REFEDS

REFEDS Report 2011-2012

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Abstract:

This report provides a short overview of the work performed between September 2011 and December 2012 as well as the costs incurred in the same period.
The second year of REFEDS funding covers the period from 1 September 2011 until 31 December 2013 (please refer to REFEDS work plan for 2011-2012 for more information: https://refeds.org/docs/refedsworkplan11-12FINAL.pdf).

This report is aimed at the Sponsors, i.e. those REFEDS organisations that provide funding and manpower to cover the costs of REFEDS.

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1. Sponsorships

The following organisations were REFEDS Sponsors during the reporting period:
- Australian Access Federation
- CESNET
- GARR
- Internet Society
- Internet2
- JISC
- NORDUnet
- SURFnet
- SWITCH

In total these organisations contributed **€ 81,298.97** in sponsorship.

2. Activities

REFEDS funding is intended to enable REFEDS to provide a more structured framework for research and education identity federations worldwide with the objectives of:
- representing the needs for the research and education community in the wider space of access and identity management;
- addressing the inter-federation issues and trying to offer some solutions for these;
- engaging more actively with other communities interested in identity federations;
- enhancing international collaborations among participants by sharing best practices and possibly contributing to the creation and/or adoption of new standards.

REFEDS work is organised in work packages. Each year REFEDS group is solicited to provide inputs for possible work areas. A short list is created with the expected budget associated with each work area. The REFEDS Steering Committee is then asked to approve the list and to define initial priorities should the budget not be sufficient to fund everything. Sponsors can of course also indicate their preference for specific work areas.

 A short summary of the progresses of each work package is provided below.

REF1: REFEDS Coordination and Promotion

 In March 2012 a REFEDS Blog was added to complement the REFEDS website and wiki. The blog is meant to offer a better way to disseminate REFEDS results and to offer a mean to report on more specific topics.

In line with the plan to liaise with other relevant initiatives world-wide, REFEDS hosted three BoFs in the reporting period at:

- Internet2 Fall Meeting 2011
- APAN 2012
- Internet 2 Spring Meeting 2012

There is increased interest in the Asia-Pacific region in deploying identity federations and REFEDS is considered more and more as a reference point.

REFEDS also held three meetings during 2012:

- May 2012 during TNC2012 (yearly main event).
- September 2012 in Utrecht in conjunction with the VAMP workshop.
- November 2012 in Belgrade in conjunction with the TERENA Task Forces meeting.

In line with the plan for this work item a first version of the Metadata Explorer Tool (MET) was delivered in November 2012. The tool gathers and shows information about federations (mostly about SPs and IdPs). Plans are to refine the UI of the tool and to include the feedback received. This work will be carried over in 2013. For more information about MET, please visit:
http://beta.terena-met.yaco.es/

REFEDS has been particularly active in reaching out different communities, particularly the e-Researchers. One of the main results in this area, which translated into a real work item is the effort to address the e-Researchers requirements as presented in the paper "Federated Identity Management for Research Collaborations" (also presented at TNC2012).

A document was prepared jointly by REFEDS and eduGAIN teams to provide answers to the various requirements and to propose a roadmap to address them. The first version was circulated to the general REFEDS list in December 2012. The final version will be presented in March 2013 to the FIM4R workshop.
The document can be found online at:
https://refeds.terena.org/images/b/b4/AnalysisFIMDocumentv0.6.doc

REFEDS is also liaising with the Kantara Initiative and with the Identity work carried out by ISOC.

REF2: Barriers to Effective Federation Use

The aim of this work package is to simplify the process for integrating new Service Providers (SPs) into federations and to improve the end-users' experience when using

federated login. This work package had two tasks:

i) Discovery and Login - The main sponsored output of this work item was the "4-Steps to Discovery" guidelines, which was delivered at the end of 2012. The guidelines offer recommendations for service providers in the area of:

- Login button and other main elements to make federated access more consistent;
- terminology;
- type of discovery software (to enable users to locate their home institution)

Plans for 2013 are to host the set of recommendations in a stand-alone website (http://discovery.refeds.org/).

Work was also carried out on the MDUI, the metadata extensions for login and discovery. Three set of documents were produced:
- MDUI Recommendations for Federations
- MDUI Recommendations for Software
- MDUI Guidance for Federation Operators (second draft)

ii) Barriers to SPs Project
This work item follows up on the recommendations contained in the "Barrier for Service Providers document" written by Nicole Harris in the spring 2011.

The **sponsored outputs** of this item are:
- Federation Policy Best Practise Approach
- Identity Federation Policy Template

REF3: Boundary Solutions

The aim of this work package is to improve the experience of users in non-federated environments. The main output of this work-item was supposed to be a software package to remotely configure servers for federated rewriting proxies.

The work on this topic was eventually frozen, although budget was available. The reason for this being that the work item leaders (Diego Lopez and David Simonsen) were not available as initially envisaged. This work has now been superseded by events and will no longer be pursed.

REF4: Federation Harmonisation

The aim of this work package is to align technologies, policies and schema where harmonisation benefits have been identified.

The work on this area was carried out, in collaboration with eduGAIN and led by

Steven Carmody (I2) and Mikael Linden (CSC).

The output became part of the eduGAIN Code of Conduct.

No REFEDS budget was used for this, all time was donated.

REF5: Inter-federation

The aim of this work package is to explore different models to support inter-federation.

The initial proposed work evolved into what is now known as PEER (Public Endpoint Entities Registry). PEER aims to create a metadata repository and lookup service used by participating entities that intend to share their metadata for inter-federation purposes. PEER software, **sponsored primarily by ISOC**, was finalised at the end of 2012. In line with REFEDS policy, the PEER software is publicly available on github and has attracted the attention of people working outside of REFEDS.

Preliminary work started to build a pilot service called REEP. REEP will offer a central register for service providers to upload their metadata and will enable federations to download relevant metadata. This has the clear advantage of avoiding duplication of data and ensuring that the data stored in REEP are updated. The content in REEP can also be consumed by national federations or by eduGAIN.

Work in 2013 will be carried out to launch the REEP website and to better define the service conditions.

REF6: Level of Assurance

The aim of this work package is to establish core level of assurance profiles that can be adapted for interoperable use within multiple federations.

Not a lot has happened with regard to Level of Assurances (LoA), despite an increasing interest in this area.

There was limited progress in this work package and mostly confined to some federations trying to map their policy to the OIX Trust Framework and the Kantara Identity Assurance Framework.

The aim of the REF6 work package has been revised during the preparation for the 2011-2012 REFEDS workplan and beside LEGO it also includes a proposal to explore LoA identified in e-Researcher use-cases. In planning for 2013, it was decided to take a step back and focus on defining the current common assurance profile across R&E identity federations through and analysis of federation operator practice statements and recommendations. This should provide a more solid platform to build out towards a common LOA1 profile base. It is accepted that this work area is a long-

term strategy.

3. Finances

A summary of the costs incurred by REFEDS in the period reported (August 2010 – August 2011) is given below.

Budget Period Sep 2011-Dec 2012	€	Comments
Contributions from Sponsors	81,298.97	
Remaining Budget per Sep 2011	48,215.54	
TOT Budget	**129,514.51**	As per Sept 2011
Left Over Budget Jan 2013	**33,380.62**	As per 1 Jan 2013

Table 1: Budget Summary

Summary Expenditure Sep 2011-Dec 2012	€	Comments
Budgeted cost Sept 2011 – Dec 2012	**104,000**	As per plan approved by the REFEDS Steering Committee
PEER Costs	- 26,538.50	Development sub-contracted to YACO
MET Cost	- 7,100.00	Development sub-contracted to YACO
Work Item 2 & 3 Costs	- 20,000	
REFEDS Meeting cost Iceland	- 1,597.13	
Personnel Costs (TERENA)	- 16,045.02	
Travel Costs (TERENA)	- 4,953.24	
Nicole Harris Time Costs	- 15,050	
Nicole Harris Travel Costs	- 4,850	
TOTAL Costs	**96,133.89**	

Table 2: Expenditures breakdown