

Microsoft Step-up Licenses

This brief applies to all Microsoft Licensing programs.

Contents

Summary	1
Details	1
What is a Step-up License	1
Qualification to obtain the Step-up License	2
Microsoft Software products	2
Microsoft Online Services	2
Step-up License availability	2
Microsoft Software products	2
Microsoft Online Services	3
Frequently asked questions.....	3

Summary

This brief explains how Microsoft Step-up licenses may be used to transition eligible Microsoft software or online service products to a higher edition of the same product or service.

Details

What is a Step-up License

Some Microsoft software and online service products are available in multiple editions (i.e. lower edition and higher edition). Examples of this are, Exchange Server is offered as the lower edition Exchange Server Standard and the higher level edition Exchange Server Enterprise, or Exchange Online is offered as Exchange Online Plan 1 and Exchange Online Plan 2. 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 product.

Once a Step-up License is acquired, the higher edition Step-up license or SL effectively replaces the lower edition license or SL. The qualifying license and the Step-up License together authorize access and use of the higher

edition. You cannot separately assign the Step-up license from the qualifying lower edition license. Step-ups purchased for qualifying perpetual licenses provide you with a perpetual license for the higher edition once paid in full (i.e. at the end of the agreement or enrollment term). At renewal, you can renew your Software Assurance for that higher edition. Subscription Licenses and online services do not provide perpetual licenses (unless there is a buyout option). However, you may renew your subscription or online service for the higher edition at the subscription renewal.

Qualification to obtain the Step-up License

Microsoft Software products

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. 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 Value, Microsoft Products and Services Agreement (MPSA), Enterprise Agreement, School Enrollment, or Enrollment for Education Solutions (CASA+EES or OVS-ES), and a Step-up License SKU needs to be available.

Microsoft Online Services

Microsoft Online Services may be migrated from an eligible lower edition subscription license (SL) to a higher edition SL of an online service, avoiding paying for a full higher edition SL in addition to their existing full lower edition SL during their existing subscription term, at which time you may renew a subscription term for the full higher edition SL. Some Microsoft online services are bundled together in suite licenses (e.g. Office 365 suite plans, Microsoft 365 suite plans) and customers may choose to deploy additional Microsoft online services at the same time they step up their existing standalone online service. To obtain a Step-up License to a higher-level edition of an online service, you need a qualifying lower level edition component SL or suite license that includes the lower level edition component in MPSA, Enterprise Agreement, Enrollment for Education Solutions (CASA) and a Step-up SL SKU needs to be available.

Step-up License availability

Microsoft Software products

This list provides examples of on premises Microsoft software product editions eligible for Step-up to a higher edition as of October 2020 and is subject to change. For currently available Step-up Licenses, please contact a Microsoft authorized reseller to verify a Step-up SKU is available.

Step up from	Step up to
BizTalk Server Branch	BizTalk Server Standard
BizTalk Server Branch	BizTalk Server Enterprise
BizTalk Server Standard	BizTalk Server Enterprise
Core CAL Suite	Enterprise CAL Suite
Core Infrastructure Server Suite Standard	Core Infrastructure Server Suite Datacenter
Exchange Server Standard	Exchange Server Enterprise
Office Standard	Office Professional Plus
Professional Desktop	Enterprise Desktop

Step up from	Step up to
Project Standard	Project Professional
SQL Server Standard Core	SQL Server Enterprise Core
System Center Standard	System Center Datacenter
Visio Standard	Visio Professional
Visual Studio Professional with MSDN	Visual Studio Enterprise with MSDN
Visual Studio Test Professional with MSDN	Visual Studio Enterprise with MSDN
Windows Server Standard	Windows Server Datacenter

Microsoft Online Services

Microsoft online services offer Step-up licenses for many transition scenarios between edition plans. Step-up SKUs are generally available when an online service is offered in more than one edition plan (for example, Microsoft 365 E5 Step-up from Microsoft 365 E3). At your next renewal, you can choose to renew the higher-level edition full SL. Check with your Microsoft Partner to confirm if Step-up SKUs are available for your online service.

Frequently asked questions

Q1: *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?*

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

Q2: *Can I renew Software Assurance on the higher-level edition software license acquired through the Step-up License?*

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

Q3: *How does the Step-up License work in an Enterprise Agreement during a True-up?*

A: 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.

© 2021 Microsoft Corporation. All rights reserved. This document is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS DOCUMENT. This information is provided to help guide your authorized use of products you license; it is not your agreement. Your use of products licensed under your volume license agreement is governed by the terms and conditions of that agreement. In the case of any conflict between this information and your agreement, the terms and conditions of your agreement control. Prices for licenses acquired through Microsoft resellers are determined by the reseller.