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Offer Overview
IBM Business Partners can earn 7% of eligible billed revenue for sales in each of these respective IBM software product areas: Data & AI, Automation, Sustainability Software (formerly AI Applications) and Security, provided the client has not previously purchased any IBM Technology products within a specified time frame. Channel X Hyperscaler transactions are eligible in the United States if they otherwise meet the criteria of this promotion.

Offer Details
• For the purposes of this offer software product areas are defined as Data & AI, Automation, Sustainability Software (formerly AI Applications) and Security.
• To qualify for the offer, the client (defined as IBM Global Buying Group or Global Client ID within a country) cannot have purchased any IBM Technology products from January 1, 2021, through December 31, 2023, according to the following definition. o No Technology revenue in the period as stated above, with the following exception. Clients that only have TLS or System z revenue in the period stated above and have new Technology revenue other than TLS or System z are considered new clients. o New clients are defined based on a "top of tree" client definition hierarchy (GBG or Global Client ID) within a country. o Technology is defined based on IBM Software and IBM Infrastructure, excluding Consulting, Watson Health, and IBM Global Financing (IGF).
• Eligible billed revenue for the promotion includes the part types listed below and found at the following location:
https://ibm.ent.box.com/s/1ifetadfqbxamwars2swyz6gkyaqm9sf, click on Software Products (Including SaaS), open the SW Product Table tab. The parts must be included in one of the following software brands: Data & AI, Automation, Security or Sustainability Software which are defined in the section titled "Product areas qualifying for the offer" below.

o Software perpetual licenses.

o Fixed term software licenses. Only the first 12 months of fixed term license revenue is eligible for the offer.

o Monthly term software licenses. Only the amount billed on or after January 1, 2024, and on or before December 31, 2024, is eligible revenue for the offer.

o Subscription licenses. For new multi-year subscription licenses, if the multi-year licenses are invoiced and billed annually, only Year 1 subscription license revenue is eligible for the offer. If the multi-year subscription licenses are invoiced and billed up front, Year 1 and Year 2 subscription license revenue is eligible for the offer.

o Engineering Lifecycle Management Suite Token parts, all of which are part of Sustainability Software (formerly AI Applications). Only the first 12 months of revenue for the Engineering Lifecycle Management Suite Token part is eligible for the offer.
▪ D29QCLL IBM Engineering Lifecycle Management Suite Token Initial Fixed Term License + SW Subscription & Support 24 Months
▪ D29QDLL IBM Engineering Lifecycle Management Suite Token Initial Fixed Term License + SW Subscription & Support 12 Months
▪ D29QELL IBM Engineering Lifecycle Management Suite Token Initial Fixed Term License + SW Subscription & Support 36 Months
▪ D29QFLL IBM Engineering Lifecycle Management Suite Token Initial Fixed Term License + SW Subscription & Support 48 Months
▪ D29QGLL IBM Engineering Lifecycle Management Suite Token Initial Fixed Term License + SW Subscription & Support 60 Months

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• Eligible billed revenue also includes SaaS part types for net new SaaS sales (no renewals, extensions, overages or expansions) that meet both of the following criteria which can be determined at this location: https://ibm.ent.box.com/s/1ifetadfqbxamwars2swyz6gkyaqm9sf, click on Software Products (Including SaaS), open the SaaS Product Table tab.
   o Part must be included in one of the UT30s listed below by software brand.
   o Part must be eligible for Base Sales Incentives as shown by "Yes" in column B and for Select Territory Incentive as shown by "Yes" in column C SaaS Product Table tab referenced above.

o Data & AI
- 30ADZ Planning Analytics for Cloud Pak for Data & SaaS
- 30AFV SPSS Modeler ▪ 30AFW Decision Optimization
- 30AG3 Db2
- 30AG4 Informix
- 30AG9 Master Data Management
- 30AGB Cognos Analytics
- 30AHU Cloud Pak for Data
- 30ANG Cognos Analytics for Cloud Pak for Data & SaaS
- 30APA OpenPages for Cloud Pak for Data & SaaS
- 30AYO SPSS Statistics
- 30DE7 Cloudant
- 30AGF Planning Analytics with Watson

o Automation
- 30A11 Content – BACS
- 30A15 WebSphere Application Server
- 30A1D MQ ▪ 30A3M API Connect
- 30A4I Cloud Pak for Integration
- 30A52 App Connect Professional
- 30A5C Robotic Process Automation (RPA)
- 30A6X Workload Automation
- 30A8X Workflow
- 30A9U Content – CMOD
- 30ABX App Connect Enterprise
- 30ACE Content – FNCM
- 30AH9 Operations Insights
- 30AHF Blueworks Live
- 30AHI Aspera
- 30AO8 Observability with Instana
- 30AVA Decisions
- 30AW5 Capture
- 30AWI Workflow – Legacy
- 30AY5 Turbonomic – ARM
- 30AZI Rational Automated Software Quality
- 30A3C - Apptio Cloudability
- 30AYB - Apptio Targetprocess
- 30AL8 – ApptioOne

o Sustainability Software (formerly AI Applications)
- 30B0M Lifecycle Optimization
- 30B1W Production Quality Insights
- 30BCN Asset Performance Management
- 30BH6 Maximo Application Suite
- 30BIY TRIRIGA Real Estate and Facilities Management
- 30BJ0 Enterprise Asset Management
- 30BJM Worker Insights
- 30BQD IBM Digital Commerce
- 30BQJ IBM Sterling Order & Inventory Management
- 30BQX IBM Supply Chain Intelligence Suite
- 30BQY IBM Sterling Supply Chain Business Network
- 30BRH TRIRIGA Building Insights
- 30BZD Envizi Sustainability Performance Management

o Security
- 30AZJ Security ReaQta
- 30BI0 Qradar on Cloud
- 30BI1 Security Orchestration and Response
- 30BIB MaaS360 Mobile Security and Management
- 30BID Trusteer Fraud Protection
- 30BII Security Verify on Cloud
- 30N78 Privileged Access Management
- 30NEB IBM Cloud Pak for Security
- 30AT3 Security Randori ASM

• Minimum required eligible billed revenue for a sales order from a client to qualify for this offer is $5,000 USD for any combination of the following: perpetual license purchases; Annual Contract Value (ACV) for Subscription license purchases; the first 12 months of revenue for Fixed Term Licenses; the amount of Monthly Term licenses billed on or after January 1, 2024, and on or before December 31, 2024; and Annual Contract Value (ACV) for Engineering Lifecycle Management Token licenses.
   o Example: billed revenue for $3,000 USD in perpetual licenses for Data & AI and $2,000 USD new subscription license ACV for Security, total $5,000 USD and makes the revenue eligible for the offer.

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- Minimum required eligible billed revenue for SaaS must meet one of the following criteria.
  o $5,000 USD Annual Contract Value (ACV) for SaaS that is billed annually, or multi-year billed up front, on or after January 1, 2024 and on or before December 31, 2024.
  o $5,000 USD cumulative monthly or quarterly billings on or after January 1, 2024, and on or before December 31, 2024. Example below.
  ▪ Client issues purchase order for a SaaS product in mid-January 2024 with $1,200 USD monthly payments and IBM receives the sales order the same day. The client will be billed monthly beginning in January, then in February, March, April, and May 2024, for a total of five months or $6,000 USD of cumulative billings before the promotion end date of December 31, 2024. Thus, the cumulative billings exceed the $5,000 USD threshold and the promotion offer can be claimed and paid.
  ▪ Note: IBM bills SaaS in arrears. Only those billings that occur between January 1, 2024, and December 31, 2024, will be included in the promotion. Billings on or after January 1, 2025, for billing periods beginning in December 2024 are not eligible for the offer.

• SaaS sales are treated independently from the perpetual licenses, Subscription Licenses, Fixed Term licenses, Monthly Term licenses and Engineering Lifecycle Management token licenses for the purpose of meeting the minimum billed revenue requirement.

• Product areas qualifying for the offer. o Software perpetual licenses, software subscription licenses, Fixed Term licenses, Monthly Term licenses, and Engineering Lifecycle Management Token parts in the product areas indicated below are eligible for the offer.

Data & AI. Includes the parts in the following Proficiency Groups:	Automation. Includes parts in the following Proficiency Groups:	Sustainability Software (formerly AI Applications). Includes parts in the following Proficiency Groups:	Security. Includes parts in the following Proficiency Group:
• Cloudera & Hadoop Database Ecosystem	• Aspera • Cloud Pak for Business Automation - Decision Management and FileNet	• ELM Application Suite	• Access Management
• Cognos Analytics	• Cloud Pak for Integration	• Maximo Application Suite	• Discover and Classify
• Data Fabric for Cloud Pak for Data	• Cloud Pak for Network Automation	• Sterling Data Exchange	• Guardium Data Encryption
• Db2	• Cloud Pak for Watson AIOps	• Sterling Order & Inventory management	• Guardium Data Protection
• Informix	• IBM Business Automation Manager Open Editions	• TRIRIGA	• Guardium Insights
• Master Data Management	• IBM Process Mining		• Guardium Key Lifecycle Management
• Netezza for Cloud Pak for Data	• Instana		• IBM Cloud Pak for Security - Guardium
• Planning Analytics	• Robotic Process Automation		• IBM Cloud Pak for Security - QRadar XDR
• Spectrum High Performance Computing	• SevOne		• Identity Governance and Administration (IGA)
• SPSS Modeler	• Turbonomic		• Privileged Access Management (PAM)
• SPSS Statistics	• WebSphere Automation		• QRadar Security Information and Event Management (SIEM)
• Watson Assistant for Cloud Pak for Data	• WebSphere Hybrid		• Security Orchestration and Response (SOAR)
• Watson Discovery for Cloud Pak for Data			• Xforce Threat Intelligence

• Parts not published to the Distributors that are related to any of these Proficiency Groups, but are only available only through special bid by IBM reps.

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• Software Proficiency Groups may be found at the following location: https://ibm.ent.box.com/s/1ifetadfqbxamwars2swyz6gkyaqm9sf, click on Software Products (Including SaaS), open the SW Product Table tab.
  o SaaS eligible parts are also grouped in the same four product areas and are defined by UT30s listed earlier in this guidance.
• Business Partners must enter the opportunity and obtain an IBM opportunity number through the IBM Partner Portal to be eligible for the offer. The IBM opportunity number must be included on both the preapproval request and the claim for payment, when both claim step are submitted.
• This offer can be combined with other offers unless specifically excluded.
• All dollar amounts in this offer description are US dollars

Exclusions. The following are excluded from this offer:
• Government Entities/Government Owned Entities.
• Trade Up licenses, Upgrades to Subscription Licenses.
• Flexible Contract Type (FCT) orders.
• Primary Support Provider (PSP) orders.
• Any products not explicitly included in the eligibility description.
• Single Tier resales (not passing through a Distributor).
• Embedded Solution Agreements/Service Provider Agreements.
• Influence deals where the Business Partner does not fulfill the deal.
• IBM Partner Marketplace transactions
• Channel X Hyperscaler transactions (except for United States where they are permitted)
• For Software the standard exclusions as stated in the IBM Software Distributor Quarterly Program Guide apply. GMSRs are not eligible for this promotion and are excluded.

General Provisions
• IBM reserves the right to modify or withdraw this Offering at any time without notice, including the right to change or add eligible parts without prior notice.
• IBM reserves the right to request additional information concerning the relevant transaction at any time and to reject requests where the eligibility criteria is not met.
• IBM reserves the right to recover from the Business Partner Representative(s) any amounts due to IBM because of overpayment or noncompliance with the Offering.
• All decisions by IBM are final.
• This offer is void wherever prohibited or restricted by law.