



InCommon Future - Community Update: InCommon Software and Funding

Presented by:

Ted Hanss, Associate CIO Medicine and Health Divisions, Yale University

Kevin Morooney, Vice President for Trust and Identity Services and NET+, Internet2

Sean Reynolds, Vice President for Information Technology and CIO, Northwestern University

InCommon Future Community Update

- Why?
- What?
- The Details
- Environmental Conditions, Challenges
- A Model for the Future
- Communication

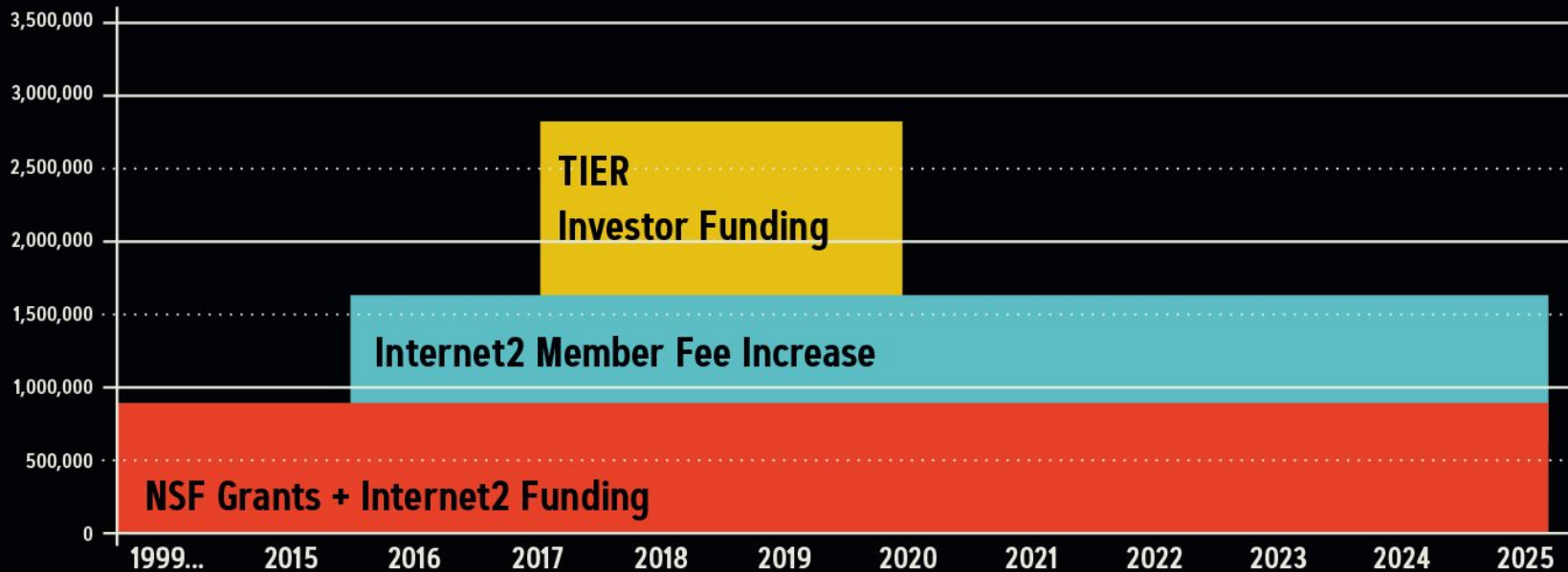
Why?

- There is a convergence of events, needs and gaps
- Internet2, InCommon, InCommon governance/committees/working groups and the community need to jointly understand how to move forward from this collection of dynamics

What (in no particular order)?

- Change in Shibboleth support (via Shibboleth Consortium)
- End of funding for the three-year TIER Program
- Recognized dependency between the community-developed software platform and InCommon federation success
- Community expression of taking action across all three dynamics, and more

SOFTWARE AND ENGINEERING FEE ALLOCATION



The Details, One-by-One

The Shibboleth Consortium (<https://www.shibboleth.net/>)

Principal members: Internet2, Jisc, NORDUnet

Federation Members: SWITCH, Talgildu Føroyar, REANNZ, HEAnet, Brazilian National Research and Educational Network, CESNET, GARR, AConet, BELnet, CANARIE, DFN, European Space Agency, GakuNin, Haka, RENATER

Academic/Non-profit members: Los Rios Community College District, Stockholm School of Economics, Temple, MIT, University of Virginia, Brandeis, Lafayette, University of Toronto, Sheridan, University of Illinois, KU Leuven, University of Montana, University of Oxford, University of Washington, Cornell, University of Wisconsin-Madison, Oakland, SMU, Cineca, Space Telescope Science Institute, CMU, LIGO

Commercial Members: Signet, DAASI, Clarity Security, Overt

Partners: Digital Identity Ltd, InfoStreet, 9Star

Change in Shibboleth Support (via Shibboleth Consortium)

In August 2017, the Shibboleth Consortium announced a change in how support would be managed:

- Desire to increase the value proposition of Consortium membership
- Sub-desire to inspire new membership, new revenue
- Recognition of limited engineer resources to do both development and support
- FYI: Over 90% of InCommon identity providers use Shibboleth

End of the TIER Program

- In 2015, 49 university CIOs agreed to invest \$75K over three years to develop the TIER program (\$3.7M)
- The goals of the program were to integrate the (since 2001) community-developed software program and make it easier to install and manage
- TIER program funds will be exhausted in early 2019

Dependencies - Software, Federation

- Having a good back-end management of identity facilitates access to cloud and collaboration services
- Good processes and well-managed identity data enhance security, access management, and community trust
- Access in a federation is also about provisioning groups to cloud services. Need to be able to manage the complex group infrastructure

Community Expression - Do Something About All of This

- Two outcomes from Internet2 Global Summit May 2018
 - Continue the success of TIER, at minimum
 - Develop software support capabilities that go beyond typical OSS support model
- Campus Success Program
 - Develop software support capabilities that go beyond typical OSS support models
 - Continue to build a mature, capable community-inspired access platform
- InCommon working groups
 - Provide more “support” for IdP and SP operators
 - Continue to move in a *aaS direction for software capabilities
- Develop a robust Shibboleth support capability for InCommon participants

Environmental Conditions, Challenges

- Continue the directions established by the TIER program **and** improve/increase support for all of the tools
- The estimate for these efforts is \$2.5M annually
- Explore an InCommon fee change to enable the efforts and new services
- Community leaders recommend that future needed resources come from all participants (as opposed to the TIER approach)
- Implement a funding change as close as possible to the end of the TIER program
- Recognition of the need for regular, inflationary increases

Current InCommon Fee Schedule

- Four* participant classes
 - Higher Education
 - Sponsored Partners
 - Research Organizations
 - Certificate Service-only
- 2017 fee change
 - Research organizations exempted
 - Certificate Service-only exempted

Current InCommon Fee Schedule

InCommon Annual Fees for Higher Education (based on Carnegie Classifications)	Level	Annual Fee
Doctoral: Highest Research	L1	\$5,025
Doctoral: Higher Research	L2	\$4,025
Doctoral: Research, Masters Larger, Medical Schools	L3	\$2,575
All other Carnegie Classifications	L4	\$1,755

InCommon Annual Fees for Sponsored Partners (based on annual revenue)	Level	Annual Fee
Revenue of \$1B or greater	L1	\$5,025
N/A	L2	\$4,025
Revenue less than \$1B and more than \$10M	L3	\$2,575
Revenue \$10M or less	L4	\$1,755

InCommon Annual Fees for Research Organizations (based on full-time equivalent staff)	Level	Annual Fee
FTE more than 10,000	L1	\$3,250
FTE 2,000-10,000	L2	\$2,700
N/A	L3	\$1,600
FTE less than 2,000	L4	\$1,180

InCommon Annual Fees for Certificate subscribers with no Federation metadata	Level	Annual Fee
Doctoral: Highest Research	L1	\$4,138
Doctoral: Higher Research	L2	\$3,363
Doctoral: Research, Masters Larger, Medical Schools	L3	\$2,088
All other Carnegie Classifications	L4	\$1,468

Proposed 2020 InCommon Fee Schedule

All participant classes

Level 1 - \$12,000

Level 2 - \$ 9,000

Level 3 - \$ 6,000

Level 4 - \$ 2,500

InCommon Fee Schedule - Current and Proposed

InCommon Fees by Participant Level				
	Current Participants	Current Cert-Only	Current Research Org	2020 Unified 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
<p><i>*Levels are based on Carnegie classifications (higher ed), FTE (research orgs), and annual revenue (sponsored partners).</i></p>				

Recap: InCommon Future Community Update

- A convergence of dynamics (TIER program end, changes in support, future desired state of T&I) drives us to decide how to manage these changes
- We recognize and are addressing the programmatic interdependencies and synergies between federation operation and enabling software solutions
- A path forward involves all who seek value and benefit from these platforms

Open Office Hours - Continue the Discussion

Office hours for feedback, Q&A

- 24 Jan 2019, 2-3 pm EST
- 31 Jan 2019, 3-4 pm EST
- 6 Feb 2019, 1-2 pm EST
- 12 Feb 2019, 1-2 pm EST

Coordinates: <https://internet2.zoom.us/j/768400238>

Or, dial in: (646) 558-8656 or (669) 900-6833; Meeting ID 768 400 238

Additional Resources

Wiki - InCommon Future - <https://spaces.at.internet2.edu/x/DQJ0C>

FAQ - InCommon Future - <https://spaces.at.internet2.edu/x/KAJ0C>

Email questions/comments to inc-future@incommon.org

Upcoming Opportunities

Weds, Jan. 23, 2019 - 2 pm ET - IAM Online - Per-Entity Metadata Service

www.incommon.org/iamonline

August 13-15, 2019 - BaseCAMP - Milwaukee, WI

- Role of federation in collaboration and access - for all InCommon participants (both Identity and Service Provider Operators)
- Introductory information for those new to the community and/or identity management
- Technical solutions overview, including InCommon Federation Manager, InCommon Trusted Access Platform software, DevOps as an operations approach

December 9-12, 2019 - TechEx - New Orleans, LA

- CAMP (campus case studies and new approaches) and Advance CAMP (defining, refining and solving community-wide issues and approaches)
- meetings.internet2.edu



InCommon Future - Community Update: InCommon Software and Funding

Presented by:

Ted Hanss, Associate CIO Medicine and Health Divisions, Yale University

Kevin Morooney, Vice President for Trust and Identity Services and NET+, Internet2

Sean Reynolds, Vice President for Information Technology and CIO, Northwestern University