

REFEDS Work Plan 2015

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1. Overview

The fourth funded period of REFEDS completes on 31st December 2014. A full report relating to the fourth period of operation has been prepared and circulated to REFEDS participants via the mailing list, and is available on the REFEDS website:

https://refeds.org/work/work_documents.html.

This workplan will be circulated to all REFEDS participants for comments, presented to the REFEDS Steering Committee for final approval of content and the REFEDS Sponsoring Group for confirmation of expenditure.

In parallel with finalising the Annual Report for 2014, the REFEDS Coordinators have carried out the planning process for the REFEDS 2015 Workplan.

2. Inputs

As per the process undertaken in previous years, REFEDS put out a call for work areas for the 2015 work programme in November 2014 (<https://wiki.refeds.org/display/WOR/2015+Work+Plan>) and discussed these issues in more detail at the REFEDS Fall 2014 meeting in Indianapolis and the November BoF in Vienna. This crowd-sourcing exercise is intended to represent the inputs and requirements from the community and does not constitute the full and final workplan for REFEDS. Based on feedback from participants via these mechanisms, discussion with partner organisations such as the GÉANT project, Kantara, ISOC and the FIM4R group the following workplan has been proposed and will be presented to the REFEDS Steering Committee for ratification. The proposals will also be shared with the REFEDS Sponsoring Organisations.

In order to effectively manage the workload and focus of REFEDS work, we believe that no more than 6 main work items should be proposed in any one year. It is also essential that each work item has a strong leader to both support the direction of the work and report back to the community on progress. Where work item leaders have not been identified so far, calls will be made to the community for volunteers.



3. Work Items

The following work items have been proposed for the REFEDS workplan in 2014:

1. REF15-1: REFEDS Coordination and Management.
2. REF15-2: Federation Operator Best Practices.
3. REF15-3: Virtual Organisations and Groups.
4. REF15-4: REFEDS Services and Monitoring.
5. REF15-5: Standards and Harmonisation.
6. REF15-5: Specialist Work Groups.



REF15-1: REFEDS Coordination and Management

This work item is the hub at the centre of REFEDS and represents the work to keep the group moving forward organisationally and administratively. It also manages the communications efforts for REFEDS. Increasingly, as REFEDS produces more outputs, there will be a need for the effort in this work area to increase to support lightweight maintenance of outputs.

Licia Florio and Nicole Harris will carry out work in this area with support from in-house staff at the GÉANT Association.

REF15-1: REFEDS Coordination and Management

Lead: Licia Florio / Nicole Harris

Aims:

- To progress REFEDS position as an important player within the access and identity management space internationally.
- To build on established relationships with GÉANT project, ISOC and Kantara.

Work Items / Milestones:

- a. Run up to 2 x REFEDS BOFs with specific community focus.
- b. Create refeds.org replacement site.
- c. Maintaining the REFEDS blog.
- d. Up to 2 x standard REFEDS meetings.
- e. Implement 2015 REFEDS Survey.
- f. Manage 3+ contracts for REFEDS work.

Budget:

20000 euros – REFEDS Coordinator time.

References:

- <https://www.refeds.org>.
- <https://wiki.refeds.org> .
- <https://blog.refeds.org>
- REFEDS mailing lists.

REF15-2: Federation Operator Best Practice

This work area will continue a core component of the REFEDS work to-date, namely work to standardise and synthesize best practice across federation operators. As part of the crowdsourcing process for work items for 2015, three core areas were identified:

- Best / Recommended Practice;
- Entity Category support;
- Metadata Optimisation.

Discrete work will be carried out in each of these areas that is achievable within the one year timeframe for this workplan, although it is likely that this work area will continue to be on the REFEDS plan for many years to come.

Under this work area, REFEDS Coordinators will also liaise with projects working on assurance for research and education federations including [Kantara Initiative](#), SIRTFI, [FIM4R](#), the AARC project (if funded), [IETF Vector of Trust \(VoT\)](#) group and the [GN4 project](#).

REF15-2: Federation Operator Best Practice

Lead: Nicole Harris

Aim:

- To complete work on metadata registration, publication and federation key management documentation and to feed in for dissemination and use within the GÉANT project (GN4) harmonisation task.
- To maintain and monitor use of existing entity categories
- To shepherd proposals for 2-3 new entity categories (library / affiliation and academic) through to conclusion.
- To carry out a lightweight review of contacts in metadata.
- To liaise and work with projects focusing on assurance profiles

Work Items / Milestones:

- a. Documentation for 3 federation operator practice statements.
- b. Report on uptake of R&S and Hide from Discovery entity categories.
- c. Development of supporting materials for R&S entity category including information on risk assessments for entity category usage and requirements for Federation Operators.
- d. Completed consultation for 2-3 new entity categories.
- e. Completed survey / review of contacts in metadata.

Budget:

10000 euros REFEDS Coordinator time.



References:

- Entity Categories: <https://wiki.refeds.org/display/ENT/Entity-Categories+Home>.
- Federation Operator Practice: <https://wiki.refeds.org/display/FBP/Federation-Best-Practice+Home>.

3.3 REF15-3: Virtual Organisations and Groups

As federated identity approaches mature, the need for virtual organisation (VO) and group management has become more pressing. REFEDS has not typically undertaken much work in this area as tool development has happened elsewhere (Grouper, CoManage, Perun, OpenConext etc.) without any identifiable area where REFEDS could add support.

In 2015, several of the VO projects have identified generic work that could help projects and organisations better understand their own requirements for such tools. Several years ago, the COmanage project put together a questionnaire aimed at helping both the VO and the organizations supporting them understand their identity management needs and business processes. This proved to be fairly useful, but it needs to be updated and expanded to help a more international audience. REFEDS is well placed to help with this generic needs assessment work that could be reused across platforms. This work could expand out to provide other best practice guidelines for VOs.

Inline with the VO requirements come the need for further focus on attribute authorities as an essential part of the federated framework. There is a need to carry out more work to investigate how VOs are managing the use of namespaces for group information in this context.

REF15-3: Virtual Organisations and Groups	
Lead: Licia Florio	
Aim:	
<ul style="list-style-type: none"> • To provide supporting material for organisations carrying out a needs assessment for VO / group management usage. • To support the standardisation of namespace usage by VOs / attribute authorities. 	
Work Items / Milestones:	
<ol style="list-style-type: none"> a. Update of VO / group management needs assessment documents. b. Problem Statement Document. c. Value Proposition of federations for VOs document. d. 3 x conference call to discuss namespace requirements. e. Draft proposal on standardising namespace. 	
Budget:	
<ul style="list-style-type: none"> • 10000 euros external consultant (Heather Flanagan). 	
Reference:	
<ul style="list-style-type: none"> • https://wiki.refeds.org/display/WOR/2015+Work+Plan. 	



3.4 REF15-4: REFEDS Services and Monitoring

Over the last two years REFEDS has funded the development of two main tools: REEP and MET. These tools have been running in pilot mode and need to be moved to full operation or retired in 2015.

REEP development has taken longer than initially envisaged due to the readiness of federations to interact with a service such as REEP. A test-case Key Management Practice Statement has been developed for the REEP service: <https://wiki.refeds.org/display/SER/REEP+Policy>. As part of joint work between eduGAIN and REFEDS, the concept of a Metadata Publication Statement has been revisited and developed for REEP. The REEP interface has been operated at a very basic level to date and needs updating to better reflect the needs of end-users.

MET, the Metadata Explorer Tool, was designed to give federations a quick overview of the metadata in existing federations. The tool has been in operation on NORDUNET servers during 2014 – but a security incident in November 2014 has led to the re-evaluation of the service and its operations. In 2015 this will be moved to full operational status at GARR.

FedLab is a suite of tools developed initially by UNINETT and further enhanced by SUNET, with the funding of the Gn3plus project. The aim is to gain user experience on the tools and provide feedback to the developer through liaison with FedLab. The pilot will run over the 2015.

Most federations have wording in their federation policy to support incident response but this tends to be a few words committing the Operator, IdP and SP to work together on issues. There is no developed idea of the workflow for incident reporting and it is difficult for SPs to understand the process across different federations or contact multiple federations. REFEDS should define a common process and workflow descriptions for federations and support a lightweight model for supporting incident reporting and discussion - possibly via the FOG list or an XMPP type approach. This work will be developed in conjunction with the SIRTFI working group.

REF15-4: REFEDS Services and Monitoring.

Lead: Licia Florio

Aim:

- To provide support for existing REFEDS pilots as well as for the new ones
- To define a lightweight process for federation operators to work together on incident response management

Work Items / Milestones:

- a. REEP operations.
- b. Operational version of MET.
- c. Liaison work with FedLab.
- d. Incident response framework.



Budget:

- 20000 euros for REEP.
- 5000 euros coordination work.
- "In kind" effort from GARR for MET operations.

Reference:

- <https://reep.refeds.org/>
- <http://openidtest.uninett.no/>.
- <https://met.refeds.org>.



3.5 REF15-5: Standards and Specifications

REFEDS is taking more of a significant role as a body that works on standards and specifications for the community. It has been agreed that where appropriate, this work should be developed as much as possible via the RFC mechanisms.

The aim for 2015 is to embed the work that REFEDS has begun in this area and begin to pilot some of the development and practices. In 2015, this will include further work on the Metadata Query Protocol work, which is essential for the development of metadata aggregation and management, a review of existing attribute schema considering requirements in this area, and Entity Category development.

This work area will also look at defining structure need for governance, editing and oversight of the standards and specifications produced by REFEDS.

As placeholder has been put for development and support of SCHAC and other attribute schema. This will be defined and approved following the report from the SCHAC consultant hired by TERENA in 2014.

Due to the significant nature of this work, external consultants will be hired to provide the focus needed for development and implementation.

REF15-5: Standards and Harmonisation

Lead: Nicole Harris

Aim:

- To provide support for the development of standards and specifications under the REFEDS banner.
- To pilot specification work to support implementation requirements.
- To put in place structures to ensure specification and schema sustainability.

Work Items / Milestones:

- a. Federation at scale: work to pilot the Metadata Query Protocol within multiple federations and report on readiness to manage more complex metadata management.
- b. Federation at scale: review of further work needed to support large-scale metadata management, including discovery.
- c. SAML Entity Categories: finalising RFC for core documentation.
- d. SCHAC development and sustainability.

Budget:

- 2000 euros RFEFEDS Coordinator.
- 10000 euros MDQ / Entity Category Consultant (Ian Young).
- 20000 euros SCHAC consultant (Heather Flanagan).



References:

- SCHAC: <https://wiki.refeds.org/display/STAN/SCHAC>.
- MDX: <https://wiki.refeds.org/display/STAN>.
- Entity Categories: <https://wiki.refeds.org/display/STAN>.



3.6 REF15-6: Specialist Working Groups

REFEDS provides the opportunity for new ideas and innovations that do not yet have defined outputs to be incubated for specialist work areas. It also supports infrastructure to allow closed discussion groups for more sensitive conversations relating to federation operations.

Any participant in the REFEDS community can propose a specialist work area. The REFEDS Coordinators will provide wiki space, mailing lists and other infrastructure to allow the groups to operate, but it will be the responsibility of each group to foster discussion and develop ideas.

REF14-6: Specialist Working Groups

Lead: According to WG Chair

Aim:

- To provide infrastructure and support for evolving ideas and areas in the REFEDS community.

Work Items / Milestones:

- a. Support for the following groups is recommended in 2015:
 - i. FOG (Federation Operators Group).
 - ii. MARI (managing attribute release in interfederation use-cases).
 - iii. OIDC(re) (OpenID Connect for Research and Education).
- b. Support will also be given to the external SIRTFI group.

Budget:

- None.

References:

- <https://wiki.refeds.org/display/GROUPS/Working-Groups+Home>.

4. Budget Requirements

Work Area	Amount
REF15-1:	20000 euros
REF15-2:	10000 euros
REF15-3:	10000 euros
REF15-4:	25000 euros
REF15-5:	35000 euros
REF15-6:	None.
Travel budget	12000 euros
TOTAL	102000 euros