

# Passport Advantage / Passport Advantage Express License Transfer Request Form

**[for Source & Target Sites in the Same Enterprise]**

## **Purpose of this document**

This document is designed to be used for a Client to request that specified license entitlements be moved from one Site (source Site) within their Enterprise to another Site (target Site) also within their Enterprise. This document is applicable to both Passport Advantage Sites and Passport Advantage Express Sites.

## **Conditions for license transfer request approval**

License Transfer is only allowed when both source and target Sites are within the same Enterprise as defined in the IBM International Passport Advantage Agreement or the IBM International Passport Advantage Express Agreement, as applicable:

Enterprise for purposes of Passport Advantage and Passport Advantage Express includes the set of legal entities that, by more than 50%, owns, are owned by, or are under common ownership with the Originating Company.

The source Site, the one in which the license entitlements are currently recorded, and the target Site, the one to which the Client is requesting the license entitlements be moved to, must exist and, for a Passport Advantage target Site, the Passport Advantage Agreement must already be active; for example it should already have had a valid initial order recorded against one or more existing Sites under the Agreement number, or have been otherwise activated, at the time of the request.

**Otherwise, if the target Site is intended to be a new Passport Advantage Originating Site, i.e., that a new PA Agreement and Originating Site is to be created to serve as the target, please complete and sign Appendix A to this form and attach the applicable enrollment form to this transfer request form, completed (and signed if for a country where that is required) by the new Originating Site's Primary Contact, otherwise leave that appendix clear.**

It is permissible for a new Passport Advantage Express Site to be created, or for a new Passport Advantage Additional Site (representing the target Site of this request) to be set up under an existing active Passport Advantage Agreement, and to receive the transferred license and Software Subscription and Support entitlements once this request has been approved.

Invalid or incomplete requests will not be processed and will be returned to the requestor.

Licenses transferred to the target Site are subject to the Passport Advantage or Passport Advantage Express terms (as applicable) of the target Site. If it is currently in effect (i.e., not lapsed), Software Subscription and Support coverage dates for the transferred licenses will remain as they were at the source Site. For Passport Advantage target Sites, currently active Software Subscription and Support coverage for the transferred licenses must be synchronized with the target Site's Anniversary immediately upon this request being approved, by ordering a prorated Software Subscription and Support Renewal.

Upon IBM's approval and completed execution of this request, the source Site must immediately stop using the software for which the licenses have been moved to the target Site.

By completing and submitting this request, both source Site and target Site Primary Contacts (1) agree to the terms and conditions of transfer as set out in this document, (2) represent and warrant that they have full authority to do so on behalf of their respective companies' Sites, and (3) agree that their respective companies are responsible for, and will pay, any duty, taxes, levy or other fees (including withholding taxes, fees, customs or other duties) which may be imposed by any authority for the import and export of any such software licenses and Software Subscription and Support. This excludes those taxes based on IBM's net income. They also confirm that they are within the same Enterprise.



## How to use this document

The Primary Contact for the source Site must complete the information below and, if required, Appendix A and the applicable enrollment form. If the Primary Contact has questions about how to properly complete the form or if they do not have some of the details required, such as the order numbers (which can be found on IBM-issued Proofs of Entitlement (PoEs)), they can ask their IBM sales representative or business partner representative to help them gather that information. An example is provided below to illustrate the correct required completion. Both source and target Sites' Primary Contacts must provide their agreement to the transfer request, and the conditions to which it is subject, by providing their authorization.

The table should be completed by entering the information regarding the original license entitlement first, followed by a line detailing each subsequent renewal of S&S and/or each reinstatement of S&S. If space is insufficient, a spreadsheet (Excel or Symphony) can be provided that includes ALL the same columns and information requested. Here's an **example** of a completed entry:

	License Part Number	Associated S&S renewal or S&S reinstatement Part Number	Quantity	Part Description	S&S start/end dates associated with license or S&S renewal or S&S reinstatement order number	License Sales Order Number(s)	S&S Sales Order Number
01	D0001LL		100	Prod A Lic+12m S&S	6/2008-6/2009	576543	
		E0002LL	100	Prod A S&S renewal	7/2009-12/2009		587654
		D0003LL	100	Prod A S&S reinstate	8/2011-8/2012		598765
		E0002LL	100	Prod A S&S renewal	9/2012-12/2012		599954

In this example, the Client's PA anniversary is January. The license is acquired in June of 2008 with the included S&S coverage running until the end of June 2009, when S&S is renewed, prorated to the anniversary. At the end of that coverage, the Client allows S&S to lapse but a year and 8 months later decides to reinstate S&S, which then runs for 12 months (always) and at the end of that coverage renews S&S again on a prorated basis to align to the anniversary.

**Where both source and target Sites are in countries where electronic signature is supported, submission by email is allowable. In that case, it is REQUIRED** (1) that the email contain a fully completed version of this form, plus any additional sheets to accommodate the list of products included in the request or an attached spreadsheet that provides the same information, (2) that the email containing the completed form be sent to IBM from the **source** Site's Primary Contact and **INCLUDE** a forwarded email from the target Site's Primary Contact requesting the transfer to them, and agreeing to the conditions of the license transfer to the target Site, and certifying that the target Site meets the "Enterprise" requirement relative to the source Site, as detailed in the Agreement (Passport Advantage or Passport Advantage Express, as applicable).

Please return the completed form as indicated below, **based on the location of the source Site:**

**EMEA IOTS:** Customers: Please contact your IBM Sales Rep or preferred business partner in order to have your request submitted and/or for any assistance you may need.

**Note for IBM'ers:** The applicable DSW request database is available at this link [Notes:///80257317006CC945/](https://80257317006CC945/). IBM'ers can contact their local PA Coordinator if they require any assistance - link to the EMEA PA Coordinators Org Chart is here: [EMEA PACs](#)

**AP (general): Email:** GCG/Korea - CoEDL-DSW-CM@wwpdl.vnet.ibm.com  
ASEAN/ANZ - dswcmmnl@ph.ibm.com (IBM internal Notes ID: CoEMNL-DSW-CM/Philippines/IBM)  
ISA - isadswcm@in.ibm.com (IBM internal Notes ID: ISA DSW Customer Maintenance/India/IBM)

**Japan:** **Fax Gateway:** +81 3-5642-2217 (Mark for the attention of the PA Desk)

**Americas:** **Engage Support:** <https://engage-support.mybluemix.net/#welcome>  
**E-Mail:** DSWSoft@us.ibm.com

**US Federal Gov't:** [US Federal Engage Support:](#)



## Client Information:

	Source Site	Target Site
Company Name	The Ministry of Energy and Mining	Ministere de l'Energie, Des mines
Client's Passport Advantage Agreement & Site Number or Passport Advantage Express Site Number	Not applicable - 4160628	<a href="#">265345</a> - <a href="#">4194836</a>
Primary Contact Name		MHAMDI Jaouad
Reason for Transfer	This site is PAX.	This site is PA.

- ☐ Check this box if Source Site is to be terminated after execution of this transfer request (only applicable to PA sites).

## Information for Licenses Subject to this Request:

- ☒ Check this box if request is for ALL licensed software entitlements in the source Site as of the date of this request and then leave table below blank, otherwise complete for each licensed product.

**Note:** All available fields (columns) are mandatory for each item and if space is insufficient, please attach additional data on a separate sheet or sheets – a spreadsheet that provides all the information requested in the table below in the same format is acceptable.

	License Part Number	Associated S&S renewal or S&S reinstatement Part Number	Quantity	Part Description	S&S start/end dates associated with license, or S&S renewal or S&S reinstatement order number	License Sales Order Number(s)	S&S Sales Order Number
01							
02							
03							
04							
05							

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	License Part Num- ber	Associated S&S renewal or S&S rein- statement Part Number	Quantity	Part Description	S&S start/end dates associated with li- cense or S&S re- newal or S&S re- instatement order number	License Sales Order Number(s)	S&S Sales Order Number
06							
07							
08							
09							
10							
11							
12							
13							
14							
15							
16							
17							
18							

**Note:** For products that require the use of license keys: To avoid being noncompliant with license terms by having more keys active than valid license entitlements, Client, at the time

of IBM's approval of this request, must return license keys associated with any of the programs listed in the table above that utilize license keys, including those obtained from IBM's License Key Center at <https://licensing.subscribenet.com/control/ibmr/login>.

❖ Source Site Primary Contact Person Name : \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

❖ Target Site Primary Contact Person Name: Jouad MHAMDI

Signature: \_\_\_\_\_

Date: 22/03/2021

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# Passport Advantage / Passport Advantage Express License Transfer Request Form

## Appendix A – New PA Agreement Target Site Addendum

*Check the box below and complete only where necessary as instructed, otherwise leave blank*

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Migration to a new PA Agreement

This Appendix is to be used when the target Site of this transfer request is intended to be a **new Passport Advantage Agreement and associated Originating Site**.

The applicable completed (and signed if for a country where that is required) PA Enrollment Form must be attached to this Request when selecting this option, or an online enrollment for a new Originating Site completed and the resulting Agreement and Site numbers entered here: \_\_\_\_\_ (Note: completion of a PA enrollment form or online enrollment must be done by the customer. Completion by a business partner or other unauthorized person is invalid).

By signing below, Client agrees that the following three (3) definitions in the new Agreement are amended as follows:

- The Anniversary is the first day of \_\_\_\_\_. <enter month name only, e.g., "December">
- The Effective Date is the date this request is approved.
- The Client's initial RSVP level for the new Agreement is BL.

Any payments outstanding from agreements between Customer and IBM and/or its acquired companies remain payable.

If there is a conflict among the terms of the various documents, the terms of this Appendix prevail over the terms of the request, the applicable Agreements and any other applicable Attachments or Transaction Documents.

Client accepts the terms of this Appendix by signing it by hand or, where recognized by law, electronically. Once signed, i) any reproduction of this Request made by reliable means (for example, electronic image, photocopy or facsimile) is considered an original and ii) all licenses and Software Subscription and Support (or equivalent) entitlements specified in it are subject to it.

Agreed to on behalf of: <enter new Originating Site legal entity name>

By \_\_\_\_\_  
Target Site Primary Contact signature

Name (type or print):

Date:

Agreement number / Site number:

IBM Customer number:

Customer address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_