

Trust and Identity PAG

9 April 2018 Meeting
(PAG Confidential)

Recap

- Nov-Jan: T&I Service Portfolio Review
- Feb-Mar: T&I Business Model Review
- April: Continue discussion and development opportunities for action vis-a-vis funding for Internet2 community software development post TIER investment

Outline

- Commercial scan
- Review HE scan
- Noodling on potential futures

Commercial scan



Who We Are

At Crunchbase, we believe that **your decisions deserve the best data.**

Crunchbase is the leading destination for millions of users to discover industry trends, investments, and news about global companies—from startups to the Fortune 1000.

Crunchbase is about more than just data – **it's about community.**

Crunchbase was founded to be the master record of data on the world's most innovative companies. We built a unique and scalable approach to data collection leveraging a strong community of contributors, the largest venture partner network, and in-house data teams armed with powerful machine learning.

Thanks to an amazing ([and growing!](#)) team, we're creating the single source of business intelligence.

The “latest” commercial vector

- About 1,400 companies are identified in the “identity management” category.
- The current top 5 valued identity management companies have received about \$800M of investment since 2004. Most of that investment starts at 2010.
- By way of example, #11 Okta has received \$230M since 2009 and is now public. Their valuation at IPO is \$1.5B.

SEARCH

Organizations or People

Clear Filters



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Full Description

contains

identity management



Search

< Prev 1-50 Next > of 1,406 results in 0.007s

Statistics

Columns

Timeline

<input type="checkbox"/>	Organization/Person ...	Categories	Primary Job Title	Primary Organization	CB Rank (Org & Person)	Number of
<input type="checkbox"/>	1. DocuSign	Cloud Management, Compu...	-	-	55	
<input type="checkbox"/>	2. Dashlane	Cloud Computing, Identity ...	-	-	687	
<input type="checkbox"/>	3. Jumio	Identity Management, Mobil...	-	-	688	
<input type="checkbox"/>	4. Gigya	Computer, Enterprise Softw...	-	-	773	
<input type="checkbox"/>	5. Pipl	Big Data, Business Intellige...	-	-	987	
<input type="checkbox"/>	6. IdentityMind Global	Analytics, Compliance, FinT...	-	-	1,046	
<input type="checkbox"/>	7. ForgeRock	Cyber Security, Enterprise S...	-	-	1,052	
<input type="checkbox"/>	8. OneLogin, Inc.	Cloud Security, Enterprise S...	-	-	1,135	
					Total	584,869,696



How much funding has this organization raised over time?

HIDE

Funding Raised Over Time

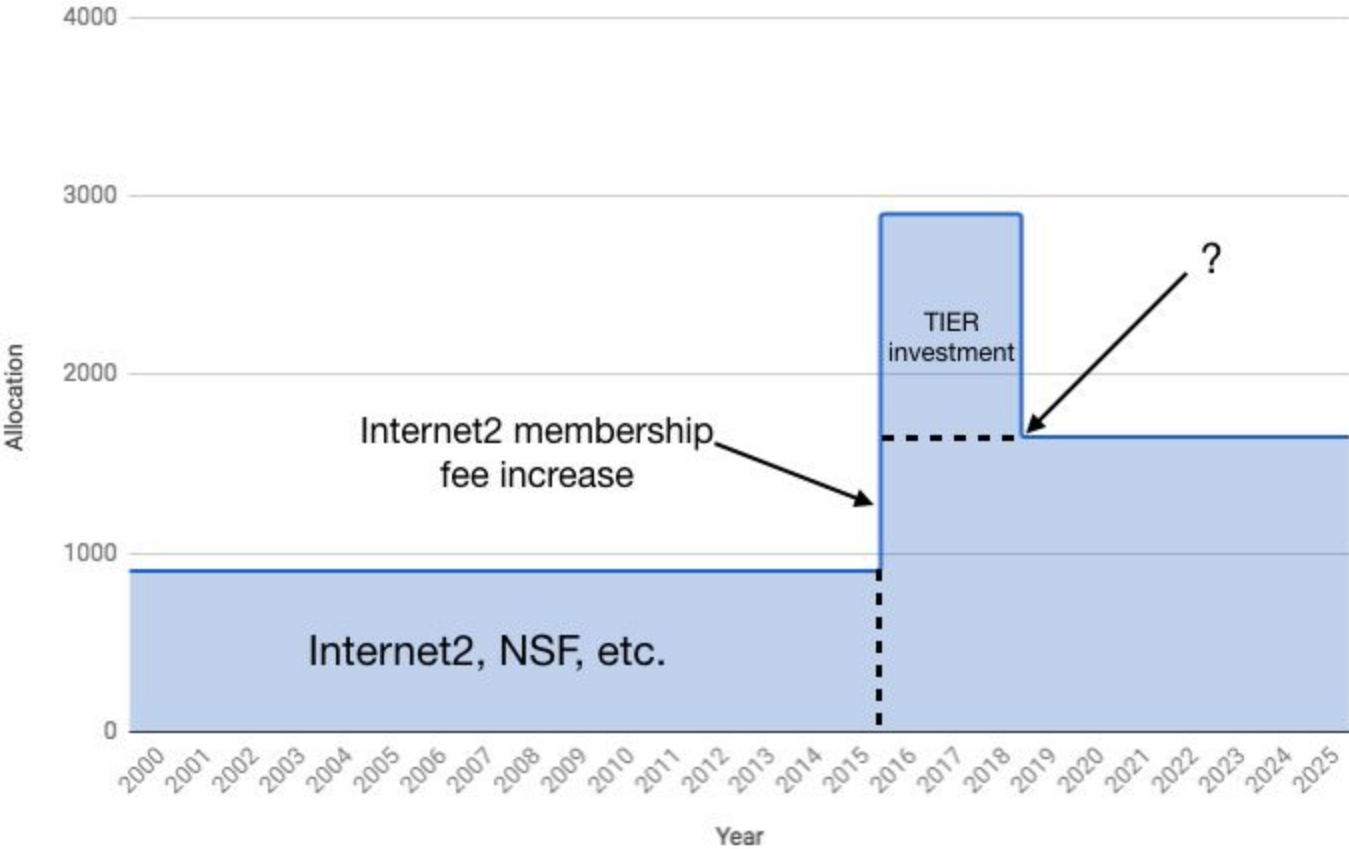


Some takeaways

- Identity management is a non-trivial investment target for the commercial sector
- Regardless of the size of this target, solving the needs of H.E. is only partially in-scope for these solutions.
- What else? (attrition, etc.)

Review HE scan

Software Engineering, etc. Allocation by Year



Some questions

- The TIER investment has made a difference. Is the amount of the investment the right amount to continue to ensure that the identity management needs of H.E. are served? TIER seamlessly (particularly with the new Shibboleth UI) integrates with a global R&E trust infrastructure that spans federal agencies, community colleges, international partners etc. Typically, commercial providers have their own "federation" with just corporate cloud SaaS providers.
- If the TIER investment is a starting point for the future, how can the TIER investment be sustained in the future?
- What is the relationship between "enterprise" and research requirements and what are best practice templates for helping H.E. institutions navigate both spaces? (the or/and dilemma)

Futures noodling

Assuming TIER investments....

- The TIER investment nets to \$1.225M annually. Assuming ~300 HE Internet2 members, that investment could be achieved at \$4,100 per member.
- InCommon serves about 550 HE institutions. If the TIER investment “gap” were to be considered evenly across just HE InCommon participants, it would be a little over \$2K per participant.
 - There are research and commercial organizations that participate in InCommon that take this number close to 800
 - This would also include nearly all HE Internet2 members
 - The somewhat recent InCommon service fee increase did not impact research orgs and the impact to cert only InCommon participants was diminished

Other considerations

- As has been the case in the past, current commercial solutions are enterprise focused and don't address the challenges posed by academic collaboration.
- The Internet2 community solutions are tailored for the academy but lack the “sales” and “sales support” dimensions of commercial offerings.
- The TIER investment has demonstrably addressed the core priorities. It has also made predictability of solutions and their timing, much improved.
- The TIER investment is creating a convergence of component interoperability and coherence.
- The TIER Campus Success Program is highlighting the efficacy of the core components in both enterprise and research dimensions.

Other considerations (continued)

- Internet2 members USED TO receive InCommon participation as a benefit of Internet2 membership. It is now separately billed.
- InCommon participants pay a size-dependent service fee between \$5,025 and \$1,755
- Certificate Service subscribers pay InCommon fees and the Certificate Service funds T&I activities.
- The Shibboleth Consortium has its own elective fee based fee schedule which ranges from \$2,960 to \$8,880

Other considerations (continued)

- Is the TIER investment the right amount of investment?
- What does the future governance look like for Internet2 community software development and investment?
- Addressing the “and” nature of solutions in the face of an “or” bias (research AND enterprise, enterprise AND research)