

# All You Ever Wanted to Know About CEO Product Categories

## CEO Product Categories

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- **History & Applicability**
  - CEO = Complete Enterprise Option; Historically, this was a separate Passport Advantage contract option, but is now integrated into the main Passport Advantage and Passport Advantage Express Agreement terms, and is therefore available to any customer, including those with Government or Academic Attachments.
- **The Offerings**
  - CEO Product Categories are a distinct set of **product offerings** within Passport Advantage and Passport Advantage Express.
  - We anticipate the number of CEO Product Categories available under Passport Advantage and Passport Advantage Express to continue to grow over time as IBM's software portfolio requires.
  - Each CEO Product Category is intended to provide a set of functionality designed to address an enterprise-wide infrastructure need (e.g., mail, business intelligence, desktop productivity, etc.), or as add-on functionality to other CEO Product Categories.
  - The CEO Product Categories are designed with customer deployment flexibility in mind, in terms of how they can or may deploy the set of components. To that end, a customer can choose which components to deploy and which not to – there is no requirement for a customer to deploy and use all of the components for all users.
- **CEO Product Category Terms and Conditions**
  - CEO Product categories are offered under a set of terms contained in the Passport Advantage and Passport Advantage Express Agreements.
  - The terms define a specific CEO Product Category "User" - the CEO Product Category 'price metric'.
  - These terms overcome any/all contradictory terms in the components' License Information documents (LIs).
  - The terms do not restrict the deployment strategy of each software component included in the CEO Product Category – each may be installed as is necessary to meet the needs of the number of CEO Product Category users for which CEO Product Category licenses have been obtained; However, any installs of any of the components can only be made and used in support of those CEO Product Category users for whom licenses have been obtained.
- **CEO Acquisition Rules**
  - A customer's first (primary) CEO Product Category initial acquisition must be for the entire population of **eligible users** in their **Enterprise** (both items are defined in the Agreement terms), or for the stated minimum initial order quantity of that CEO Product Category, whichever is the greater.
  - The "Enterprise-wide" requirement described above is an ongoing requirement – as a customer's population of eligible users in their Enterprise rises, additional licenses for the primary CEO Product Category must be obtained in order to continue to meet this requirement.

- After the initial acquisition of licenses for the primary CEO Product Category, additional license acquisitions can be of any size – there is no minimum order quantity for follow-on CEO Product Category license orders.
  - A CEO Product Category “user” doesn’t have to be an employee as such – it could be a contractor or any other person the customer allows to access/use their system(s)/network, as long as that person fits the definition in the terms and conditions.
  - “Enterprise” for purposes of CEO Product Category acquisition is the same as for all other purposes in the Passport Advantage and Passport Advantage Express Agreements – the criteria is based only on the relationships between customer entities, without regard to geographic location. So, a primary CEO Product Category must be obtained to cover all eligible users in all customer entities that make up the customer’s Enterprise, worldwide.
  - Any additional, or secondary, CEO Product Categories obtained by the customer need only meet the minimum initial order quantity requirement.
  - There is no minimum order quantity for additional orders for the secondary CEO Product Category once the initial requirement has been met.
  - Although it is likely that a given Passport Advantage Agreement’s Originating Site will drive the initial acquisition of the Enterprise-wide primary CEO Product Category, there is no requirement that this be the case. Of course, if new Passport Advantage Sites have to be created to achieve the customer-required deployment model (centralized or decentralized management), that requires the agreement of the Originating Site.
  - **CEO Product Categories, Client-Server Licensing, Acquisition Restrictions**
    - The major CEO Product Categories are composed of a mixture of both server components and the [end-user, desktop] client components that will access the server-side components. In those cases:
      - A customer may not separately obtain non-CEO Product Category licenses that will then be used to deploy client software that accesses any server included as a component of, and licensed under, a CEO Product Category license. All client-side software must and can only be licensed (obtained) using the same CEO Product Category under which the server-side component is licensed
      - While there is nothing in the terms that restricts the acquisition of discrete server-side licenses for components [products] already licensed to the customer under their CEO Product Category, it would not make much sense to do so since the number of server installs in support of CEO Product Category users is not limited – a customer can install as many or as few server components from the CEO Product Category as they choose, as long as those installs are all in support, and ONLY in support, of the users licensed by the CEO Product Category. Nevertheless, there are circumstances, especially if the server software in question is one included in a customer’s secondary CEO Product category, where discrete server licensing may be reasonable and even appropriate to meet bounded needs of a specific subset of their Enterprise not served by the CEO Product category.
- + [Exception conditions](#)
- + [In the case of CEO Messaging and Portal, whose contents are the same as those covered by CEO Lotus Communications, plus WebSphere Portal Enable, there is no conflict with a customer obtaining both types of](#)

CEO Product Categories and sharing the basic server infrastructure - such use is not considered to breach the client access restrictions described above.

- **How the Licensing 'Works'**
  - Each CEO Product Category license authorizes the use of a number of components [products] which are available individually outside the CEO Product Category under their own pricing metrics and License Information documents.
  - CEO Product Categories do not have their own overriding License Information document. Except where there is conflict with the CEO Product Category terms in the Passport Advantage and Passport Advantage Express Agreements, the component product License Information documents are applicable to their use.
  - CEO Product Categories are offered under their own unique per user pricing metric; Processor Value Units licensing/pricing is NOT applicable.

- **Are CEO Product Categories Bundles?**
  - Each CEO Product Category is offered as a **product**, intended to provide a set of functionality designed to address an enterprise-wide infrastructure need (e.g., mail, business intelligence, desktop productivity, etc.), or as add-on functionality to one of the other CEO Product Categories
  - CEO Product Categories are **not** bundles in the “bill of materials” meaning, so are **not** made up of individual licenses for the components, governed only by each component’s respective individual License Information document.
  - CEO Product Categories are **not** bundles in the “bill of materials” meaning, so are **not** made up of individual licenses for the components that can be managed or operated on at an individual product level.
- **Software Subscription and Support & Media/Download Access**
  - Like all licenses offered under Passport Advantage, CEO Product Category licenses come with 12 months of Software Subscription and Support included.
  - Software Subscription and Support renewal for CEO Product Category licenses must and can only be done at/by the Site(s) where the licenses are held.
  - Software Subscription and Support for CEO Product Categories is obtained at the CEO Product Category level only, not at the component level. Media and downloadable e-assemblies are, however, enabled at the component level since there is no top-level media or e-assembly covering all components of a CEO Product Category.
  - CEO Product Categories do not have a media pack at the CEO Product Category level – media packs are those of the individual components. The same is true for downloadable e-assemblies.
  - Like any other product offered under Passport Advantage or Passport Advantage Express, unless the customer and/or the country in which the customer Site is situated has been excluded by contract from participating, Software Subscription and Support for CEO Product category licenses will be subject to continuous renewal.
- **Changes to CEO Product Categories – Adding/Deleting Components**
  - Additional components may be added to a CEO Product Category over time, in which case customers with active Software Subscription and Support will automatically get access to those additional components. Customers who have allowed their Software Subscription and Support to lapse will not be licensed for, nor get access to those additional components.
  - Components of a CEO Product Category may be replaced by others over time as the general IBM portfolio evolves. Customers with active Software Subscription and Support will automatically get access to and support for those replacement components.
  - In rare cases, a component may be removed entirely from a CEO Product Category, possibly because the component has reached its announced end of life without a replacement. The customer can continue to use the component that was originally licensed under their CEO Product category but there will be no further updates to it, support will, at some point, cease to be provided, and no guarantee will be provided that the discontinued component will work with future releases of the other components included in the CEO Product Category.
- **Trade-up Rules**
  - Where trade-up parts have been provided for CEO Product Categories (either from other individual IBM products, other CEO Product Categories, or competitive

products), the rules are no different than for trade-ups for any other product offerings under Passport Advantage/Passport Advantage Express:

- There is no contractual requirement that the precursor product be on current active Software Subscription and Support in order to be eligible to obtain trade-up licenses
- Precursor products are defined by the IBM product brand owning the product being traded-up to. Sometimes this is explicit in the trade-up part description, sometimes in the License Information document or marketing materials for the product being traded-up to.
- There should always be “equivalence” - the customer should have the equivalent number of licenses for the precursor product as they will be obtaining using trade-up license parts.
- **Resources (hot links)**
  - [Passport Advantage web site](#)
  - [Passport Advantage Agreements and forms](#)
  - [IBM Base License Agreements and License Information Documents](#)
  - [Software Subscription and Support Brochure](#)
  - [Support Handbook](#)

NOTE: This guide is solely for informational purposes and may contain errors. It does not supplement or alter the terms of your agreement(s) with IBM. In order to understand your rights and obligations with respect to the Complete Enterprise Option, please refer to your Passport Advantage or Passport Advantage Express Agreement, and any associated contract documents referenced in it.