



Passport Advantage V11

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Summary of Changes

Passport Advantage vs Passport Advantage Express

<https://www.ibm.com/software/passportadvantage/index.html>

- Passport Advantage Express
 - Transaction-based Terms
 - Same core terms as Passport Advantage
 - No point aggregation; Suggested Retail Pricing (SRP) only
 - Designed for smaller, single-site Enterprises
 - No Enrollment required
 - S&S renewal aligns to each initial purchase date
 - No Anniversary Date - Results in different renewal dates for different sites

- Passport Advantage
 - Relationship-based Agreement
 - Ideal for larger, multi-site, multi-national Enterprises
 - One-time Enrollment required, until Client notifies IBM to terminate
 - Single Anniversary date per Agreement number
 - Same date for all sites under the Agreement
 - Clients earn entitled discounts through point aggregation
 - Relationship Suggested Volume Pricing (RSVP)
 - S&S renewal aligns to Anniversary date

Passport Advantage Enrollment

- Enrollment can occur via on-line portal or use of PDF files
 - <https://www.ibm.com/software/passportadvantage/howtoenroll.html>
- Signature requirement varies by Country
 - https://www.ibm.com/software/passportadvantage/online_enrollment_signature_requirements.html
- On-line form:
 - <https://www-112.ibm.com/software/howtobuy/passportadvantage/webenrollments/enrollments/enroll>
- Off-line PDF forms on IBM Terms:
 - No Signature: <https://www.ibm.com/terms/?id=Z125-6125>
 - 1 Signature: <https://www.ibm.com/terms/?id=Z125-6498>
 - 2 Signature: <https://www.ibm.com/terms/?id=Z125-6499>

Passport Advantage V11 Key Dates

IBM Passport Advantage Agreement: www.ibm.com/terms/?id=z125-5831

IBM Passport Advantage Express Agreement: www.ibm.com/terms/?id=z125-6835


- Last PA refresh was 2017 with PA10
- PA11 Effective Dates
 - February 1, 2023
 - New PA Express Transactions
 - New PA Enrollments
 - May 1, 2023 (follows 90-day notice period for existing PA Clients)
 - Existing PA Agreements & Sites
 - For new transactions and renewals
 - Prior acquisitions, transactions, and multi-year contracts (e.g., ELAs) remain on existing terms until completed



Summary of PA11 Revision

- **Basic Changes**
 - Language consistency, wording clarifications, and removal of duplicate terms
 - Modernized IPAA Revision notification method to subscribing to notifications
- **Simplification & Clarification of Existing Policies**
 - Separately signed Attachments no longer required for Subscription License & Container Licensing
 - Clarified Subscription & Support (S&S) Partial Renewal terms: System generated evidence required; 30 days before renewal date
 - Clarified License Verification terms: IBM report format; due 30-days following request
 - Clarified Trade-up and Subscription License Upgrade terms: Active Subscription & Support required

Modernize IPAA Revision Notification Method

- PA11 email notification
 - 100K emails sent; 80% delivery success
 - Clients need to subscribe on IBM Terms site to receive direct notification
- PA Online – Banner/news announcement
 - Client advised of PA11 update
 - Clients need to subscribe on IBM Terms site to receive direct notification
- Client can subscribe to IBM Terms site (www.ibm.com/terms)
 - Consolidated single site for IBM terms
 - Base agreements, Privacy, LI documents, Service Descriptions, etc.
 - Client, IBM Business Partner, and IBM sections based on log-on credentials
 - All encouraged to utilize “Manage your subscriptions” for notification 

Passport Advantage Agreements	<input type="text" value="x United States"/>	<input type="button" value="Unsubscribe"/>
International License Agreements	<input type="text"/>	<input type="button" value="Subscribe"/>

Subscription & Support Partial Renewals

Clarified Subscription & Support (S&S) Partial Renewal terms: System generated evidence; 30 days before renewal date

- What did not change in PA 11 re: Partial Renewal Rules
 - Maintain Subscription & Support for all uses and installations of the IBM Program
 - Evidence required when requesting Partial Subscription & Support Renewals
- What did change in PA11 re: Partial Renewal Rules
 - Clarified Client to provide system-generated evidence
 - Evidence must be provided 30-days prior to renewal date
- Why did IBM make changes?
 - Responding to Client Feedback
 - Terms previously did not clearly state that IBM required system-generated evidence
 - Requirement for 30-days advance notice facilitates on-time renewals

Clarification & Transparency on License Verification

Clarified License Verification terms: IBM report format; yearly; upon request within 30 days

- IBM Strategy around Software Asset Management
 - Help Clients achieve compliance with IBM's software licensing terms and provide related report framework
 - Request Clients to generate and retain software deployment reports to reduce the number of software licensing reviews.
 - Enroll in the IBM IASP program; reducing the need for a formal compliance review
 - <https://www.ibm.com/about/software-licensing/verification/iasp>
- Existing Policies still apply
 - Create & Retain deployment reporting requirement remains part of IBM agreements and provide to IBM upon request
- Clarification in PA11
 - Recommend Client proactively create reports once a year ahead of their renewal anniversary to be prepared to provide to IBM within 30 days of request
- Next Steps
 - Publish these clarifications, including report format, on the IBM Software Licensing website
 - <https://www.ibm.com/about/software-licensing>

Trade-ups and Subscription License Upgrades

Clarified Trade-up and Subscription License terms: Active Subscription & Support required

- Existing Policies requiring active Subscription & Support still applies
 - Trade-ups – previously documented in Program License Information (LI) documents
 - Subscription License Upgrades – previously documented in Subscription License Attachment
- Trade-ups (Perpetual to Perpetual):
 - Once “TO product” is install, Client must stop using “FROM product”
 - Unless utilize Temporary Use policy
 - Permits for 90 days use of “FROM product” in production and “TO product” in Non-production
 - <https://www.ibm.com/support/customer/csol/terms/?ref=taup-00-05-2013-zz-en>
- Subscription License (SL) Upgrades (Perpetual to SL):
 - “FROM product” is delivered within the “TO product”, Client can continue to use the FROM product
 - If Client does not renew the SL Upgrade entitlement, Client can return to using the original perpetual entitlement

References

- IBM Terms Site: <http://www.ibm.com/terms>
- Passport Advantage/Passport Advantage Express Overview: <https://www.ibm.com/software/passportadvantage/index.html>
- IBM Passport Advantage Agreement (IPAA): www.ibm.com/terms/?id=z125-5831
- IBM Passport Advantage Express Agreement (IPAEA): www.ibm.com/terms/?id=z125-6835
- How to enroll in PA: <https://www.ibm.com/software/passportadvantage/howtoenroll.html>
- PA Enrollment Signature Requirements by Country:
https://www.ibm.com/software/passportadvantage/online_enrollment_signature_requirements.html
- On-line Enrollment: <https://www-112.ibm.com/software/howtobuy/passportadvantage/webenrollments/enrollments/enroll>
- Off-line PDF Enrollment forms
 - No Signature: <https://www.ibm.com/terms/?id=Z125-6125>
 - 1 Signature: <https://www.ibm.com/terms/?id=Z125-6498>
 - 2 Signature: <https://www.ibm.com/terms/?id=Z125-6499-09>
- Temporary Use Policy: <https://www.ibm.com/support/customer/csol/terms/?ref=taup-00-05-2013-zz-en>
- IBM Software Licensing: <https://www.ibm.com/about/software-licensing>
- IASP Program: <https://www.ibm.com/about/software-licensing/verification/iasp>