



Peppol

The future is open

PINT migration scenarios

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Topics

1. Objectives of a migration
2. Migration plan
3. Timelines



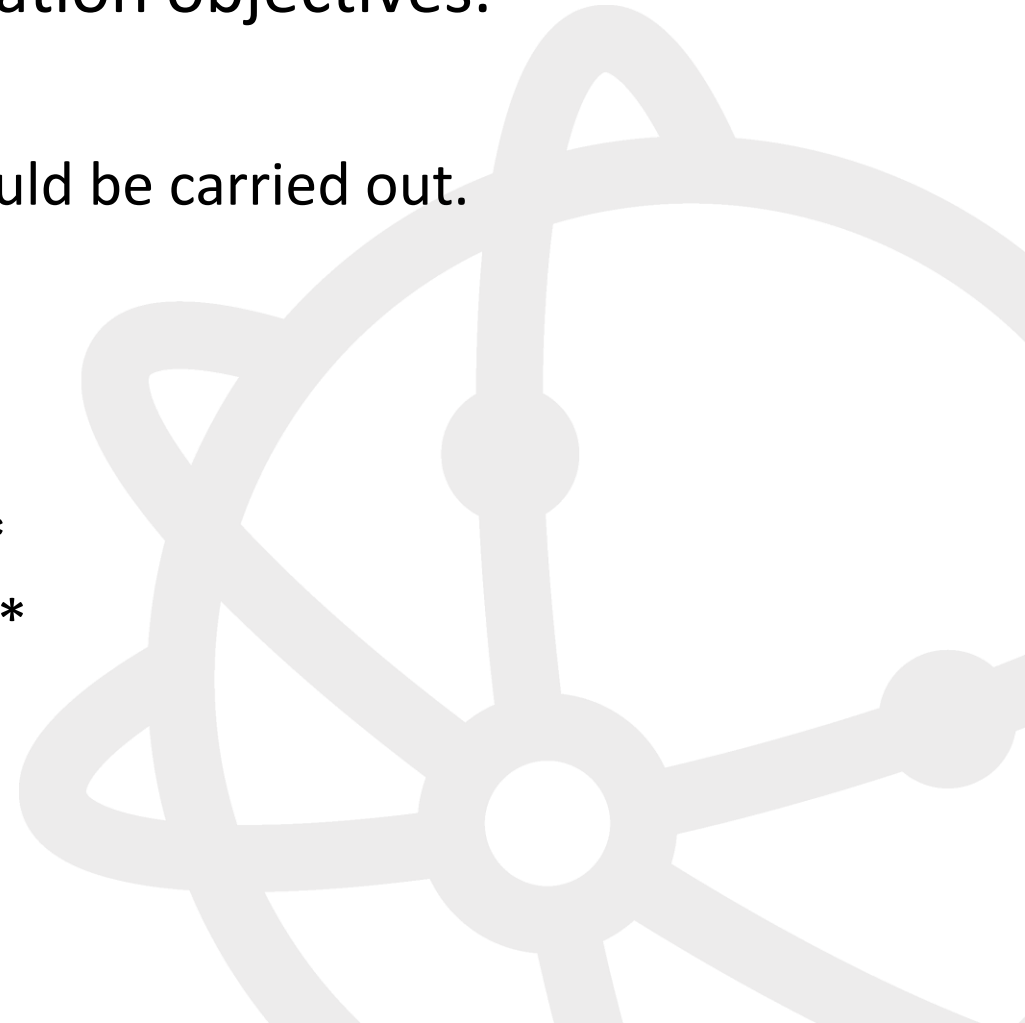
Objectives

Mandatory principle

- OpenPeppol applies a mandatory principle on receiving capabilities in order to ensure interoperability.
 - Those who want to receive particular document type, such as an invoice, must be willing and able to receive the mandatory invoice specification
- Today this is Peppol BIS Billing 3.0 in Europe and extensions on it for other regions.
- A PINT migration project would be to replace the current mandatory invoice specifications with ones that are based on PINT.

Migration to PINT

- PINT development team has analysed migration objectives.
- The analysis identifies and evaluates:
 - Options in the way that a migration to PINT could be carried out.
 - Tasks that need to be carried out.
 - Timelines in global and regional context.
- Main migration scenarios evaluated
 - Global mandate of receiving capability of pint*
 - Regional mandating of receiving capability for *
 - Optional receiving capability for pint*



Global receiving capability of pint*

- Receiving capabilities
 - pint* would be globally supported as receiving capability.
 - pint/pa* could in parallel be mandated by individual Peppol Authorities
- Benefits
 - A single invoice format with global supports allows for maximum interoperability.
 - Clarity in the network. One single specification.
 - Consistent with Peppol positioning as a global solution
- Disadvantages
 - All receivers need to have capability for international invoice even if they never receive one.
 - For many, the volume of international invoices is low and justifies little small implementation.
 - Effort and justification to require small receivers to setup the receiving capability.
 - Some countries point directly to Peppol BIS Billing 3.0 in legislation.(affects the timeline)
 - Depends on whether the legislation names Peppol BIS Billing 3.0
 - Receivers may feel they loose control of what they are receiving.
 - PINT may conflict with the legislation of a particular country.

Regional mandating of pint/pa* receiving capability

- Peppol would not mandate pint* on global.
- Peppol requires all PA to set a receiving capability
 - not necessarily pint based (this is current situation)
 - pint based
 - Each receiver in a jurisdiction must have pint/pa*
- Benefits
 - Each PA may use own timeline.
 - Small receivers are not required to add receiving capability for international invoices.
- Disadvantages
 - Less clear promotion of global interoperability.
 - Less clarity for Service Providers.
 - Higher risk that the pint model becomes unfocused and overtime less interoperable.
 - May function in the same way as the CIUS in the EN16931 which is now the compliance point.
- Is EU a region or is each PA in EU a region.
 - PA mandates Pint* or pint/pa*
 - PA mandates sending pint/pa for senders within in the jurisdiction (sending mandate)

pint* optional receiving capability

- * receiving capability is not mandated in the network but remains as an optional receiving capability that can be used by users.
- Benefits
 - No migration is required, those who want to use it do others don't.
 - Countries that refer to BIS 3 in contracts and legislation do not need to change.
- Disadvantages
 - „Global interoperability“ across the network is not realized.
 - SP will need to decide on the option of using two invoice specs.
 - Then the mandatory principle dictates the parallel use of whatever is mandatory.
 - There will be differences between SP capabilities, assuming that some don't support pint.
 - C1 and C4 will need to consider this when selecting SP.
 - Introduces a complexity in the end users choice of service providers and invoicing spec.
 - One solution sales pitch of Peppol is confused.

Assessment

- The main benefits of PINT are fully realised by globally mandating a pint* receiving capability.
- Keeping PINT optional would not realize the investment in PINT
- Regional mandates could be used as a step towards global.

Development of a migration plan aims for global support of pint*

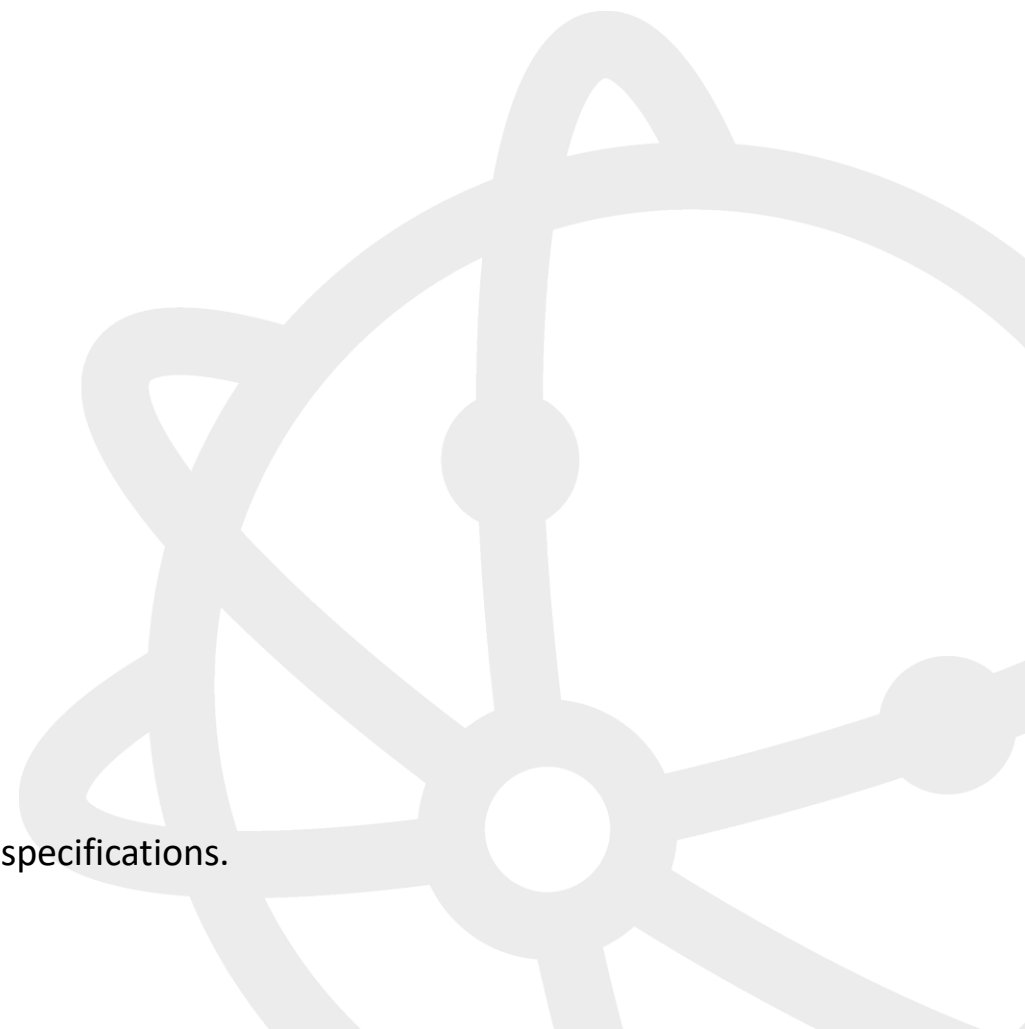
Migration plan

Receiving capability

- The ability to handle an invoice that complies with a specification.
- Key is that the “Sender KNOWS that the receiver handle it”.
- How the receiver handles the invoice does not matter to the sender
 - Automated processing.
 - Manual
 - A SP may forward it in a suitable format such as on .pdf
- The processing of a pint* invoice is similar to receiving non-tax invoice.
- A buyer who receives eInvoice at all is not the simplest buyer
 - Not a street vendor.
 - He has setup some capability for handling XML documents.

Main migration tasks

- **C1 – Sender MUST**
 - Send their invoices using a PINT based Customization ID
 - By change in their ERP system or by using C2 services.
- **C2 – Senders AP provider MUST**
 - Change the lookup for receiving capabilities to consider a wildcard.
- **C3 – Receivers AP provider MAY**
 - Design new services to deal with * functionality.
 - Update transformation services.
 - Updating archiving service.
- **C4 – Receiver MUST**
 - Register receiving capability for PINT based invoice.
 - Add capability to handle an international invoice.
 - Directly or by using C3 services.
 - Using automated handling or manual.
- **SMP Operators MUST**
 - Update SMP to enable registering wildcard receiving capabilities.
- **Peppol Authorities MUST**
 - Confirm if laws or regulations need to be updated, if they point to specific specifications.

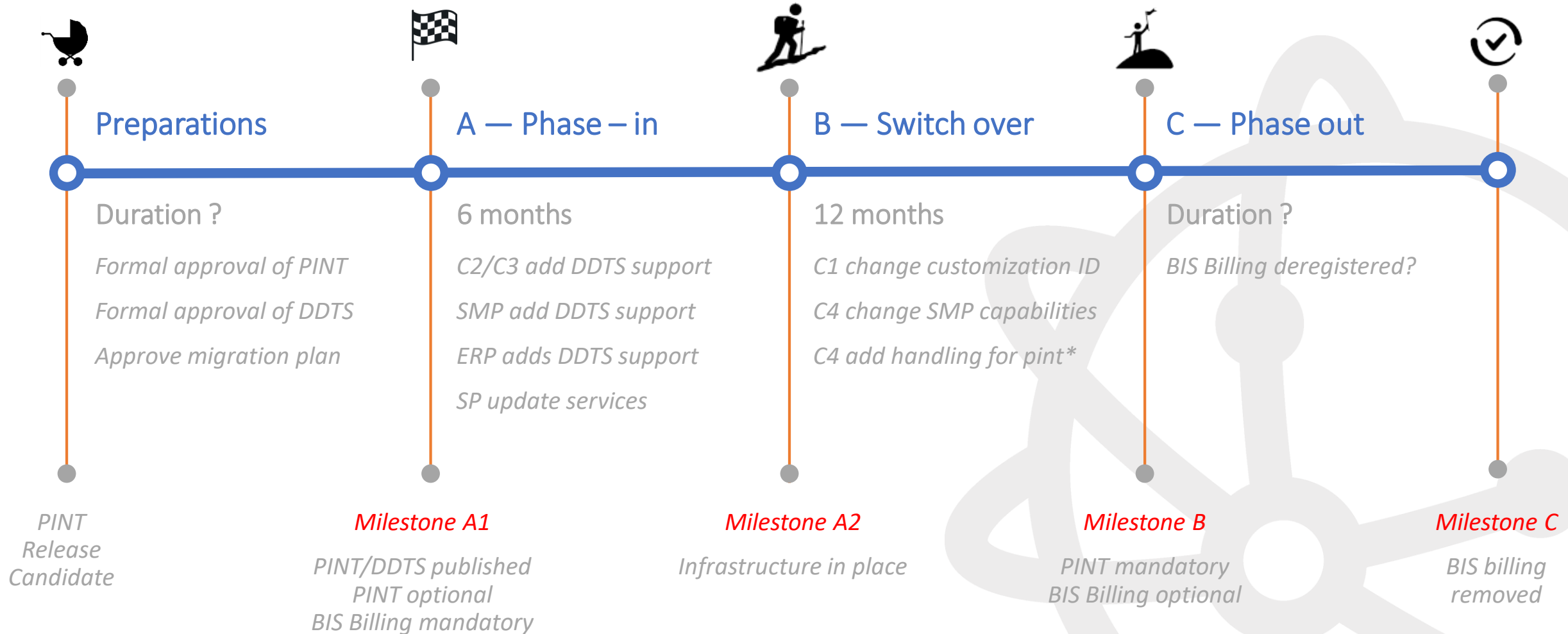


Migration to a new release







OpenPeppol internal regulations, section 2.2.5

1. Every new release of a technical artefact must be supported by a migration plan, which in itself must respect the migration requirements of the changes contained in the release and define how older versions of the artefact are to be phased out.
2. A migration plan must contain the following steps:
 - a. **Phase-in:** The new version is introduced in the Peppol Network as optional and relevant parties start to implement it in their systems.
 - b. **Switch-over:** The new version becomes mandatory, and the old version becomes optional in the Peppol Network.
 - c. **Phase-out:** The old version is no longer supported and will be removed from the Peppol Network.
3. The migration plan must contain the above steps as a minimum, clearly identifying what is expected of implementers at the beginning and end of each step and what are the time periods between milestones that delineate the beginning and end of each phase. Migration plans may contain more steps if relevant and appropriate.

Timeline



Regional adoption

	Phase A	Phase B  = becomes mandatory	Phase C
Global timeline			
EU			
AUNZ, SG			
JP			
MY			

The issue of change





THANK YOU!

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