



## Licensing Guide

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## 1 Executive Summary

Microsoft Lync is an enterprise-ready unified communications platform that connects people everywhere, on Windows 8 and other devices, as part of their everyday productivity experience. Lync provides a consistent, single client experience for presence, instant messaging, voice, video and meetings. Lync supports multiparty HD video conferencing, modern “touch first” capabilities for fast and natural communications, and work anywhere scenarios that do not require a VPN for encryption.

Microsoft Lync offers three primary deployment options. It can be deployed on premises, hosted by Microsoft, or hosted by a partner. Depending on the option selected, there are different ways to purchase the appropriate license for Lync:

- **On premises:** To deploy Lync on premises, users need a server license for each Lync Server 2013 Front End instance and Client Access Licenses (CALs) for each user or device accessing Lync Server. Customers can acquire CALs on a standalone basis, or along with other Microsoft products in the Core CAL or Enterprise CAL (ECAL) Suites.
- **Microsoft-hosted:** For a Microsoft-hosted Lync deployment, a User Subscription License (USL) is needed for each user. Similar to on-premises Lync licensing, Users can purchase Lync Online standalone or in combination with other Microsoft products as part of an Office 365 Suite.
- **Partner-hosted:** Microsoft has a large partner ecosystem to help customers build, deploy, and service Microsoft Lync Server 2013 products and solutions. Contact a partner directly to host Lync infrastructure or help build a next-generation communications experience.

Licensing and information for these options will be described in more detail in this document.

## 2 Key Changes for Lync

### 2.1 One Server License

Lync Server 2013 is licensed in a single edition for all deployment types. Customers who purchased Software Assurance (SA) with Lync Server 2010 Standard Edition OR Lync Server 2010 Enterprise Edition will receive rights to Lync Server 2013.

### 2.2 External Connector functionality now included with Lync Server license

The Lync External Connector license has been discontinued, and the functionality covered by these licenses is now included in the Lync Server license. Customers who purchased SA for Lync External Connector licenses will receive rights to one Lync Server 2013 license for every External Connector license covered by SA.

### 2.3 New Lync Basic Client

Lync Basic is a less-feature rich Lync client targeted at Office 365, Lync Online, and CoreCAL customers without access to the full Lync 2013 client via Office ProPlus 2013 or standalone purchase.

Lync Basic 2013 requires the appropriate CAL or USL for the functionality deployed to the customer's end users.

### 2.4 Lync Room Systems

Lync Room Systems, available from select Lync hardware partners, deliver a full and familiar Lync experience brought to the meeting room and remote participants. Lync Room Systems are simple for IT Admins to deploy and easy for users to schedule, join from, and manage.

## 3 On Premises Licensing for Lync Server 2013

### 3.1 License Types

Lync Server 2013 on premises is licensed in the Server/Client Access License (CAL) model. There are two types of licenses relevant to this model.

- Server
- Client access

In addition to Server/CAL licenses, customers will need to acquire the appropriate client software licenses for their client devices.

### 3.1.1 Server Licenses

A server license must be assigned to each instance of Lync Front End Server that is being run.

### 3.1.2 Client Access Licenses (CALs)

To access Lync Server 2013 as an Active Directory (AD) authenticated user, a CAL is required in most cases. A CAL is a license that gives a user the right to access the services of the server.

There are three CALs for Lync:

- Lync Server 2013 Standard CAL
- Lync Server 2013 Enterprise CAL
- Lync Server 2013 Plus CAL

The Standard CAL is the base CAL and required for all authenticated internal users accessing Lync Server functions. Enterprise CAL and Plus CAL are supplemental to the Standard CAL—customers can choose to add just the Enterprise CAL, just the Plus CAL, or both CALs to a Standard CAL.

The feature details for server and CAL licensing are described in section **3.5 Lync Server 2013 Client Access Licenses**.

### 3.1.3 Device and User CALs

For each Lync CAL, there are two types of CALs available for purchase:

- User-based CAL (User CAL)
- Device-based CAL (Device CAL)

The choice between Device CAL and User CAL is based on customer preference.

With the User CAL, a CAL is purchased for each authenticated user who access Lync Server 2013 features, regardless of the number of devices the user will use to access Lync Server. Purchasing a User CAL may make more sense if users need roaming access to the corporate network using multiple, unknown, or additional devices than on-site users.

With the Device CAL, a CAL is purchased for every device that accesses Lync Server 2013, regardless of the number of users who use that device. Device CALs are useful for organizations whose workers share devices.

Examples of devices which connect to Lync Server 2013 features and require a license include, but are not limited to, are:

- personal computers (PCs) and
- IP phones



Devices which connect to Lync Server 2013 features and do not require either a user or device license include:

- Analog devices connected to Lync Server via a 3<sup>rd</sup> party gateway
- USB only peripheral devices for the PC

### 3.1.4 Client License

In order to access the functionality of Lync Server 2013 and have an authenticated experience, users need the Lync client application. There are several clients available for use with Lync:

- Microsoft Lync 2013 – the complete Lync client, which is part of the Office ProPlus 2013 Suite and can also be purchased standalone
- Microsoft Lync Basic 2013 – a less feature-rich Lync client, licensed at no charge
- Lync Windows Store app – a modern Lync experience for Windows 8 users, available via the *Windows Store* on Windows 8
- Mobile clients – Windows Phone, iOS, and Android clients, available to end users via the relevant platform stores
- Lync for Mac 2011 – the Lync client for Mac OS X desktop and laptop computers

In addition to these clients, individuals invited to Lync Meetings who do not have a Lync client installed will be able to use the Lync Web App, which enables a rich meeting experience via the browser. Supported OSes and browsers are detailed at <http://technet.microsoft.com/en-us/library/gg425820.aspx>.

## 3.2 Licensing External Users

External users may require a license in order to access a Lync Server 2013. There are four types of external users that may access a Lync Server 2013:

- Federated users
- Anonymous users
- External Authenticated users
- Public IM Connectivity users

### 3.2.1 Federated Users

A federated user is an external user that possesses valid credentials with a federated external Lync deployment and is authenticated on that basis by Lync Server 2013. Federation is a feature provided with the licenses of Lync Server 2013. Users connected by federation with another Lync deployment do not require a CAL as the federated party will already own the appropriate number of licenses.

### 3.2.2 Unauthenticated<sup>1</sup> Users

An unauthenticated, or anonymous, user is a person/device that does not have an identity in the Active Directory® Domain Services or Lync Server. Unlike a federated user, an anonymous user is not authenticated. With the Lync 2010 Attendee client, unauthenticated users can join a Microsoft Lync Server 2013 hosted meeting. There are no required licenses for unauthenticated users of Lync Server 2013.

### 3.2.3 External<sup>2</sup> Authenticated Users

An unlimited number of authenticated<sup>3</sup> external users may access a Lync Server 2013 in scenarios where the number of CALs is uncertain.

### 3.2.4 Public Instant Messaging Users

Lync Server 2013 provides organizations with the capability to connect their existing base of Lync Server 2013-enabled users to certain public IM service providers. Licensing and availability requirements for Public IM Connectivity depend on the service providers customers want to connect with, and Lync Server 2013 CALs.

- **AOL Instant Messenger (AIM):** Customers with Lync Server 2013 qualify for federation with AOL without additional licensing requirements. Service with AOL will be available so long as Microsoft and AOL maintain an agreement to continue the service. This mutual agreement will expire on June 30, 2014. In order to limit customer disruption when the service ends, we have discontinued the provisioning of additional customer domains. Until June 30, 2014, customers do not need to do anything to continue to support federated communications with AIM. Beyond this date (or for customers that would like to provision additional domains in the meantime), a substitute service is available directly from AOL.
- **Yahoo! Messenger:** As of September 1st, 2012, the Microsoft Lync Public IM Connectivity User Subscription License ("PIC USL") is no longer available for purchase for new or renewing agreements. Customers with active licenses will be able to continue to federate with Yahoo! Messenger until the service shut down

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<sup>1</sup> Unauthenticated: A user who does not have an identity in the Active Directory Domain Services or Lync Server

<sup>2</sup> External: A user typically not an employee and not defined in the customer's agreement

<sup>3</sup> Authenticated: A user or device who has an identity in the Active Directory Domain Services or Lync Server

date of June 30, 2014. The PIC USL was a per-user per-month subscription license that is required for Lync Server or Office Communications Server to federate with Yahoo! Messenger. Microsoft's ability to provide this service has been contingent upon support from Yahoo!, the underlying agreement for which is winding down.

- **XMPP Networks:** Federation with XMPP (Extensible Messaging and Presence Protocol) networks, such as Google Talk, can be enabled through the Lync Server 2013 XMPP Gateway. This Gateway provides presence sharing and Instant Messaging (IMing) with XMPP networks, and is available at no additional licensing cost.
- **Skype:** Skype connectivity is included in Lync licensing as documented in sections 3.4 and 4.2.

## 3.3 Lync Server 2013 Feature Details

### 3.3.1 Prerequisite Microsoft Technologies and Licenses

Lync Server 2013 requires Windows Server and Microsoft SQL Server to run and may also require other Microsoft technologies to enable certain functions. Lync Server licenses do not include licenses for those products.

- Windows Server is typically licensed through the Server/CAL model. For complete information on licensing for Windows Server, see the [Windows Server 2012 licensing page](#).
- SQL Server has two primary licensing models: per processor and Server/CAL. For complete information on licensing for SQL Server, see the [SQL Server 2012 licensing page](#).
- SQL Server Express is provided with the Lync Server 2013 standard deployment.
- Exchange Standard and Enterprise CALs or Exchange Online Plan 2 are required to take advantage of Lync Unified Messaging scenarios. For information on licensing Exchange, see the [Exchange licensing page](#).
- SharePoint may be required to enable some scenarios, such as Skill Search. For information on licensing SharePoint, see the [SharePoint licensing page](#).
- Office integration scenarios may require the appropriate Office suite. For more information on licensing Office, see the [Office licensing page](#).

## 3.4 Lync Server 2013 Client Access Licenses

### 3.4.1 Standard CAL

The Lync Server 2013 Standard CAL offers instant messaging and rich presence (IM/P) features. It provides users with real-time presence and enhanced IM along with PC-to-PC audio and video communications, as well as authenticated attendee experience for internal Lync Meetings.

### 3.4.2 Enterprise CAL

The Lync Server 2013 Enterprise CAL offers Lync Meetings, including Audio, Video, and Web conferencing features. It provides users the ability to create, moderate, and join conferences for collaboration with both internal and external users.

### 3.4.3 Plus CAL

The Lync Server 2013 Plus CAL offers enterprise voice capabilities that can enhance or replace traditional PBX systems. These capabilities include common calling features such as answer, forward, transfer, hold, divert, release, and park, along with Enhanced 9-1-1 calling for North America, support for analog devices and a broad range of both IP and USB user devices from partners.

### 3.4.4 New and Improved Features of the CALs

Figures 1-3 provide a detailed feature breakdown for each Lync Server 2013 CAL.

To enhance the collaboration experience for users with rights to Lync Server, the following shared features should be considered when considering CALs:

- Attendee and Presenter Experience. Users with a Lync Standard CAL can attend meetings and can be promoted to presenter in conferences initiated by an Enterprise CAL user. In order to have full collaboration capabilities including initiating or scheduling conferences, a user would need both the Standard CAL and Enterprise CAL.
- Audio Conferencing. Audio Conferencing is a shared feature of both the Enterprise CAL and Plus CAL users. In order to leverage the audio conferencing features such as initiating and scheduling an audio conference, a user will required either the Enterprise or Plus CAL or both CALs.

**Figure 1: Instant Messaging and Presence**

Feature	New or Improved	Standard CAL	Enterprise CAL	Plus CAL
See other's presence	Improved	●		
Manage own presence	Improved	●		
See presence in Office	Improved	●		
Contact management	Improved	●		
Contact card	Improved	●		
PC-PC and multiparty IM	Improved	●		
PC-PC and multiparty file transfer	Improved	●		
Persistent Chat	Improved	●		
PC-to-PC computer audio calling	Improved	●		
PC-to-PC computer video calling	Improved	●		
PC-to-PC IM, audio, and video with users at federated organizations	Improved	●		

PC-to-PC presence display, IM, audio, and video with Skype users <sup>4</sup>	New	•		
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**Figure 2: Lync Meetings**

Feature	New or Improved	Standard CAL	Enterprise CAL	Plus CAL
Initiate an impromptu multiparty (3+ users) meeting with audio and video (including dial-out to PSTN or PBX users)	Improved		•	
Initiate impromptu application sharing (1:1 or multiparty)	Improved		•	
Initiate impromptu white boarding session (1:1 or multiparty)	Improved		•	
Schedule and invite attendees to meetings with audio (including dial-out to PSTN or PBX users and hosted audio conferencing features), video, web conferencing and content sharing	Improved		•	
Automatically join meeting audio from PBX or other phone number	Improved		•	
Enable use of Lync Room Systems	New		•	

**Figure 3: Enterprise Voice**

Feature	New or Improved	Standard CAL	Enterprise CAL	Plus CAL
Initiate an impromptu multiparty (3+ users) meeting with audio (including dial-out to PSTN or PBX users)	Improved			•
UC and PBX Call Control	Improved			•
Visual Access to Voicemail	Improved			•
Advanced Voice Features	Improved			•
Routing Rules	Improved			•

<sup>4</sup> When available. Availability dates vary across Skype client platforms.

E911 Capabilities	Improved			•
Delegation	Improved			•
Response Group Agent and Agent Anonymity	Improved			•
Lync Phone Edition "Better Together" features	Improved			•
Dial out to PSTN	Improved			•
Receive calls from PSTN	Improved			•

### 3.5 Pricing for Lync Server 2013 Servers and CALs

All prices reflect pricing for Open (No Level) retail purchases within the United States and are in US dollars as of December 1, 2012. The prices listed are license only estimated prices (not including SA); reseller pricing can vary by program and volume. Please note that prices are subject to change; contact a reseller or Microsoft account representative for specific pricing.

Figure 4: Client and Server Pricing

Microsoft Lync Pricing	Prices
Lync 2013 (client)	\$31
Lync Server 2013	\$3,646

Figure 5: CAL Pricing

Lync Server CAL Pricing	Prices
Standard CAL (per device)	\$31
Standard CAL (per user)	\$36
Enterprise CAL (per device)	\$107
Enterprise CAL (per user)	\$123
Plus CAL (per device)	\$107
Plus CAL (per user)	\$123

### 3.6 Purchasing Lync Server 2013 as Part of a Microsoft CAL Suite

Standalone Lync CALs provide use rights to Lync Server 2013; however, the Lync Standard CAL can also be purchased as part of the Microsoft Core CAL Suite (CCAL) and the Lync Enterprise CAL can be purchased as part of the Microsoft Enterprise CAL (ECAL) Suite with other Microsoft products.

The Plus CAL can only be purchased standalone and is not included in either the Core CAL Suite or ECAL Suite offerings. Refer to [Microsoft CAL Suites](#) for more information about choosing to purchase Lync as part of a suite.

### 3.6.1 Plus CAL for Enterprise CAL Suite

As an additional benefit for purchasers of ECAL Suite, the features provided by the Plus CAL can be purchased at a price advantage when purchasing both the ECAL Suite and the “Plus CAL for ECAL Suite” offering. The “Plus CAL for ECAL Suite” is a CAL offering for ECAL Suite customers only. It provides the same features and functionality as the Plus CAL, however it is offered with a 20% saving from the standalone Plus CAL. This offering is only available in the programs where the ECAL Suite is offered. For further information on pricing and eligibility please contact your reseller.

## 4 Online Subscription Licensing for Microsoft-hosted Lync Online

Lync Online provides communications and collaboration solutions that can be provided as cloud services, on-premises services, or a combination of the two. This level of flexibility allows organizations to create solutions that meet their ever-changing business requirements.

### 4.1 Subscribing to Lync Online

#### 4.1.1 Lync Online User Subscription Licenses

Rather than purchasing server and CAL licenses for each Server and user/device that access Lync Server 2013, Lync Online is licensed through a subscription model in which each named user needs a User Subscription License (USL).

Lync Online offers two (2) USLs:

- Lync Online Plan 1 USL
- Lync Online Plan 2 USL

Lync Online USLs are inclusive of the prior USL. Lync Online Plan 2 USL includes all of the features and functionality of Plan 1 with additional features and functionality.

### 4.2 Lync Online USL Features

The features offered in Lync Online are similar to the features offered in Lync on premises, though there may be differences in the specific features available and the specific scenario coverage of a feature for Lync Server and Lync Online. The following provides a high-level feature overview for each Lync Online USL:

#### 4.2.1 Lync Online Plan 1 USL

Lync Online Plan 1 USL offers instant messaging and rich presence (IM/P) features. It provides users with real-time presence and enhanced IM along with PC-to-PC audio and video communications, as well as attendee experience for internally hosted conferences.

#### 4.2.2 Lync Online Plan 2 USL

In addition to the features of Lync Online Plan 1 USL, Plan 2 USL offers audio, video, and web conferencing features. It provides users the ability to create, moderate, and join conferences for collaboration with both internal and external users.

Lync Online PSTN Audio Conferencing and PSTN dialing out capabilities require a third-party Audio Conferencing provider.

For hosted conferences in Lync Online, an unauthenticated, or anonymous, user is a person/device that does not have an identity in Lync Online. With the Lync 2010 Attendee client,



unauthenticated users can join Lync Online hosted meeting. There are no required licenses for unauthenticated users of Lync Online.

### 4.2.3 New and Improved Features of the USLs

Figures 6-8 provide a detailed feature breakdown for each Lync Online USL.

**Figure 6: Instant Messaging and Presence**

Feature	New or Improved	Lync Online Plan 1	Lync Online Plan 2
See other's presence	Improved	●	●
Manage own presence	Improved	●	●
See presence in Office	Improved	●	●
Contact management	Improved	●	●
Contact card	Improved	●	●
PC-PC and multiparty IM	Improved	●	●
PC-PC and multiparty file transfer	Improved	●	●
PC-to-PC computer audio calling	Improved	●	●
PC-to-PC computer video calling	Improved	●	●
PC-to-PC IM, audio, and video with users at federated organizations	Improved	●	●
PC-to-PC presence display, IM, audio, and video with Skype users <sup>5</sup>	New	●	●

**Figure 7: Audio, Video, and Web Conferencing**

Feature	New or Improved	Lync Online Plan 1	Lync Online Plan 2
Initiate an impromptu multiparty (3+ users) meeting with PC-based audio and video	Improved		●
Initiate impromptu application sharing (1:1 or multiparty)	Improved		●
Initiate impromptu white boarding session (1:1 or multiparty)	Improved		●

<sup>5</sup> When available. Availability dates vary across Skype client platforms.

Schedule and invite attendees to meetings with audio, video, web conferencing and content sharing	Improved		•
Use a third-party dial in audio conferencing service integrated with Lync Online to host audio conferences and dial out to PSTN numbers from audio conferences	Improved		•
Enable Lync Room Systems usage	New		•

### 4.3 How to Buy Lync Online

All pricing for retail purchases within the United States are in estimated U.S. dollars; reseller pricing may vary by program and volume. Please note prices are subject to change; contact a reseller or Microsoft account representative for specific pricing. Lync Online is available for purchase in either Enterprise Agreements or Microsoft Online Subscription Agreements only.

**Figure 9: USL Pricing**

Lync Online USL Pricing	Prices
Lync Online Plan 1 USL	\$2/user/month
Lync Online Plan 2 USL	\$6.50/user/month

### 4.4 Purchasing Lync Online as Part of Office 365

Lync Online USLs can be purchased as part of Office 365. To learn more about the Office 365 Suite, visit [www.office365.com](http://www.office365.com).

Lync Online Plan 2 services are included with each Office 365 Suite, including Office 365 Small Business Premium, Office 365 Midsize Business, and Office 365 Enterprise.

#### 4.4.1 Office 365 Enterprise E4

Office 365 Enterprise E4 adds a subscription to Lync Server Plus CAL in addition to the modern Office and productivity infrastructure of [Office 365 Enterprise E3](#), enabling customers to deploy Lync on-premises or with a partner and realize the benefits of Lync Enterprise Voice with Exchange, SharePoint, and Office from Microsoft’s Office 365 cloud service.

### 4.5 Lync Online Client

Lync Online requires the separate purchase and installation of Microsoft Lync 2013 (or Lync for Mac 2011) to access the complete feature set of Lync Online Plan 1 and Plan 2. As a limited

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time offer, customers licensed for Lync Online receive one licensed copy of Lync for Mac 2011 at no cost with each trial or paid subscription license to Lync Online. The software may only be used with Lync Online, and all rights to use the software will terminate upon expiration of the underlying subscription license or migration to the next major new version of Lync Online and release of a new Mac client for Lync Online, whichever comes first. Customers may use the free Lync Basic 2013 client for their Windows-based end users.

Customers without access to the Lync client through the purchase of an Office 365 plan that includes the Lync client, purchase of the Microsoft Office ProPlus Suite, or standalone purchase of the Lync client will be able to use the Lync Basic 2013 client with Lync Online.<sup>6</sup>

## 4.6 Combining On-Premises and Online Licensing for Lync

### 4.6.1 Purchasing Lync Online When User Currently Owns Lync Server 2013

For some volume licensing customers with active SA, Lync Online subscriptions can be purchased at a discounted rate based on the licenses a user currently owns. Please contact a reseller for more information.

### 4.6.2 Purchasing Lync Online When User Currently Owns Microsoft Office Live Meeting 2007

Existing Microsoft Office Live Meeting users can automatically migrate to Lync Online as part of the new product version benefit. Customers can upgrade their USL of LiveMeeting to qualifying Lync Online USLs Live Meeting to Lync Online USL Use Rights will change on Lync Online launch and Live Meeting subscriptions will allow use of Lync Online based on the table below:

**Figure 10: Qualifying USL for Migration**

Qualifying Live Meeting USL	Successor Lync Online USL
Live Meeting Professional	Lync Online Plan 2
Live Meeting Standard	Lync Online Plan 2

<sup>6</sup> Note that Windows XP is not supported for Lync Basic 2013, therefore customers using Windows XP with Lync Online between the GA of the next major version of Lync Online and the end of support date for Windows XP will be receive one (1) licensed copy of Lync 2010 at no cost with each valid subscription license to Lync Online. The software may only be used with Lync Online, and all rights to use the software will terminate upon expiration of the underlying subscription license or release of the next major new version of Lync Online, or the end of support date for Windows XP, whichever comes first

Live Meeting Basic	Lync Online Plan 1
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### 4.6.3 Online Subscription with On-Premises Deployment

Lync Online USLs provide the flexibility to deploy the Lync functionality on premises and includes rights to the equivalent on premises CAL. The rights to the CAL are non-perpetual and expire when the underlying subscription rights expire.

Figure 11 provides a list of Lync Server CAL right available with each Lync Online or equivalent USL. USL provides rights to the functionality of the equivalent Lync Server 2013 CALs to deploy on premises.

**Figure 11: On Premises Use Rights with Lync Online and Office 365**

USL	Standard CAL	Enterprise CAL	Plus CAL
Lync Online Plan 1	•		
Lync Online Plan 2	•	•	
Office 365 – E1	•	•	
Office 365 – E2	•	•	
Office 365 – E3	•	•	
Office 365 – E4	•	•	•

Software Assurance benefits are not provided with the USLs. Additionally, purchasing appropriate server licenses is still required when deploying Lync Server CALs on premises.

## 5 Lync Partner Offerings

Microsoft has a large partner ecosystem to help customers build, deploy, and service Lync Server 2013 products and solutions. The licensing model is similar to Lync on premises or Lync Online; each device or user must have a valid license or subscription to Lync. Most partners offer a number of solutions with different levels of functionality.

To obtain more information about offers and pricing, contact a local partner.

### 5.1.1 Independent Software Vendors

The Microsoft Independent Software Vendor (ISV) Royalty Licensing Program offers partners the option to provide users with a unified solution that allows them to integrate Microsoft licensed software into other applications, and distribute the unified solution to end users. The ISV Royalty Licensing Program grants ISVs the right to license Microsoft products as part of unified solutions.

## 5.1.2 Services Providers License Agreements

The Microsoft Services Provider License Agreement (SPLA) program allows partners to license and host Microsoft products for customer use.

## 6 Device Licensing

Devices are important elements of the Lync experience, capturing and rendering voice, video, and content. As noted above in section 3.1.3, there are several types of devices that may connect to a Lync Server or to a Lync Client running on a Windows or Mac desktop machine, but that do not require a license. Devices that do not require a license to access Lync functionality include:

- Analog devices connecting to Lync Server via a gateway—these include analog phones, analog fax machines, and TTY/TTYD or DECT phones connected via an analog gateway
- USB Peripherals (headsets, USB speakerphones and handsets)

### 6.1 IP Phones

IP Phones for Lync are available in two types, Optimized for Lync and Compatible IP Phones Tested and Qualified for Lync.

#### 6.1.1 Optimized for Lync IP Phones

IP Phones that are designated as “Optimized for Lync) include the Lync Phone Edition client and support “Better Together” scenarios when connected via USB cable to a PC running a Lync client. Example Optimized for Lync IP Phones include the HP 4120 IP Phone, the Aastra 6726 IP Phone, the Polycom CX3000 IP Conference Phone, and the Polycom CX5000 HD Unified Conference Station (aka “RoundTable”). The rules for licensing Optimized for Lync IP Phones are as follows:

- Optimized phones that are primarily used by Lync users licensed to use Lync under a user based CAL approach do not require additional CALs to connect to Lync Server. Examples would be hot desking phones that are used in a shared cubicle environment where all users are licensed for Lync or conference room phones within an environment where all or most conference room users are licensed for Lync.

- Optimized phones that are primarily used by individuals not licensed to use Lync require a Lync Standard CAL and a Lync Plus CAL<sup>7</sup>. Examples would be common area phones in reception areas, conference phones in meeting rooms used primarily by covered employees not licensed for Lync, and shared phones used by multiple users not licensed under Lync user CALs (but who may use Lync via shared computers covered by Device CALs).

### 6.1.2 Compatible IP Phones Tested and Qualified for Lync

Compatible IP phones run manufacturer OS and do not require gateways for interoperability. They are fully tested and qualified to provide direct connectivity, core call functionality, presence awareness, and server management and provisioning.

Compatible IP Phones tested and qualified for Lync have the same license requirements as the Optimized for Lync IP Phones described in section 6.1.1 above.

## 6.2 Lync Room Systems

Lync Room Systems, available from select Lync hardware partners, deliver a full and familiar Lync experience brought to the meeting room and remote participants. Lync Room Systems are simple for IT Admins to deploy and easy for users to schedule, join from, and manage.

Lync Room Systems require a Standard CAL and an Enterprise CAL or Lync Online Plan 2.

## 7 Frequently Asked Questions

### 7.1 General Pricing and Licensing

**Q: Will I obtain rights to the Lync 2013 client when I purchase Lync Server 2013?**

A: No, Lync 2013 is not included with either the Server or CALs—it is available for purchase as a standalone license, as a component of Office ProPlus, or as a component of some Office 365 subscriptions. The Lync Server 2013 CALs provide the rights to access IM and Presence, Audio/Video/Web Conferencing, and Enterprise Voice features through the appropriate Lync client.

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<sup>7</sup> Lync phones do not require Windows CALs as they authenticate against Lync Server, not Active Directory and do not access Windows Server features

**Q: What are the licensing implications if I choose to run Lync Server 2013 in a virtual machine rather than directly on a physical server?**

A: One server license is required for each running instance of Lync Server 2013 Front End Server Role—whether it is installed natively on a physical machine or in a virtual machine. All other server roles can be deployed, in as many instances, physical or virtual, as your architecture requires.

**Q: If several users share the same desktop computer, do they each need separate Lync Server 2013 CALs?**

A: Customers may still license Lync Server 2013 with either per-user or per-device CALs. If several users share a desktop and do not individually access Lync Server 2013 from other locations (such as their home PCs or smartphones), then they can be licensed with just one device CAL.

**Q: Are there any licensing prerequisites for Lync Server 2013?**

A: Yes, Windows Server and SQL Server are required to run Lync Server 2013. For each Lync Server 2013 CAL, there are other possible prerequisites for underlying Microsoft technologies—primarily dependent on the features within Lync you would like to deploy. These include, but are not limited to, Windows Server CAL, Exchange Server Standard and Enterprise CAL, SharePoint Enterprise CAL, and Office Professional Plus.

**Q: Can I purchase a specific feature (such as Click to Call functionality) separately in place of licensing the CAL?**

A: No, features are available as part of the assigned CAL and are only available in the CAL or CAL Suite (if applicable).

**Q: What are the key licensing and pricing changes in Lync Server 2013?**

A: Lync Server 2013 now has a single server license with new pricing that covers all deployment scenarios. External Connector functionality is now included with the Lync Server 2013 license. There are now additional client options for customers without Office ProPlus. The price of user CALs has increased by 15%, device CAL prices are unchanged.

## 7.2 Lync Grandfathering Policy

**Q: If my customer purchased E-CAL Suite or OCS 2007 R2 Enterprise CALs prior to Lync 2010 GA, will subsequent true-ups of E-CAL Suite or OCS E-CALs on the same enrollment qualify for grandfathering to the Lync 2013 Plus CAL?**

A: Yes, customers who purchased ECAL Suite or OCS 2007 Enterprise CALs on their EA prior to Lync Server GA, subsequent true-ups of E-CAL Suite, or OCS E-CALs, they will receive the same grandfathering rights to Lync 2010 Plus CAL as the initial qualifying licenses purchased. For an overview of how True-ups work, please read: [Enterprise Agreement – True-up Guide](#).

## 7.3 Lync Online

### ***Q: How long can I stay on Live Meeting?***

A: Customers who have a Live Meeting Volume Licensing contract (either from Microsoft or through a partner) can remain on Live Meeting through the remainder of their current contract term.

### ***Q: How will dial-in conferencing be provided for Lync Online?***

A: Lync Online uses partners to provide dial-in conferencing capabilities. Additional information is available at [www.Office365.com](http://www.Office365.com).

## 7.4 Additional Assistance

### ***Q: After reviewing this guide, my license agreement, and the Microsoft Product List and Product Use Rights, I have additional questions about acquiring Lync or Lync Online. How can I get more assistance?***

A: Your Microsoft representative, or reseller has access to additional details and resources and can assist you.



## 8 Appendix

### 8.1 Lync Server 2010 Migration Paths

With the New Product Versions benefit of Software Assurance (SA), qualified customers of Office Communications Server receive rights to Lync Server 2013 for each license covered by SA.

**Figure 12: Qualifying Licenses for Migration under SA**

Qualifying Product	Successor Product
Lync Server 2010 Standard	Lync Server 2013
Lync Server 2010 Enterprise	
Lync Server External Connectors	
Lync Server 2010 Standard CAL	Lync Server 2013 Standard CAL
Lync Server 2010 Enterprise CAL	Lync Server 2013 Enterprise CAL
Lync Server 2010 Plus CAL	Lync Server 2013 Plus CAL

### 8.2 Grandfathering Policy

Though Enterprise Voice features were discontinued from the Enterprise CAL with Lync 2010, Microsoft is offering rights to the Plus CAL to customers who qualify. Qualified customers include those who purchased Office Communications Server 2007 R2 Enterprise CAL or the ECAL Suite and have maintained their SA benefits on the originally purchased Office Communications Server 2007 R2 Enterprise CAL or ECAL Suite.

#### 8.2.1 Summary of Key Changes:

Some voice-specific features previously offered with the Office Communications Server 2007 R2 Enterprise CAL were discontinued and are now only offered in the Lync Server 2013 Plus CAL. As a result of this change, the Lync Server 2013 Plus CAL and its associated features are not included with the ECAL Suite.

#### 8.2.2 Grandfathering Entitlements

Customers who have purchased Office Communications Server 2007 R2 Enterprise CAL or ECAL Suite and have maintained their SA benefits will benefit from one of the two following entitlements:

**Figure 13: Grandfathering entitlements under SA**

Qualifying License	Acquisition Date	Complimentary License and Benefits
Office Communications Server 2007 R2 Enterprise CAL, or Enterprise CAL Suite	Before December 1, 2010	Lync Server 2010 Plus CAL with Software Assurance

Office Communications Server 2007 R2 Enterprise CAL, or Enterprise CAL Suite	Before July 1, 2009	Lync Server 2013 Plus CAL with Software Assurance
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The following terms and conditions apply to the table above:

- **Migration Path:** Customers with active SA coverage for a given Qualifying license, as of the Acquisition Date, and upon the release of Lync Server 2010 (and Lync Server 2013, as noted in the table), are eligible to use software under the Complimentary License.
- **Use rights:** The right to use software under the Complimentary License under this offering expires when the right to use software under the Qualifying License expires. Use of that software is governed by the use rights for the software and the terms and conditions of the customer’s volume license agreement. This product condition and the customer’s evidence of the corresponding Qualifying License and SA document the right to use software under the Complimentary License.
- **License and Software Assurance:** Software Assurance coverage on the Complimentary License expires when the coverage on the Qualifying License expires. Upon expiration of SA coverage for the Qualifying License, the customer may acquire SA for the Complimentary License without the need to acquire a new license separately.
- **True-ups:** For Enterprise Agreement customers eligible for these complimentary licenses and rights as described above, Office Communications Server 2007 R2 Enterprise CALs and External Connectors acquired as part of a customer’s annual true-up process are also qualifying licenses.
  - For customers who first purchased a qualifying license before July 1, 2009, this applies to CALs and External Connector licenses acquired as part of their true-up process during enrollment term in effect as of December 1, 2010 and any renewal term starting before Lync Server 2013 general availability (December 1, 2012).
  - For customers who first purchased a qualifying license between July 1, 2009 and December 1, 2010, this applies to CALs and External Connector licenses acquired as part of their true-up process during the enrollment in effect as of December 1, 2010.
- **Subscription agreements:** For Enterprise Subscription, Campus and School, and Open Value Subscription Agreements, the same rights are granted on a temporary basis under the same conditions until the end of their current enrollment term (or agreement term in the case of Open Value). For customers who first purchased a qualified license before July 1, 2009, the temporary rights also apply during any renewal term commencing before Lync Server 2013 general availability (December 1, 2012). The customer must maintain continuous subscription coverage. These rights only become permanent upon exercise of the buy-out option, and remain subject to all the terms and conditions of the customer’s license agreement.

A customer's right to use and access Office Communications Server 2007 R2 under this offer is subject to the terms and conditions of a customer's license agreement, the Microsoft Product Use Rights, the Microsoft Product List, and other Microsoft documents incorporated by reference into the license agreement between Microsoft and the customer. That right expires upon the expiration or termination of the right to use software under the qualifying licenses (for example, Complimentary Licenses received under subscription programs expire when the qualifying licenses expire).

Customers who do not have SA, or do not maintain SA, on their Office Communications Server Enterprise CAL or the ECAL Suite at General Availability of Lync Server 2013 will not be qualified for the grandfathering offer and will be required to purchase the Lync Plus CAL in order to have rights to the Lync Server 2013 Plus CAL functionality.

Refer to the [Microsoft Product List Notes](#) for further information.