

## OpenPEPPOL – Migration Policy

### Introduction

This document outlines OpenPEPPOL's Migration Policy. The Migration Policy is part of the Release Management of OpenPEPPOL's Life Cycle Management and Governance Framework. In this document, the guiding principles are presented. The principles are then applied on two transition events – **the migration from the transport protocol START to AS2 and SBDH (a message wrapper) and the migration from the current versions of PEPPOL BIS (v 1) to the updated PEPPOL BIS (v 2).**

### Principles

The Migration Policy is based on the following principles:

1. To allow a smooth and as friction free transition as possible, using two versions of the element subject to migration for new as well as existing end-users to prepare for an updated element must be allowed.
2. To ensure non-disrupted operations and full interoperability of the messages exchanged in the PEPPOL network, the period during which two parallel version are allowed should be as short as possible.
3. Any changes affecting the current (mandatory) PEPPOL element should be notified, communicated and agreed upon in the relevant coordinating community well in advance.
4. The migration is conducted in three steps at three different points in time, marked as "A", "B" and "C" and defined as follows:
  - a. **A – Phase in:** date at which the new/updated element is introduced as an **optional** element. At this date it should be able to download any specification for the new / updated PEPPOL element. The new / updated element is optional at this point in time.
  - b. **B – Transition:** the date at which the new/updated element replaces the current element as the **mandatory** element. The previously mandatory element becomes **optional**.
  - c. **C – Phase out:** the date after which the element that was mandatory at "A" and became optional at "B" is no longer supported in the PEPPOL network

## Relevance

### PEPPOL BIS:

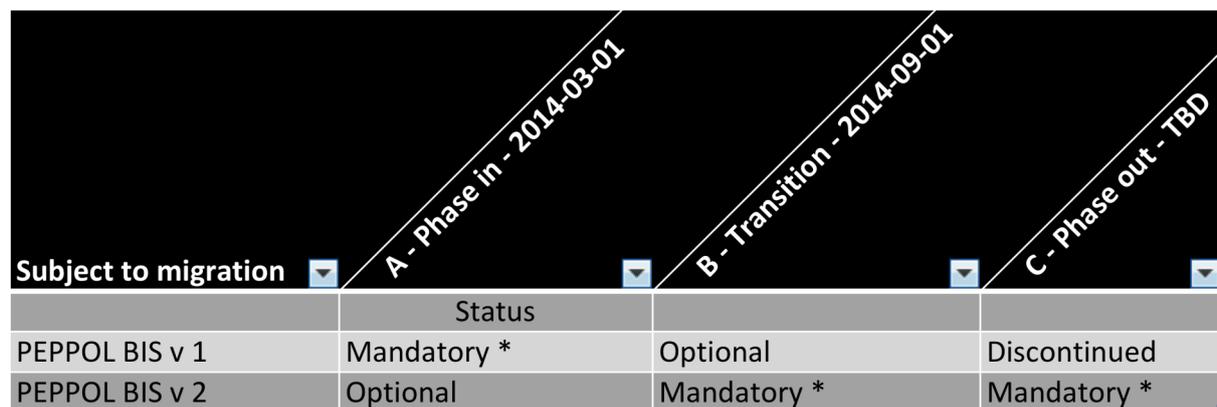
- The migration rules only apply to an **end user's** individual PEPPOL BIS registered in the SMP.
- The migration rules only applies for an updated PEPPOL BIS, i.e. when an existing and current PEPPOL BIS version exists.
- All PEPPOL participants need to adhere to the Migration Policy.

## Migration of PEPPOL BIS

### Introduction

This section describes how and when updated PEPPOL Business Interoperability Specifications (BIS) will be available for use.

### Migration overview



Subject to migration	A - Phase in - 2014-03-01	B - Transition - 2014-09-01	C - Phase out - TBD
	Status		
PEPPOL BIS v 1	Mandatory *	Optional	Discontinued
PEPPOL BIS v 2	Optional	Mandatory *	Mandatory *

\* Pertains to those PEPPOL BIS registered in a SMP by the individual end user according to the rules presented in sections “**Relevance**” and “**Migration Rules**”.

### Detailed description

#### Phase In (“A”):

“Phase in” is defined as the start date for the optional use of PEPPOL BIS “version 2” corresponding to the publication date when the new PEPPOL BIS specifications become available for download at [www.peppol.eu](http://www.peppol.eu). The date is set to **2014-03-01**.

#### Transition (“B”):

The Transition is defined as the period during which the current PEPPOL BIS (version 1) changes status from **mandatory to Optional**. The new PEPPOL BIS, version 2, becomes mandatory. The start date for the transition period is set to **2014-09-01** (which aligns with migration plans for the AS2 migration).

#### Phase-out (“C”):

After the phase-out, the old PEPPOL BIS (version 1) are not available and the document id's are removed from the **Policy for Identifiers document**. No date has yet been defined for the phase-out of PEPPOL BIS version 1).

### Migration rules - PEPPOL participants affected by the Migration Policy

The Migration Policy affects all end-users registered in a SMP according to the following rules:

- **Rule 1** – Relevance: End-users registered in a SMP **before** the phase-in date (“A”, 2014-03-01):
  - It is **mandatory** to support the current PEPPOL BIS versions (i.e. PEPPOL BIS v1) that are registered in the SMP for an individual end user until the transition (“B”, 2014-09-01). Supporting New PEPPOL BIS versions is optional until the transition (“B”, 2014-09-01).
- **Rule 2** – Relevance: End-users registered in a SMP **after** the phase-in date (“A”, 2014-03-01):
  - It is **optional** to support the current PEPPOL BIS versions (i.e. PEPPOL BIS v1) and the new PEPPOL BIS versions (i.e. PEPPOL BIS 2) that are registered in the SMP for an individual end user until the transition (“B”, 2014-09-01).
- **Rule 3** – Relevance: For all end-users after the transition (“B”, 2014-09-01):
  - After the transition, the PEPPOL BIS version 2 becomes mandatory and the PEPPOL BIS version 1 optional.

Please note that the above rules only apply for any individual PEPPOL BIS used by an end user that is registered in the SMP.

### PEPPOL BIS v2

The new PEPPOL BIS are listed and available for download at:

<http://www.peppol.eu/ressource-library/technical-specifications/post-award/mandatory>