InC Policy Forum
2010 Internet2 Fall Member Meeting
November 2, 2010

Jack Suess, vice-chair of the InCommon Steering Committee, reviewed 2010 and the status of items identified in the Futures Report (from mid-2009).

So far in 2010, InCommon participants have increased from 199 to 257, including 21 new sponsored partners.

The Futures Report, released in July 2009, was a planning process to chart the future of InCommon. The report identified both short- and long-term needs. Jack provided a summary of some of those needs and the actions taken.

- Identified a need for additional outreach, with the monthly IAM Online webinar (in partnership with EDUCAUSE) created as a result.
- Identified a need for additional education and training, with InCommon assuming responsibility for CAMP and creating the Shibboleth Workshop Series. For the 2010 CAMP, we planned on 80 attendees and sold out at 150). A Day CAMP focused on joining InCommon sold out at 45, and four Shibboleth installation workshops (two for the IdP software and two for the SP) took place during 2010.
- Identified a need to involve potential federation consulting partners that are neither IdPs nor SPs, but provide a service. Four companies joined this new InCommon Affiliates program (AegisUSA, Microsoft, Unicon and Gluu).
- Explored the concept of expanding into other trust services – one was following the model of Europe and offering a certificate service. There are now 64 subscribers to the InCommon Cert Service.
- Identified the need for additional staff to ensure the continued growth of InCommon and its infrastructure. Three staff were moved from either a part-time consulting role or part-time status with InCommon to full-time status with InCommon and one full-time staff member was added. The result was a move from 2.1 FTE to 4.8 FTE.

 Overall, the Futures Report had 13 recommendations:
1. Move beyond federation and focus on trust services
2. Provide a broad-based support structure for critical software tools. Launch the Shibboleth consortium
3. Establish a management and governance structure
4. Develop a business plan
5. Generate positive cash flow by the end of 2012
6. Internet2 to provide working capital (to be repaid as identified in the business plan)
7. Internet2 to continue to provide support and administrative services
8. Have 75 percent of Internet2 members as InCommon participants by end of 2010 (currently 61 percent)
9. Review and roll out cert service
10. Launch training and adoption programs to support new members (Q2 2010)
11. Build partnerships with service providers
12. Roll out Bronze and Silver
13. Review the pricing structure

In a nutshell, we put a committee together, built the report, and we're now doing what we said we would do.

Plans for 2011
- Over the next few years, we need to emphasize international cooperation.
- Ramp-up progress on identity assurance profiles, particularly Silver. The Committee for Institutional Cooperation (CIC) schools (Big Ten plus University of Chicago) are working together to define standards and begin implementation. Eleven SURA schools have launched a similar effort. One key benefit will be the documentation of procedures.
- Continuing development of value propositions for Service Providers. Increasing the number of SPs will provide additional reasons for higher education institutions to join.

2011 fees
- no increase for 2011
- will set rates for Silver
- looking at aligning rates/tiers for certs and annual InCommon fee

2011 governance and management
- InCommon Steering, the Internet2 GNC, and Internet2 management have opened discussions about how InCommon fits with the Internet2 governance structure.

Presentation from NSF

- NSF is federating Research.gov, which is intended as a modernization of FastLane. It includes research spending and results, research headlines and events, a policy library, and project outcomes reports.
- Research.gov federating is being done in phases, with Penn State, the University of Washington and the University of California Davis participating. Phase 2 will include Colorado State and Georgetown.
- Future plans include an application submission web service and myReseach.gov
- Partners in these efforts include NASA, Department of Defense, and the National Institute of Food and Agriculture

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Questions and Discussion

Pricing Model – Is InCommon looking at other pricing models for certain situations, such as a state federation (like the University of Texas) or state-based organizations that may go beyond higher education, like MCNC (North Carolina)? In addition, InCommon may now be looking at constituencies (such as small colleges and K-12) for which pricing may be a hurdle.

Answer – Jack Suess invited Texas, MCNC and others to make a proposal to InCommon. InCommon has looked at pricing models for systems, with a goal of keeping rates low but still funding the necessary services. As to K-12, John Krienke comented that the fee schedule may be the easy part; that jurisdictional issues and the lack of IdM

systems may be more challenging. The solution for K-12 may be for some state-wide organization to assume legal responsibility and to provide IdM support.

Role of the Federation (Carrots and Sticks): There was a discussion about the best way to encourage federation participants to adopt new technologies. In moving to SAML2, for example, should the federation set a date after which SAML1 will not longer be supported?

Scott Cantor commented that the best way to move forward is to add value around the technologies we want people to adopt. For the move to SAML2, for example, the federation needs to move from away from the WAYF (which supports only SAML1) to the Discovery Service. That will help adoption. The Shibboleth project is working on a DS, as well, which will also help. The larger concern, though, is to help participants work with and work around the deficiencies of the implementations people are using.

One concern with the move to SAML2 are products that don't handle SAML2 well. There was discussion about whether InCommon might do some outreach and education to vendors concerning best practices for SAML2.

Other thoughts included:

- InCommon suggesting prompts for federating with certain vendors. For example, February is the time to start working with alcohol.edu to have it ready in time for September.
- Developing recommendations for CIOs, such as working with purchasing departments to educate them on using and requiring federated IdM.
- Developing a federation-approved method for remote identification of users for Silver (perhaps a vendor solution?).
- Somehow we need to deal with companies that charge more to do federated SSO than custom systems.
- Developing an InCommon elevator speech on how we fit with other services, like OpenID. Examples: Google credentials might be fine for individuals, but we want people using university credentials. There is a difference between Social Sign-On and Smart Sign-On. If we make it about nothing other than authN, it will be difficult to argue against Google and Facebook.