

2008 Definitions

“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

1. **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).
2. **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. *Defined* tradeups are those that have an associated part number in Passport Advantage. The consideration paid for defined tradeups is generally either 50% or 75% of the list price of the acquired product. Other tradeups may be offered on a case-by-case, special bid basis. Tradeups are never automatic, they must always be requested/purchased.

“Latest Generation” 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:

1. IBM Rational Systems Developer

In **March 2006** we introduced two additional offerings in the “Contemporary MDD” family:

1. IBM Rational Data Architect
2. IBM Rational Data and Application Modeling Bundle

In **February 2007** we introduced one additional offering in the “Contemporary MDD” family:

1. IBM Rational Modeling Extension for Microsoft® .NET

In **September 2008**, the following product packaging changes were implemented:

1. IBM Rational Systems Developer was withdrawn and replaced by Rational Software Architect Standard Edition
2. IBM Rational Software Architect was renamed to IBM Rational Software Architect for WebSphere Software

“Rose” Offerings Defined

In **June 2006** we announced the **market withdrawal** of an older set of 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). The bundling was done to provide flexibility, letting customers choose which product to use as a post-purchase decision. Circumstances surrounding third-party technology utilized in the XDE product required that XDE be withdrawn. The IBM Software Lifecycle Policy dictates that when a component of a bundle offering is withdrawn, the bundle must also be withdrawn.

As replacements we announced the “Rose” 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

These served to keep the Rose product available as the XDE product was withdrawn. The “Rose” offerings were defined as default migration paths for the “Rose XDE” offerings. This is superficially depicted in Figure 1.

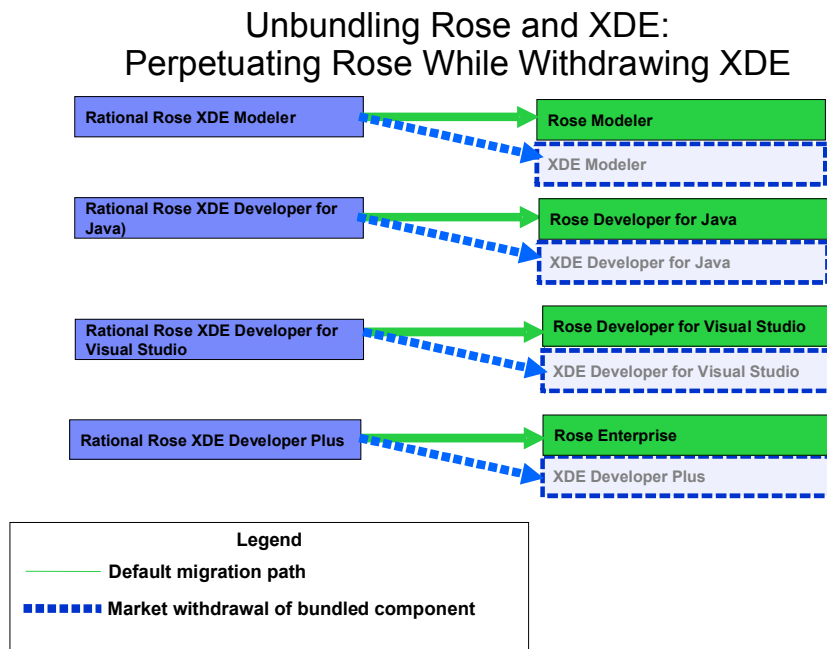


Figure 1

Also considered as one of the “Rose” offerings, for purposes of migrations to “Latest Generation” products defined as of September 2008:

1. IBM Rational Rose Developer for Unix

This offering was never included as part of the “Rose XDE” bundles, it has always been defined as a stand-alone offering.