InCommon Partnership Models and Trust Fabrics

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Overview and Motivation

- Accelerate development of a business model that supports CAIs
- MCNC offered to work intensively with InCommon
  - Mark Scheible, Mark Johnson
  - John Kreinke, David Walker, Ann West
- All day meeting in Chicago September 19
- Fully develop one model for serving CAIs that would offload cost from inCommon …and lower cost for CAIs
- Fighting off urge and encouragement to increase our scope

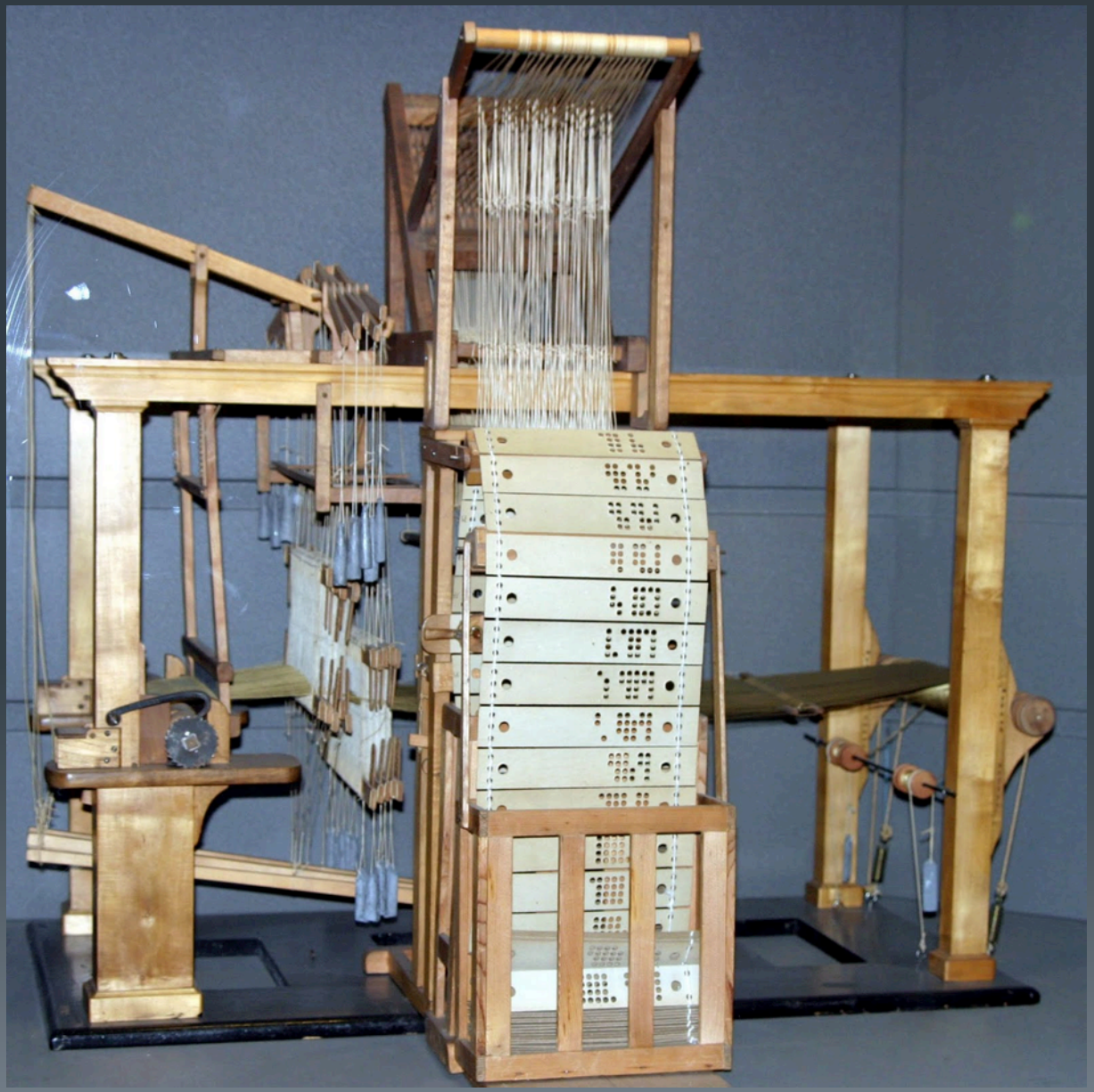
Our approach

- Break down the work of building the InCommon trust fabric into its atomic units
- Look at how those parts could be shifted around to offload InCommon
- Focus on one approach that appeals to MCNC
- Develop “term sheets” describing the content needed in agreements between InCommon, the regional (MCNC), and downstream organizations
- While we’re at it write up what we’ve done in a short white paper

Where we stand now

- Paper is done – you have it
- Term sheets are our next focus area
- Develop some real cost numbers
- Begin to put a new model in place at MCNC

Maintaining a Trust Fabric



Maintaining a Common Trust Fabric

- Governance
  - Defines eligibility, promises and behaviors, terms, fees, and policies of participation
  - Defines common vocabulary & usage rules: identifiers, attributes (eduperson), their sharing, storage, & privacy
  - Defines Interoperability technologies: standards, software, services & trust mechanisms
- Operations, Support, Outreach
  - Verifies organizations, trusted officers, and entity metadata
  - Securely collects, validates, decorates, and redistributes metadata
  - Provides support: documentation, help desk, training, community
  - Creates additional frameworks for trusted exchange: attribute release mechanisms, levels of identity assurance, privacy and consent
  - Back office invoicing, accounts receivable, legal negotiations, financial audit, etc.
- Moving forward
  - Additional services & partnerships for easy adoption, interop, & scale
  - From descriptive to normative practices
  - From the large few to the many small adopters, from national to internationally aligned fabrics

Atomic Units: Low Hanging Fruit

Background Information for Regional / InCommon Collaboration

Business Relationship

- **Maintains financial, legal, and policy relationship**

Registration Authority (RA)

- Establishes the federation "trust" with the candidate organization
  - Vetting of the Organization and its Internet DNS domains
  - Vetting of the Organization's People
    - The Executive
    - One or two Site Administrators (SA)

Metadata (MD) Management

Verifies content and policy adherence, ensures integrity and access

- Testing/Inspecting submitted MD according to community requirements
- Signing and publishing the Metadata Aggregate (MDA) of the federation
- Hosting the MDA for federation members to download

Current

Services	RO joins InCommon directly No Regional services provided to RO
Legal	No: InCommon/Regional Yes: InCommon/RO
Cost	InCommon published feeds incommon.org/fees

Facilitation and Support

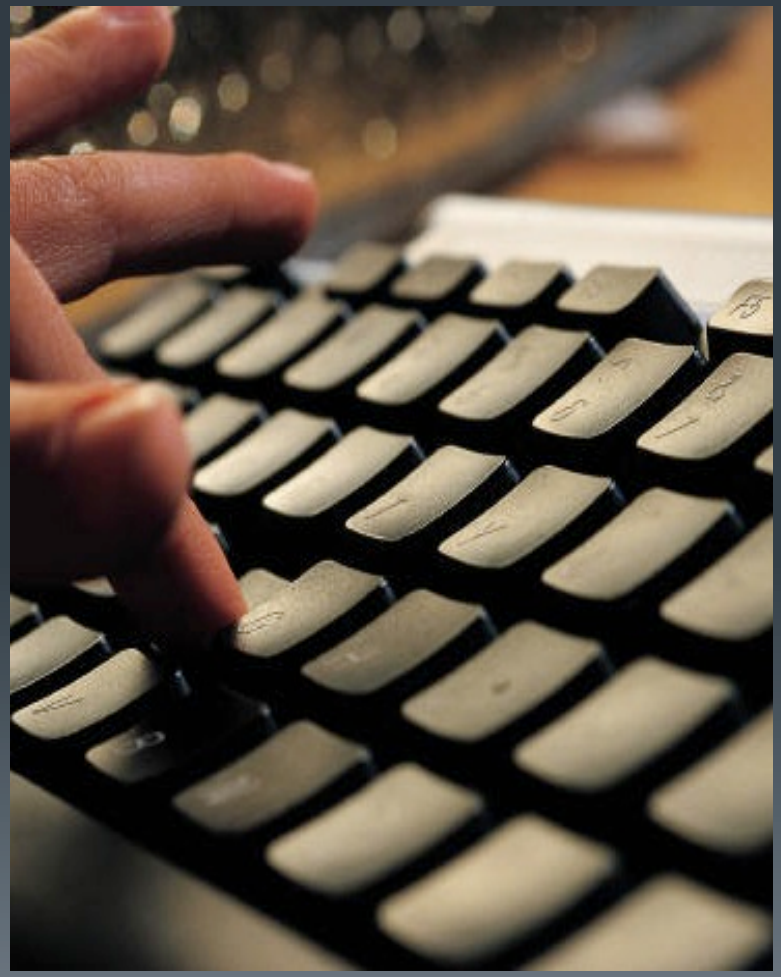
Services	Regional may assist RO w/ • Legal • Training and support • Local identity management • Hosting services RO joins InCommon directly
Legal	Maybe: InCommon/Regional Yes: Regional/RO Yes: InCommon/RO
Cost	InCommon published fees: incommon.org/fees

Business Partnership

Services	Regional provides RegAuth and Relationship Mgmnt • Contact Vetting/Mgmnt • Perform legal/billing support • Probably check all metadata submitted by in-scope domains • Provide optional facilitation/ support services to ROs RO may or may not join InCommon
Legal	Yes: InCommon/Regional Yes: Regional/RO Maybe: InCommon/RO
Cost	Shared between Regional and InCommon

Technical Steward

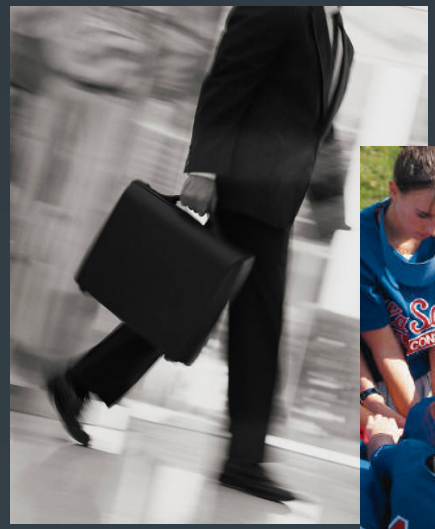
Services	Regional provides tech support to RO Provides InC metadata vetting and submission • May submit metadata for RO • Check all metadata submitted by in-scope domains • Optional hosting • Optional facilitation and support RO may or may not join InCommon
Legal	Yes: InCommon/Regional Yes: Regional/RO Maybe: InCommon/RO
Cost	Shared between Regional and InCommon

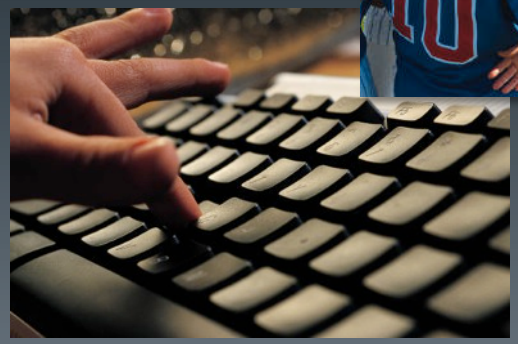


Full Service Partnership

Services	Regional provides
	• Facilitation and Support
	• Business Partnership Services
	  • RA, Admin, Billing
	• Technical Steward Services
	  • Metadata mgmnt and submission
	RO may or may not join InCommon

Legal	Yes: InCommon/Regional Yes: Regional/RO No: InCommon/RO
Cost	Shared between Regional and InCommon





Regional Federation Operator

Services	Independent Federation Operator • Manage all services for Federation • No services or support from inCommon • Optional metadata sharing with InCommon
Legal	Maybe: InCommon/Regional if metadata is exchanged Yes: Regional/RO No: InCommon/RO
Cost	Regional bears all cost

Next Steps: InCommon/MCNC

Legal	• Third Party IdP & SP representation • Submission into InCommon metadata aggregate • Compliance • RA validation partnership (Registration Authority) • Eligibility Classification • Defined constituencies • Non exclusive
Pricing Principles	• Sustainability for all: ability to pay • Not transaction based • Unit of price: IdPs • SPs drive IdPs (5:1) • Standardization & Transparency • Fixed Costs and Variable Costs
Pricing	• Lump Sum -or- Unit by Unit • Tiers

Maintaining a Common Trust Fabric: Fixed and Variable Costs

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  - Defines eligibility, promises and behaviors, terms, fees, and policies of participation
  - Defines common vocabulary & usage rules: identifiers, attributes (eduperson), their sharing, storage, & privacy
  - Defines Interoperability technologies: standards, software, services & trust mechanisms
- Operations, Support, Outreach
  - Verifies organizations, trusted officers, and entity metadata
  - Securely collects, validates, decorates, and redistributes metadata
  - Provides support: documentation, help desk, training, community
  - Creates additional frameworks for trusted exchange: attribute release mechanisms, levels of identity assurance, privacy and consent
  - Back office invoicing, accounts receivable, legal negotiations, financial audit, etc.
- Moving forward
  - Additional services & partnerships for easy adoption, interop, & scale
  - From descriptive to normative practices: transitions & migrations
  - From the large few to the many small adopters, from national to internationally aligned fabrics

InCommon K12/CC Grant

- Requested by Regional partners in October 2013; approved by Steering in November 2013
- To encourage experimentation and adoption
- For each pilot Regional:
- Annual participation free-of-charge for five qualified K12 or community colleges in 2013 and 2014, with no one-time registration fee.
- Qualifying organizations will be verified on a state-by-state basis in partnership with a relevant Internet2 Regional member.
- Published fees will apply in 2015.