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I want to simplify and better track my software licenses.

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Microsoft® Open Programs

Program Guide

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# Microsoft Open Programs Overview

Small and midsize organizations looking for a cost-effective way to purchase software licenses can rely on Microsoft® Open programs, which includes Open Value and Open License. The Open programs are a convenient and simple way for organizations with at least five desktop PCs to acquire the latest Microsoft technology. The Microsoft Open programs are for corporate, academic, charity[[1]](#footnote-2), and government organizations that want to make a minimum initial purchase of five software licenses. With features such as a customizable platform and volume discounts for minimal up-front purchases, Open programs give you value and flexibility in a convenient Microsoft Volume Licensing program.

Managing software licenses is easy with either our Microsoft Volume License Services (MVLS) Web site (at <https://licensing.microsoft.com>) for Open Value agreements or the eOpen tool (<https://eopen.microsoft.com>) for Open License agreements. MVLS and eOpen are an online tools that offer an easy way for you to electronically manage your license orders, using purchase history, track compliance, and receive order confirmation. Using these tools can simplify license management by helping you reduce the time you spend tracking paper copies of software licenses.

Open Value and Open License are available through a broad worldwide reseller channel.

## Benefits

The Open programs offer many benefits, including:

* **Licensing Simplicity.** Now you can place an order and start using licensed products immediately. The flexible pay as you go model helps eliminate the need for forecasting. After you place your order in Open License, you receive a single authorization identification number that you can reuse and share with qualified affiliates. Good for the entire two-year agreement, this identification number helps reduce procurement costs and simplifies the purchasing process.
* **Licensing Flexibility.** Open Value now gives you a single platform option, which allows you to choose components from the Windows® client, the Microsoft Office System, and Client Access Licenses (CALs) under a single platform, rather than being required to choose between the Small Business or Desktop Professional platform.

You can also choose latest offerings from Microsoft in midsize IT solutions with Windows Essential Business Server. If your organization requires Microsoft enterprise solutions, Microsoft Office Enterprise, Enterprise CAL, and Microsoft Desktop Optimization Pack (MDOP) are now available.

* **Licensing Convenience.** You will have fast, convenient access to Microsoft licensed products through a broad worldwide reseller channel.
* **Licensing Manageability.** Online tracking tools make managing licenses easy and convenient. With the online VLSC tool, you can electronically manage your license orders, review purchase history, download Volume License Keys (VLKs) for software product installation, track compliance, and receive order confirmations.
* **Licensing Affordability.** Stretch software procurement budgets further than retail purchase options. With a simple one-time transaction, you can pay for what you need when you need it, giving you the flexibility to manage your software needs. Greater cost savings are available in Open License for commercial and eligible government customers who require a larger initial up-front order of 500-plus points in one or more product pools (applications, systems, and/or servers).
* **Open Value.** Customers can now take advantage of improved volume pricing for 250 or more desktop PCs combined with an additional price level. (Commercial only; does not apply to Open Value for Government, Academic, or Charities.)

## The Open Program Family

Microsoft recognizes that small and midsize organizations have a variety of license acquisition needs. Open Value and Open License share many of the same program features, but give you different license purchasing options. These options ensure that you are getting a program that fits your specific needs.

### Open Value

Open Value is the recommended program if you have a small to midsize organization with five or more desktop PCs and want to simplify license management, manage software costs, and get better control over your investment. Open Value includes Software Assurance benefits, the enhanced maintenance program that helps you get the most out of your software spending through each phase of software management. In addition, access to valuable benefits such as training, deployment planning, software upgrades, and product support help you increase the productivity of your entire organization.

Note: Open Value for Government is not available in all regions. Please contact your Microsoft reseller for availability in your country.

Open Value Company (Organization)-Wide Option

Open Value Company-wide offers commercial, and government organizations additional savings opportunities to organizations that want to standardize all their desktop PCs on one or more Microsoft enterprise products. This program includes discounts on company (organization)-wide deployment, so you get the best deal for your software license purchases.

By choosing Open Value Company-wide, you receive the rights to the latest Microsoft licensed products with a single platform option. With the single platform option, you can customize your desktop PC as you choose components from an operating system, the Microsoft Office system, and CAL product pools, plus additional software products selected in your agreement that include the following platform product options.

* The Microsoft Office System: Microsoft Office Professional Plus, Microsoft Office Small Business, and Microsoft Office Enterprise
* Operating Systems: Windows Vista® Business upgrade (with rights to Windows Vista Enterprise)
* Client Access License (CAL): Microsoft Core CAL Suite for the Windows Server®, Windows Small Business CAL Suite, and Enterprise Business Server CAL Suite

Open Value Subscription Option

Similar to the Company (Organization)-Wide option, with the Subscription option, you pay a single price per desktop PC to deploy Microsoft technology as the standard across your organization. This option gives your organization the rights to run the software Company (Organization)-Wide only during the term of the agreement with Microsoft. You also have the ability to add the single platform option to an Open Value Subscription agreement.

**For Government customers**: A one-year Open Value Subscription option is available for eligible government customers. This option better aligns with government procurement requirements by giving you the flexibility to choose from a one-year or three-year term. The up-to-date (UTD) discount is not available for the one-year option, and you must have purchased Open Value Subscription for a continued period of three or more years at the time of buyout.

### Open License

Open License is a good choice if you are a corporate, academic, charitable, or government organization that wants to pay as you go. Because you pay for licenses as you need them, you get maximum flexibility to grow with your organization’s increasing and changing business needs. You must have a minimum initial purchase of five software licenses for an Open License agreement, but you can acquire additional licensed products through Open License in any quantity at any time during the two-year agreement term. Software Assurance can be purchased at the time of the license purchase, but the benefits terminate with the expiration of agreement Authorization Number.

Open License also offers a volume option to commercial and government organizations with an additional price break for larger purchases. This additional price point is offered to commercial organizations that purchase 500 points or more in a single product pool.

## Program Offerings for eligible Government, Academic, and Charity Organizations (Public and Private)

Eligible public and private organizations may receive special pricing levels.

Government

Qualified government organizations are eligible for special government pricing with Open Value or Open License for Government. You can access government eligibility requirements at <http://www.microsoftvolumelicensing.com/userights/DocumentSearch.aspx?Mode=3&DocumentTypeId=6>

Academic

Microsoft is committed to providing licensing solutions for education customers. Learn more about licensing options for education customers, including Open License for Academic at <http://www.microsoft.com/licensing/programs/education/default.mspx>.

Charity

Eligible charity organizations may qualify for Open License for Charities pricing. You can access charity eligibility requirements at <http://www.microsoft.com/licensing/programs/open/opencharity.mspx>.

Open License for Charities is not available in all regions. Check with your reseller for availability in your country.

## Software Assurance

Software Assurance is a comprehensive maintenance offering that helps you get the most out of your software investment. Its broad range of benefits includes exclusive technology, training, support, deployment services, and the rights to future upgrades. These benefits are available throughout the software management life cycle, so you can access them when you need them.

Software Assurance benefits also contribute to the return on your technology investment by making it easier to predict budgets. This helps minimize downtime, improve productivity, and lower the operating expenses for employee development, deployment, and support. Software Assurance may also offer other advantages, depending on how you activate and use the benefits.

If you want these benefits, we recommend purchasing an Open Value Agreement, which includes Software Assurance. Software Assurance is an additional option with Open License.

Software Assurance benefits available through Open Value and Open License are listed below. For details on each benefit and for the latest benefit list, visit <http://www.microsoft.com/licensing/sa/>.

|  |  |  |  |
| --- | --- | --- | --- |
| **Benefit** | **Open Value** | **Open Value Company (Organization)-Wide or Subscription Option** | **Open License for Commercial, Academic, and Charities** |
| New Version Rights | X | X | X |
| Spread Payments | X | X |  |
| Microsoft SharePoint® Server Deployment Planning Services | X | X |  |
| Desktop Deployment Planning Services | X | X |  |
| Microsoft Desktop Optimization Pack (MDOP) for Software Assurance | X | X |  |
| Training Vouchers | X | X |  |
| E-Learning Courses | X | X |  |
| Home Use Program (HUP) | X | X | X |
| Windows Vista Enterprise | X | X | X |
| Microsoft Employee Purchase Program (EPP) |  | X |  |
| 24x7 Problem Resolution Support | X | X | X |
| TechNet Subscription through Software Assurance | X | X | X |
| “Cold” Backups for Disaster Recovery | X | X | X |
| Extended Hotfix Support (Server Only) 1 | X | X | X |

1 SERVER: 90-day enrollment not required. Annual contract fee for Microsoft Exchange Server, Microsoft Operations Manager, Microsoft Systems Mangement Server, Microsoft SQL Server®, and Windows Server® is included as part of the Software Assurance program. DESKTOP: Not eligible.

### Acquiring Software Assurance

Software Assurance coverage is included for the entire term of an Open Value agreement, so if you want these benefits, we recommend this option.

You may also purchase Software Assurance with an Open License Agreement for the remaining balance of the term of the Open License Authorization number. Software Assurance must always be paid for in two-year increments, regardless of when it was purchased. In cases where time has passed after the initiation of an Open License, it may be better to acquire a new Open License authorization number to receive the most value from your Software Assurance purchase.

Software Assurance may also be purchased on its own in the following cases:

* System or server software products are purchased through retail full-packaged product (FPP) or from an original equipment manufacturer (OEM). There is a 90-day period during which time Software Assurance may be added to these purchases.
* Microsoft Office 2003 or newer version licenses are purchased through an OEM. Again, a 90-day enrollment period exists during which time Software Assurance may be added to these purchases.

## Open Programs Comparison Chart

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Open Value** | **Open License** | **OEM** | **FPP** |
| **Initial Purchase** | Five licenses[[2]](#footnote-3)  One license for MBS products, MSDN®, TechNet, and other products designated in the Product List | Five licenses. To qualify for additional price discount, the initial order must have 500-point minimum within a specific product pool (applications, systems, and servers); each license carries a point value. | One license with a complete system | 1 unit |
| **Single Agreement for Multiple Entities** | Yes[[3]](#footnote-4) | No[[4]](#footnote-5) | Not applicable | Not applicable |
| **Reordering** | Yes, until three years after the agreement was entered into | Yes, until two years after authorization number was created. Possible to place new order with new authorization number with no time restriction. | Not applicable | Not applicable |
| **Product Portfolio** | Nearly all business-oriented products | Nearly all business-oriented products | Limited[[5]](#footnote-6) | Nearly all business-oriented products |
| **Software Assurance** | Included | Optional | Add through Open Value or Open License[[6]](#footnote-7) | Add through Open Value or Open License[[7]](#footnote-8) |
| **Downgrade Rights** | Yes | Yes | No, with a few exceptions | No, with a few exceptions[[8]](#footnote-9) |
| **Subscription** | Optional | No | No | No |
| **Spread Payments** | Yes, optional[[9]](#footnote-10) | No | No | No |
| **Price Protection** | Yes[[10]](#footnote-11) | No | No | No |
| **Standardization Benefits** | Yes, reduced pricing, price protection, and additional Software Assurance benefits | No | No | No |
| **Install Before You Order** | Yes, monthly ordering | No | No | No |
| **Web-based License Management** | Yes | Yes | No | No |
| **Media Includes** | Yes, also for new versions | No.  Products are available for free online download. | Yes | Recovery media included depending on hardware vendor |
| **Product Activation** | No | Yes | Yes | Yes[[11]](#footnote-12) |

# License Management

Managing software licenses is easier than ever with our online services. The following are descriptions of the services we provide.

## Microsoft Volume Licensing Service Center (MVLS)

The Microsoft Volume Licensing Service Center (MVLS) Web site is a one-stop shop where you can easily manage all your Volume Licensing agreements, download licensed products, and access product keys for your software. The site features your customized Microsoft License Statement, an easy-to-use report that provides a real-time calculation of Volume Licensing entitlements across agreements. You can also use it to quickly identify and activate Software Assurance benefits. Access the Microsoft Volume Licensing Service Center at <https://licensing.microsoft.com>/.

## eOpen

eOpen is an online tool that helps you manage your Open License Agreements. You can electronically manage your license orders, view purchase history and license agreement details, track compliance, access product keys, and receive order confirmation online. This gives you the flexibility to manage licenses more effectively.You must have an Open License Authorization number and corresponding license number to access this secure site.

Microsoft Open License customers can also download products or purchase licensed media directly from eOpen now that media distribution has been discontinued[[12]](#footnote-13) for most countries. You can access eOpen at <https://eopen.microsoft.com>/.

# Placing an Order

If you are interested in volume pricing through the Microsoft Open program, locate a reseller near you. To find a Microsoft reseller near you, call (800) 426-9400 in the United States or (877) 568-2495 in Canada. Outside the United States or Canada, please contact your reseller or see <https://solutionfinder.microsoft.com>/ to find a reseller.

# Making Copies

After your Open Value or Open License Agreement has been initiated, you may run the exact number of copies of product for which you are licensed. Use legally acquired downloads or media kits to install licensed products across multiple workstations or servers, which may reduce the volume of media per desktop PC maintained as a result of retail software license purchases.

# Additional Resources

For more information about Open Programs: <http://www.microsoft.com/licensing/programs/open/default.mspx>

For information about Microsoft Volume Licensing Programs:

<http://www.microsoft.com/licensing/>

To learn more about Software Assurance:

<http://www.microsoft.com/licensing/sa>/

Microsoft Product Use Rights:

<http://www.microsoftvolumelicensing.com/userights/>

For a list of available licensed products through Microsoft Volume Licensing:

<http://www.microsoftvolumelicensing.com/userights/PL.aspx>

Volume Licensing for Government organizations:

<http://www.microsoft.com/licensing/programs/gov/default.mspx>

Volume Licensing for Academic organizations:

<http://www.microsoft.com/licensing/programs/education/default.mspx>

Volume Licensing for Charitable organizations:

<http://www.microsoft.com/licensing/programs/open/opencharity.mspx>

To determine the right Volume Licensing program for your organization, try the Microsoft Product Licensing Advisor tool at: <http://www.microsoft.com/licensing/mplahome.mspx>

# Appendix

## Determining the Licenses You Need

A software product license can be broken into five main elements: product pool, product, version, edition, and product type.

### Product Pool

Microsoft software programs fall under one of the following three product pools:

1. **Applications:** Examples of Microsoft applications include the 2007 Office system, Microsoft Visio® drawing and diagramming software, and Microsoft Project. Developer tools and utilities such as Microsoft Visual Studio® development system are also part of the Microsoft applications pool.
2. **Systems:** Examples of Microsoft desktop PC operating system software programs are Windows 2000 Professional.
3. **Servers:** Examples of Microsoft server software programs are Microsoft 2000 Exchange Server, Microsoft SQL Server® 2000, and Windows 2000 Server.

### Product

The product software is, for example, Microsoft Office, Visual Studio, Windows 2000, or SQL Server.

### Version

Versions differentiate various releases of the product (for example, the 2007 Microsoft Office system and Microsoft Office 2000).

### Edition

The edition specifies the level of features and/or applications included in a product (for example, Microsoft Office Standard 2007 includes Microsoft Office Word 2007, Microsoft Office Excel® 2007 spreadsheet software, Microsoft Office Outlook® 2007 messaging and collaboration client, and Microsoft Office PowerPoint® 2007 presentation graphics program where Microsoft Office Professional 2007 includes Office Word 2007, Office Excel 2007, Office Outlook 2007 with Business Contact Manager, Office PowerPoint 2007, Microsoft Office Access® 2007 database software, Microsoft Office Publisher 2007, and Microsoft Office Accounting Express 2008).

### Product Type

License: Provides the right to run a specific version of the product ordered. For example, Microsoft Office Professional 2007.

### Software Assurance

Software Assurance may be ordered for any underlying licensed product and provides the right to upgrade to, and run, the latest version of that product that Microsoft makes available during the covered period. Software Assurance is automatically included in the Open Value, Open Value Subscription, Enterprise Agreement (EA), and Enterprise Subscription Agreement programs.

**Note:** Options and rules differ across products.

# Glossary

**Affiliate**

**Commercial Affiliate**

Any legal entity that you own, which owns you, or which is under common ownership with you, and (ii) with regard to Microsoft, any legal entity that we own, which owns Microosft, or which is under common ownership with Microsoft. “**Ownership**” means, for purposes of this definition, more than 50% ownership.

**Academic Affiliate**

[Academic non-U.S.] means (a) with regard to you, any eligible education customer that you own and/or control, that owns you and/or controls you, or that is under common ownership and/or control with you, and (b) with regard to Microsoft, any legal entity that we own, that owns Microsoft, or that is under common ownership with Microsoft; “ownership” means, for purposes of this definition, more than 50% ownership;

[Academic U.S.] means

a. with regard to you,

(i) if you are a non-public entity, any eligible education customer that you own and/or control, that owns you and/or controls you, or that is under common ownership and/or control with you; “ownership” means, for purposes of the definition, more than 50% ownership, and

(ii) if you are a state or local government entity,

any other eligible education customer that is an agency, department, office, bureau, division, or other entity of your state or local government, and

any other eligible education customer expressly authorized by the laws of your state to purchase under state education contracts;

provided that your state and its affiliates shall not, for purposes of this definition, be considered to be affiliates of the federal government and its affiliates

b. with regard to Microsoft, any legal entity that Microsoft owns, that owns Microsoft, or that is under common ownership with Microsoft.

**Charity Affiliate**

Any legal entity that a party owns, that owns a party or that is under its common ownership.  Ownership means control of more than a 50% interest in an entity.

**Government Affiiate**

An Eligible Entity, as defined at http://www.microsoft.com/licensing/contracts, that is located in the defined region where the customer is located.

**Agreement number**

The unique number assigned to the customer by Microsoft after receiving an initial order in a Microsoft Volume Licensing program. Within Open Value, this number allows reorders for three years from the initial signing date.

**Client Access License (CAL)**

A license that authorizes a user to access Microsoft server products and perform certain functions such as file and print sharing or access services such as e-mail. In general, a single CAL is required for each user or device accessing a server, depending on how the server has been licensed and configured.

**Client Access Licenses (CAL) Suite**

The Microsoft CAL Suites, only available through Microsoft Volume Licensing, offer a convenient way to license basic server components across desktop PCs. Choose from the Microsoft Core Client Access Licenses (CALs) Suite for the Windows Server, Microsoft Exchange Server, Microsoft Office SharePoint Server 2007, Configuration Management License for Microsoft Systems Management Server, Windows Small Business CAL Suite, and Enterprise Business Server CAL Suite.

**Company (Organization)-Wide option**

The Company (Organization)-Wide option provides additional savings within Open Value for organizations that want to acquire Microsoft product licenses for all of the desktop PCs in their organization. The minimum desktop PC requirement is five desktop PCs.

**Customer**

The organization or entity signing an Open Program Agreement, either Open Value or Open License.

**Effective date**

The licensing agreement start date. Typically this is the date the contracting Microsoft Affiliate accepts the agreement for Open Value and the Authorization number issue date for Open License.

**Media**

Media can be Web-based downloads of Microsoft Volume Licensing Products from the Microsoft Volume License Services Center**,** materials such as a floppy disk, CD-ROM, or DVD for a licensed software product, and may also include printed materials such as a user’s guide or product manual.

**Microsoft Software License Terms**

Each Microsoft licensed product includes Microsoft Software License Terms, formerly known as the End-User License Agreement (EULA). The Microsoft Software License Terms cover your use of the licensed product as governed by the terms of your agreement and the Product Use Rights (PUR) specific to such products.

**Full packaged product (FPP)**

Physical boxes of licensed product, with one license per box, offered by software retailers. FPP is for those who are looking to acquire a small number of software licenses quickly. When upgrading to a new computer, you may transfer FPP licenses to new hardware no more than one time.

**License**

Any one of those offerings identified in the Microsoft Product List (including standard licenses, and upgrades for desktop PC operating systems) that provide the right to run a specific version of the software product ordered.

**License & Software Assurance**

Combines a License and Software Assurance within a single offering.

**Media**

Media can be Web-based downloads of Microsoft Volume Licensing Products from the Microsoft Volume Licensing Service Center,materials such as a floppy disk, CD-ROM, or DVD for a licensed software product, and may also include printed materials such as a user’s guide or product manual.

**Non-Company (Organization)-Wide option**

An Open Value option that allows you to pay annually for licenses and upgrade rights on some of your organization’s desktop PCs or servers.

**Original equipment manufacturer (OEM)**

OEM software licenses are acquired when you buy a computer with software legally preinstalled. If you have ever purchased a computer from the store with Windows or Microsoft Office installed, you have acquired a license for OEM or System Builder software. OEM licenses may be used only on the computer that the software was preinstalled on.

**Open License**

A Microsoft Volume Licensing program for small and midsize organizations that provides discounts over the estimated retail price based on the size of the initial order. The minimum initial order is five licenses.

**Open Value**

A Microsoft Volume Licensing program for small and midsize organizations that want the advantages of the latest software and other Software Assurance benefits, and the ability to spread out payments annually. The minimum initial order is five licenses.

**Platform Option**

Open Value Company-wide customers may add the single platform option. The single platform option allows customers to customize the desktop PC as they choose components from an operating system, Microsoft Office, and CAL product pools, plus additional software products selected in the agreement.

**Product list**

The statement published by Microsoft from time to time that identifies the products that are or may be made available under a Volume Licensing program and any product-specific conditions or limitations on the acquisition of licenses for the product.

**Product Use Rights (PUR)**

Use of any product that is licensed by Microsoft is governed by Product Use Rights specific to each product and version.

**Qualified desktop PCs**

Qualified desktop PCs are personal computers and similar devices that are used for the general benefit of an organization. Qualified desktop PCs do not include computers and systems dedicated to specialized purposes, such as computers designated as a server-only and systems that are exclusively for line-of-business (LOB) software, such as an accounting program used by an accountant, or systems running an embedded operating system.

**Region**

The area in which the customer is located. If the customer is located in the European Union (EU) or European Free Trade Association (EFTA), the territory is the entire EU/EFTA.

**Reseller**

An entity authorized by Microsoft to resell Microsoft product licenses to customers.

**Software Assurance**

The Microsoft enhanced maintenance program that provides for any underlying licensed product for which it is ordered, the right to upgrade to, and run in place of the underlying licensed product, the latest version of that product that Microsoft makes available during the covered period.

**Subscription option**

An Open Value option that allows customers to subscribe through annual payments to licenses for the use of Microsoft licensed products, with the ability to make a final buyout payment to own the licenses.

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The contents of this guide are subject to change. Please contact your Microsoft account manager or LAR for the most current version of this guide.

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1. Not available for charitable organizations in all regions. Check with your reseller regarding availability in your country. [↑](#footnote-ref-2)
2. A license is either a license with Software Assurance or only Software Assurance. Buying Software Assurance without a license can be done when you want to renew active Software Assurance that has been purchased through a previous agreement or when you want to add Software Assurance to an OEM license. [↑](#footnote-ref-3)
3. Limited to entities in the same defined region. [↑](#footnote-ref-4)
4. A qualified affiliate can place order under the same authorization number. [↑](#footnote-ref-5)
5. Products available through an OEM license are Windows Vista, Windows Server, Windows Small Business Server, and several Microsoft Office products. [↑](#footnote-ref-6)
6. Software Assurance can be added to OEM licenses for up to 90 days after licenses acquisition. [↑](#footnote-ref-7)
7. Software Assurance can be added to full packaged product licenses for desktop PC operating systems and server products for up to 90 days after licenses acquisition. [↑](#footnote-ref-8)
8. For example, Windows Vista can be downgraded, but the 2007 Microsoft Office system cannot. [↑](#footnote-ref-9)
9. Unlike Open Value, Open Value Subscription only offers annual spread payments. [↑](#footnote-ref-10)
10. Price protection is provided for subsequent payments. Open Value Companywide also provides price protection for subsequent orders for companywide products. Price protection applies to list prices and not promotional prices. Open Value Subscription provides price protection for all previously ordered products. [↑](#footnote-ref-11)
11. In most cases, your hardware vendor completes Product Activation for you as part of the installation procedure. [↑](#footnote-ref-12)
12. Because of challenges with Internet or broadband access in some emerging countries, those countries will continue to receive their open media through distributors. Microsoft will review these countries on an individual basis prior to removing their open media fulfilment through distributors. [↑](#footnote-ref-13)