FAQ - InCommon Future and Fee Change

Why are my InCommon fees changing?

The community is asking more of InCommon and the scope is expanding to include software development and engineering. Federation and associated software and services are critical access management infrastructure, critical for academic collaboration and cloud services. Operating within the Federation requires a robust identity management function as well as cost-effective software to interact with partners in the community. That identity and access and federation software is the organization's InCommon springboard into the Federation community.

InCommon's role has become more complex in the last few years as we moved to ensure an always-on 24/7 service. Now we are expanding to support trusted access software, making it as easy as possible to install, operate and configure to ensure that any eligible organization can participate.

I know this software is open source. Doesn't that mean "free"?

Open-source software is like a free puppy: It takes lots of work and resources to keep it healthy. The code is available for those who wish to modify or enhance it, bit it is never free to engineer.

The technical and identity expertise available in the InCommon community, a combination of campus and research volunteers and Internet2-paid community and corporate contributors, is very rare. Many if not all can make a much higher wage elsewhere, but they remain because they are passionate and believe in the community and the mission we collectively serve. For you, the software user, it means that you have a bespoke identity and access platform that enables access to global services, tailored for research and education at an incredibly reasonable cost.

Who developed the software that the InCommon fees will be supporting?

The software was community driven, spurred by National Science Foundation grants beginning in 1999, an ongoing commitment by Internet2, and accomplished with significant guidance and development work by hundreds of community members. Starting in 2016, the three-year TIER (Trust and Identity in Education and Research) program added significant funding to speed development and make things easier to install and integrate.

I don't use the software and, while I support it in spirit, should I really help pay for it?

A trust community is like public health: You may choose not to get a flu shot, but you benefit when the people around you do, because they are more likely to be healthy. In a trust community like InCommon, organizations need to have a cost-effective solution to operate in a trustworthy way. A provider of services, for instance, will want to know that the identity information being sent and used for access to the resource is accurate and has integrity.

The InCommon Trusted Access Platform (formerly TIER) was developed with federation and the collaboration and cloud use cases in mind. For those organizations that use it, they have the platform and resources they need to make their connections easy, secure and trusted. In addition, InCommon supports other infrastructures that scholars use, so your faculty and/or students are benefiting because others leverage the platform, even if you do not have it installed.

Have there been discussions about possibly decreasing the scope of software development and support activities?

Feedback and questions from a variety of community conversations was, as to be expected with such a diverse set of stakeholders, varied. The dominant sentiment expressed in those conversations was a concern that the scope of activities was too narrow and the revenue being targeted to support those activities was small. The changes being proposed are an attempt to be representative across the spectrum of perspectives.

I only joined InCommon for certificates. Why should I pay for the federation and software?

We like the InCommon Certificate Service and know others do, too. However, we and our community advisory members think the InCommon Federation and the unique, critical functions it provides are very important for supporting the academic and research mission. Because of that, we want to make it easy for you to support the Federation should you choose to do so. Every InCommon participant can register services in the InCommon Federation at any time with no new legal or financial red tape. By the way, the vast majority of InCommon Certificate Service Subscribers use the InCommon Federation, too.

I'm an Internet2 member and also an InCommon participant and both fees are changing. How do they relate?

You are correct that both fees are changing. Extensive Internet2 board discussions and community feedback led to the decision to make modest annual Internet2 fee changes, as opposed to large changes every few years. This is much like the modest tuition increases that many universities adopt every year.

The InCommon change relates to an immediate need, also supported by community feedback, to sustain the software development and maintenance work required to keep services useful and relevant. The InCommon context is more about a fundamental strategic change in what InCommon is and does. That said both changes have strong support from their respective community governance and advisory bodies.

I hear that Shibboleth support for InCommon Participants is part of this fee change. What will that look like?

The international Shibboleth Consortium (shibboleth.net) is responsible for the Shibboleth software, and provides timely answers to implementation and related software questions only for Consortium members. As a member and leader in the Consortium, InCommon (as part of Internet2) would explore options with the Consortium to provide this service to all InCommon participants. We are also in the process of developing more-extensive online and in-person training options.

My institution is a paying member of the Shibboleth Consortium. How will this InCommon Shibboleth support capability impact the Shibboleth Consortium membership and support?

We're still working on that. When final decisions are made regarding the InCommon fee changes, we will work with the Shibboleth Consortium and its U.S./InCommon members to develop future, U.S. Shibboleth support capabilities.

How often have you changed the InCommon fees?

InCommon was free for the first year and has since raised fees just 4 times in 15 years. The InCommon Federation began in 2004 with no fee. We started charging in 2005 with an annual fee of $1,000. In 2009, the InCommon Steering Committee created a strategic planning team of community members and Internet2 staff called the Futures Group. Their report introduced pricing tiers, which were adopted in 2010. Two years later, in 2012, we upped the fees to reflect two-year price index changes. We held these 2012 fees constant until the last change in 2017, after implementing global interfederation using GÉANT's service eduGAIN.

What are the new fees being considered?

Below are the proposed fees, compared to current fees.

InCommon Fees by Participant Level				
	Current Participants	**Current Cert-Only**	**Current Research Org**	**2020 Participation Fees****
Level 1	$5,025	$4,138	$3,250	$12,000
Level 2	$4,025	$3,363	$2,700	$9,000
Level 3	$2,575	$2,088	$1,600	$6,000
Level 4	$1,755	$1,468	$1,180	$2,500
*Levels are based on Carnegie classifications (higher ed), FTE (research orgs), and annual revenue (sponsored partners).				
**Note: These fees are for InCommon participation. They do not include the separate fees for the Certificate Service or eduroam.				

The target revenue for the fee change is $2.5M. How is that amount determined?

Approximately half of the target is from the desire to sustain the activity of the TIER program, which comes to a final close in early 2019. The other half of the target amount comes from the estimates for establishing a Shibboleth support capability for InCommon participants. This portion of the increase includes both the projected costs of the support and the estimated costs with the Shibboleth Consortium.

When will this change go into effect?

InCommon Steering must approve the fee change, and the proposal is scheduled for the April meeting. If approved, the change will be reflected in the annual invoices sent in November 2019, covering the service year January 1-December 31, 2020.

Are other fees also changing, such as the subscription fee for the Certificate Service or the connector fee for eduroam?

No. The Certificate Service and eduroam fees are not changing for the year 2020.

I'm looking at the percentage increase and it seems very large.

While the percentage increase is large, for many organizations the dollar amounts are a small part of the overall budget. But the main reason for the size of the increase is the recognition that the sustainability of the InCommon Federation depends on maintaining and enhancing the associated open-source software. These funds will allow continuation of the TIER (Trust and Identity in Education and Research) effort, which made these products easier to install and configure. InCommon will now steward the software as part of the InCommon Trusted Access Platform. The fees will also provide support for the Shibboleth software. Such support is now limited to members of the Shibboleth Consortium, but InCommon will provide support to its participants.

I see fees are based on Carnegie Classifications for higher education. How do I know my school's classification?

You can look up your institution's classification at this website: http://carnegieclassifications.iu.edu/ Based on that, you can find your InCommon fee level here: https://www.incommon.org/fees_HE.html

Are these fees set in stone or might they change?

InCommon's governing and advisory boards have had extensive discussions about the fees since April 2018. Based on those discussions, the proposed fees were established and communicated to participants in a January 16 webinar and via email and the wiki. The ultimate decision falls to the InCommon Steering Committee, which intends to finalize the fee structure during its April 1, 2019, meeting. The period between January 16 and April 1 is essentially an open comment and consultation time. Once Steering makes a decision, the new fees will be effective January 1, 2020 (and reflected on invoices sent in November 2019).

I'm confused about what services we actually purchase through InCommon. I think we have Certificates and maybe Canvas?

For organizations that are part of Internet2, this can be confusing. For this purpose, it helps to think of InCommon and Internet2 as separate providers. InCommon offers the federation, certificates, and the eduroam wifi roaming services. Internet2's NET+ program offers a portfolio of cloud offerings (like Canvas, in this example) tailored to research and education.

Why are the differences in the proposed changes as significant as they are between levels within a participation class?

One of the goals of the fee change is to create a balanced distribution of revenue among the four levels of participants based on value to the organization and ability to pay. Some institutions (typically the large Level 1 participants) have rich and deep IAM skills and more-complex implementations serving more people. Others (typically the Level 3 and 4 participants) may have modest to thin capabilities and implementations, addressing the needs of fewer individuals.

The federation and software platform serves these types of institutions in different ways, but provides value to both. New capabilities may initially serve the more-complex institutions, while continuing efforts to simplify the installation and configuration of the software is better appreciated by those with fewer staff and/or resources.

The graph below shows the distribution of revenue generated with the proposed fee changes. When considering the needs across the federation for higher education participants, the revenue produced by the two cohorts described above (1) large, complex, rich skills and 2) smaller, less complex, modest skills) is roughly equivalent. That is, level one higher education institutions generate about the same revenue as the combination of level 3 and 4 institutions.

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