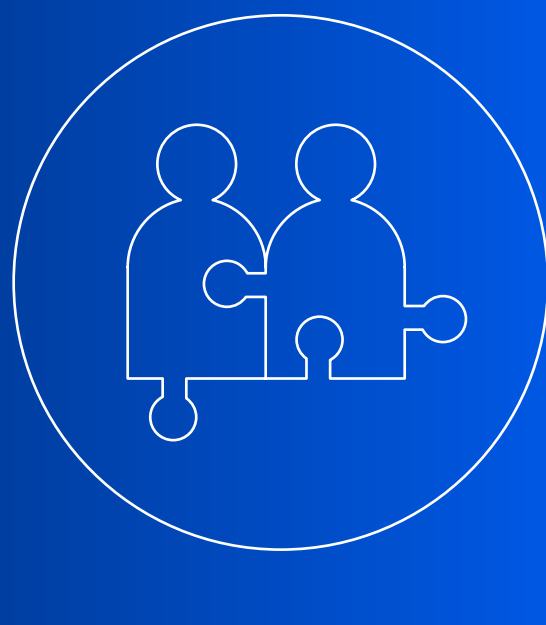


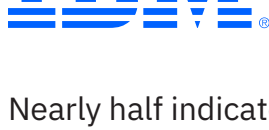
IBM Business Partners online survey results



Markesha Hill Clausell
 WW Business Development and
 Solutions Executive Global Business
 Partners—Cloud Service Providers

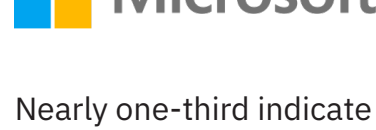
Tammy Doolittle
 Advisor, Client Research, Market Insights

While most IBM Business Partners who participated report that they are selling or recommending cloud services, they are likely to have been doing so for 5 years or less. Apart from IBM, their primary vendor partners for cloud services include Microsoft and AWS.



Nearly half indicate that IBM is their "primary" vendor for cloud services and 9 in 10 are partnering in some capacity.

While not selected by the majority, IBM has the highest percentage of partners selecting them as the vendor primarily used across all cloud services (hybrid, private, multi-cloud, public, and integration).



Nearly one-third indicate that Microsoft is their "primary" vendor for cloud services and three-quarters are partnering in some capacity.

2 in 10 consider Microsoft to be their primary vendor for public cloud.



2 in 10 indicate that AWS is their "primary" vendor for cloud services and nearly two-thirds are partnering in some capacity.

2 in 10 consider AWS to be their primary vendor for public cloud.

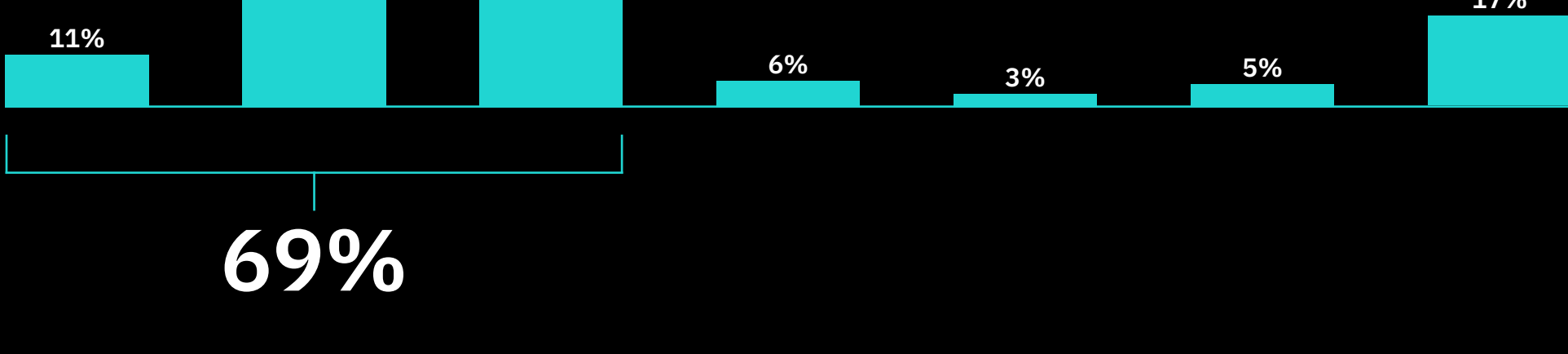
Business activities participated in:

Business Partners who sell or recommend cloud services primarily consider themselves to be systems integrators and/or consultants.

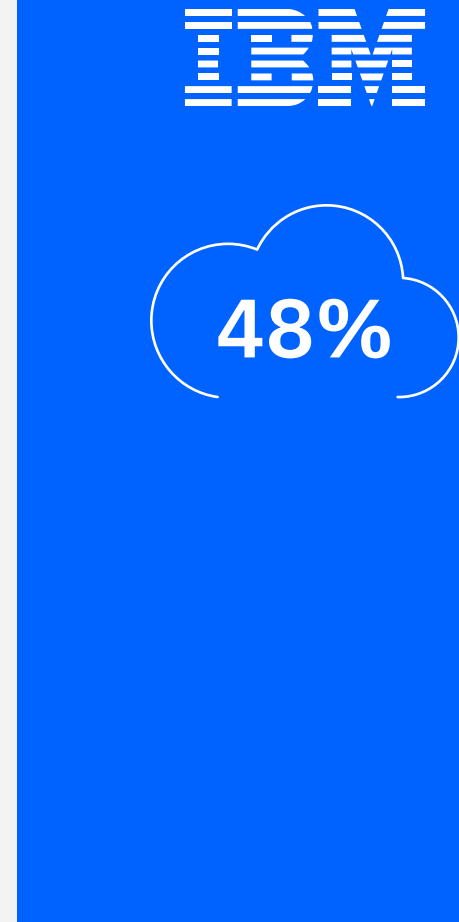
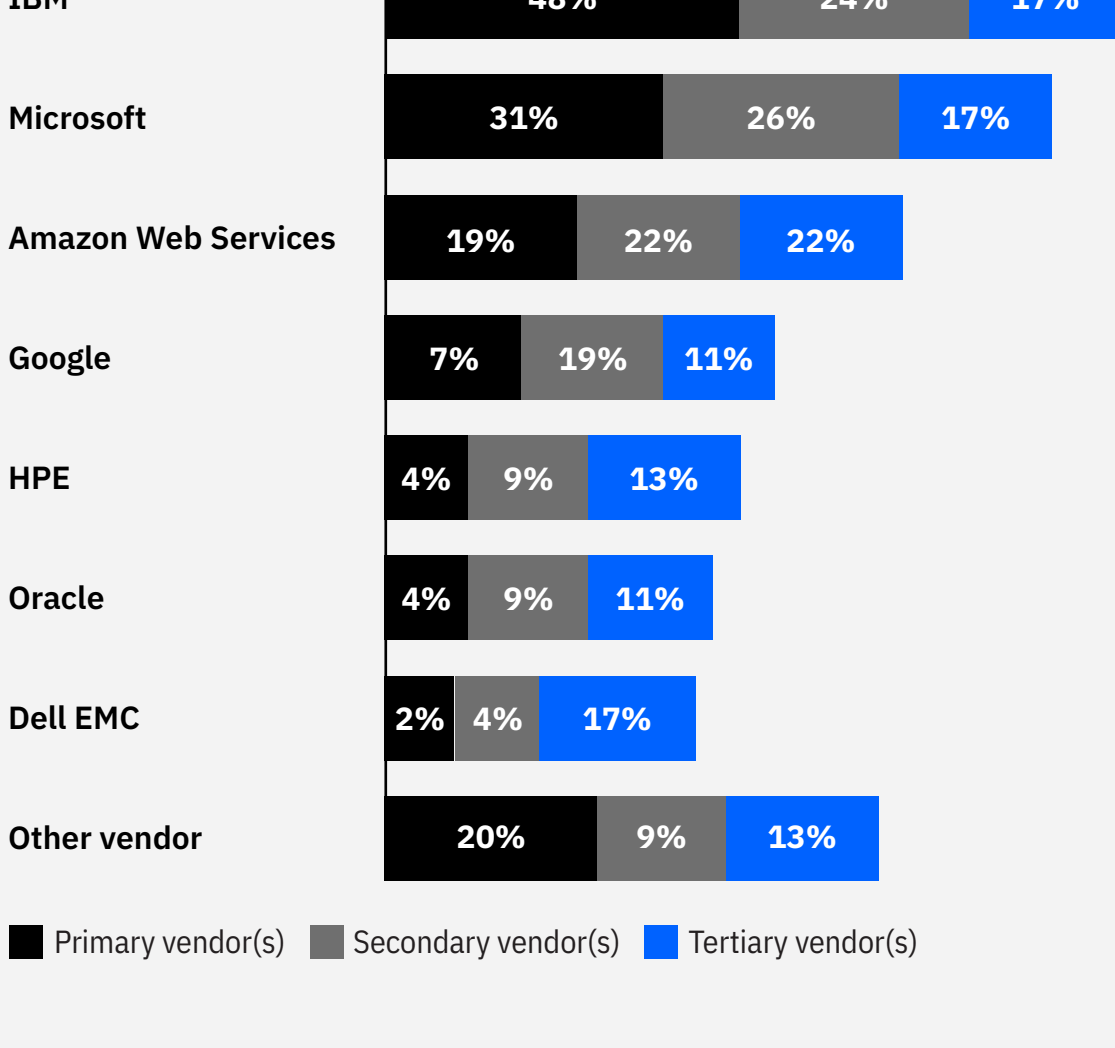
They are also participating in a mix of additional activities that would classify them as Cloud Service Providers (CSPs), Value Added Resellers (VARs) and/or Independent Software Vendors (ISVs).

Most IBM Business Partners report selling or recommending cloud services, and a majority have been doing so for 5 years or less.

Tenure selling or recommending cloud services (Total = 65)

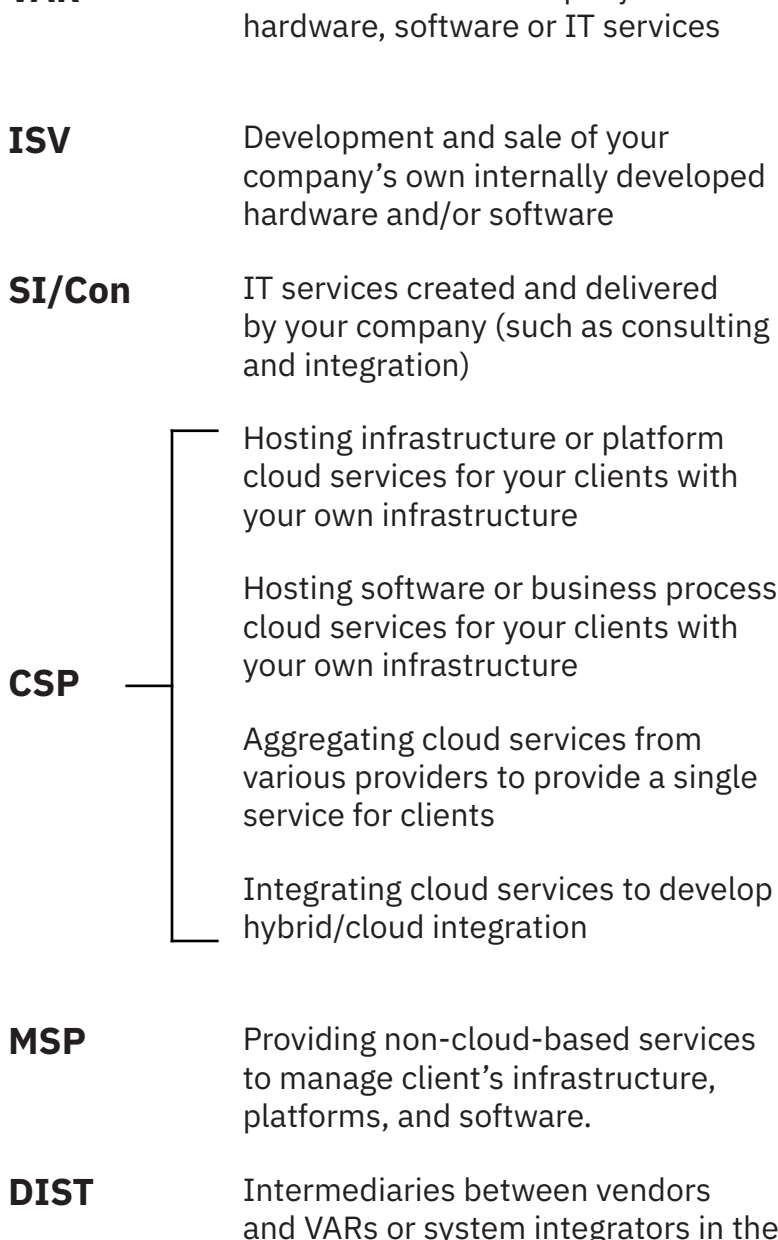


Most IBM Business Partners partner with IBM for cloud services; however, only about half consider IBM to be their "primary" vendor. They are also likely to be working with Microsoft and AWS.

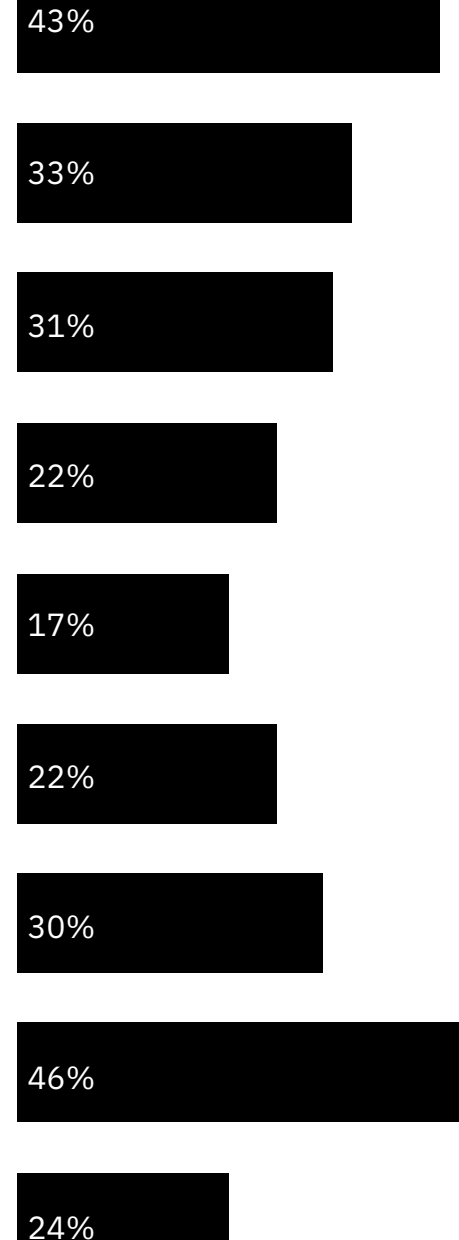


IBM Business Partners who sell or recommend cloud services primarily consider themselves to be systems integrators/consultants but they are also participating in a mix of additional activities.

Primary business activities (Cloud = 54)

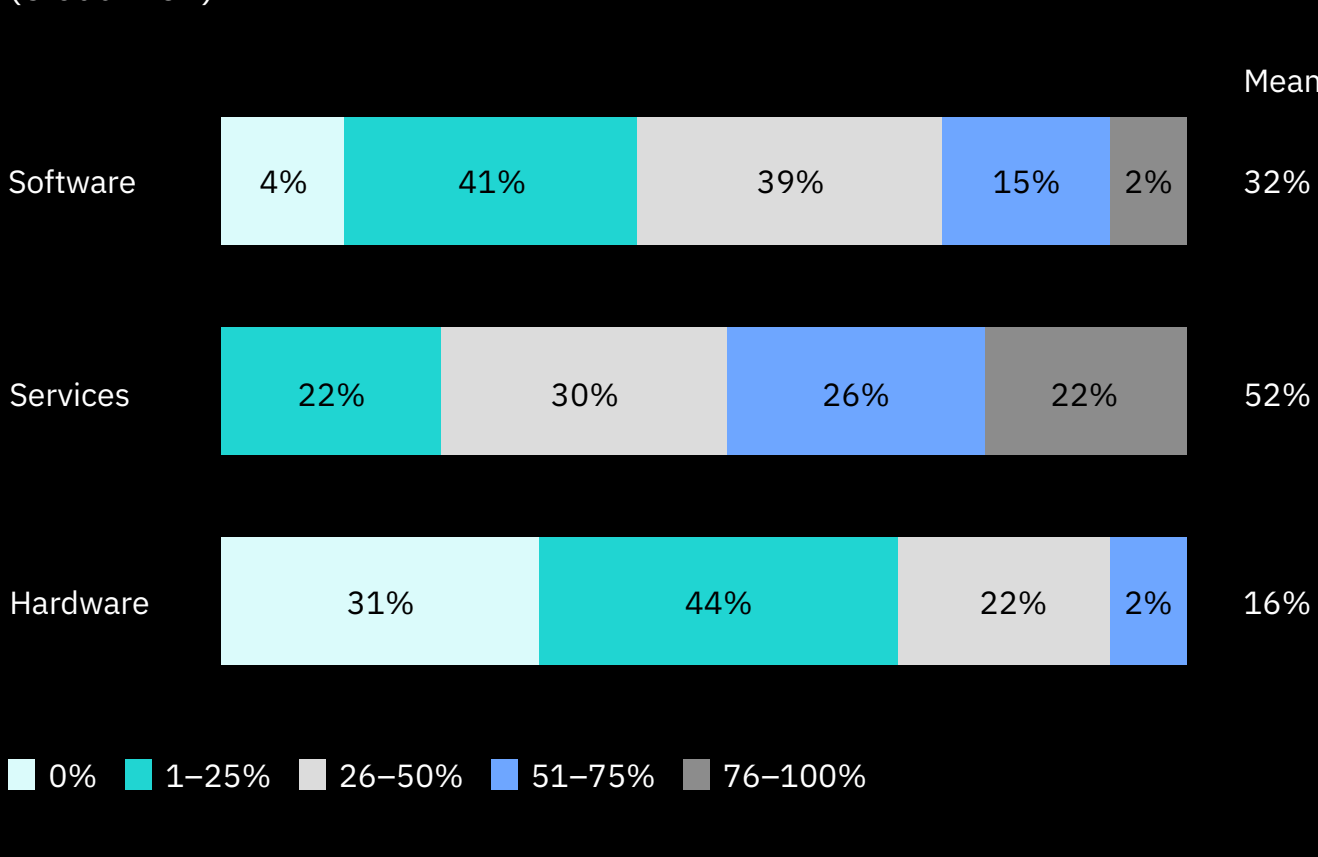


Additional business activities (Cloud = 54)

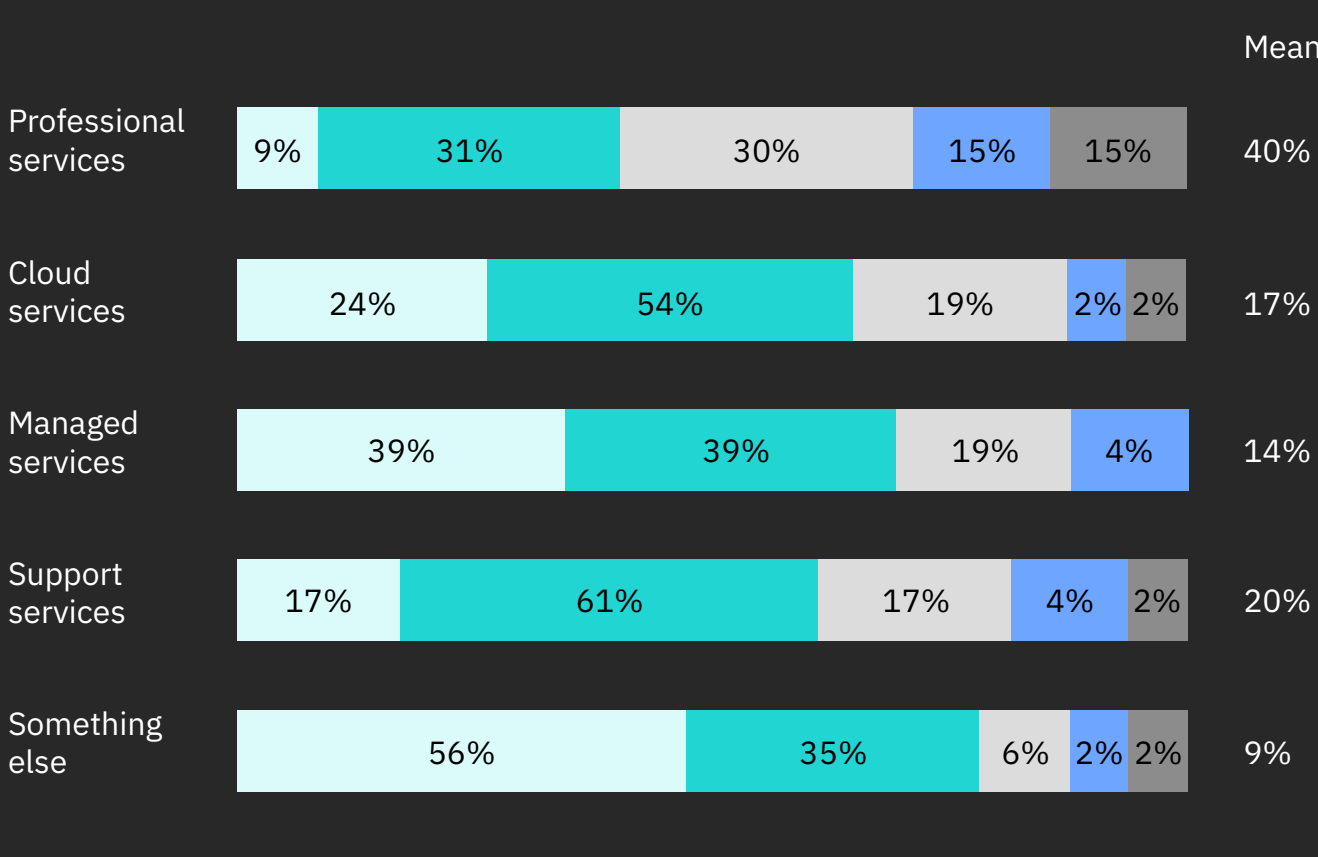


Most of our Business Partners involved in cloud services report that their business is generated from services; when services are broken out about half of that revenue is coming from "professional services."

Percentage of company's business generated in past 12 months (Cloud = 54)

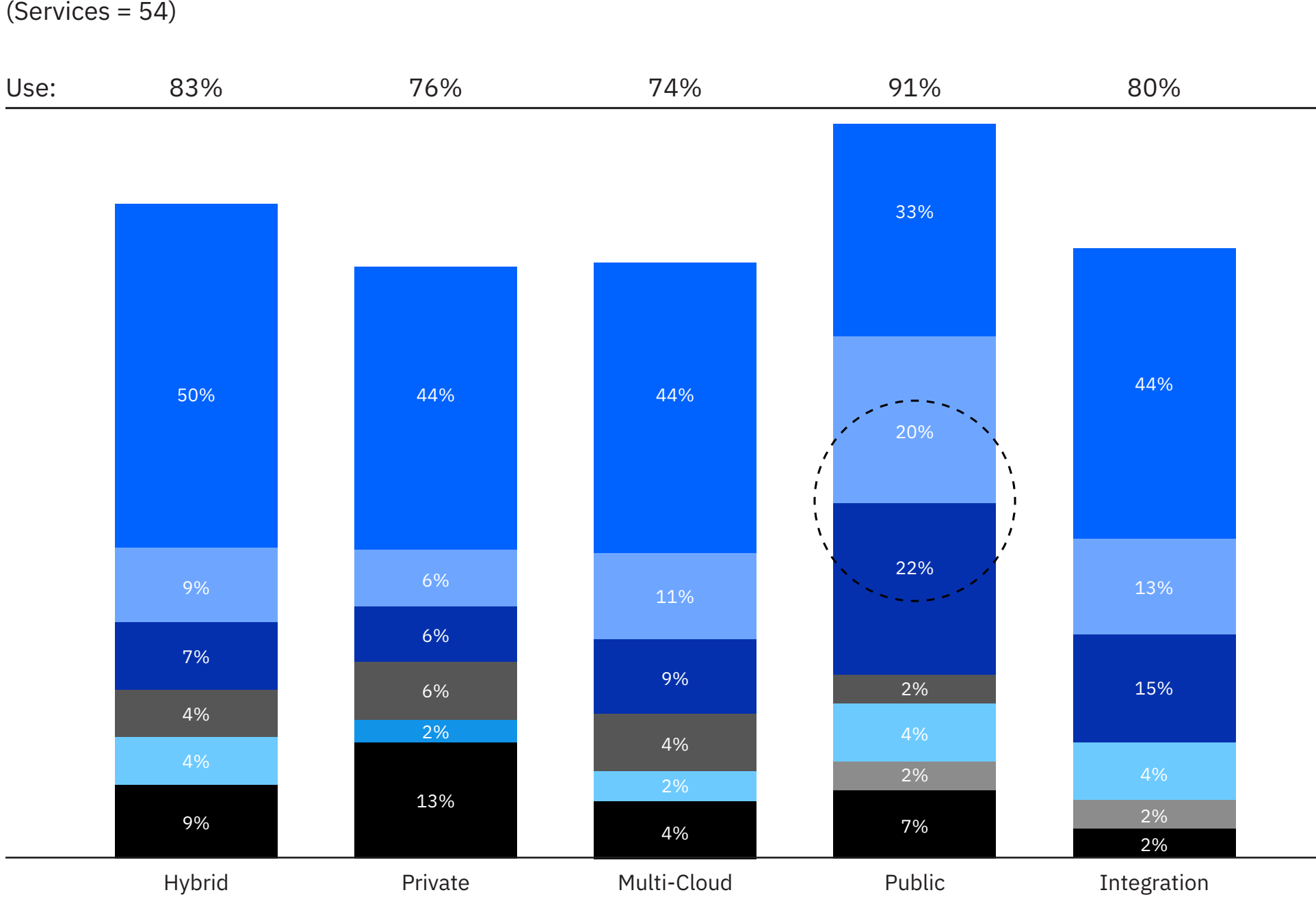


Percentage of company's business generated by services in past 12 months (Services = 54)



IBM Business Partners are using a variety of cloud services; while IBM is selected as the partner "primarily used" by the highest percentage of Business Partners, the majority do not select IBM as their "primary" partner. Microsoft and AWS might be their public cloud of choice.

Cloud services vendor (Services = 54)



Business Partners who use IBM for cloud services prefer to be treated "like a partner" and report that they feel that this is the case.

Relationship with IBM: Preferred versus current (Use IBM for cloud services = 48)

