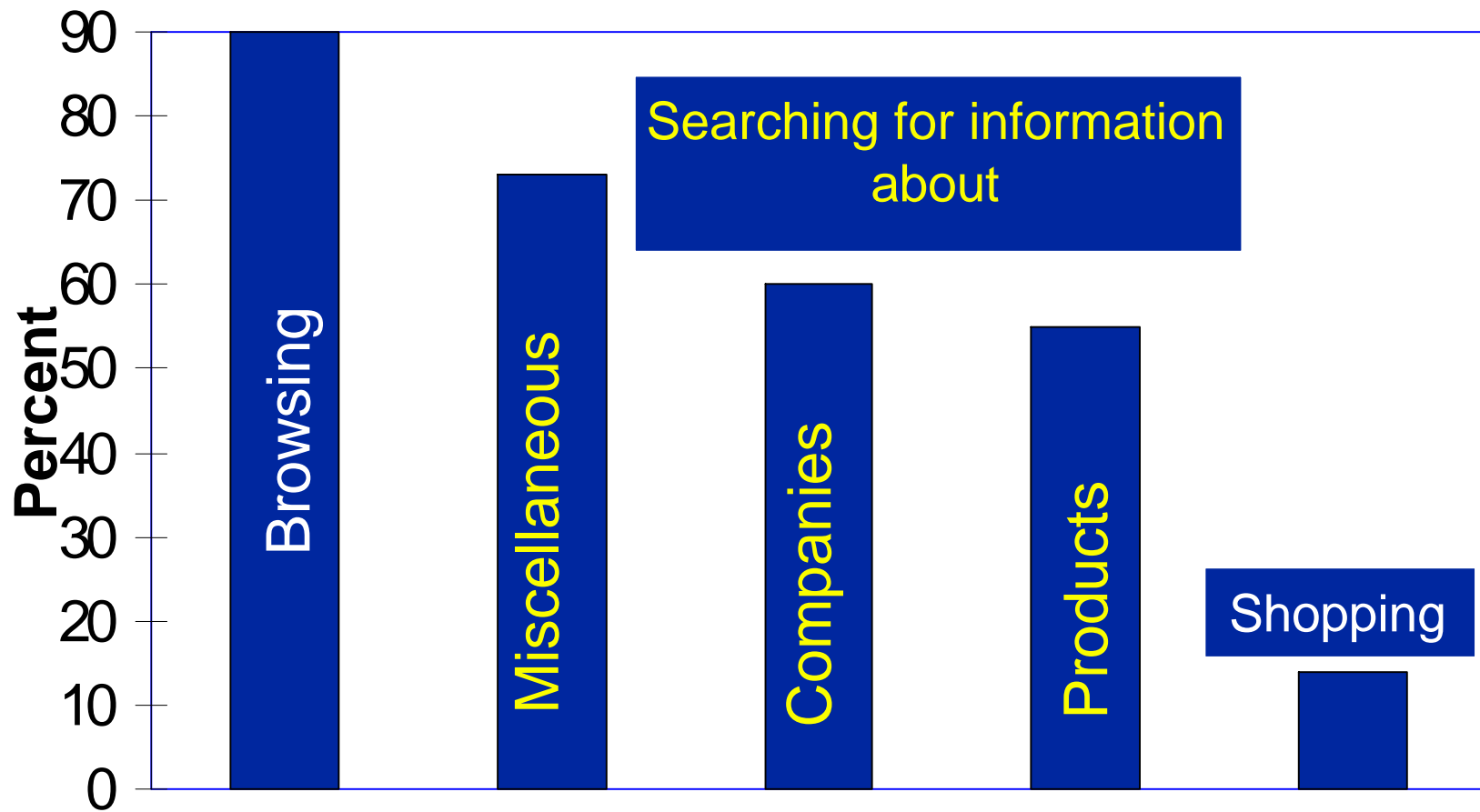
Adapted from Nielsen Media



Access and Usage U.S. and Canada



Ever Use WWW For ???



Adapted from Nielsen Media



Business Uses of Internet

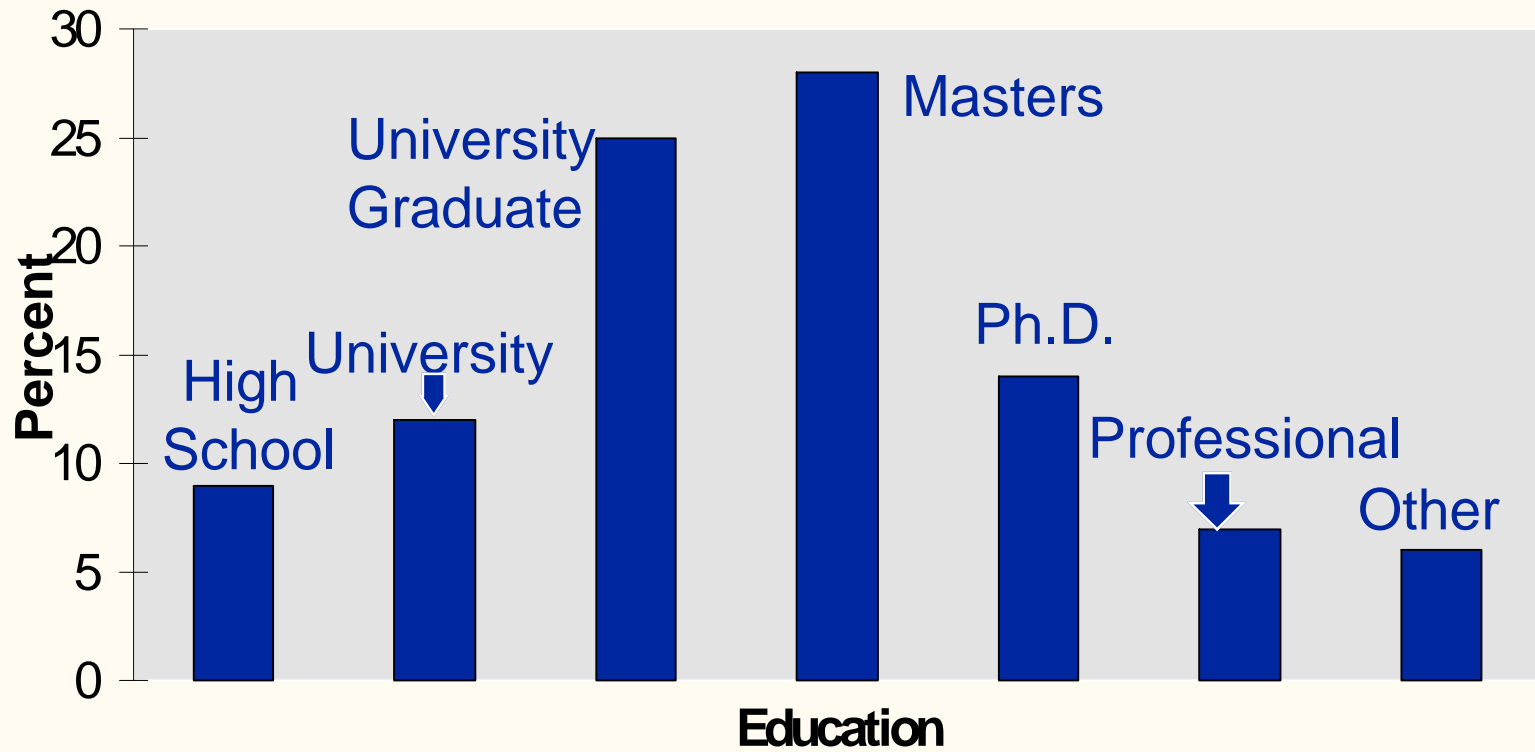
Gathering information	77%	Customer service & support	38%
Collaboration	54%	Publishing	33%
Vendor Support	50%	Purchasing	23%
Competitive analysis	46%	Selling	13%
Internal communications	44%		

Adapted from Nielsen Media





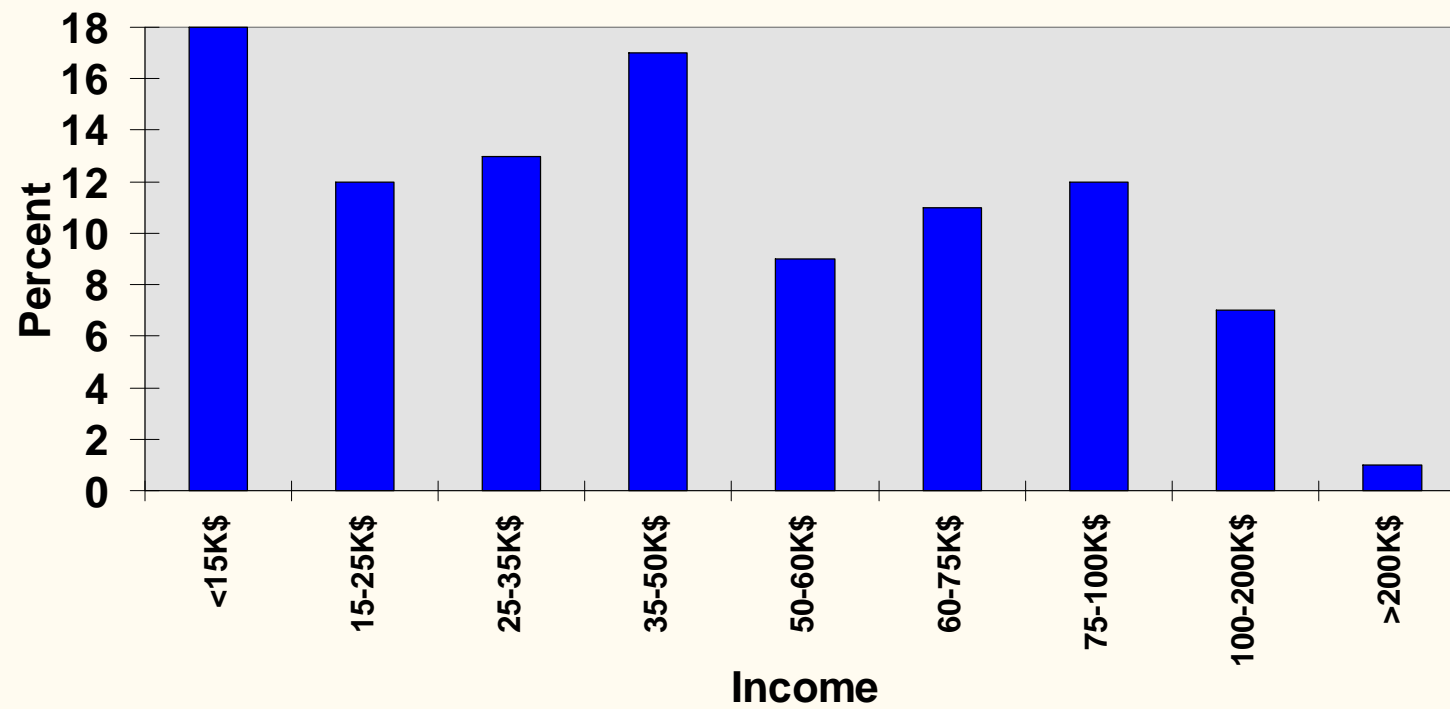
European Internet Users



Source: http://www.cc.gatech.edu/gvu/user_surveys



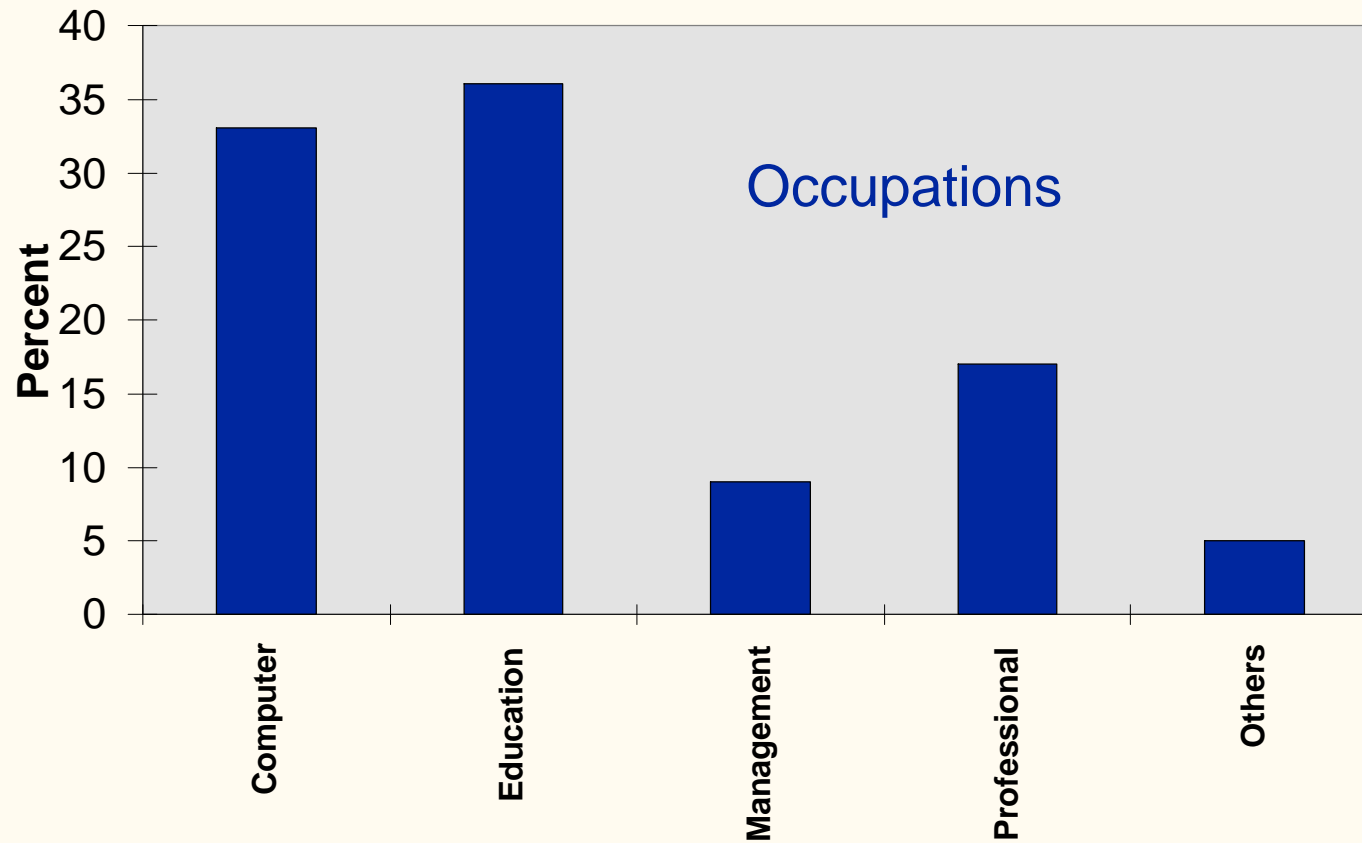
European Internet Users



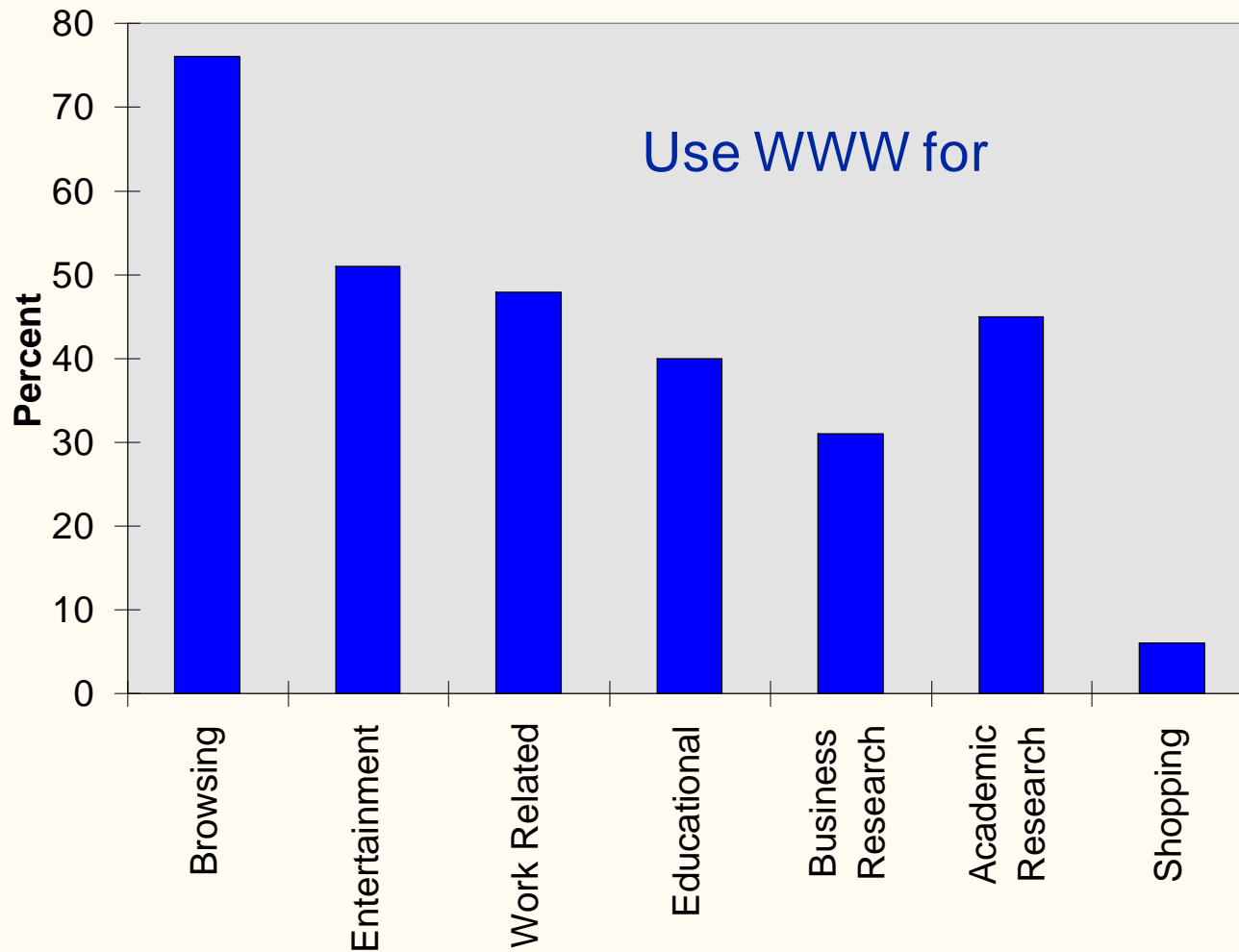
Source: http://www.cc.gatech.edu/gvu/user_surveys

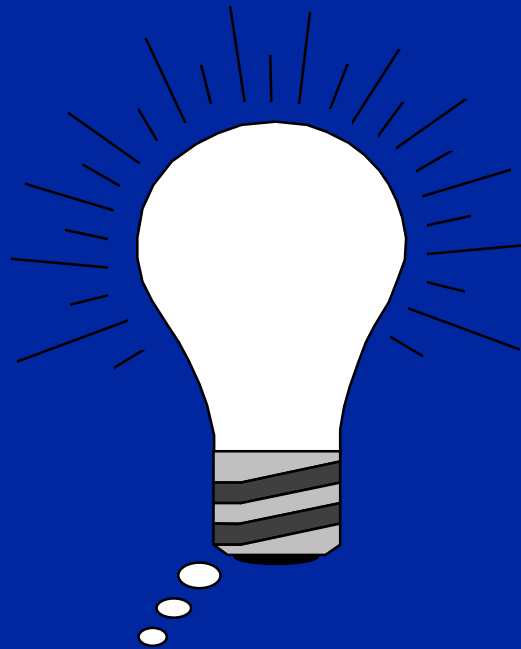


European Internet Users



European Internet Users





A Few Examples

- Half-duplex telephony
- Full-duplex telephony
- Push/pull servers/browsers
- Split-screen browsers
- Java
- VRML
- Photo libraries
 - Picture Network Int'l
 - West Stock
- Gambling
- Payment mechanisms
 - First Virtual
 - Cybercash
 - Mastercard/Visa
 - Sun/Intuit
- Frequent travelers
 - United Airlines
 - Marriott Hotels



A Few More Examples

- Low-cost “net surfers”
 - Philips
 - \$150 adapter for CD-i
 - PDA’s
 - Apple’s Pippin
 - Net software driven
 - SUN, Oracle
- Help wanted advertising
 - Boston Globe
 - Chicago Tribune
 - Los Angeles Times
 - New York Times
 - San Jose Mercury News
 - Washington Post



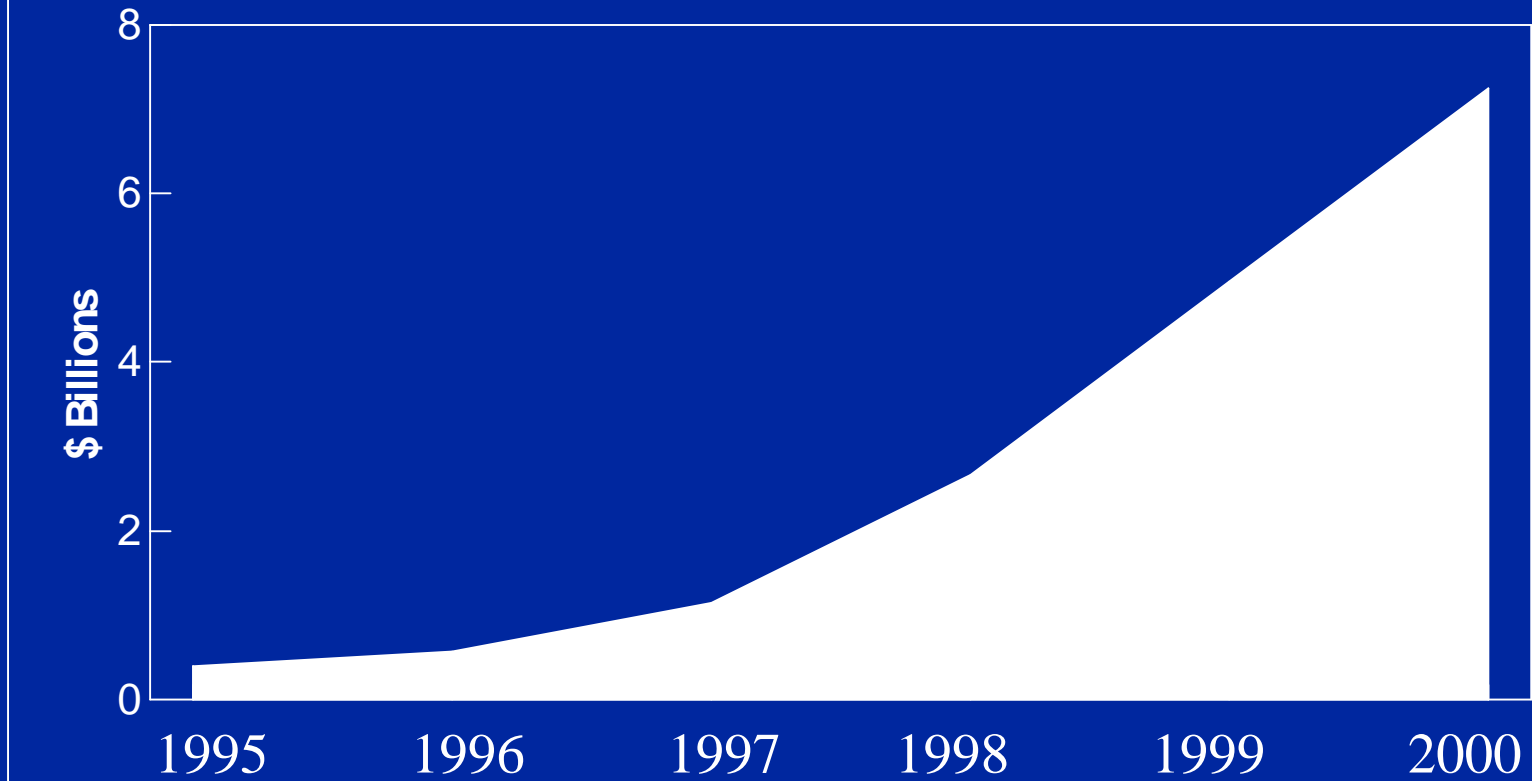


Straws in the Wind

- PC's in the home
 - USA 1:3
 - France & Germany 1:7
- Online services
 - USA - ~ 6.000.000 users
 - Europe < 1.000.000 users



ESTIMATED CONSUMER PURCHASES INTERNET AND OTHER ONLINE SERVICES



Adapted from Forrester Research









To: Executive Staff

From: Bill Gates

Date: May 26, 1995

Now

**I assign the Internet
the highest level of importance.
In this memo I want to make clear
that our focus on the Internet is
critical to every part of our business.
The Internet is the most important
single development to come along
since the IBM PC was
introduced in 1981.**







¿ Questions ?

