Characteristic Bisimulations for Higher-Order Session Processes

Dimitrios Kouzapas\textsuperscript{1,2}, Jorge A. Pérez\textsuperscript{3}, and Nobuko Yoshida\textsuperscript{1}

\textsuperscript{1} Imperial College London, UK  
\textsuperscript{2} University of Glasgow, UK  
\textsuperscript{3} University of Groningen, The Netherlands

\begin{abstract}
Characterising contextual equivalence is a long-standing issue for higher-order (process) languages. In the setting of a higher-order $\pi$-calculus with sessions, we develop \textit{characteristic bisimilarity}, a typed bisimilarity which fully characterises contextual equivalence. To our knowledge, ours is the first characterisation of its kind. Using simple values inhabiting (session) types, our approach distinguishes from untyped methods for characterising contextual equivalence in higher-order processes: we show that observing as inputs only a precise finite set of higher-order values suffices to reason about higher-order session processes. We demonstrate how characteristic bisimilarity can be used to justify optimisations in session protocols with mobile code communication.
\end{abstract}

\section{Introduction}

\textbf{Context.} In \textit{higher-order process calculi} communicated values may contain processes. Higher-order concurrency has received significant attention from untyped and typed perspectives (see, e.g., [15, 6, 10, 7, 13]). In this work, we consider HO$\pi$, a higher-order process calculus with \textit{session primitives}: in addition to functional abstractions/applications (as in the call-by-value $\lambda$-calculus), HO$\pi$ contains constructs for synchronisation on shared names, session communication on linear names, and recursion. Thus, HO$\pi$ processes may specify protocols for higher-order processes that can be type-checked using \textit{session types} [4]. Although models of session communication with process passing exist [12, 3], their \textit{behavioural equivalences} remain little understood. Since types can limit the contexts (environments) in which processes can interact, typed equivalences usually offer \textit{coarser} semantics than untyped semantics. Hence, clarifying the status of these equivalences is key to, e.g., justify non-trivial optimisations in protocols involving both name- and process-passing.

A well-known behavioural equivalence for higher-order processes is \textit{context bisimilarity} [16]. This characterisation of barbed congruence offers an adequate distinguishing power at the price of heavy universal quantifications in output clauses. Obtaining alternative characterisations of context bisimilarity is thus a recurring, important problem for higher-order calculi—see, e.g., [15, 16, 6, 7]. In particular, Sangiorgi [15, 16] has given characterisations of context bisimilarity for higher-order processes; such characterisations, however, do not scale to calculi with \textit{recursive types}, which are essential to session-based concurrency. A characterisation that solves this limitation was developed by Jeffrey and Rathke in [6].
This Work. Building upon [15, 16, 6], our discovery is that linearity of session types plays a vital role in solving the open problem of characterising context bisimilarity for higher-order mobile processes with session communications. Our approach is to exploit the coarser semantics induced by session types to limit the behaviour of higher-order session processes. Formally, we enforce this limitation by defining a refined labelled transition system (LTS) which effectively narrows down the spectrum of allowed process behaviours, exploiting elementary processes inhabiting session types. We then introduce characteristic bisimilarity: this new notion of typed bisimilarity is tractable, in that it relies on the refined LTS for input actions and, more importantly, does not appeal to universal quantifications on output actions. Our main result is that characteristic bisimilarity coincides with context bisimilarity. Besides confirming the value of characteristic bisimilarity as an useful reasoning technique for higher-order processes with sessions, this result is remarkable also from a technical perspective, for associated completeness proofs do not require operators for name-matching, in contrast to untyped methods for higher-order processes with recursive types [6].

We explain how we exploit session types to define characteristic bisimilarity. Key notions are triggered and characteristic processes/values. Below, we write \( s?x.P \) for an input on endpoint \( s \), and \( \pi(V).Q \) for an output of value \( V \) on endpoint \( \pi \) (the dual of \( s \)). Also, \( R \xrightarrow{s?V} R' \) denotes an input transition along \( s \) and \( R \xrightarrow{(\nu \overline{m})s!V} R' \) denotes an output transition along \( s \), sending value \( V \), and extruding names \( \overline{m} \). Weak transitions are as usual. Throughout the paper, we write \( \mathcal{R}, \mathcal{R}', \ldots \) to denote binary relations on (typed) processes.

Issues of Context Bisimilarity. Context bisimilarity (\( \approx \), Def. 10) is an overly demanding relation on higher-order processes. There are two issues, associated to demanding clauses for output and input actions. A first issue is the universal quantification on the output clause of context bisimilarity. Suppose \( P \mathcal{R} Q \), for some context bisimulation \( \mathcal{R} \). We have:

\[
\text{(⋆) Whenever } P \xrightarrow{(\nu \overline{m})s!V} P' \text{ there exist } Q' \text{ and } W \text{ such that } Q \xrightarrow{(\nu \overline{m}_2)s!V} Q' \text{ and, for all } R \text{ with } \mathcal{R}x(R) = x, \langle (P' | R[V/x]) \mathcal{R} (\nu \overline{m}_2)(Q' | R[W/x]) \rangle.
\]

The second issue is due to inputs: it follows from the fact that we work with an early labelled transition system (LTS). Thus, an input prefix may observe infinitely many different values. To alleviate this burden, in characteristic bisimilarity (\( \approx^c \)) we take two (related) steps:

(a) We replace (⋆) with a clause involving a more tractable process closure; and
(b) We refine inputs to avoid observing infinitely many actions on the same input prefix.

Trigger Processes. To address (a), we exploit session types. We first observe that closure \( R[V/x] \) in (⋆) is context bisimilar to the process \( P = (\nu s)((\lambda z. z?x).R)s | \pi(V).0 \). In fact, we do have \( P \approx R[V/x] \), since application and reduction of dual endpoints are deterministic.

Now let us consider process \( T_V \) below, where \( t \) is a fresh name. If \( T_V \) inputs value \( \lambda z. z?x.R \) then we can simulate the closure of \( P \):

\[
T_V = t?(x).((\nu s)(xs | \pi(V).0) \quad \text{and} \quad T_V \xrightarrow{t?(\lambda z. z?x).R} P \approx R[V/x])
\]

Processes such as \( T_V \) offer a value at a fresh name; this class of trigger processes already suggests a tractable formulation of bisimilarity without the demanding clause (⋆). Process \( T_V \) in (1) requires a higher-order communication along \( t \). As we explain below, we can give an alternative trigger process; the key is using elementary inhabitants of session types.
Characteristic Processes and Values. To address (b), we limit the possible input values (such as \( \lambda x. z?x.R \)) above by exploiting session types. The key concept is that of characteristic process/value of a type, the simplest term inhabiting that type (Def. 11). This way, for instance, let \( S = ?(S_1 \rightarrow \diamond); ! (S_2); \) end be a session type: first input an abstraction, then output a value of type \( S_2 \). Then, process \( u?x.(u'|(s_2)); 0 \mid x s_1 \) is a characteristic process for \( S \) along \( u \). Given a session type \( T \), we write \( \{ T \}^u \) for its characteristic process along \( u \) (cf. Def. 11). Also, given value type \( U \), then \( \{ U \}^c \) denotes its characteristic value. As we explain now, we use \( \{ U \}^c \) to limit input transitions.

Refined Input Transitions. To refine input transitions, we need to observe an additional value, \( \lambda x. t?y.(y x) \), called the trigger value. This is necessary: it turns out that a characteristic value alone as the observable input is not enough to define a sound bisimulation (cf. Ex. 12). Intuitively, the trigger value is used to observe/simulate application processes. Based on the above discussion, we refine the transition rule for input actions (cf. Def. 13).

\[
P \xrightarrow{s?y(V)} P' \land (V = m \lor V \equiv \lambda x. t?y.(y x) \lor V \equiv \{ U \}^c \text{ with } t \text{ fresh}) \Rightarrow P' \xrightarrow{s?y(V)} P''
\]

Note the distinction between standard and refined transitions: \( s?y(V) \) vs. \( s?y(V) \). Our refined rule for (higher-order) input admits only names, trigger values, and characteristic values. Using this rule, we define an alternative, refined LTS on typed processes: we use it to define characteristic bisimulation (\( \approx^c \), Def. 14), in which the demanding clause (\( \ast \)) is replaced with a more tractable output clause based on characteristic trigger processes (cf. (2)).

Characteristic Triggers. Following the same reasoning as (1), we can use an alternative trigger process, called characteristic trigger process with type \( U \) to replace clause (\( \ast \)):

\[
t \Leftarrow V : U \overset{\text{def}}{=} t?x.((\nu s)(\{ ?(U); \text{end} \}^s \mid \pi!(V).0)
\]

This is justified because in (1) \( T_V \overset{c?y(U; \text{end})}{\longrightarrow} (\nu s)(\{ ?(U); \text{end} \}^s \mid \pi!(V).0) \). Thus, unlike process (1), the characteristic trigger process in (2) does not involve a higher-order communication on \( t \). In contrast to previous approaches [15, 6] our characteristic trigger processes do not use recursion or replication. This is key to preserve linearity of session endpoints.

It is also noteworthy that \( \text{HO} \pi \) lacks name matching, which is usually crucial to prove completeness of bisimilarity—see, e.g., [6]. Instead of matching, we use types: a process trigger embeds a name into a characteristic process so to observe its session behaviour.

Outline. Next we present the session calculus \( \text{HO} \pi \). §3 gives the session type system for \( \text{HO} \pi \) and states type soundness. §4 develops characteristic bisimilarity and states our main result: characteristic and context bisimilarities coincide for well-typed \( \text{HO} \pi \) processes (Thm. 16). §5 concludes with related works.

# 2 A Higher-Order Session \( \pi \)-Calculus

We introduce the Higher-Order Session \( \pi \)-Calculus (\( \text{HO} \pi \)). \( \text{HO} \pi \) includes both name- and abstraction-passing, shared and session communication, as well as recursion; it is essentially the language proposed in [12] (where tractable bisimilarities are not addressed).
We define the dual operation over names

\[ \text{Client sends mobile processes to both hotels to automatically negotiate and book a room.} \]

the choice down to two hotels, and requires a quote from the two in order to decide. The round-trip time (RTT) required for taking quotes from the two hotels is not optimal, so the client sends mobile processes to both hotels to automatically negotiate and book a room.

We now present two HOπ implementations of this scenario. For convenience, we write
if \( e \) then \((P_1 \; ; P_2)\) to denote a conditional process that executes \(P_1\) or \(P_2\) depending on boolean expression \(e\) (encodable using labelled choice). The first implementation is as follows:

\[
P_{xy} \stackrel{\text{def}}{=} x!(\text{room}).x?!(\text{quote}).y!(\text{quote}).y' \begin{cases} \text{accept} : x \triangleleft \text{accept}.x!\langle \text{credit} \rangle.0, \\ \text{reject} : x \triangleleft \text{reject}.0 \end{cases}
\]

\[
\text{Client}_1 \stackrel{\text{def}}{=} (\nu h_1. h_2)(s_1!(\lambda x. P_{xy}\{h_1/y\}).s_2!(\lambda x. P_{xy}\{h_2/y\}).0 | \\
\bar{h}_1!(x).\bar{h}_2!(y).\text{if } x \leq y \text{ then } (\bar{h}_1 \triangleleft \text{accept}.\bar{h}_2 \triangleleft \text{reject}.0 ; \bar{h}_1 \triangleleft \text{reject}.\bar{h}_2 \triangleleft \text{accept}.0))
\]

Process \(\text{Client}_1\) sends two abstractions with body \(P_{xy}\), one to each hotel, using sessions \(s_1\) and \(s_2\). That is, \(P_{xy}\) is the mobile code: while name \(x\) is meant to be instantiated by the hotel as the negotiating endpoint, name \(y\) is used to interact with \(\text{Client}_1\). Intuitively, process \(P_{xy}\) (i) sends the room requirements to the hotel; (ii) receives a quote from the hotel; (iii) sends the quote to \(\text{Client}_1\); (iv) expects a choice from \(\text{Client}_1\) whether to accept or reject the offer; (v) if the choice is accept then it informs the hotel and performs the booking; otherwise, if the choice is reject then it informs the hotel and ends the session. \(\text{Client}_1\) instantiates two copies of \(P_{xy}\) as abstractions on session \(x\). It uses two fresh endpoints \(h_1, h_2\) to substitute channel \(y\) in \(P_{xy}\). This enables communication with the mobile code(s). In fact, \(\text{Client}_1\) uses the dual endpoints \(\bar{h}_1\) and \(\bar{h}_2\) to receive the negotiation result from the two remote instances of \(P\) and then inform the two processes for the final booking decision.

Notice that the above implementation does not affect the time needed for the whole protocol to execute, since the two remote processes are used to send/receive data to \(\text{Client}_1\).

We present now a second implementation in which the two mobile processes are meant to interact with each other (rather than with the client) to reach to an agreement:

\[
R_x \stackrel{\text{def}}{=} \text{if } \text{quote}_1 \leq \text{quote}_2 \text{ then } (x \triangleleft \text{accept}.x!\langle \text{credit} \rangle.0 ; x \triangleleft \text{reject}.0)
\]

\[
Q_1 \stackrel{\text{def}}{=} x!(\text{room}).x?!(\text{quote}_1).y!(\text{quote}_1).y?!(\text{quote}_2).x/\langle \text{credit} \rangle.0
\]

\[
Q_2 \stackrel{\text{def}}{=} x!(\text{room}).x?!(\text{quote}_1).y?(\text{quote}_2).y!\langle \text{quote}_1 \rangle.0
\]

\[
\text{Client}_2 \stackrel{\text{def}}{=} (\nu h)(s_1!(\lambda x. Q_1\{h/y\}).s_2!(\lambda x. Q_2\{\bar{h}/y\}).0)
\]

Processes \(Q_1\) and \(Q_2\) negotiate a quote from the hotel in the same fashion as process \(P_{xy}\) in \(\text{Client}_1\). The key difference with respect to \(P_{xy}\) is that \(y\) is used for interaction between process \(Q_1\) and \(Q_2\). Both processes send their quotes to each other and then internally follow the same logic to reach to a decision. Process \(\text{Client}_2\) then uses sessions \(s_1\) and \(s_2\) to send the two instances of \(Q_1\) and \(Q_2\) to the two hotels, using them as abstractions on name \(x\). It further substitutes the two endpoints of a fresh channel \(h\) to channels \(y\) respectively, in order for the two instances to communicate with each other.

The differences between \(\text{Client}_1\) and \(\text{Client}_2\) can be seen in the sequence diagrams of Fig. 2. We will assign session types to these client processes in Example 4. Later on, we will show that they are behaviourally equivalent using characteristic bisimilarity; see Prop. 4.3.

### 3 Types and Typing

We define a session typing system for \(\text{HO}^{\pi}\) and state its main properties. Our system distills the key features of \([12, 13]\). We give selected definitions; see \([1]\) for a full description.

#### Types.

The syntax of types of \(\text{HO}^{\pi}\) is given below:

- **(value)** \(U ::= C \mid L\)
- **(session)** \(S ::= !U \mid U \mid ?U \mid \mu T.S \mid t \mid \{l_i : S_i\}_{i \in I} \mid \&\{l_i : S_i\}_{i \in I}\)
- **(name)** \(C ::= S \mid \langle S \rangle \mid \langle L \rangle\)
- **(abstr)** \(L ::= U \rightarrow \infty \mid U \rightarrow \infty\)
We rely on a typing system that is similar to the one developed in [12, 13]. We state the type soundness result for \( HO\pi \) processes; see [1] for details of the associated proofs.

Typing Environments and Judgements. Typing \textit{environments} are defined below:

\[
\begin{align*}
\Gamma & ::= \emptyset \mid \Gamma \cdot x : U \rightarrow \cdot \mid \Gamma \cdot u : \langle S \rangle \mid \Gamma \cdot u : \langle L \rangle \mid \Gamma \cdot X : \Delta \\
\Lambda & ::= \emptyset \mid \Lambda \cdot x : U \leftarrow \cdot \mid \Delta ::= \emptyset \mid \Delta \cdot u : S
\end{align*}
\]

\( \Gamma \) maps variables and shared names to value types, and recursive variables to session environments; it admits weakening, contraction, and exchange principles. \( \Lambda \) maps variables to linear higher-order types, and \( \Delta \) maps session names to session types. Both \( \Lambda \) and \( \Delta \) are only subject to exchange. The domains of \( \Gamma, \Lambda \) and \( \Delta \) are assumed pairwise distinct. \( \Delta_1 \cdot \Delta_2 \) is the disjoint union of \( \Delta_1 \) and \( \Delta_2 \). We define \textit{typing judgements} for values and processes:

\[
\Gamma; \Lambda; \Delta \vdash V \triangleright U \\
\Gamma; \Lambda; \Delta \vdash P \triangleright \cdot
\]

The first judgement says that under environments \( \Gamma; \Lambda; \Delta \) value \( V \) has type \( U \); the second judgement says that under environments \( \Gamma; \Lambda; \Delta \) process \( P \) has the process type \( \cdot \). The type soundness result for \( HO\pi \) (Thm. 3) relies on two auxiliary notions on session environments:

\begin{itemize}
\item A session environment \( \Delta \) is \textit{balanced} if whenever \( s : S_1, \bar{s} : S_2 \in \Delta \) then \( S_1 \) dual \( S_2 \).
\item We define the reduction relation \( \rightarrow \) on session environments as:
\end{itemize}

\[
\begin{align*}
\Delta \cdot s : \langle U \rangle ; S_1 \cdot \bar{s} : \langle \bar{U} \rangle ; S_2 & \rightarrow \Delta \cdot s : S_1 \cdot \bar{s} : S_2 \\
\Delta \cdot s : \oplus \{ l_i : S_i \}_{i \in I} \cdot \bar{s} : \& \{ l_i : S'_i \}_{i \in I} & \rightarrow \Delta \cdot s : S_k \cdot \bar{s} : S'_k (k \in I)
\end{align*}
\]

We rely on a typing system that is similar to the one developed in [12, 13]. We state the type soundness result for \( HO\pi \) processes; see [1] for details of the associated proofs.
Theorem 3 (Type Soundness). Suppose $\Gamma; \emptyset; \Delta \vdash P \triangleright \diamond$ with $\Delta$ balanced. Then $P \rightarrow P'$ implies $\Gamma; \emptyset; \Delta' \vdash P' \triangleright \diamond$ and $\Delta = \Delta'$ or $\Delta \rightarrow \Delta'$ with $\Delta'$ balanced.

Example 4 (Hotel Booking Revisited). Assume $S = !\{\text{quote}\}; \& \{\text{accept} : \text{end}, \text{reject} : \text{end}\}$ and $U = !\{\text{room}\}; !\{\text{quote}\}; \& \{\text{accept} ; !\{\text{credit}\}, \text{end}, \text{reject} : \text{end}\}$. We give types to the client processes of Ex. 1:

$\emptyset; \emptyset; s_1 :: (U \rightarrow \infty); \text{end} \cdot s_2 :: (U \rightarrow \infty); \text{end} \vdash \text{Client}_1 \triangleright \diamond$

$\emptyset; \emptyset; y :: !\{\text{quote}\}; \text{end} \vdash \lambda x. P_{x y} \triangleright U \rightarrow \infty$

$\emptyset; \emptyset; s_1 :: (U \rightarrow \infty); \text{end} \cdot s_2 :: (U \rightarrow \infty); \text{end} \vdash \text{Client}_2 \triangleright \diamond$

4 Characteristic Session Bisimulation

We develop a theory for observational equivalence over session typed HO$\pi$ processes that follows the principles laid in our previous works [9, 8]. We introduce characteristic bisimulation (Def. 14) and prove that it coincides with reduction-closed, barbed congruence (Thm. 16).

We begin by defining an (early) labelled transition system (LTS) on untyped processes (§4.1). Then, using the environmental transition semantics (§4.2), we define a typed LTS to formalise how a typed process interacts with a typed observer.

4.1 Labelled Transition System for Processes

Interaction is defined on action labels $\ell$:

$$\ell ::= \tau \mid n?(V) \mid (\nu \vec{m})!n!(V) \mid n \oplus l \mid n \& l$$

Label $\tau$ defines internal actions. Action $(\nu \vec{m})!n!(V)$ denotes the sending of value $V$ over channel $n$ with a possible empty set of restricted names $\vec{m}$ (we may write $n!(V)$ when $\vec{m}$ is empty). Dually, the action for value reception is $n?(V)$. Actions for select and branch on a label $l$ are denoted $n \oplus l$ and $n \& l$, resp. We write $\text{fn}(\ell)$ and $\text{bn}(\ell)$ to denote the sets of free/bound names in $\ell$, resp. Given $\ell \neq \tau$, we write $\text{subj}(\ell)$ to denote the subject of $\ell$.

Dual actions occur on subjects that are dual between them and carry the same object; thus, output is dual to input and selection is dual to branching. Formally, duality on actions is the symmetric relation $\simeq$ that satisfies: (i) $n \oplus l \simeq n \& l$ and (ii) $(\nu \vec{m})!n!(V) \simeq ?!(\{x \mid x \in \text{fn}(\ell)\})$.

The LTS over untyped processes is given in Fig. 3. We write $P_1 \xrightarrow{\ell} P_2$ with the usual meaning. The rules are standard [9, 8]. A process with an output prefix can interact with the environment with an output action that carries a value $V$ (rule $\langle \text{Snd} \rangle$). Dually, in rule $\langle \text{Rv} \rangle$, a receiver process can observe an input of an arbitrary value $V$. Select and branch processes observe the select and branch actions in rules $\langle \text{Sel} \rangle$ and $\langle \text{Bra} \rangle$, resp. Rule $\langle \text{Res} \rangle$ closes the LTS under restriction if the restricted name does not occur free in the observable action. If a restricted name occurs free in the carried value of an output action, the process performs scope opening (rule $\langle \text{New} \rangle$). Rule $\langle \text{Ruc} \rangle$ handles recursion unfolding. Rule $\langle \text{Tau} \rangle$ states that two parallel processes which perform dual actions can synchronise by an internal transition. Rules $\langle \text{Parl} \rangle$ and $\langle \text{Parr} \rangle$ and $\langle \text{Alpha} \rangle$ close the LTS under parallel composition and $\alpha$-renaming.

4.2 Environmental Labelled Transition System

Fig. 4 defines a labelled transition relation between a triple of environments, denoted $(\Gamma_1, \Lambda_1, \Delta_1) \xrightarrow{\ell} (\Gamma_2, \Lambda_2, \Delta_2)$. It extends the LTSs in [9, 8] to higher-order sessions. Notice that due to weakening we have $(\Gamma', \Lambda_1, \Delta_1) \xrightarrow{\ell} (\Gamma', \Lambda_2, \Delta_2)$ if $(\Gamma, \Lambda_1, \Delta_1) \xrightarrow{\ell} (\Gamma', \Lambda_2, \Delta_2)$. 

Def. 14 (Characteristic Bisimulation). We say $P \sim P'$ if $P \sim \bigoplus_{\ell} P'$. It extends the LTSs in [9, 8] to higher-order sessions. Notice that due to weakening we have $(\Gamma', \Lambda_1, \Delta_1) \xrightarrow{\ell} (\Gamma', \Lambda_2, \Delta_2)$ if $(\Gamma, \Lambda_1, \Delta_1) \xrightarrow{\ell} (\Gamma', \Lambda_2, \Delta_2)$. 

We give types to the client processes of Ex. 1:

$\emptyset; \emptyset; s_1 :: (U \rightarrow \infty); \text{end} \cdot s_2 :: (U \rightarrow \infty); \text{end} \vdash \text{Client}_1 \triangleright \diamond$

$\emptyset; \emptyset; y :: !\{\text{quote}\}; \text{end} \vdash \lambda x. P_{x y} \triangleright U \rightarrow \infty$

$\emptyset; \emptyset; s_1 :: (U \rightarrow \infty); \text{end} \cdot s_2 :: (U \rightarrow \infty); \text{end} \vdash \text{Client}_2 \triangleright \diamond$
We illustrate rule \( \text{(Sel)} \)
\[
\frac{s \prec l.P \xrightarrow{\text{Sel}} P}{\implies \frac{s \triangleright l.\{P_i\}}{P_j \ (j \in I)}}
\]
defines internal transitions: it keeps the session environment unchanged or reduces it (Def. 2).

\[\text{Rule subtracted from the resulting type tuple. The prefix of session environments of names are defined by rules }\]
\[\text{which restrict the scope of value }\]
\[\text{in the session environment: if it were present the only possible communication would be the interaction between the two endpoints (cf. rule }\text{[Tau]}\text{). Rule }\text{[ShRv]}\text{ is for shared names and follows similar principles.}\]

\[\text{Output Actions} \text{ are defined by rules }\text{[SSnd]}\text{ and }\text{[ShSnd]}. \text{Rule }\text{[SSnd]}\text{ states the conditions for observing action }\text{(ν }\tilde{m}\text{)s!(V) on a type tuple }\text{(Γ, Λ : }\text{s : S). The session environment }\text{Δ with }\text{s : S should include the session environment of the sent value }\text{V, excluding the session environments of names }\text{m}_j \text{ in }\text{tilde}{m} \text{ which restrict the scope of value }\text{V. Analogously, the linear variable environment }\text{Λ'} \text{ of }\text{V should be included in }\text{Λ. Scope extrusion of session names in }\text{tilde}{m} \text{ requires that the dual endpoints of }\text{tilde}{m} \text{ should appear in the resulting session environment. Similarly for shared names in }\text{tilde}{m} \text{ that are extruded. All free values used for typing }\text{V are subtracted from the resulting type tuple. The prefix of session }\text{s is consumed by the action. Rule }\text{[ShSnd]}\text{ is for output actions on shared names: the name must be typed with }\text{(U); conditions on }\text{V are identical to those on rule }\text{[SSnd].}\]

\[\text{Other Actions} \text{ Rules }\text{[Sel]}\text{ and }\text{[Bra]}\text{ describe actions for select and branch. Rule }\text{[Tau]}\text{ defines internal transitions: it keeps the session environment unchanged or reduces it (Def. 2).}\]

\[\triangleright \text{Example 5. Consider environment }\text{(Γ; }\emptyset; \text{s : !(}S; \text{end} \rightarrow \infty); \text{end }\cdot \text{s' : }S\text{)} \text{and typed value}\]
\[
\Gamma;\emptyset; \text{s' : }S \cdot m :? \text{(end); end }\triangleright V \triangleright !\text{(S); end} \rightarrow \infty \text{ with } V = \lambda x!\text{(s', }m?\text{(z)).0}\]
We illustrate rule \(\text{[SSnd]}\) in Fig. 4. Let \(\Delta'_1 = (\overline{m};!\text{(end); end})\) and \(U = !\text{(S); end} \rightarrow \infty\). Then we can derive:
\[
(\Gamma;\emptyset; s :)!\text{(S); end} \rightarrow \infty) ; \text{end }\cdot \text{s' : }S) \xrightarrow{(\nu m)s!(V)} (\Gamma;\emptyset; \text{s : end})
\]
Our typed LTS combines the LTSs in Fig. 3 and Fig. 4.

\[\triangleright \text{Definition 6 (Typed Transition System). A typed transition relation is a typed relation }\text{Γ; }\Delta_1 \vdash P_1 \xrightarrow{\Delta_2} P_2 \text{ where (1) } P_1 \xrightarrow{\Delta_2} P_2; (2) } (\Gamma, \emptyset, \Delta_1) \xrightarrow{\Delta_2} (\Gamma, \emptyset, \Delta_2) \text{ with } \Gamma;\emptyset; \Delta_1 \vdash P_1 \triangleright \emptyset\text{.}\]

\[\text{Figure 3} \text{ The Untyped LTS for }\text{HOπ processes. We omit rule }\text{(PARR).}\]

\[\text{Input Actions} \text{ are defined by rules }\text{[SRv]}\text{ and }\text{[ShRv]. In rule }\text{[SRv]}\text{ the type of value }\text{V and the type of the object associated to the session type on }\text{s should contain the environments associated to }\text{V. The dual endpoint }\text{π cannot be present in the session environment: if it were present the only possible communication would be the interaction between the two endpoints (cf. rule }\text{[Tau]}\text{). Rule }\text{[ShRv]}\text{ is for shared names and follows similar principles.}\]
We now define a barb with typed relations relate only closed terms whose session environments are balanced and with $P \triangleright \bowtie \Gamma$. The first behavioural relation we define is reduction-closed, barbed congruence \[5\].

\[\text{SRv} \quad \frac{\pi \not \in \text{dom}(\Delta)}{(\Gamma; \Lambda; \Delta \cdot s :(U); S) \xrightarrow{\Delta'(V)} (\Gamma; \Lambda; \Delta'; \Delta' \cdot s : S)} (\Gamma; \Lambda; \Delta' \triangleright V \triangleright U) \]

\[\text{ShRv} \quad \frac{\Gamma; \emptyset; \emptyset \vdash a \triangleright (U) \quad \Gamma; \Lambda; \Delta' \triangleright V \triangleright U \quad \pi \not \in \text{dom}(\Delta)}{(\Gamma; \Lambda; \Delta) \xrightarrow{\Delta'(V)} (\Gamma; \Lambda; \Lambda'; \Delta \cdot \Delta')}\]

\[\text{SSNd} \quad \frac{\Gamma \cdot \Gamma'; \Lambda'; \Delta' \triangleright V \triangleright U \quad \Gamma''; \emptyset; \Delta_j \triangleright U_j \quad \Gamma; \emptyset; \emptyset \vdash a \triangleright (U)}{(\Gamma; \Lambda; \Delta) \xrightarrow{(\nu \bar{m})al(V)} (\Gamma; \Lambda'; \Lambda'; (\Delta \cdot s : \cup_j \Delta_j') \Delta')}\]

\[\text{SEL} \quad \frac{(\pi \not \in \text{dom}(\Delta)) \quad j \in I}{(\Gamma; \Lambda; \Delta \cdot s \cdot \cup \{l_i : S_i\}_{i \in I}) \xrightarrow{s k l_j} (\Gamma; \Lambda; \Delta \cdot s : S_j)}\]

\[\text{BRa} \quad \frac{(\pi \not \in \text{dom}(\Delta)) \quad j \in I}{(\Gamma; \Lambda; \Delta \cdot s \cdot \cup \{l_i : T_i\}_{i \in I}) \xrightarrow{s k l_j} (\Gamma; \Lambda; \Delta \cdot s : S_j)} \quad \text{[TAu]} \quad \Delta_1 \xrightarrow{\ell} \Delta_2 \lor \Delta_1 = \Delta_2 \quad \frac{(\Gamma; \Lambda; \Delta_1) \xrightarrow{\ell} (\Gamma; \Lambda; \Delta_2)}{[\text{SRv}] \quad \frac{\Gamma; \emptyset; \emptyset \vdash a \triangleright (U) \quad \Gamma; \Lambda; \Delta' \triangleright V \triangleright U \quad \pi \not \in \text{dom}(\Delta)}{(\Gamma; \Lambda; \Delta) \xrightarrow{\Delta'(V)} (\Gamma; \Lambda; \Lambda'; \Delta \cdot \Delta')}}\]

\[\text{Figure 4} \quad \text{Labelled Transition System for Typed Environments.}\]

(i = 1, 2). We extend to $\Rightarrow$ and $\Longrightarrow$ where we write $\rightarrow$ for the reflexive and transitive closure of $\rightarrow$, $\xrightarrow{\ell}$ for the transitions $\xrightarrow{\ell} \rightarrow$, and $\xrightarrow{\ell}$ for $\xrightarrow{\ell}$ if $\ell \neq \tau$ otherwise $\rightarrow$.

### 4.3 Reduction-Closed, Barbed Congruence ($\bowtie$)

We now define typed relations and contextual equivalence (i.e., barbed congruence). We first define confluence over session environments $\Delta$: we denote $\Delta_1 \xrightarrow{\ast} \Delta_2$ if there exists $\Delta$ such that $\Delta_1 \xrightarrow{\ast*} \Delta$ and $\Delta_2 \xrightarrow{\ast*} \Delta$ (here we write $\rightarrow \ast$ for the multi-step reduction in Def. 2).

**Definition 7.** We say that $\Gamma; \emptyset; \Delta_1 \triangleright P_1 \triangleright \bowtie \Gamma; \emptyset; \Delta_2 \triangleright P_2 \triangleright \bowtie$ is a typed relation whenever $P_1$ and $P_2$ are closed; $\Delta_1$ and $\Delta_2$ are balanced; and $\Delta_1 \equiv \Delta_2$. We write $\Gamma; \Delta_1 \triangleright P_1 \triangleright \bowtie \Delta_2 \triangleright P_2$ for the typed relation $\Gamma; \emptyset; \Delta_1 \triangleright P_1 \triangleright \bowtie \Gamma; \emptyset; \Delta_2 \triangleright P_2 \triangleright \bowtie$.

Typed relations relate only closed terms whose session environments are balanced and confluent. Next we define bars [11] with respect to types.

**Definition 8 (Bars).** Let $P$ be a closed process. We write $P \downarrow_n$ if $P \equiv (\nu \bar{m}) (n! (V), P_2 | P_3)$, with $n \not \in \bar{m}$. Also: $P \downarrow_n$ if $P \rightarrow \ast \downarrow_n$. Similarly, we write $\Gamma; \emptyset; \Delta \triangleright P \downarrow_n$ if $\Gamma; \emptyset; \Delta \triangleright P \triangleright \bowtie$ with $P \downarrow_n$ and $\pi \not \in \Delta$. Also: $\Gamma; \emptyset; \Delta \triangleright P \downarrow_n$ if $P \rightarrow \ast P'$ and $\Gamma; \emptyset; \Delta' \triangleright P' \downarrow_n$.

A bar $\downarrow_n$ is an observable on an output prefix with subject $n$: a weak bar $\downarrow_n$ is a bar after a number of reduction steps. Typed bars $\downarrow_n$ (resp. $\downarrow_n$) occur on typed processes $\Gamma; \emptyset; \Delta \triangleright P \triangleright \bowtie$. When $n$ is a session name we require that its dual endpoint $\pi$ is not in $\Delta$.

To define a congruence relation, we introduce the family $\mathbb{C}$ of contexts:

$$
\begin{align*}
\mathbb{C} & ::= - \\
& | u! (V), \mathbb{C} \\
& | u? (x), \mathbb{C} \\
& | u! (x), \mathbb{C}, P \\
& | (\nu n) \mathbb{C} (x), \mathbb{C}, n | \mu X, \mathbb{C} \\
& | \mathbb{C} \cdot P \\
& | P \cdot \mathbb{C} \\
& | u < l, \mathbb{C} \\
& | u > \{l_1 : P_1, \ldots, l_n : P_n\}
\end{align*}
$$

Notation $\mathbb{C}[P]$ denotes the result of substituting the hole $-$ in $\mathbb{C}$ with process $P$. The first behavioural relation we define is reduction-closed, barbed congruence [5].
We formalise the ideas given in the introduction. We define characteristic processes/values:

1. If $P_1 \rightarrow P_1'$ then there exist $P_2', \Delta'_1$ such that $P_2 \rightarrow^* P_2'$ and $\Delta'_1 \vdash P_1' \cong \Delta'_2 \vdash P_2'$;
2. If $\Gamma; \Delta_1 \vdash P_1 \downarrow n$ then $\Gamma; \Delta_2 \vdash P_2 \downarrow n$;
3. For all $\mathcal{C}$, $\Delta''_1, \Delta''_2$ we have: $\Gamma; \Delta''_1 \vdash \mathcal{C}[P_1] \cong \Delta''_2 \vdash \mathcal{C}[P_2]$;
4. The symmetric cases of 1 and 2.

The largest such relation is denoted with $\equiv$.

### 4.4 Context Bisimilarity ($\approx$)

Following Sangiorgi [16], we now define the standard (weak) context bisimilarity.

**Definition 11 (Context Bisimilarity)**. A typed relation $R$ is a context bisimulation if for all $\Gamma; \Delta_1 \vdash P_1 \cong P_2$, $\Delta_2$:

1. Whenever $\Gamma; \Delta_1 \vdash P_1 \xrightarrow{(\nu m_1)_{n(V_1)}} \Delta'_1 \vdash P_2$, there exist $Q_2, V_2, \Delta'_2$ such that $\Gamma; \Delta_2 \vdash Q_1 \xrightarrow{(\nu m_2)_{n(V_2)}} \Delta'_2 \vdash Q_2$ and for all $R$ with $fv(R) = x$:

   $\Gamma; \Delta'_1 \vdash (\nu m_1)(P_2 | R\{V_1/x\}) \cong (\nu m_2)(Q_2 | R\{V_2/x\})$;

2. For all $\Gamma; \Delta_1 \vdash P_1 \xrightarrow{\ell} \Delta'_1 \vdash P_2$ such that $\ell$ is not an output, there exist $Q_2, \Delta'_2$ such that $\Gamma; \Delta_2 \vdash Q_1 \xrightarrow{\ell} \Delta'_2 \vdash Q_2$ and $\Gamma; \Delta'_1 \vdash P_2 \cong \Delta'_2 \vdash Q_2$; and

3. The symmetric cases of 1 and 2.

The largest such bisimulation is called context bisimilarity and denoted by $\approx$.

As hinted at in the introduction, in the general case, context bisimilarity is hard to compute. Below we introduce characteristic bisimulations, which are meant to be a tractable proof technique over session typed processes with higher-order communication.

### 4.5 Characteristic Bisimilarity ($\approx^C$)

We formalise the ideas given in the introduction. We define characteristic processes/values:

**Definition 12 (Characteristic Process and Values)**. Let $u$ and $U$ be a name and a type, respectively. Fig. 5 defines the characteristic process $\langle U \rangle^u$ and the characteristic value $\langle U \rangle^u_c$.

**Proposition 4.1.** Let $S$ be a session type. Then $\Gamma; \emptyset; \Delta \vdash S : \langle S \rangle^\triangleright \circ$. Also, let $\langle U \rangle$ be a first-order (channel) type. Then $\Gamma \cdot a : \langle U \rangle; \emptyset; \Delta \vdash \langle \langle U \rangle \rangle^\triangleright \circ$.

The following example motivates the refined LTS explained in the introduction.

**Example 12 (The Need for Refined Typed LTS)**. We show that observing a characteristic value input alone is not enough to define a sound bisimulation closure. Consider processes

$$ P_1 = s?(x) . (x \ s_1 \mid x \ s_2) \quad P_2 = s?(x) . (x \ s_1 \mid s_2?(y) . 0) $$

(3)

where $\Gamma; \emptyset; \Delta \vdash s : \langle \langle ?(C) ; \text{end} \rangle \rangle \circ \triangleright \circ$. If $P_1$ and $P_2$ input and substitute over $x$ the characteristic value $\langle \langle ?(C) ; \text{end} \rangle \rangle \circ \triangleright \circ = \lambda x . x?(y) . 0$, then they evolve into:

$$ \Gamma; \emptyset; \Delta \vdash s_1?(y) . 0 \mid s_2?(y) . 0 \triangleright \circ $$
As explained in the introduction, we define the\[\text{refined typed LTS by considering a transition}
\text{rule for input actions using the input rules in Fig. 4:}
\]
\[
[\text{RRcv}] (\Gamma_1; A_1; A_2) \xrightarrow{\nu}(\Gamma_2; A_2; A_2) \quad V = m \lor V \equiv (U)_k \lor V \equiv \lambda x.(t?)(y)(x,y) \text{ with } t\text{ fresh}
\]
\[
(\Gamma_1; A_1; A_2) \xrightarrow{\nu}(\Gamma_2; A_2; A_2)
\]
Rule [RRcv] is defined on top of rules [SRv] and [SRuv] in Fig. 4. We use the non-receiving rules in Fig. 4 together with rule [RRcv] to define \( \Gamma; A_1 \vdash P_1 \xrightarrow{\ell} A_2 \vdash P_2 \) as in Def. 6.

Notice that \( \Gamma; A_1 \vdash P_1 \xrightarrow{\ell} A_2 \vdash P_2 \) (refined transition) implies \( \Gamma; A_1 \vdash P_1 \xrightarrow{\ell} A_2 \vdash P_2 \) (ordinary transition). Below we sometimes write \( (\nu \lambda x. U)_k \) when the type of \( V \) is \( U \).
Characteristic Bisimulations. We define characteristic bisimulations, a tractable bisimulation for HO\(\pi\). As hinted at above, their definition uses trigger processes (cf. (2)):}

\[
t \leftarrow U : U \overset{\text{def}}{=} t?((x). (\nu s)(([?U]; \text{end})^* \parallel \text{ref}(V). 0))
\]

\begin{itemize}
  \item \textbf{Definition 14 (Characteristic Bisimilarity).} A typed relation \(\mathcal{R}\) is a characteristic bisimulation if for all \(\Gamma; \Delta_1 \vdash P_1 \mathcal{R} \Delta_2 \vdash Q_1\),

  \begin{enumerate}
  \item Whenever \(\Gamma; \Delta_1 \vdash P_1 \cong (\nu m_1 m_2)(\text{In}([V_1 : U_1]) \Delta_1' \vdash P_2 \text{ then there exist } Q_2, V_2, \Delta_2' \text{ such that }
\]
  \begin{align*}
  \Gamma; \Delta_2 \vdash Q_1 \cong (\nu m_1 m_2)(\text{In}([V_2 : U_2]) \Delta_2' \vdash Q_2 \text{ and, for fresh } t, \\
  \Gamma; \Delta_2' \vdash (\nu m_1)(P_2 | t \leftarrow V_1 : U_1) \mathcal{R} \Delta_2'' \vdash (\nu m_2)(Q_2 | t \leftarrow V_2 : U_2)
  \end{align*}

  \item For all \(\Gamma; \Delta_1 \vdash P_1 \overset{\ell}{\longrightarrow} \Delta_1' \vdash P_2 \text{ such that } \ell \text{ is not an output, there exist } Q_2, \Delta_2' \text{ such that }
\]
  \begin{align*}
  \Gamma; \Delta_2 \vdash Q_1 \overset{\ell}{\longrightarrow} \Delta_2' \vdash Q_2 \text{ and } \Gamma; \Delta_1' \vdash P_2 \mathcal{R} \Delta_2' \vdash Q_2; \text{ and }
  \end{align*}

  \item The symmetric cases of 1 and 2.
  \end{enumerate}

  The largest such bisimulation is called characteristic bisimulation and denoted by \(\cong^C\).

\end{itemize}

Internal transitions associated to session interactions or \(\beta\)-reductions are deterministic.

\begin{itemize}
  \item \textbf{Definition 15 (Deterministic Transition).} Let \(\Gamma; \emptyset; \Delta \vdash P \overset{\tau}{\longrightarrow} P'\) be a balanced HO\(\pi\) process. Transition \(\Gamma; \Delta \vdash P \overset{\tau}{\longrightarrow} P'\) is called a session transition whenever the transition \(P \overset{\tau}{\longrightarrow} P'\) is derived using rule \((\text{Tau})\) (where \(\text{subj}(\ell_1)\) and \(\text{subj}(\ell_2)\) in the premise are dual endpoints), possibly followed by uses of \((\text{Alpha}), (\text{Res}), (\text{Rec}),\) or \((\text{ParL})/(\text{ParR})\).

  Transition \(\Gamma; \Delta \vdash P \overset{\tau}{\longrightarrow} \Delta' \vdash P'\) is called a \(\beta\)-transition whenever the transition \(P \overset{\tau}{\longrightarrow} P'\) is derived using rule \((\text{Apv})\), possibly followed by uses of \((\text{Alpha}), (\text{Res}), (\text{Rec}),\) or \((\text{ParL})/(\text{ParR})\). \(\Gamma; \Delta \vdash P \overset{\tau}{\longrightarrow} \Delta' \vdash P'\) denotes either a session transition or a \(\beta\)-transition.

  \item \textbf{Proposition 4.2 (\(\tau\)-inertness).} Let \(\Gamma; \emptyset; \Delta \vdash P \overset{\tau}{\longrightarrow} P'\) be a balanced HO\(\pi\) process. Then \(\Gamma; \Delta \vdash P \overset{\tau}{\longrightarrow} \Delta' \vdash P'\) implies \(\Gamma; \Delta \vdash P \cong^C \Delta' \vdash P'\).

  See [1] for associated proofs. Our main theorem follows: it allows us to use \(\cong^C\) as a tractable reasoning technique for higher-order processes with sessions.

  \item \textbf{Theorem 16 (Coincidence).} \(\cong, \cong^C,\) and \(\cong^H\) coincide in HO\(\pi\).

  \begin{itemize}
  \item \textbf{Proof (Sketch).} We use \textit{higher-order bisimilarity} \(\cong^H\), an auxiliary equivalence that is defined as \(\cong^C\) but by using trigger processes with higher-order communication (cf. (1)). We first show that \(\cong^C\) and \(\cong^H\) coincide by using Prop. 4.2; then, we show that \(\cong^H\) coincides with \(\cong\) and \(\cong^C\). A key result is a substitution lemma which simplifies reasoning for \(\cong^H\) by exploiting characteristic processes/values. See [1] for full details.
  \end{itemize}

  Now we prove that processes Client\(_1\) and Client\(_2\) in Example 1 are behaviourally equivalent.

  \item \textbf{Proposition 4.3.} Let \(S = ![\text{room}]; ?(\text{quote}) \oplus \{\text{accept} ![\text{credit}]; \text{end}, \text{reject} : \text{end}\}\) and \(\Delta = s_1 ![\text{end}]; s_2 ![\text{end}].\) Then \(\emptyset; \Delta \vdash \text{Client}_1\cong^C \Delta \vdash \text{Client}_2\).

  \begin{itemize}
  \item \textbf{Proof (Sketch).} We show a bisimulation closure by following transitions on each Client. See [1] for details. First, the characteristic process is given as: \([?S^\infty]; \text{end})^* = s?(x). (x k)\). We show that the clients can simulate each other on the first two output transitions, that
also generate the trigger processes:

\[
\begin{align*}
\emptyset; \emptyset; \Delta \vdash \text{Client}_1 & \quad \frac{s_1(\lambda x. Px_1 \{h_1/y\})}{s_2(\lambda x. Px_2 \{h_2/y\})} \\
\emptyset; \emptyset; k_1: S \cdot k_2: S & \vdash (\nu h_1, h_2)(t_1; t_2; \nu h_2)(x_1; x_2; t_3) \cdot (y_1; y_2; t_4).
\end{align*}
\]

After these transitions, we can analyse that the resulting processes are behaviourally equivalent since they have the same visible transitions; the rest is internal deterministic transitions.

5 Related Work

As in this work, the bisimulations in [9, 8] (binary and multiparty sessions, respectively) are defined and characterised on an LTS which combines an untyped LTS for processes and an LTS on session type environments. The work [14] studies typed equivalences for a theory of binary sessions based on linear logic, without shared names. None of [9, 8, 14] consider session processes with higher-order communication, as we do here. Our results have important consequences in the relative expressivity of higher-order sessions; see [1] for details.

Our approach to typed equivalences builds upon techniques developed by Sangiorgi [15, 16] and Jeffrey and Rathke [6]. As we have discussed, although contextual bisimilarity has a satisfactory discriminative power, its use is hindered by the universal quantification on output. To deal with this, Sangiorgi proposes normal bisimilarity, a tractable equivalence without universal quantification. To prove that context and normal bisimilarities coincide, [15] uses triggered processes. Triggered bisimulation is also defined on first-order labels where the context bisimulation is restricted to arbitrary trigger substitution. This characterisation of context bisimilarity was refined in [6] for calculi with recursive types, not addressed in [16, 15] and quite relevant in session-based concurrency. The bisimulation in [6] is based on an LTS extended with trigger meta-notation. As in [16, 15], the LTS in [6] observes first-order triggered values instead of higher-order values, offering a more direct characterisation of contextual equivalence and lifting the restriction to finite types. We briefly contrast the approach in [6] and ours based on characteristic bisimilarity (≈\text{C}):

- The LTS in [6] is enriched with extra labels for triggers; an output action transition emits a trigger and introduces a parallel replicated trigger. Our approach retains usual labels/transitions; in case of output, ≈\text{C} introduces a parallel non-replicated trigger.
- Higher-order input in [6] involves the input of a trigger which reduces after substitution. Rather than a trigger name, ≈\text{C} decrees the input of a trigger value \(\lambda z. t?(x). (x z)\).
- Unlike [6], ≈\text{C} treats first- and higher-order values uniformly. As the typed LTS distinguishes linear and shared values, replicated closures are used only for shared values.
- In [6] name matching is crucial to prove completeness of bisimilarity. In our case, HO\pi lacks name matching and we use session types: a characteristic value inhabiting a type enables the simplest form of interactions with the environment.

We have compared our approach to that in [6] using a representative example. We considered the transitions and resulting processes involved in checking bisimilarity of process \(n!(\lambda x. x (\lambda y. y!(m).0)).0\) with itself. This comparison, detailed in [1], reveals that our approach requires less visible transitions and replicated processes. Therefore, linearity information does simplify analyses, as it enables simpler witnesses in coinductive proofs.
Environmental bisimulations [17] use a higher-order LTS to define a bisimulation that stores the observer’s knowledge; hence, observed actions are based on this knowledge at any given time. This approach is enhanced in [7] with a mapping from constants to higher-order values. This allows to observe first-order values instead of higher-order values. It differs from [16, 6] in that the mapping between higher- and first-order values is no longer implicit.

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