Agenda

1. Revised Peppol Agreement Framework

Agreement Revision Task Force

- Status report for SPC meeting
- January 26, 2021
- Jostein Frømyr, Peppol Agreement Coordinator

The future is open

Presentation outline

The TF Mandate and MVP approach

Timeline

Status in the different workstreams

WS A: Agreements
WS B: Operational Procedures
WS C: Internal Regulations

The mandate and MVP Approach

Some highlights from the mandate approved by MC at their meeting on December 15, 2020

- 3 deliverables expected:
  - ○ ***Proposals for a set of updated Agreement documents with annexes and attachments*** *so that all binding clauses of the contracting parties are handled in the agreements (and their annexes).*
  - ○ ***Proposals for a set of Operational Procedures (OP)*** *that will ensure a good and common understanding about how to implement the provisions of the Agreements and the Internal Regulations in day-to-day operations of the OpenPeppol Communities and Change Management Boards, as well as the Operating Office.*
  - ○ ***Proposals for a set of Internal Regulations (IR)*** *that will focus on the internal life (processes and procedures) of the association i.e. who does what.*

- Focusing on the MVP needed to support implementation of the revised agreement documents
  - ○ *Priority should be given to establishing a Minimally Viable Product (MVP) for IR (that sets priorities on implementing the terms of relevant articles of the statutes); considering if there is a need for Policies; and setting conditions and establishing interface with the Agreements, also from this angle.*

- The project is driven by the OpenPeppol members (PAC/SPC) with the support from OO resources
  - ○ *Each WS will have a Leader coming from the PA or the SP Communities. It is the role of the WS Leaders to plan, manage and monitor the work within each workstream, including managing the backlog of task to be done.*
  - ○ *A Lead Editor will be appointed in each WS, having as main function to ensure consistency within the workstream deliverable and between the three deliverables.*

The timeline

As per January 12, 2021

- Unfortunately, we were a bit delayed in starting the project

- Nor has work progressed as quickly as we had hoped
  - Questionable if we will meet the end January target date
  - Probably need 1st half of February before WS deliverables are available

Activities	Nov	Dec	2021 Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2022 Jan	Feb	Mar	Apr	May	Jun	Jul
Identify requirements for IR from Statutes																					
Identify requirements for IR from business needs																					
Agreement on to-do list																					
Develop IR 1.0 from requirements and available text																					
Adopt IR Through MC decision																					
Develop Operational Procedures																					
Adjustments to Agreement documents																					
Approval of policy documents (if needed) and Operational Procedures according to IR (incl. review)																					
Approval of updated agreement documents																					
PA agreement migration																					
SP Agreement migration																					

WS A on Agreement Annexes

- Status update
  - Analysis of agreements completed and issues identified
  - Potential annexes/attachments identified
  - Drafting underway

- Key learnings
  - Clarity and consistency must be maintained across the three work streams
  - Duplication of effort must be avoided – annex v regulation v procedure
  - A revised approach is required – principles-based annexes supported by detailed regulations and procedures

WS B on Operational Procedures

- Status update:
  - Agreed on Bronze-version (table of content, structure)
  - First input on
    - PA specific requirements operational procedure
    - Statistical reporting operational procedure
    - Change management operational procedure
  - Further input expected for Wednesday this week
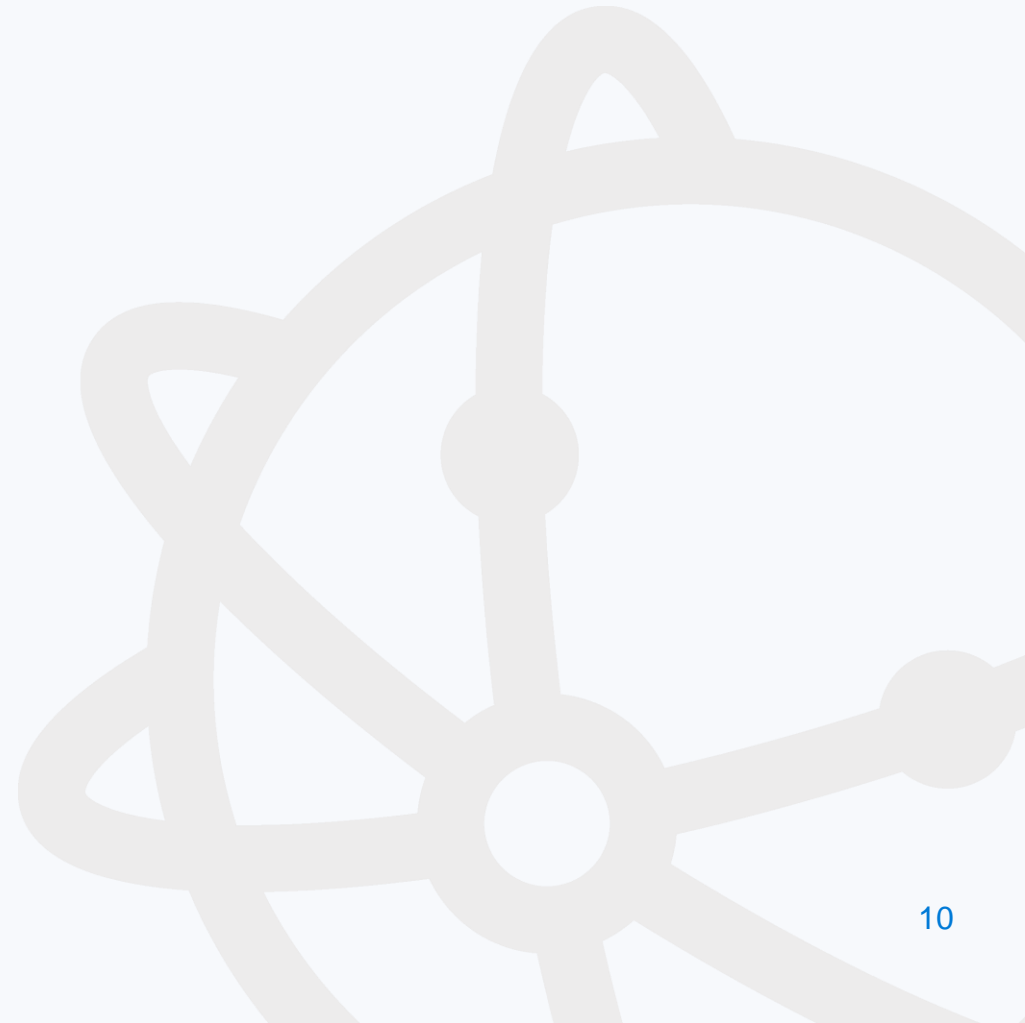
WS C on Internal Regulations

Status update:

- Table of content ready
- First chapters have content

Issues:

- Not enough people with the knowledge to write content
- Discussion on the decision-making processes

Service Providers' Perspective on New TIA Workgroups
Observations

- Most representation is from Peppol Authorities
  - Watch for communications from your PA
  - Participation from SPs is welcome
- Unclear how SPs work across PAs
- Structure is still in flux, the focus is on commercially viable agreements and procedures

Service Provider Lifecycle

Map agreements on to SP processes

1) **New Access Point**

- Join OpenPeppol

- Approach your local Peppol Authority (OpenPeppol if there is no local PA)

- Sign agreement with local Peppol Authority

- Certify your AP

- Accredit with other Peppol Authorities (optional)

Service Provider Lifecycle

Map agreements on to SP processes

2) Maintain Access Point

- Keep updated with Peppol BIS May and November releases

- Keep updated with eDelivery specifications

- Renew PKI certificate every 2 years (testbed revalidate at same time?)

- Provide regular reports to Peppol Authority, as specified.

- Renew OpenPeppol Membership annually

- Interact with OpenPeppol Communities

Service Provider Lifecycle

Map agreements on to SP processes

3) Onboarding Your Customers

- Ensure they sign terms compatible with TIA

- Conduct customer verification noting any local Peppol Authority requirements

- Add to SMP/SML

4) Transferring Customers Between Access Points

5) Offboarding Your Customers

Service Provider Lifecycle

Map agreements on to SP processes

6) Escalating Issues Between Access Points

- Identifying AP contact details from SMP

- Contact other AP in first instance

- Escalate to Peppol Authority or OpenPeppol Helpdesk

7) Get involved with OpenPeppol

- General Assembly

- Stakeholder Communities

- Change Management Boards

Service Provider Lifecycle

Feedback

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THANK YOU!

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