Towards an Understanding Between Apereo and Internet2

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External agencies created to support higher education have a responsibility to explore potential areas of collaboration and synergy. The focus of such exploration should be to amplify the benefits we provide and deliver clear additional value to higher education institutions. For this purpose, representatives of InCommon and the Apereo Foundation have drafted the attached document and set out a brief rationale for potential collaboration that is deliberately practical. It is intended as the start of both internal conversation and dialog in our respective organisations, and as a prelude to meaningful collaboration.

Why Pursue a Working Relationship?

Internet2's Trust and Identity in Education and Research (TIER) Initiative's vision centers on aligning identity approaches across implementers and developers to enable easier and more secure application innovation, integration and deployment beyond state and national boundaries. This vision cannot be achieved unless we pursue it hand-in-hand with organizations that represent key stakeholders such as Apereo and their community. The Apereo Foundation was formed in December 2012 to help higher education institutions "collaborate to foster, develop, and sustain open technologies and innovation to support learning, teaching, and research." Apereo has a focus on software to support delivery of the academic mission, together with the infrastructure to support that delivery. Identity is a key element of that infrastructure. It makes sense, then, for Apereo and TIER to build a relationship including information exchange and practical collaboration.

These are the key areas of interest overlap between TIER and Apereo:
- Apereo is an international community that includes developers of popular open source software (uPortal, CAS, Bedework, Sakai, among others). These projects support and/or rely on identity as a key infrastructure element.
- Apereo maintains key open-source IAM components like OpenRegistry and CAS and participates on the shared API work that are a key piece of the CIFER project.

Everyday, InCommon Participants benefit from Apereo's investment in open source and IAM software. Similarly, Apereo Projects from identity and other work undertaken by Internet2. The more alignment we have with our work, the more chances we will have collectively to address our mutual goals. A clear understanding based around information exchange and practical collaboration between TIER and Apereo would benefit both organisations and the communities they serve.

Potential Foci of Collaboration

Areas of shared interest, information exchange and potential shared activity, which aim to leverage and develop overlap between Apereo and Incommon/TIER community could include:

- Providing opportunities for information exchange by supporting reciprocal participation in international and national/regional events (possibly at a session or track level).
- Encouraging cross fertilisation of ideas and experience by co-locating community events.
- Ensuring identity issues are raised with incubating Apereo projects by, for example, requesting InCommon input to specific projects moving through the process or providing open webinars for clusters of projects.
- Encouraging adoption/contribution (e.g. Grouper and Federated Identity).

Annex: Organizational Information

The Apereo Foundation

Apereo is a non-profit foundation which exists to support educational organisations which 'collaborate to foster, develop, and sustain open technologies and innovation to support learning, teaching, and research'. Apereo was formed by the merger of Jasig and Sakai, two pioneers of open source software in higher education, in late 2012. The Foundation currently has 105 institutional members, together with 12 commercial partners, and has a close collaboration with the ESUP consortium of 73 French higher education institutions. Around two-thirds of Apereo membership is currently based in North America, with strong clusters of member institutions in Europe, South Africa and Japan. We have members on every continent except Antarctica.

Apereo is made up of self-governing software communities and communities of interest. Both types of community manage projects, whether they be specific software releases or projects of other types. The Foundation provides common technical, legal, licensing and social infrastructure as a series of shared services for constituent communities and the institutions supporting them. In general, Apereo operates around the principle of subsidiarity, only undertaking activity or providing services which cannot be better provided by institutions directly.

Software Communities and Communities of Interest within Apereo fall into two broad categories; those closely engaged in the academic mission delivery - learning, teaching and research, and those which provide supporting infrastructure for those activities. Current communities include teaching and learning, Sakai, Apereo Open Academic Environment, Student Success Plan Project, uPortal, CAS, and Bedework. Opencast Matterhorn entered the Apereo incubation process in February 2014. Our projects range from those with very wide adoption, including adoption outside higher education, such as CAS, to newer initiatives which use innovative, web-scale technology stacks such as the Apereo Open Academic Environment.

Apereo has evolved an incubation process to assist new projects and initiatives progress towards self-sustaining community status. This process consists of extensive written guidance and opportunities for obtaining the support of mentors drawn from existing software communities and communities of interest. The incubation process is shared with the ESUP consortium. A description of the process can be found at http://www.apereo.org/content/incubation

Apereo is governed by an elected Board of Directors, with individual constituent communities utilising governance structures appropriate to their context and subject to board approval. Apereo by-laws can be found at http://www.apereo.org/content/bylaws.

Internet2

Internet2's Trusted Identity in Education and Research initiative aims to enable lifelong, single sign-on academic access for students, educators and researchers, and provide a secure, portable identity that allows an online user to authenticate locally, and access resources globally.

A centerpiece of TIER is InCommon, which provides a secure and privacy-preserving identity and trust fabric for research and higher education, and their partners, in the United States. InCommon operates an identity management federation, a related identity assurance program, and offers certificate and multifactor authentication services. InCommon has more than 600 participants, including higher education institutions and research organizations and their sponsored partners. InCommon also collaborates with other international research and education trust providers to design a global infrastructure to ensure identity trust scales and operates across national boundaries.