

Doing Business with IBM

What Algorithmics Business Partners need to know

IBM recently acquired Algorithmics, a provider of leading financial risk solutions. Beginning 1 October 2012, Algorithmics' business will be conducted by IBM.

The following "Doing Business with IBM" (DBWI) guide describes changes to expect and actions needed to maximize the benefits of your relationship with IBM. It will also ensure a smooth transition to IBM's business systems and processes. Although processes are changing, most of your contacts in sales, service delivery, support and education will remain the same.

Algorithmics has identified you as the Primary Contact for your company. As part of the transition into IBM, Algorithmics has endeavored to contact you to verify you are the correct Primary Contact and to also confirm and/or gather contact information for your Technical and Billing contacts. Because you are the Primary Contact, you are receiving this communication.

As an IBM Business Partner, you will continue to have access to Algorithmics offerings, now under the IBM brand, as well as the extensive IBM portfolio of software solutions and services offerings, while enjoying the high-quality, responsive service you have come to expect from both Algorithmics and IBM.

We anticipate that you and your organization will experience a smooth transition to IBM over the next several months. During this process, the IBM team and your IBM Algorithmics representatives are available to answer any questions and to address your ongoing software support and service needs.

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CREDIT

For each IBM business partner transacting directly with IBM (Tier 1 relationship), credit assessment is one component of the order management process. While in the vast majority of cases the credit assessment is a function of publically available credit rating data, absent this, it is likely that financial statements will be requested with which to evaluate credit worthiness.

Purchase credit is granted commensurate with expected, near term revenue generation with IBM and is influenced by historical revenue, payment history, and your company's size and financial strength (profit & cash flow).

In addition to purchase credit, IBM Global Finance offers other programs that may be applicable, such as credit lines and end user financing. If interested, the next step would be to alert your IBM sales representative.

ACCOUNTS PAYABLE AND PURCHASING

Effective 1 October 2012, Algorithmics processes will migrate to IBM. Business Partners will use a common process to acquire software products and services from IBM.

The quotes and invoices you receive will change in format after 1 October 2012, and they will be issued from an IBM location. Your remit-to address may change, and in certain countries, the transaction currency that you are using today, also may change. Please check the following items on your internal vendor records:

North America Partners:

Tax ID Exemption Certificates and Change Requirements

If applicable, you will need to reissue Tax Exemption Certificates from your company to IBM. Please submit your Tax Exemption Certificate prior to your first order to the Algorithmics Sales Administration team.

If applicable, your vendor Tax Identification Number will change.

Electronic Software Delivery Tax Exception for U.S. Customers

For U.S. customers, if applicable, electronic software delivery (ESD) tax exceptions require enablement prior to ordering. Please check with your IBM sales representative for processing details.

Europe, Middle East and Africa Partners:

VAT Exemption Certificates and Change Requirements

Vendor applicable VAT Number will change.

If you are currently exempt from local VAT, you will need to issue your company's **VAT Exemption Certificates** to IBM with your first order after 1st October 2012. Please contact your sales representative for processing details.

Asia Pacific Partners:

IBM's prices do not include indirect tax such as VAT/GST or Business Tax. Where applicable the IBM company that does business in your country will, in addition, charge a VAT/GST or Business tax at the applicable rate. The IBM company that does business in your country will issue the relevant invoice containing the indirect tax.

Table of Changes for Accounts Payable and Purchasing

What is changing	Description
Vendor name	Vendor name will change from Algorithmics, an IBM Company to the applicable local/regional IBM operation covering your location (the term “Vendor” below represents the applicable IBM entity).
Vendor remit-to address	Vendor remit-to address for checks, wire transfers and overnight payments will change after 1 October 2012. The new details will appear on your invoices issued from IBM after 1 October 2012.
Vendor standard payment terms	The payment terms in your existing Algorithmics contract will apply until such time as that contract expires, is terminated, or replaced. Any new agreements entered into with IBM will be subject to the IBM standard payment terms. In most countries, IBM standard payment terms of “due upon receipt” may be applicable. You will find this information on either your invoice or quote.
Currency	In some countries, the currencies used by Algorithmics are different from those used by IBM, thus you may be transacting in a different currency with IBM. Please refer to the currency table at the end of this document.
Language	In some countries, the correspondence you will receive from IBM may be in the local language.
Customer number	Effective 1 October 2012, Algorithmics customers will be assigned IBM customer numbers (ICNs) and a Software Site Number. Over the upcoming months, you will receive your ICN and Software Site Number in a welcome letter from IBM. Please note that your ICN will be used on all order-related communications.
Purchase documentation	All purchase documentation, such as invoices, will be sent to the contact(s) listed in your IBM profile associated with your IBM customer number unless specified otherwise in your order.

What is changing	Description
Part number and product description	<p>New part numbers and product descriptions for the IBM Algorithmics portfolio will replace the existing Algorithmics product descriptions.</p> <p>These new part numbers and descriptions will appear on quotes and invoices you receive from IBM.</p>
Document format	<p>The format of documents (quotes, services statements of work, invoices, etc.) you receive will change based on the local/regional IBM operation covering your location.</p>
PO requirement	<p>If your company requires issuing a purchase order to facilitate payment for any goods or services, IBM may require a new purchase order. Please contact your Algorithmics or IBM representative with any questions.</p>
New Licensing Process	<p>IBM Algorithmics offerings are governed by License Agreements which can be found here: http://www-03.ibm.com/software/sla/sladb.nsf/search/.</p> <p>Customers using license keys to access their software should have received new generic license keys prior to 30 September 2012.</p> <p>For new purchases of software which contains license keys, the license key will be located with the software on the download site. Access instructions to the Software Download Site will be contained in the separate Welcome to IBM letter.</p> <p>If you have not received your generic license key or have concerns in this area, please contact IBM Algorithmics Support at: http://www.ibm.com/algorithmics/support/.</p>
Tax Liability	<p>Beginning 1 October 2012, all order transactions will include applicable sales tax (unless you have a tax exempt certificate on file with IBM). Taxes will be included in the invoice.</p> <p>For Asia Pacific customers:</p> <p>IBM's prices do not include indirect tax such as VAT/GST or Business Tax. Where applicable the IBM company that does business in your country will, in addition, charge a VAT/GST or Business tax at the applicable rate. The IBM company that does business in your country will issue the relevant invoice containing the indirect tax.</p>
Software Download	<p>As we complete the migration to IBM systems, if applicable, you will be provided with an IBM website to download software. Software downloads through the IBM website are accessed using a SAP ID and password, which will be communicated to you after 1 October 2012.</p> <p>Until then, Algorithmics products currently available via download will continue to be available through the existing Algorithmics download location.</p>

What is changing	Description
Demonstration and Evaluation Software	IBM software for demonstration and evaluation, development and testing, and internal training can be acquired through an optional fee-based 12 month program: the IBM Value Package, or the IBM Software Access Option. Please check with your IBM sales representative for details.
Shipping Point	The shipping point, delivery options and freight charges will be aligned with IBM software manufacturing and delivery standards.
Submitting New Software Orders	Details regarding order submission will be communicated separately.

SOFTWARE SUPPORT

The Algorithmics Support teams will continue to focus on delivering customer satisfaction without compromise. Existing Algorithmics support offerings and systems will continue to be used after 1 October 2012.

As we work to integrate Algorithmics and IBM Support, we will offer IBM Algorithmics customers expanded capabilities through the existing IBM Support infrastructure. Communication related to changes in your support experience can be found in the IBM Algorithmics Customer Center at: <http://www.ibm.com/algorithmics/support/>.

The Algorithmics Customer support phone and web interfaces will remain unchanged until mid 2013.

What does not change on 1 October 2012:

- Support is provided per your existing Algorithmics Support agreements.
- IBM Algorithmics Support is accessed through existing Algorithmic support processes and tools. Refer to <http://www.ibm.com/algorithmics/support/> for details.

Please ensure the primary support contact within your organization is aware that they should continue to access IBM Algorithmics Support in the same way they always have via email and telephone. Refer to <http://www.ibm.com/algorithmics/support/> for more details.

Below are informational highlights to help you understand the definition of the Primary and Technical contact roles in IBM.

- The **IBM Primary Contact** is a specific individual who will manage access to IBM's software download site for their organization's IBM Algorithmics software contract(s). The Primary Contact approves IBM Download Site access requests from others in their organization and will receive all account management and download instruction communications. This person will also be the primary contact for annual support renewal invoices for IBM Algorithmics software and services at your organization. Note: If a Primary Contact is not designated, the Technical Contact will be used for both roles. The Primary Contact must be a single individual.

- Only a **single** Primary Contact can be designated per Company in the IBM systems.
- The **Site Technical Contact** is a specific individual from the Customer's company who will manage access to IBM's Technical Support services and grant the authority to open Technical Support Requests on behalf of their organization. The Technical Contact approves IBM Support access requests from their organization's employees and business partners and will receive all IBM Support access instructions and communications. More information regarding IBM's electronic Support can be found at <http://www-01.ibm.com/support/electronic/support/workwithibm.html>.
- Only a **single** Primary Site Technical Contact can be designated per company in the IBM systems. Additional Named Callers can be added to the system by the Site Technical Contact.

SOFTWARE MAINTENANCE AND SUPPORT

Algorithmics Maintenance and Support will be known as IBM Subscription and Support (S&S) after 1 October 2012. S&S transactions will be integrated into the IBM processes in a phased approach.

The following outlines the key dates associated with the transition to the IBM Software Subscription & Support (S&S) process:

Table of S&S entitlement dates and actions

S&S Date Expiration	What will happen
S&S expires before 1 October 2012	You should have received your S&S invoice from the Algorithmics Finance team as per the normal Algorithmics invoicing processes. You should proceed with paying any invoices issued by Algorithmics per the payment terms outlined on your invoice. Timely payment of these invoices will help to ensure that there are no disruptions in your S&S. If you have not yet received an invoice, please contact Algorithmics Finance: finarrev@ca.ibm.com .
S&S expiration date between 1 October 2012 and 31 January 2013	If your S&S expires within these dates, you will receive an invoice issued by Algorithmics Finance following standard Algorithmics processes. All of these invoices will be issued prior to 21 September 2012 with payment terms clearly stated on the invoice. If by 25 September 2012 you have not received an invoice for S&S that expires during the outlined period, please contact Algorithmics Finance: finarrev@ca.ibm.com .
S&S expiration date after 31 January 2013 and beyond	<p>Existing Algorithmics Term License Customers: Your S&S invoices associated with your term license agreements will now be generated out of IBM systems and sent with the same invoicing frequency you had with Algorithmics. These S&S invoices will be issued per your legacy Algorithmics contract until the term of the contract expires.</p> <p>Existing Algorithmics Perpetual License Customers: Your Software Subscription and Support Renewal associated with your perpetual license will now include a renewal quote generated from IBM systems and provided to you by an IBM renewal representative. This quote will be subject to standard IBM terms and conditions, and the renewal end date will move out to the last day of the month.</p>

Any questions about your Algorithmics Subscription & Support should be directed to your existing Algorithmics support representative or via Algorithmics Finance: finarrev@ca.ibm.com.

PROFESSIONAL SERVICES AND EDUCATION

IBM will now provide Algorithmics Professional Services and Education.

Professional Services

IBM Algorithmics Professional Services will serve as your client support partner with the same professional staff we have always deployed. This includes your Account Management and Customer Success teams.

Changes in Professional Services as of 1 October 2012

- IBM will assume any ongoing Algorithmics Professional Services engagements and statements of work (SOW) and will complete them as originally contracted.
- While there will be several process changes regarding the way contracts and SOWs are developed, there are virtually no changes to the overall Algorithmics services business model. Customers will engage IBM Algorithmics services to support the IBM Algorithmics portfolio of products. One exception is customers requiring a purchase order between their organization and IBM to facilitate payment for existing Algorithmics services. In that case, the customer must provide their Algorithmics services contact with a new purchase order, which references the original contract or SOW.
- All new services orders will be contracted using standard IBM services agreements, rate structure and SOWs. The IBM services agreements, SOWs, and service order systems may be separate from the IBM software licensing contracts and order systems (e.g., Passport Advantage).
- Certain customers may receive more than one invoice for their Algorithmics offering where they previously received a single invoice, i.e., Services on one invoice and Software Subscription and Support Renewal on a different invoice.

Education

Changes in Education as of 1 October 2012

- IBM Algorithmics education will be part of the IBM Business Analytics education portfolio of offerings.
- All classes will be contracted using IBM standard training agreements.
- Course and registration information can be found at: <http://www-304.ibm.com/jct03001c/services/learning/ites.wss/us/en?pageType=page&c=U431952F76355G56>.
- Additional new offerings such as the IBM Education Pack discount program and others can be found at: <http://www-304.ibm.com/jct03001c/services/learning/ites.wss/us/en?pageType=page&c=U431952F76355G56>.
- For additional inquiries, please select the “Were here to help” option in the upper right hand side of the following web page: <http://www-304.ibm.com/jct03001c/services/learning/ites.wss/us/en?pageType=page&c=U431952F76355G56> or contact your IBM Algorithmics Account Manager or Customer Success Team.

IBM PARTNERWORLD

PartnerWorld is IBM's overarching partner program across all of our software, systems, and services offerings and the single portal to access all of the benefits and services that IBM makes available to its Business Partners worldwide.

If you are not a member of the IBM PartnerWorld program you could be missing out on some key channel support tools.

Members of IBM's PartnerWorld programs have the ability to access a wide variety of tools, technology and resources to grow business and market share. You can join PartnerWorld by following the easy steps outlined in our online guide: [1-2-3 Guide to Join PartnerWorld \(https://www-304.ibm.com/partnerworld/wps/servlet/ContentHandler/pw_com_jnw_index\)](https://www-304.ibm.com/partnerworld/wps/servlet/ContentHandler/pw_com_jnw_index).

We welcome you to IBM and expect a strong relationship to continue between our companies for our mutual success, and the success of our customers.

CONTACTS AND RESOURCES FOR ADDITIONAL INFORMATION

After 1 October 2012, the same personnel with whom you have been working at Algorithmics will continue to be your primary interfaces at IBM. In some cases, you will also be introduced to new IBM channel managers in your region that are available to assist in transitioning into IBM Business Partner incentive programs.

IBM Algorithmics Contacts:

Channel Region	Contact	Email address
WW Risk Analytics PM & MM BA Channel Exec.	Amy Lewis	alewis@us.ibm.com
WW Risk Analytics Channel BA Channel Leader	Maura Cieslik	mcieslik@us.ibm.com
WW Risk Analytics Business Development Exec.	Andy Coulter	Andy.Coulter@uk.ibm.com
WW Risk Analytics BA ASL & SaaS	Raphi Zaionz	Raphi.zaionz@ca.ibm.com
GMU, AP – Business Analytics Channel Leader	Rohan Persaud	rpersaud@au.1.ibm.com
China - Consulting Sales Specialist	Jiong Qiao (Elaine)	qiaoj@cn.ibm.com
Indonesia – Senior Sales Specialist	Purwa Raida	rpurwa@id.ibm.com
Korea – BA Brand Channel Rep	Ji Hyun Kim	jihkim@kr.ibm.com
Taiwan – Advisory Sales Specialist	Angela WC Wang	angelaw@tw.ibm.com
EU – BA Business Analytics Channel Leader	Steve Gibbs	steven.gibbs@uk.ibm.com
CEE – Business Analytics Channel Leader	Jan Kriek	Jan_kriek@nl.ibm.com
MEA – Business Analytics Channel Leader	Sameer Gupta	SAMEER@ae.ibm.com
NA BA – Business Analytics Channel Leader	Richard Luciano	Rich.Luciano@us.ibm.com
LA – Business Analytics Channel Leader	Hernan Llosa	hllosa@ar.ibm.com
WW IBM Channel Integration Executive	Sue Hahn	hahnsu@us.ibm.com

APPENDIX

IBM Currency Table

Countries in which IBM conducts business, but are not listed here, transact business in US dollars.

*Note for Asia Pacific Customers: Services are provided in local currency when contracted through the local IBM Software Services organization.

Country	Geo	Currency
Afghanistan	EMEA	USD
Albania	EMEA	EUR
Algeria	EMEA	USD
American Samoa	Americas	CAD
Andorra	EMEA	EUR
Angola	EMEA	USD
Anguilla	Americas	USD
Antigua/Barbuda	Americas	USD
Argentina	Americas	USD
Armenia	EMEA	USD
Aruba	Americas	USD
Australia	APAC	AUD
Austria	EMEA	EUR
Azerbaijan	EMEA	USD
Bahamas	Americas	USD
Bahrain	EMEA	USD
Bangladesh	APAC	USD
Barbados	Americas	USD
Belarus	EMEA	USD
Belgium	EMEA	EUR
Belize	Americas	USD
Benin	EMEA	USD
Bermuda	Americas	USD
Bhutan	APAC	USD
Bolivia	Americas	USD
Bosnia and Herzegovina	EMEA	EUR
Botswana	EMEA	USD
Brazil	Americas	BRL
British Indian Ocean Territory	EMEA	USD
Brunei	APAC	USD
Bulgaria	EMEA	EUR
Burkina Faso	EMEA	USD
Burundi	EMEA	USD
Cambodia	APAC	USD
Cameroon	EMEA	USD
Canada	Americas	CAD
Cape Verde	EMEA	USD
Cayman Islands	Americas	USD
Central African Republic	EMEA	USD
Chad	EMEA	USD

Country	Geo	Currency
Channel islands	EMEA	GBP
Chile	Americas	USD
China	APAC	CNY
Colombia	Americas	USD
Comoros	EMEA	USD
Congo	EMEA	USD
Congo, The Democratic Republic of the	EMEA	USD
Costa Rica	Americas	USD
Cote d'Ivoire	EMEA	USD
Croatia	EMEA	EUR
Cuba	Americas	USD
Cyprus	EMEA	EUR
Czech Republic	EMEA	EUR
Denmark	EMEA	DKK
Djibouti	EMEA	USD
Dominica	Americas	USD
Dominican Republic	Americas	USD
East Timor	APAC	USD
Ecuador	Americas	USD
Egypt	EMEA	USD
El Salvador	Americas	USD
Equatorial Guinea	EMEA	USD
Eritrea	EMEA	USD
Estonia	EMEA	EUR
Ethiopia	EMEA	USD
Falkland Islands (Malvinas)	EMEA	USD
Faroe Islands	EMEA	DKK
Finland	EMEA	EUR
France	EMEA	EUR
French Guiana	EMEA	EUR
French Polynesia	EMEA	EUR
French Southern Territories	EMEA	EUR
Gabon	EMEA	USD
Gambia	EMEA	USD
Georgia	EMEA	USD
Germany	EMEA	EUR
Ghana	EMEA	USD
Gibraltar	EMEA	GBP
Greece	EMEA	EUR
Greenland	EMEA	DKK
Grenada	Americas	USD
Guadeloupe	EMEA	EUR
Guam	Americas	USD
Guatemala	Americas	USD
Guinea	EMEA	USD
Guinea-Bissau	EMEA	USD
Guyana	Americas	USD

Country	Geo	Currency
Haiti	Americas	USD
Holy See (Vatican City State)	EMEA	EUR
Honduras	Americas	USD
Hong Kong	APAC	USD
Hungary	EMEA	EUR
Iceland	EMEA	DKK
India	APAC	INR
Indonesia	APAC	USD
Ireland	EMEA	EUR
Israel	EMEA	USD
Italy	EMEA	EUR
Jamaica	Americas	USD
Japan	APAC	JPY
Jordan	EMEA	USD
Kazakstan	EMEA	USD
Kenya	EMEA	USD
Korea	APAC	KRW
Kuwait	EMEA	USD
Kyrgyzstan	EMEA	USD
Laos	APAC	USD
Latvia	EMEA	EUR
Lebanon	EMEA	USD
Lesotho	EMEA	USD
Liberia	EMEA	USD
Libya	EMEA	USD
Liechtenstein	EMEA	CHF
Lithuania	EMEA	EUR
Luxembourg	EMEA	EUR
Macau	APAC	USD
Macedonia, Former Yugoslav Republic	EMEA	EUR
Madagascar	EMEA	USD
Malawi	EMEA	USD
Malaysia	APAC	USD
Mali	EMEA	USD
Malta	EMEA	USD
Marshall Islands	Americas	USD
Martinique	EMEA	EUR
Mauritania	EMEA	USD
Mauritius	EMEA	USD
Mayotte	EMEA	USD
Mexico	Americas	USD
Micronesia	Americas	USD
Moldova, Republic of	EMEA	USD
Monaco	EMEA	EUR
Montserrat	Americas	USD
Morocco	EMEA	USD
Mozambique	EMEA	USD

Country	Geo	Currency
Myanmar	APAC	USD
Namibia	EMEA	USD
Netherlands	EMEA	EUR
Netherlands Antilles	Americas	USD
New Caledonia	EMEA	USD
New Zealand	APAC	NZD
Nicaragua	Americas	USD
Niger	EMEA	USD
Nigeria	EMEA	USD
Northern Mariana Islands	Americas	USD
Norway	EMEA	NOK
Oman	EMEA	USD
Pakistan	EMEA	USD
Palau	Americas	USD
Panama	Americas	USD
Paraguay	Americas	USD
Peru	Americas	USD
Philippines	APAC	USD
Pitcairn	EMEA	USD
Poland	EMEA	EUR
Portugal	EMEA	EUR
Puerto Rico	Americas	USD
Qatar	EMEA	USD
Reunion	EMEA	EUR
Romania	EMEA	EUR
Russia	EMEA	USD
Rwanda	EMEA	USD
Saint Helena	EMEA	USD
Saint Kitts/Nevis	Americas	USD
Saint Lucia	Americas	USD
Saint Pierre and Miquelon	EMEA	USD
Saint Vincent	Americas	USD
San Marino	EMEA	EUR
Sao Tome and Principe	EMEA	USD
Saudi Arabia	EMEA	USD
Senegal	EMEA	USD
Serbia & Montenegro	EMEA	EUR
Seychelles	EMEA	USD
Sierra Leone	EMEA	USD
Singapore	APAC	USD & SGD
Slovakia	EMEA	EUR
Slovenia	EMEA	EUR
Somalia	EMEA	USD
South Africa	EMEA	ZAR
Spain	EMEA	EUR
Sri Lanka	APAC	USD
Sudan	EMEA	USD

Country	Geo	Currency
Suriname	Americas	USD
Svalbard and Jan Mayen	EMEA	NOK
Swaziland	EMEA	USD
Sweden	EMEA	SEK
Switzerland	EMEA	CHF
Taiwan	APAC	USD
Tajikistan	EMEA	USD
Tanzania, United Republic of	EMEA	USD
Thailand	APAC	USD
Togo	EMEA	USD
Trinidad and Tobago	Americas	USD
Tunisia	EMEA	USD
Turkey	EMEA	USD
Turkmenistan	EMEA	USD
Turks and Caicos	Americas	USD
Uganda	EMEA	USD
Ukraine	EMEA	USD
United Arab Emirates	EMEA	USD
United Kingdom	EMEA	GBP
United States	Americas	USD
Uruguay	Americas	USD
Uzbekistan	EMEA	USD
Vanuatu	EMEA	NZD
Venezuela	Americas	USD
Vietnam	APAC	USD
Virgin Islands, British	Americas	USD
Virgin Islands, U.S.	Americas	USD
Wallis and Futuna	EMEA	USD
Western Sahara	EMEA	USD
Yemen	EMEA	USD
Zambia	EMEA	USD
Zimbabwe	EMEA	USD