

Definitions

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“Adoption” Defined

Adoption is the process of putting a new product into service for production use in a project or across an organization. Adoption is distinct from migration, which refers to exchanging one set of product entitlements for another. Adoption involves activities such as training new users, establishing policies for use, and possibly the conversion or porting of artifacts (projects, models, and so on) that were produced by an older product, so those artifacts can be used with the product that is being adopted.

“Migrations” Defined

Migrations are exchanges of one product entitlement for another, where the new product that is being acquired (the “to” product) represents comparable value to the product being surrendered (the “from” product), and no consideration is paid for the exchange. Migrations can be either

- **Default.** These are defined within IBM's fulfillment systems to occur automatically on maintenance renewal anniversaries (the replacement product is the basis of the next maintenance renewal quote).
- **On request (aka “optional”).** These are used to supplement default migrations when there are multiple “to” products defined for the qualifying “from” product. They are also used when a migration path is offered prior to market withdrawal of the “from” product.

“Tradeups” Defined

Tradeups are exchanges of one product entitlement for another where the new product that is being acquired represents value greater than the product that is being surrendered, and a consideration is paid for the exchange. The consideration is generally either 50% or 75% of the list price of the acquired product. All tradeups have a part number in Passport Advantage (defined on the product that is being traded up to). Tradeups are never automatic, they must always be requested/purchased.

“Rose XDE” Offerings Defined

In October 2003 IBM Rational introduced the “IBM Rational Rose XDE” family of products including the following Passport Advantage offerings:

1. IBM Rational Rose XDE Modeler
2. IBM Rational Rose XDE Developer for Java
3. IBM Rational Rose XDE Developer for Visual Studio
4. IBM Rational Rose XDE Developer Plus

These offerings bundled two separate products (Rational Rose and Rational XDE). This was done to provide flexibility, letting customers choose which product to use as a post-purchase decision. Usage of the contained products is governed by the standard Passport Advantage license terms and conditions governing product bundles, i.e. either or both products may be used but only by a single user (a single Rose XDE entitlement may not be used to provision multiple practitioners' desktops).

“Contemporary MDD” Offerings Defined

In November 2004 we introduced a new generation of Model Driven Development (MDD) product offerings with the announcement of the following:

1. IBM Rational Software Modeler
2. IBM Rational Software Architect

In January 2006 we introduced a third offering in the family of "Contemporary MDD" Offerings

3. IBM Rational Systems Developer

In March 2006 we introduced two additional offerings in the "Contemporary MDD" family

4. IBM Rational Data Architect
5. IBM Rational Data and Application Modeling Bundle

In February 2007 we introduced one additional offering in the "Contemporary MDD" family

6. IBM Rational Modeling Extension for Microsoft® .NET

"Rose Only" Offerings Defined

In June 2006 we announced the start of the market withdrawal process for the "Rose XDE" offerings. At that time we announced the following new "Rose Only" offerings

1. IBM Rational Rose Modeler
2. IBM Rational Rose Developer for Java
3. IBM Rational Rose Developer for Visual Studio
4. IBM Rational Rose Enterprise

The new "Rose Only" offerings serve to keep the Rose product available as the XDE products are withdrawn. In essence we are breaking up the "Rose XDE" bundles to starting the withdrawal for XDE while continuing to extend the lifetime of Rose. The "Rose Only" offerings represent the default migration paths for the "Rose XDE" offerings. This is superficially depicted in Figure 1.

Unbundling Rose and XDE: Perpetuating Rose While Withdrawing XDE

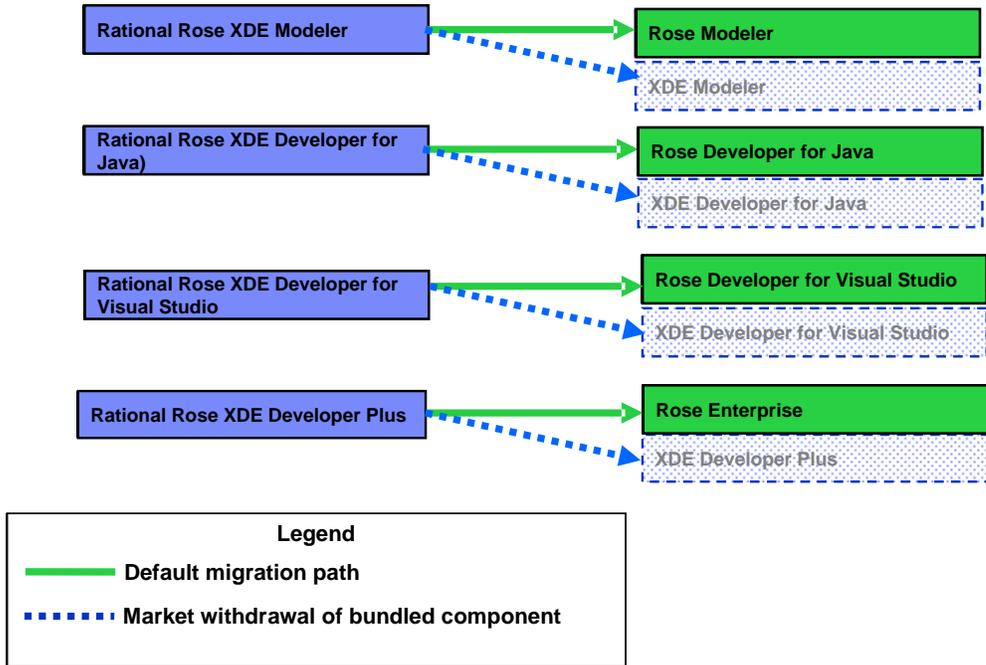


Figure 1