Step-up licenses

This brief applies to all Microsoft Volume Licensing programs except Open License.

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Summary

Volume Licensing customers with Software Assurance may migrate from a lower edition to a higher edition software product while maintaining their Software Assurance coverage on a given product. (See below for complete details about maintaining Software Assurance Coverage in Step-up scenarios.) The Step-up License makes it easier for you to move from a lower level edition to a higher level edition without incurring the full cost of licensing two separate editions of the software. This licensing brief presents the possible Step-ups and explains the Step-up rules.

What's New in This Brief

This brief replaces a previous version published in December 2012. It has been updated to reflect the available step-up licenses as of November 2013.

Details

Step-up License Availability as of November 2013

This list is subject to change. For currently available Step-up licenses, refer to the [Microsoft Volume Licensing Product List.](url)

Step-up licenses

Step Up From	Step Up To
BizTalk Server Branch	BizTalk Server Standard
BizTalk Server Branch	BizTalk Server Enterprise
BizTalk Server Standard	BizTalk Server Enterprise
Commerce Server Standard	Commerce Server Enterprise
Core CAL Suite	Enterprise CAL Suite
Core CAL Suite Bridge for Office 365	Enterprise CAL Suite Bridge for Office 365
Core CAL Suite Bridge for Windows Intune	Enterprise CAL Suite Bridge for Windows Intune
Core CAL Suite Bridge for Office 365 and Windows Intune	Enterprise CAL Suite Bridge for Office 365 and Windows Intune
Core Infrastructure Server Suite Standard	Core Infrastructure Server Suite Datacenter
Desktop Education w/ Core CAL	Desktop Education w/ ECAL
Desktop School w/ Core CAL	Desktop School w/ ECAL
Exchange Server Standard	Exchange Server Enterprise
Forefront TMG Standard	Forefront TMG Enterprise
Internet Security & Acceleration (ISA) Standard Server	Internet Security & Acceleration (ISA) Enterprise Server
Microsoft Dynamics CRM Workgroup Server	Microsoft Dynamics CRM Server
Office Standard	Office Professional Plus
Professional Desktop	Enterprise Desktop
Professional Desktop with Microsoft Desktop Optimization Pack	Enterprise Desktop with Microsoft Desktop Optimization Pack
Project Standard	Project Professional
SQL Server Standard Core	SQL Server Enterprise Core
SQL Server Standard	SQL Server Business Intelligence
System Center Standard	System Center Datacenter
Visio Standard	Visio Professional
Visual Studio Professional with MSDN	Visual Studio Premium with MSDN
Visual Studio Premium with MSDN	Visual Studio Ultimate with MSDN
Visual Studio Test Professional with MSDN	Visual Studio Premium with MSDN
Windows Server Standard	Windows Server Datacenter

Step-up licenses

Qualification to Obtain the Step-up License

To obtain a Step-up license to a higher level edition of a product, you need a lower level edition license and active Software Assurance in Open License Value, Select License, Select Plus, Enterprise Agreement, School Enrollment, or Enrollment for Education Solutions (CASA+EES or OVS-ES).

Step-up License for Renewing Customers

Enterprise Agreement, Select Plus, Select License, and Open License Value customers have the option to acquire a Step-up License on or after the renewal of their previous agreements.

On renewal:
Open License Value, Select Plus, and Select License customers need:

- ▶ Active Software Assurance for the lower level license originally acquired, and
- ▶ Three years remaining "SA Step-up" license for the higher level edition.

Enterprise Agreement customers need:

- ▶ Active Software Assurance for the lower level license originally acquired, and
- ▶ Added-at-signing "SA Step-up" license for the higher level edition.

For an existing agreement:
Enterprise Agreement, Select License, Select Plus, and Open License Value customers need to have:

- ▶ Active Software Assurance for the lower level license they currently have, and
- ▶ One-, two-, or three-years remaining "SA Step-up" license for the higher level edition.

Step-up License for School Enrollment and Enrollment for Education Solutions customers

For any eligible covered by an active School Enrollment or Enrollment for Education Solutions (CASA+EES or OVS-ES), the customer may acquire a Step-up License at any time, including during their existing term or at their annual renewal, extension, or anniversary order.
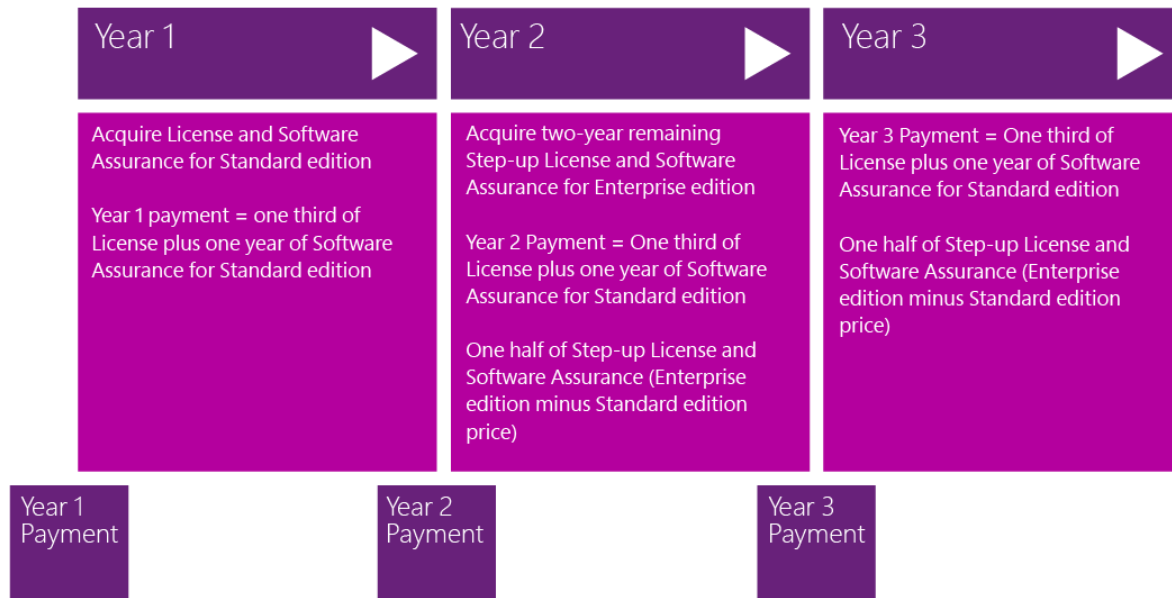
Step-up License Pricing

The Step-up License price is the difference between the License and Software Assurance (L&SA) price of the higher level and lower level editions of the software. For Select License, Select Plus, Open License Value, Enterprise Agreement, and Enrollment for Education Solutions with Added-at-signing customers, the Step-up License price is spread out in equal annual payments for the remainder of the agreement term. For Enterprise Agreement and Enrollment for Education Solutions customers who acquired a Step-up License after the renewal, the price is paid at the time of acquisition of the license as with all additional software license acquisitions.

Example of Step-up License Pricing
This example shows the calculation and annual payments of the Step-up License acquired in the second year of an existing Select Plus or Open License Value agreement.

Step-up licenses

Example of Step-up License pricing

▶ The original Standard edition payments continue after the acquisition of the Step-up License until the end of the agreement term (annual payment of one third of license plus one year of Software Assurance).

▶ The Step-up License simply adds the price difference and spreads that price throughout the remaining years of the agreement term.

▶ The price of the Step-up License corresponds to the remaining years left in the agreement term.

▶ Note: For Select Plus the agreement is evergreen and pricing is based on the months remaining on the lower edition product you are stepping up. You pay the difference in the price of the License between the two products and the difference in the price of the monthly Software Assurance between the two products multiplied by the number of months that remain on the lower edition product.

Frequently Asked Questions

1. **Can I acquire the Step-up License if I licensed the Standard edition software under a previous agreement and renewed Software Assurance on a current agreement?**

   Yes. If you have active Software Assurance on the Standard edition software license, then you may acquire the Step-up License.

2. **Can I renew Software Assurance on the higher level edition software license acquired through the Step-up License?**

   Yes. The License and Software Assurance for the higher level edition software license are both acquired under the Step-up License offering. When that Software Assurance coverage expires, you may renew coverage on the higher level edition you stepped up to.

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3. **How does the Step-up License work in an Enterprise Agreement during a True-up?**

The same rules for True-up apply. On acquiring the Step-up License, your underlying Standard edition software license is considered replaced by the higher level edition software license. Eligible customers may then True-up on additional copies of the higher level edition software during the remaining term of their agreement.