

# Evolving InCommon's Affiliate Program

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InCommon Steering Committee—October 2014

## What is the InCommon Affiliate Program?

The InCommon Affiliate Program was founded in 2009 with the goal of supporting higher education and the growing commercial service provider community who provide identity services. Participating companies most commonly offer cloud-based IAM solutions, on-prem IAM solutions, development services and consulting. The Affiliates Program is a marketing relationship where the companies enjoy benefits such as attendance at annual CAMP meetings; participation in working groups; and being featured in co-branded webinars and website placements. The InCommon Affiliate companies do not offer other types of federated services; they offer services to help *others* federate.

To join the program, InCommon Affiliates must provide two references, at least one of which is from a participant in InCommon, and one from a higher education institution. The references are contacted and asked four questions about their experiences with the company; beyond this, the organization is not vetted, nor are their products reviewed for quality. We do not receive formal feedback from the community about their products and services.

Currently there are seven Affiliates: Microsoft, Unicon, Fischer International, Aegis Identity, IDM Integration, Cirrus Identity and Spherical Cow Group. The latter three companies are extremely small (under 10 employees).

## What is the Problem?

There are five primary issues with the InCommon Affiliate Program.

- **Identity is broader than InCommon's current outreach mechanisms.** It is not clear that NET+ participants are aware of the Affiliates and that they could help with InCommon integration. In addition, one of the Affiliates has extensive expertise in assisting research projects and virtual organizations with identity and access control. How can we get this broader message out?
- **Their products and services are not vetted.** Since the inception of the program, one of the primary concerns has been the lack of a formal product/service review and the possibility of perceived endorsement of services that are not helpful, and in fact may be detrimental, to a campus's deployment. The emergence of the NET+ program with its full lifecycle and campus validation model creates a very different expectation set for campuses.
- **A pure marketing relationship, as originally envisioned by the program, may not be possible going forward.** Despite our disclaimers on our website, it has become clear that the Affiliates use of the InCommon brand is misinterpreted by some in the community as having "approved" or "reviewed" products. We need to be careful what we brand with InCommon going forward.
- **The Affiliate program is not growing.** As the Federation grows in importance and HE market share, the number of companies offering services that support the increasing variety of needs will also need to grow. Part of the goal of the Affiliates Program is to inform the Affiliates, keep them aware of needs, and to keep them clued in to supporting good Federation practices. Growing the program means having more knowledgeable partners doing more good things. The companies in the InCommon Affiliate category act as "infrastructure catalysts" and accelerate the community's ability to deploy identity and access control solutions. The Affiliate Program hasn't seen the growth

that fits with the vision of scale needed for the InCommon Federation to become the identity infrastructure for Research and Education. The Program started with four participants and through highs and lows still has only seven.

- **The Affiliate Program duplicates the administrative tasks of the Internet2 Industry Program.** This includes billing, contracts and onboarding.

## Requirements for Approach

Via discussions with current InCommon Affiliates, we have identified the following goals as important to apply to the evolved program:

1. The support goal of the Affiliates Program is very important to retain to help resource-strapped organizations implement an identity & access management (IAM) strategy that will have InCommon at its core.
2. The program should be flexible and provide choices for companies in which to participate, but not duplicate other efforts.
3. The program should extend IAM outreach opportunities to existing Internet2 Industry Members.
4. Any Affiliate products or services offered should be vetted before or reviewed after use so the community has some assurance of the applicability and characteristics of the service. Once vetted, the company would be able to display a certified logo.
5. The corporate participants should be positioned to help members with IAM issues in other areas, such as research support, SDN, Net+ etc.
6. The resulting offering should be flexible enough to serve existing and future TIER needs.

## Proposed Solution

We propose to offer four solutions to the current Affiliates:

1. Do you have a cloud IAM-related service you would like to sell through Internet2 NET+?
  - a. Join NET+ and vet through the Service Validation process. Established in 2012, the *Internet2 NET+* initiative provides a community-directed approach to normalizing access to cloud services, including aligning business models, security, identity, community vetting, and legal aspects. All service providers in the NET+ portfolio are required to join the InCommon Federation to access to their cloud service.
  - b. NET+ partners must also join the Internet2 Industry Program.
2. Do you have a non-cloud IAM-related service you would like to sell through Internet2 NET+?
  - a. Become a NET+ Service Provider in the Trust and Identity portfolio under new subcategories to be identified.
  - b. NET+ partners must also join the Internet2 Industry Program.
3. Do you want to communicate to the community that you support best practices?
  - a. Join the (proposed, new) Internet2 Catalyst Program under the Internet2 Industry Program
  - b. Primary goal is to create community-approved best practices in IAM, security, networking, and other areas and to engage corporate service providers in implementing these best practices throughout the Research and Education community.
  - c. Build this Catalyst Program in 2015

- d. Associated membership dues revenue would be generated from setting in motion a certification assessment that could be renewed annually and from yearly training on updated practices and related logo to indicate adherence. Possible revenue sharing.
  - e. Each area such as networking, security, or identity would have its own practice set.
  - f. The Program would provide a community vetting mechanism by either validating organizations up front like NET+ or using a social mechanism after the fact where individuals can submit/post comments and ratings. The program could also provide lightweight testing mechanisms.
  - g. Classes of *Catalyst* for innovating campus Best Practices could be:
    - i. Networking: Science DMZ, Performance tuning, IPv6
    - ii. Security: REN-ISAC, DNS Sec, and other Best Practices
    - iii. Cloud Proud: Procurement, Business process speed, data management, etc.
    - iv. Identity and Access Management: on-campus and inter-campus best practices.
4. Do you want to show your support of the community through *sponsorships*?
- a. Join the Internet2 industry Program. The *Internet2 Industry Relations* program was founded in 1997. It currently has nearly 80 members (including three of the seven InCommon Affiliates). Internet2 Industry Members enjoy engagement with the Internet2 community and a portfolio of benefits including: attendance as members at two annual anchor events; representation in governance; participation in working groups, special events, programs, demos, and other initiatives.
  - b. An InCommon Affiliate transitioning to Internet2 Industry Membership would have the added benefits of:
    - i. Exposure to the broad Internet2 Community as an Industry Member
    - ii. Access to Internet2 events (Global Summit, Technology Exchange, etc.) as an Internet2 Industry Member
    - iii. A dedicated booth, and additional visibility if they elect to sponsor
    - iv. A co-branded webinar with engagement across the Internet2 community

### ***Catalyst and NET+ TIER Considerations***

The *NET+* Initiative provides a community-directed approach to normalizing access to cloud services, including aligning business models, security, identity, community vetting, and legal aspects. A *Catalyst* would accelerate the community's ability to deploy identity and access management solutions by supporting best practices associated with federation and with the TIER architecture. Any new programs would need to be well defined. For example, Fischer International, a company with an IaaS offering, could participate as both a *Catalyst* and *NET+* provider, but may choose to be a *Catalyst* only. The programs could be aligned so that would be acceptable as long as the revenue generated is equivalent to the value and cost of running the program. All of the current InCommon Affiliates could fit into the *Catalyst* Program if their practices meet established criteria.

### **Program Transition Recommendations**

Reconciliation of InCommon Affiliates, Internet2 membership (within a new program), and *NET+* Services, while continuing to nurture the growing market of identity-support services, can pave the way for more effective engagement with our campus community. Via the proposed framework, we intend to reconcile the different goals of the various programs and explore ways to enhance the value proposition of Industry Membership, encouraging the transition from being an InCommon Affiliate to Internet2 member.

### ***Current Financial Model***

Both the Internet2 Industry Member and InCommon Affiliates programs require annual dues. The current financial model is as follows:

- Annual Internet2 Industry Member dues are: \$33,600 for companies with annual revenues over \$1 billion; \$13,125 for companies with annual revenues between \$10 million and \$1 billion; \$2,500 for companies with annual revenues under \$10 million – these fees do not include event registration fees, webinars, or exhibit space, each of which are optional at additional cost. *Three of the seven Affiliates are already members of Internet2. The remaining four---all small companies---would have dues of \$2,500.*
- Annual InCommon Affiliate program dues are \$6,000 annually (revenue independent). This fee includes two registrations for the annual CAMP meeting (this year integrated into Technology Exchange and valued at ~\$1500 total); a co-branded webinar (valued at ~\$1000), exhibit table space during CAMP/TechEX (valued at \$2000) as well as a prominent presence on the InCommon website

### ***Transitional Financial Model (2015)***

Going forward, in 2015, we propose that current Affiliates transition to the Internet2 Industry Program. During this year, they would have the chance to provide input on the development of the Catalyst Program and choose how they would like to participate in the community. They would need to determine their chosen mix of services by end of 2015.

During 2015, the current Affiliates would transition to Internet2 Industry Members using the following financial model.

- Pay Internet2 Industry Program Membership fee. Three of the seven Affiliates are already members of Internet2. The remaining four---all small companies---would fall in the under \$10 million revenue mark with a dues cost of \$2500 per year. The remaining three companies are already Internet2 members and would save money.
- Choose from a selection of unbundled Affiliate Program-like features as for-fee options under the Internet2 Industry Program. This enables organizations to pay-as-they-go, a la carte.

*Attachment 1* illustrates how features of the InCommon Affiliate program parallel with Internet2 Industry Membership features and options. An incumbent InCommon Affiliate engaging as an Internet2 Industry Member and selecting the full menu of options aligning with 2014 InCommon Affiliate benefits would incur a \$1,000 increase over current 2014 InCommon Affiliate dues. In 2016, they would realize a \$2,500 increase over 2014 InCommon Affiliate dues. A current InCommon Affiliate who does not select the optional registrations, exhibit table (2015) or sponsorship booth (2016), and/or webinars would pay basic Internet2 membership dues only, but could still participate in select working groups.

### ***InCommon Affiliates that are also Incumbent Internet2 Members***

The remaining three of the seven InCommon Affiliates would pay their Internet2 Industry Member dues and elect registration, webinars, and exhibit space to parallel their current InCommon Affiliates benefits. This would result in a \$1,500 decrease in dues/fees in 2015 per current Internet2 member company, since they would not be paying two sets of dues, and an increase of \$2,500 in 2016, thus a “break even” over 2 years of membership in Internet2, with ala carte benefits paralleling the ‘old’ InCommon Affiliate program features. (*Attachment 1 details the features/benefits.*)

*\*These projections are based on existing programs that may be subject to modification in the future*

### **Timing**

Integration of the InCommon and Internet2 programs could be achieved by:

- Freezing the engagement of any new InCommon Affiliates as of October 31, 2014;
- Referring any companies that would have originally sought to become InCommon Affiliates to the Internet2 Industry Membership as of November 1, 2014;
- Finalizing the program proposal with the support of InCommon Steering and Internet2 leadership by November 15, 2014;
- Transitioning four of the seven incumbent Affiliates who are not Internet2 Industry members to full Internet2 Industry membership beginning in 2015.

### **Conclusion**

Making this transition will enable the current set of Affiliates to address a larger set of problems. To ensure product and service applicability and level of service, we can leverage existing vetting process through NET+ for some services and establish a new approach to make identity and access management easier, more interoperable, and consistent with best practice.

In the end, this establishes a more logical framework in which companies can participate with TIER. Finally, this document proposes business model approach for supporting the promulgation of Internet2-community practices to corporate partners.

# Attachment 1: Comparative Analysis

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## Comparative Analysis

Current InCommon Affiliate Program Benefits	2014 InCommon Affiliate Program (Sun-setting Dec. 31, 2014)	2015 Transition from InCommon Affiliates to Internet2 Industry Program	2016 Full Integration of Affiliates into Internet2 Industry Program
<b>Annual Dues</b>	\$6000	\$2500 Level 4	\$2500* Level 4
<b>Attendance at CAMP</b>	2 registrations included (2014- for TechEX attendance since CAMP is embedded in program)	2 x ~\$750=\$1500 Optional (included if booth sponsor)	2 x ~\$750* = \$1500 Optional (included if booth sponsor)
<b>Co-branded webinar</b>	Included (valued at \$1000) (InCommon Affiliate co-brand)	1 x \$1000=\$1000 Optional Internet2 Member co-brand	1 x \$1000=\$1000 Optional Internet2 Member co-brand
<b>Working Group</b>	Included	Involvement in key Internet2 and InCommon working group activities	Involvement in key Internet2 and InCommon working group activities
<b>Visibility through Webinars; newsletters, etc.</b>	Profile on InCommon Federation Website	Listing on InCommon and Internet2 websites; announcements shared through InCommon Communications and Internet2 Communications	Vetted members on InCommon website; members on Internet2 website; announcements shared through InCommon Communications and Internet2 Communications
<b>Exhibit aligned with CAMP sessions</b>	Exhibit table included (valued at \$2000)	Exhibit table as an Internet2 Member at TechEX 2015 - \$2000 <i>Note: Could become a booth sponsor for \$5000 (includes 2 registrations)-a net \$1500 increase over shared table + 2 reg.)</i>	No exhibit table; option to become a sponsor with <i>booth</i> =\$5000* (includes 2 TechEX Registrations))
<b>TOTAL</b>	<b>\$6000</b>	<b>\$2500+ up to \$4500 of ala carte options</b>	<b>\$2500 + up to \$6000 of ala carte options</b>

\* The financial implications of the proposed new NET+ categories and the proposed Catalyst program are to be determined during the transition period.