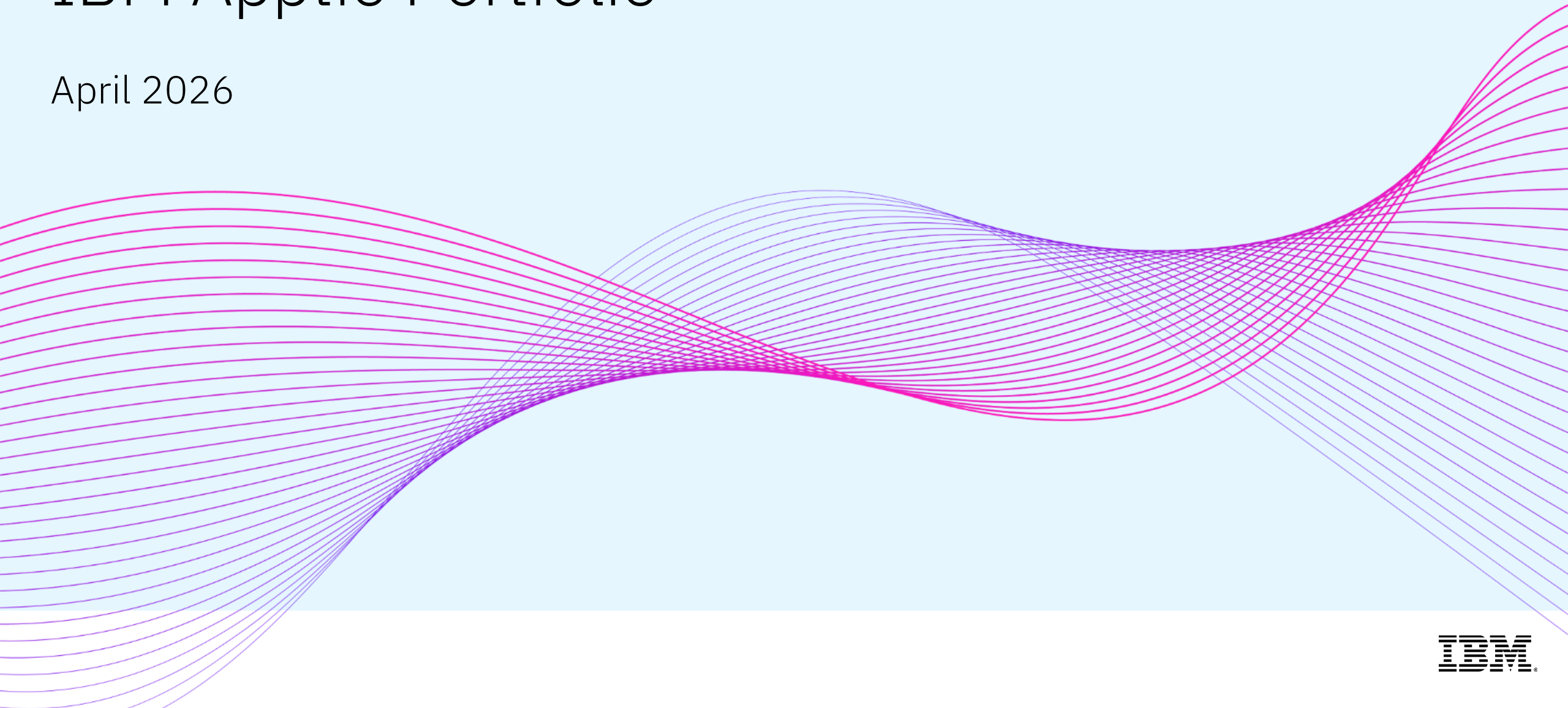


2026 Product Investments & Roadmap

IBM Apptio Portfolio

April 2026



IBM Apptio Costing & Billing - 2026 Investments



Accelerating Time to Insight

Modernize and simplify our experience to make it easier and faster to glean insights from your data.

Intuitive Reporting & Insights:

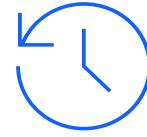
- New Report Studio, w/ refreshed OOTB reports
- AI Assistant (Conversational AI)
- AI Report Builder Assistant

Self-serve education:

- In App-guided digital experiences
- AI Assistant (Expert Guidance)

Performance & Scale:

- Perf Enhancements: Cache Re-architecture
- Perf Enhancements: Horizontal Scaling
- Perf Enhancements: Calc Explorer & Anomaly detection



Accelerating outcomes w/ Automation

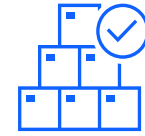
Reduce manual effort across data processing, and financial processes

Faster Data Processing, Configuration & Onboarding:

- AI Data Assistant (*Normalize, Enrich, Classify, Extract, Assess data quality, Parse data from PDFs*)
- Automated Data Management (ADM) Enhancements
- Next-Gen Data Studio & Model Studio

Smarter Month-End & Ongoing Operations:

- Intelligent Forecasting for Costing
- Variance analysis Explainability for Month End Close



Driving Business Value

Build new enhancements & capabilities to deliver value

OOTB Solutions for Technology:

- New Use Cases for Mainframe TCO, Product TCO, AI TCO & Usage
- New Solutions: Data Center TCO, AI ROI & Value
- Workforce Management (w/ Targetprocess)

OOTB Solutions for the Enterprise:

- Apptio for Assets and Facilities
- Apptio for Real Estate
- Apptio for Tech & Ops
- Apptio for Finance
- Apptio for Healthcare

Embedded Benchmarking:

- Labor Benchmarking in Costing

IBM Apptio Planning - 2026 Investments



Accelerating Time to Insight

Make it easier and faster to glean insights from your data

Intuitive Reporting & Insights:

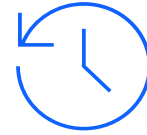
- New View (GA): New View expense table experience
- Undo: Enable reversible user actions
- Modernize UI with IBM Carbon design system.
- AI Assistant (Conversational AI)

Onboarding & Educating:

- In App-guided digital experiences
- AI Assistant (Expert Guidance)

Performance & Scale:

- Ongoing enhancements



Accelerating outcomes w/Automation

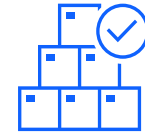
Reduce manual effort in data processing and financial workflows

New & Enhanced Integrations:

- Cloud Planning Integration – sync ITP Plan line items with CFP forecasts.
- Automated Data Management (ADM) Enhancements
- REST APIs: Introduce read/write APIs for Plans, Actuals, Reference Data, Permissions, and Change History.

Automated Data Analysis:

- AI/ML-powered Intelligent Forecasting for Planning



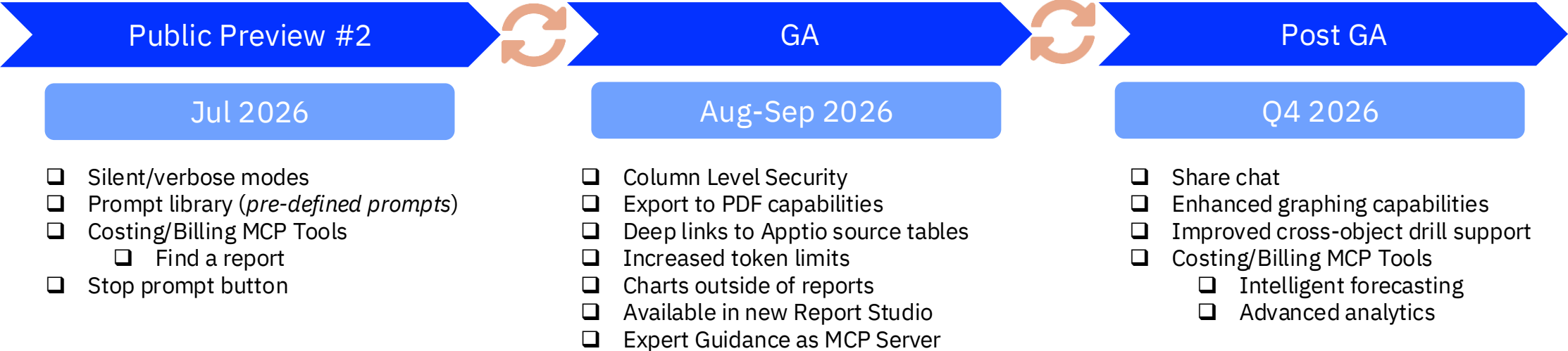
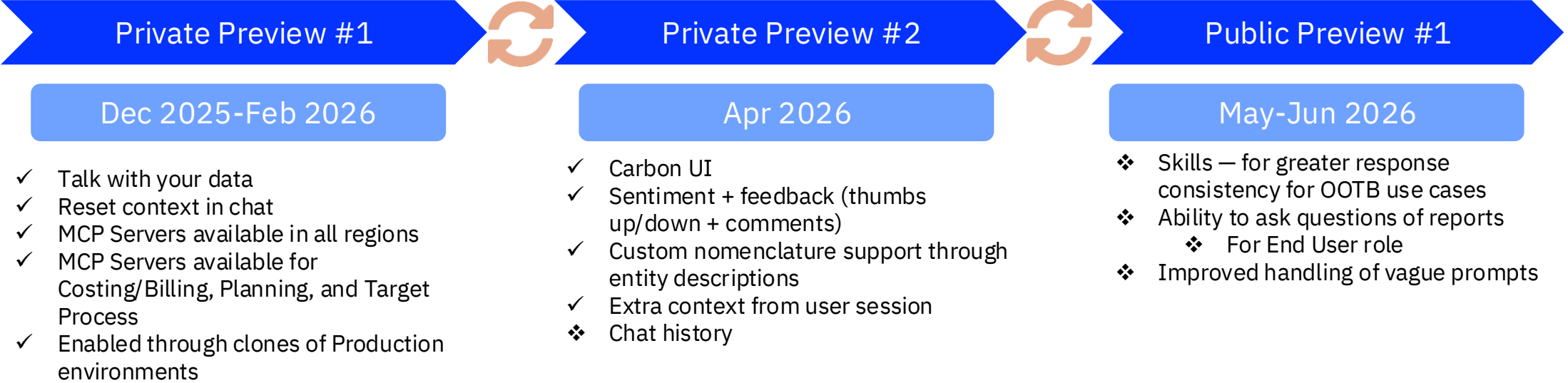
Driving Business Value

New capabilities and enhancements that deliver additional business value

- Plan-Level Reference Data: Version and manage reference data within a plan.
- Align Actuals to Forecast: Map actuals to forecasted line items using business rules.
- Driver-Based Contracts: Introduce P*Q modeling for variable contracts.
- Multiyear Targets: support for multi-year budget targets.
- Time-Based Planning: Time-effective labor rates and rules.
- Advanced Labor Allocation Rules: Support complex compensation calculations and use multiple dimensions in rules.

Conversational Insights Milestones: Scope & Timelines

- ✓ Delivered
- ❖ In Progress
- Planned
- Delayed



X-Product & Tech Integrations

- 1) Commercial customers only
- 2) Costing Standard only
- 3) Requires IBM EBM SKU
- ✓ Delivered
- ❖ In Progress
- Planned
- Delayed

Q1 2026	Q2 2026	Q3 2026	Q4 2026
<ul style="list-style-type: none"> ❖ ADM: GA & Rollout of Cloudability -> Costing integration ¹ • Multiple schedules support ❖ ADM: Cloud Financial Planning (CFP) -> Costing Integration ❖ ADM: Cross environment dataset exchange support within Planning ❖ ADM: GovCloud Compliance ❖ New Datalink Connectors ¹ <ul style="list-style-type: none"> • OpenAI Connector (Cost) • Jira (DLF Feature parity) • Workday (OAuth) • Snowflake (OAuth) • Published Tables (Egress) 	<ul style="list-style-type: none"> □ ADM Enhancements for Costing <-> Planning integration ¹ <ul style="list-style-type: none"> • Import actuals and reference data on demand from Costing to Planning • Import external line items from Costing to Planning • Expose partial statuses from CT (Success + Failed) • Expose CT errors (business related) to end customer in UI (ADM status page) □ ADM: Enhancement for Cloudability -> Costing integration <ul style="list-style-type: none"> ▪ Select TBM version attributes □ New Datalink Connectors ¹ <ul style="list-style-type: none"> • OpenAI Connector (Usage) • MS CoPilot • O365/SharePoint • GreenPixie • IBM Cloud Object Storage • Datalink Recipe Management (Import, Export) 	<ul style="list-style-type: none"> □ ADM Enhancements ¹ <ul style="list-style-type: none"> • CLDY, ITP, TP -> CT - Entity Scheduler supports publishing same entity to multiple CT projects • Support for Dynamic Dimensions (Cloudability-CT integration) • Admin Panel for restricted dimensions, monthly unit tokens for historical export & custom dataset support □ New Datalink Connectors ¹ <ul style="list-style-type: none"> • Datalink Recipe Management (Certification Program) • Published certified recipes 	<ul style="list-style-type: none"> □ ADM Enhancements ¹ <ul style="list-style-type: none"> • PPO integration for provisioning/deprovisioning automation • FCS - fiscal calendar support - [P2 - Planning] - 30 planning clients - 4,4,5 calendar and 13 period Calendar □ New Datalink Connectors ¹ <ul style="list-style-type: none"> • Datalink Recipe Management (Marketplace) • Published certified recipes

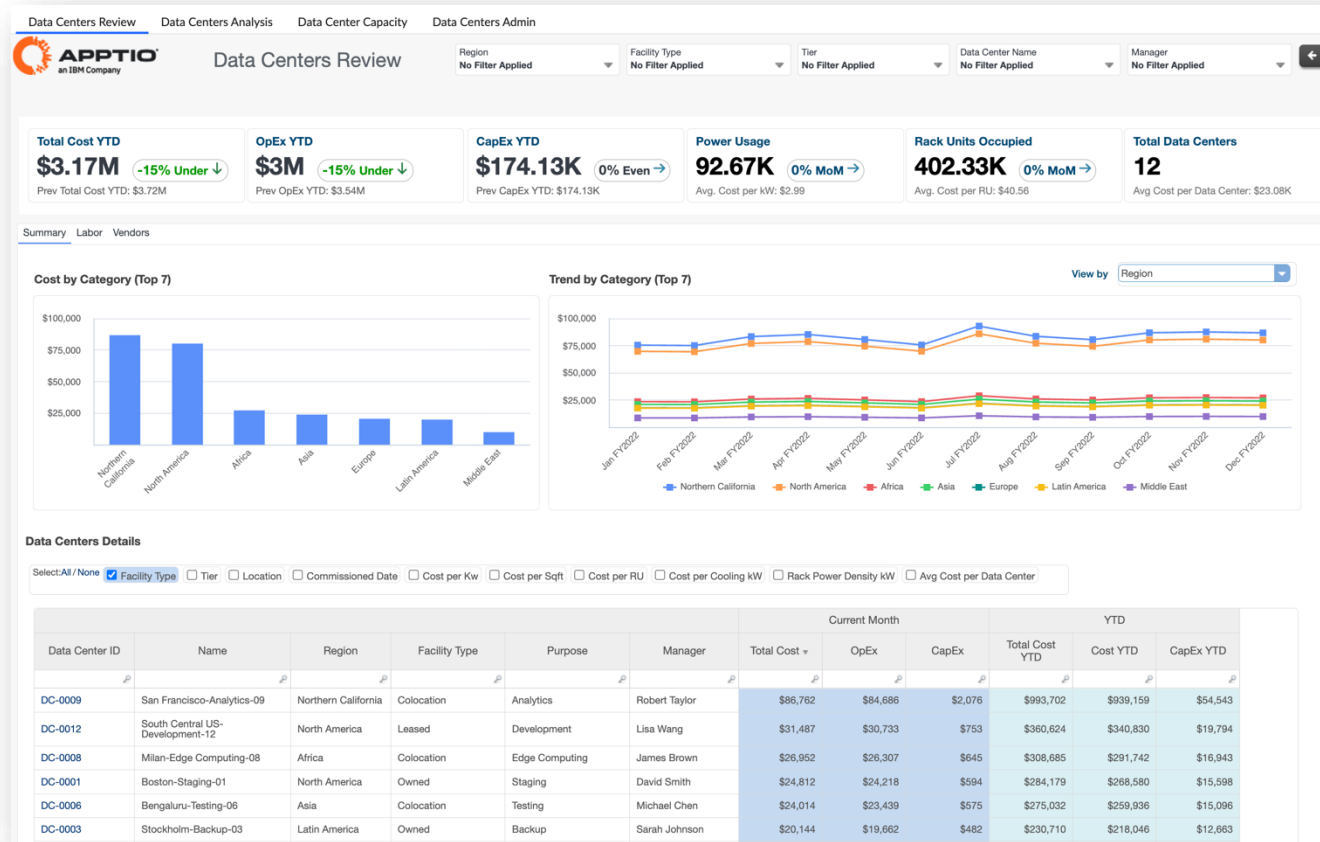


TCO Solution Series

Data Center TCO

for IBM Apptio Costing Standard

Turn fragmented data center details into confident, long-term investment and accountability decisions



Get a clear, enterprise-wide view of the cost of data center facility operations and maintenance:

- Quantify TCO and unit economics across data center sites and regions (including \$/kW, \$/rack, and \$/sq ft) to identify inefficiencies and optimize spend
- Identify data center cost drivers, including facility, energy, and vendor costs to understand largest cost areas and prioritize spend areas
- Identify constraints across power, cooling, rack space, and floor space to inform data center expansion and investment decisions
- Allocate data center costs to infrastructure, applications, products, and services to establish a defensible basis for showback and chargeback

IBM Apptio Mainframe TCO

Understand your total cost of ownership and accurate utilization of mainframe environments to drive business value



Executives & IT Leadership



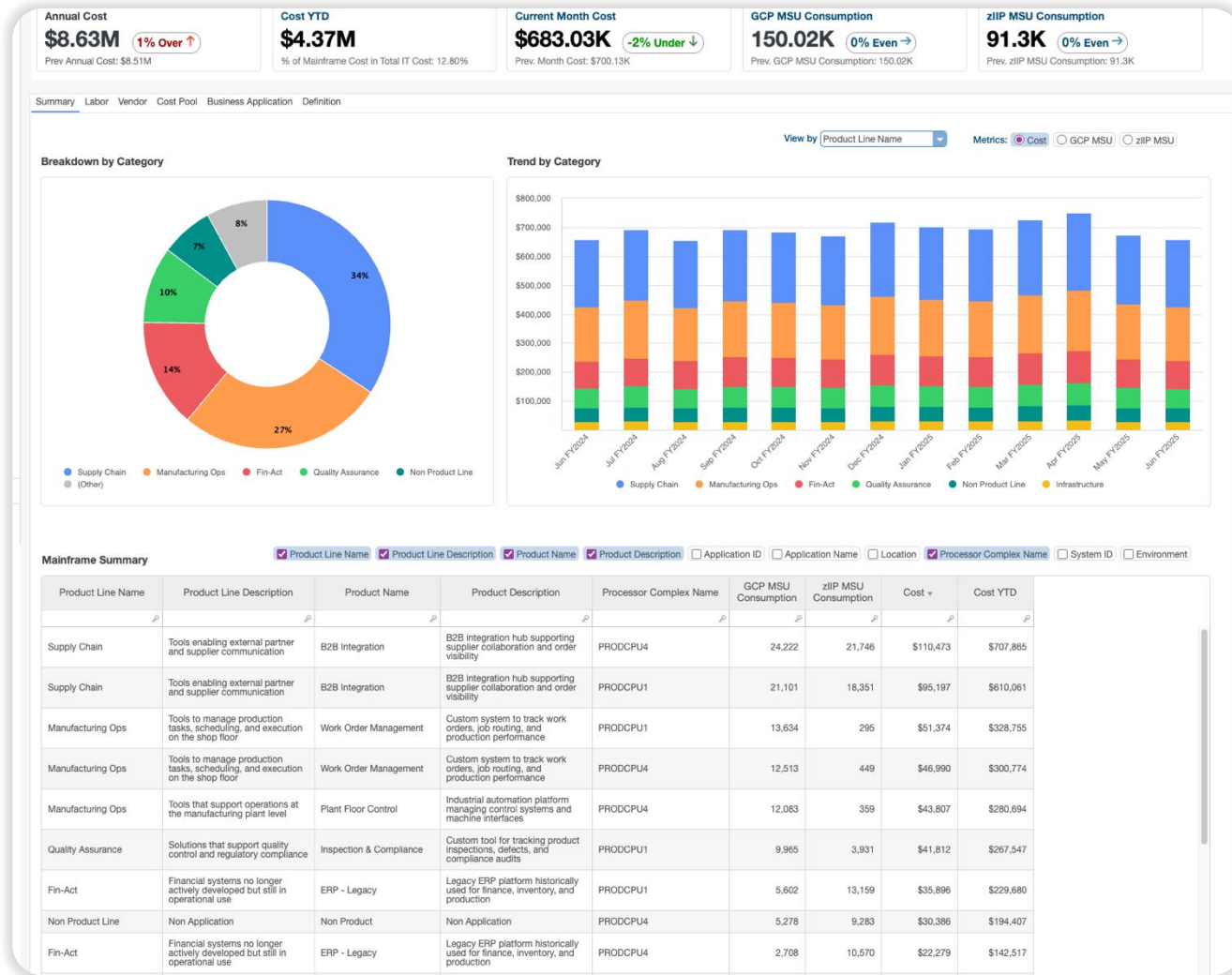
IT Finance



IT Operations & Enterprise Architects



Infrastructure & Application Owners



Solution

A purpose-built solution that delivers a clear, defensible view of mainframe costs, enabling accurate cost allocation, comprehensive utilization tracking, and data-driven decision making. It supports a variety of performance data sources, and when paired with IBM Z IntelliMagic Vision for z/OS' performance management software, it **unlocks deeper insights and a 360° view of mainframe economics.**

Cost Transparency & Allocation

Get a full view of mainframe TCO with cost per MSU, GCP/zIIP usage, and spend by application or workload to support accurate allocation and reporting.

Unit Rates & Consumption Insights

Track GCP and zIIP MSU trends to spot underutilization, anomalies, and patterns (spikes, seasonality, growth).

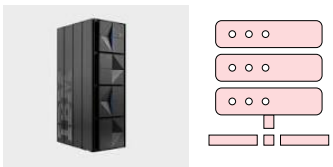
Showback & Chargeback

Allocate costs by actual usage and provide clear, defensible views to business units.

Workload Efficiency

See what's running on mainframe, identify redundant workloads, and reallocate or retire them to improve efficiency.

Problem statement (s)



- What is my current TCO?
- Am I efficiently optimized or do I have under utilized assets?

1 Visibility?

2 What? When? Where?

- Where should the (new) workload(s) be placed?
- What are my options if I want to “modernize”?
- When do I migrate these workloads?

- Do I modernize on (on-prem) distributed systems?
- What is my One-time cost to migrate?
- What is my future TCO?
- How will this impact my business goals & metrics?

Modernization-in-place



- Do I upgrade and modernize in place?
- What are my upgrade (and migration?) costs?
- What is my future TCO?
- How will this impact my business goals & metrics?

Public Cloud



- Do I consider the cloud?
- What are my One-time costs to migrate?
- What is my future TCO?
- How will this impact my business goals & metrics?

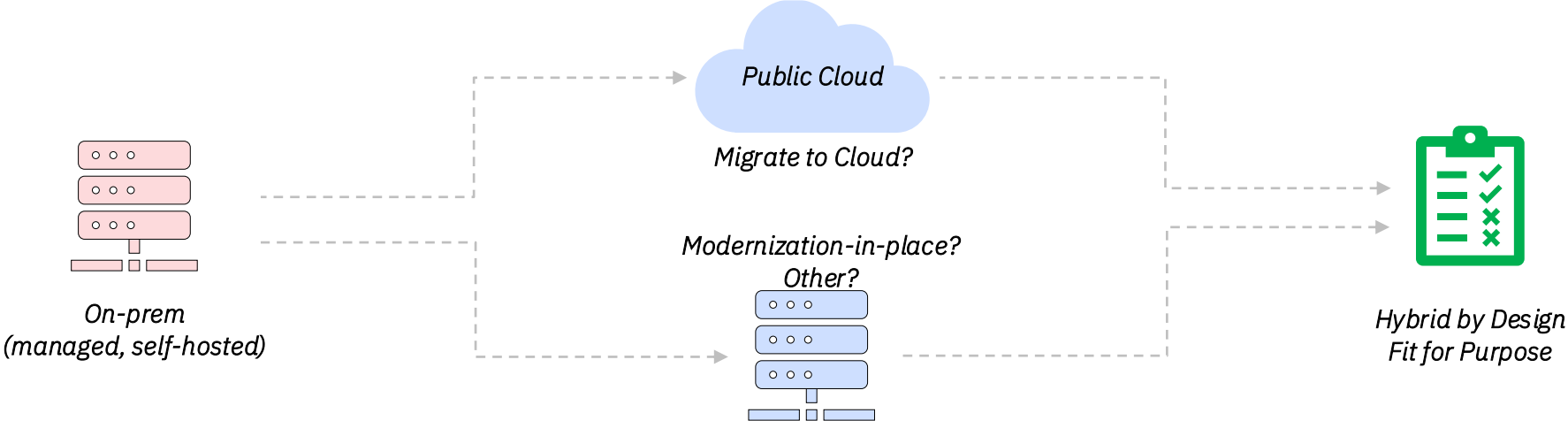


On-prem distributed systems

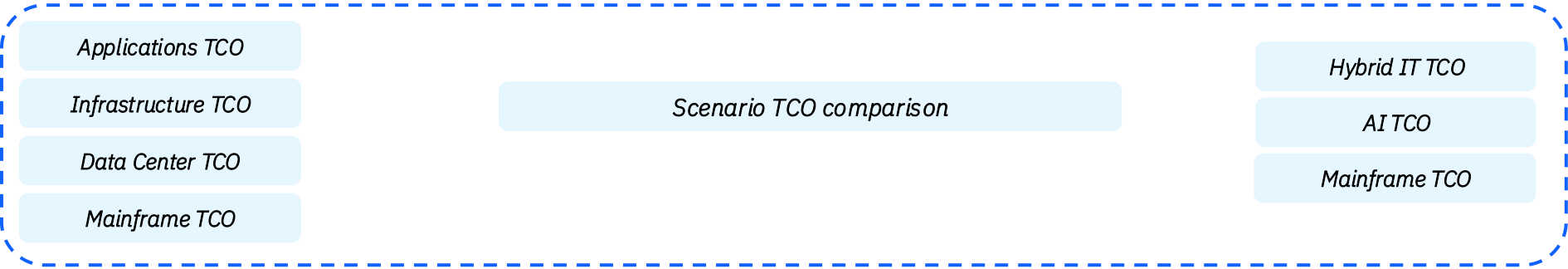
3 Post Modernization: Hypothesis Validation

- Have I achieved my financial benefits
- Have I achieved my optimization goal?
- Have I removed stranded assets?

Solution: IBM Apptio TCO Series



IBM Apptio TCO Series



1 TCO Visibility

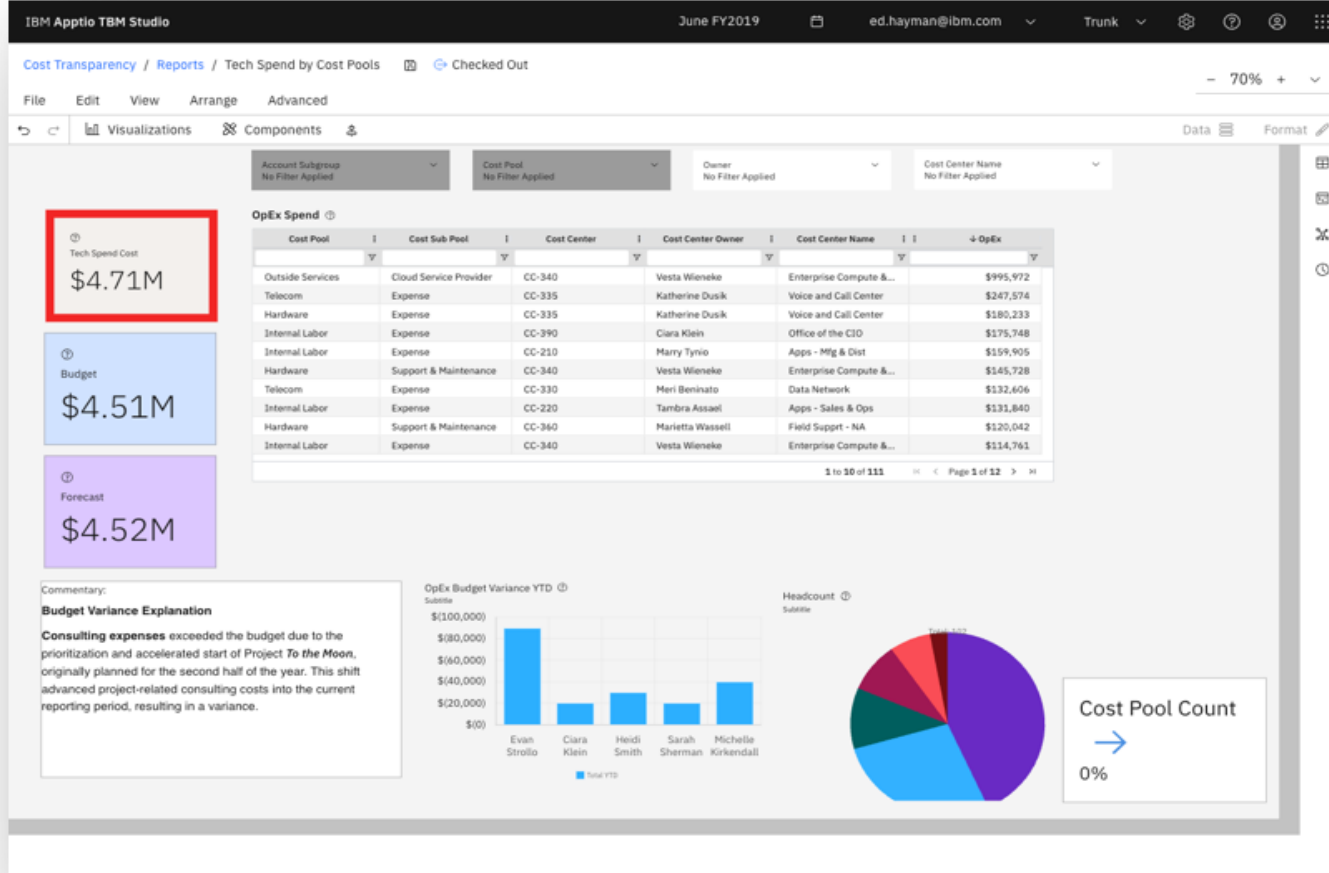
2 What-if Scenario Modeling

3 Validation & Tracking

IBM Apptio Report Studio

IBM Apptio Report Studio

The new IBM Apptio Report Studio - a more powerful, flexible, and user-friendly reporting experience



New Features

- New IBM Apptio Report Studio for a more intuitive and flexible reporting experience.
- Enhances visualization options with KPIs, slicers, tables, charts, groups, and layers.
- Offers advanced layout controls such as zoom, fit to page, fit to width, snap to grid, show grid, and rulers.
- Enables seamless data interaction for easier report exploration and sharing.

Key Benefits

- Streamline report creation with an intuitive and user-friendly experience.
- Improve data exploration and insights with advanced visualization options.
- Enhance precision and control in report layouts for better presentation.
- Increase efficiency in sharing and interacting with reports across teams.



2026: Feature backlog

Post GA (2H 2026)

- Published Formulas (Replacing Perspectives)
- IntelliSense (auto-complete) in formula columns
- Components
 - Tables enhancements
 - Conditional Formatting
 - Text Component
 - Toggle Button (New)
 - Hierarchical Slicers
 - Collapsible Column Picker (New)
 - Component Visibility
- Add & configure visualisations
 - Donut/ Half-Pie charts
 - Tree Maps
 - Heatmaps
 - Radar
 - Sankey charts (New)
 - Waterfall charts (New)
 - Pareto Charts (New)
 - Geo-Spatial Charts (New)
 - Gauge charts (New)
 - Shapes (New)
- Editable Tables
 - Enable Add row dialog
 - Precision
 - Rich editor
 - Search datasets for ""
 - Conditional formatting
- New Report Viewer
 - Recent, Favorites
 - Email Subscriptions
 - Edit Mode (New)
 - Slideshow (New)
 - Landing Page (New)
 - End-user Dashboards (New)
- Master Reports/Customer Branding
- Localization support with auto-adjust/responsive layouts (New)
- Layout controls
 - Alignment Assistance, Snap to object, dynamic layout
- Report Studio Landing Page
- Report Labels/Tags (New)

