

Step-up licenses

Licensing guidance

Summary

Step-up licenses allow customers purchasing through certain Commercial Licensing programs to upgrade eligible Microsoft software or online services to a higher edition of the same product or service at any time. The document provides an overview, details on what a Step-up license is, qualifications, availability, and the transitions between different editions.

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What is a Step-up license?

Some Microsoft software and online service products are available in multiple editions, for example Exchange Server is offered as a lower edition Exchange Server Standard and a higher edition Exchange Server Enterprise. Similarly, Exchange Online is offered as a lower edition Exchange Plan 1 and higher edition Exchange Plan 2.

Step-up licenses enable you to move from the lower edition to the higher edition at any time by paying only the difference in price between the lower edition you've already purchased and the higher edition you want to move to instead of having to either start paying for the full higher edition license in addition to the lower edition license or having to wait until your enrollment anniversary or renewal date to replace the lower edition (base) licenses with the higher edition licenses.

When you acquire a Step-up license, it effectively replaces the lower edition license. The qualifying base license and the Step-up license together authorize access and use of the higher edition. At your next enrollment anniversary or renewal, you replace the separate SKUs for the base and Step-up licenses with a single SKU for the higher edition.

Stepping-up on-premises software

Qualifying for on-premises software Step-up licenses

For on-premises software, Step-up licenses are a benefit of Software Assurance, therefore you must have active Software Assurance coverage for the qualifying base licenses you want to step-up to a higher edition. For example, to be eligible for the Exchange Server Standard to Exchange Server Enterprise Step-up license, you must have active Software Assurance coverage for Exchange Server Standard.

Purchasing and assigning on-premises software Step-up licenses

You must purchase Step-up licenses under the same licensing agreement or enrollment (if any) as the qualifying base licenses. You cannot separate a Step-up license from its qualifying base license; you can only use the Step-up license for a device with a qualifying base license.

[View the related Step-up terms for on-premises software.](#)

Availability of on-premises software Step-up licenses

Step-up licenses for on-premises software are available through the Open Value, Microsoft Products and Services Agreement (MPSA), Enterprise Agreement, School Enrollment, or Enrollment for Education Solutions (CASA+EES or OVS-ES) programs. The specific Step-up licenses available may vary by program. Refer to the related [Step-up terms for on-premises software](#) for the licensing program you are purchasing through to see the available Step-up paths and contact your Microsoft partner or Microsoft Sales representative to verify the availability of specific Step-up licenses.

Stepping-up online services subscriptions

You can step-up an eligible lower plan subscription licenses to a higher plan of an online service at any time between your enrollment anniversary or renewal dates. For example, you can user subscriptions from Exchange Plan 1 to Exchange Plan 2 or from Microsoft 365 E3 to Microsoft 365 E5. At your enrollment anniversary or renewal date, you may drop the separate base plan and Step-up subscription licenses and add full subscription licenses for the higher plan. For example, if you stepped-up your Microsoft 365 E3 user to Microsoft 365 E3 midterm by adding the Microsoft 365 E3 to Microsoft 365 E3 Step-up to your existing Microsoft 365 E3 user subscription licenses, you may drop the separate Microsoft 365 E3 and Step-up licenses and add full Microsoft 365 E5 licenses for those users.

Purchasing and assigning online services Step-up licenses

You must purchase the Step-up subscription licenses under the same licensing agreement or enrollment (if any) as the qualifying base subscription licenses. You cannot separate a Step-up license from its qualifying base license; you can only assign the Step-up license to a user or device to which a with a qualifying base subscription license is also assigned.

Availability of online services Step-up licenses

Online services Step-up licenses are available through the Microsoft Products and Services Agreement (MPSA), Enterprise Agreement, School Enrollment, or Enrollment for Education Solutions (CASA+EES or OVS-ES) programs. Contact your Microsoft partner or Microsoft Sales representative to verify the availability of specific Step-up licenses.

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 under the new agreement.

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 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.

3. If I drop separate based and Step-up subscription licenses for an online service, will I need to reassign the licenses to my users?

No. When you purchase the Step-up SKU, your base subscription licenses are replaced by full subscription licenses for the higher plan. For example, if you add the Microsoft 365 E3 to Microsoft 365 E5 Step-up SKU, your E3 licenses will be replaced by full E5 licenses. When you switch to the full E5 license SKU at anniversary or renewal, the existing E5 licenses acquired via the Step-up SKU will remain in place and be renewed via the full E5 SKU.

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