

REFEDS Work Plan 2013

Licia Florio and Nicole Harris

1. Overview

The second funded period of REFEDS completes on 31st December 2012. This period was extended by 6 months to bring REFEDS management and reporting in line with the calendar year, so REFEDS will have been operating as a funded organisation for 30 months. A full report relating to the second period of operation will be prepared and circulated to REFEDS participants via the mailing list.

Year 1 of REFEDS focused on establishing REFEDS as a group and tackling some very well defined projects, and the second funding period presented the opportunity for the group to begin to manage more complex problems and issues with wide-ranging implications. This has seen the development of PEER and REEP, the Discovery Project, work to align policy recommendations and significant cross-over work between GEANT and REFEDS.

In calling for proposals for the third REFEDS workplan, we have been met with unprecedented input, ideas and inspiration from the community – demonstrating the impact that REFEDS as a group is now beginning to have. This has also meant a need to carefully look at all of the proposals and their justification for progress under the REFEDS banner. It is clear that in order to meet all of the requirements of the community, REFEDS will need to work closely with a range of groups to ensure the workload can be met. This will include tf-emc2, GEANT3+, ISOC and Kantara.

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.

2. Inputs

Proposals for the 2013 workplan have been received from the widest range of individuals and organisations to date, and are fully documented on the REFEDS wiki:
https://refeds.terena.org/index.php/REFEDS_Planning_Documents_2013.

Several items from the 2011/12 workplan will be deemed complete by 31st December 2012 and as such removed from the planning cycle. This includes all of the work under the "REF2" banner on removing barriers to federation uptake and the software component of PEER. Other areas will be refocused in line with changing community requirements and others dropped due to lack of progress (REF3, Boundary Solutions).

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 2013:

1. REF13-1: REFEDS Coordination and Management
2. REF13-2: Defining baseline assurance within federations.
3. REF13-3: Engaging with eResearch.
4. REF13-4: Understanding and improving metadata flow across federations.
5. REF13-5: Specialist Work Areas.

3.1 REF13-1: 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.

Work in this area is carried out by Licia Florio and Nicole Harris (subject to new contract in 2013) with support from in-house staff at TERENA.

REF13-1: REFEDS Coordination and Management
Lead: Licia Florio / Nicole Harris
Aim: <ul style="list-style-type: none">• To progress REFEDS position as an important player within the access and identity management space internationally.
Work Items: <ul style="list-style-type: none">• Establish better understanding of workflow between tf-emc2, GEANT and REFEDS.• Continue developing relationships with Kantara, ISOC, NIST and NSTIC.• Continue evolving REFEDS communications channels.• Develop working with MET to inform REFEDS intelligence.• Establish contact point for queries from REFEDS outputs (discovery project work, PEER / REEP contact point).• General admin for meetings, mailing lists and supporting infrastructure.• Complete work on RFC.



Sponsored Output: <ul style="list-style-type: none"> • 2 x REFEDS BOFs with specific community focus. • www.refeds.org maintenance/development. • Maintaining the REFEDS blog. • 2 x standard REFEDS meetings. • REFEDS PR material (newsletters, REFEDS map).
Time Allocation: 34 days REFEDS coordinator time over the period 1 January 2013 – 31 st December 2013.
Budget: €30,000 – including travel costs.
Reference: N/A

3.2 REF13-2: Defining baseline assurance within federations

A recurring theme within 2012 has been the need to better understand what the base-line of assurance is for federations. All federations currently set out a minimum standard for IdPs and SPs seeking membership, but it is difficult to map this against any standard or 'level' at this point in time. This work area will seek to make recommendations around this and support the first steps in defining LOA for research and education federations. Three work area proposals from the community have been included in this work item.

REF13-2: Defining baseline assurance within federations Lead: Nicole Harris
Aim: <ul style="list-style-type: none"> • To improve the understanding of the base assurance of federations and to improve the usage of federation infrastructure based on increased assurance understanding and implementation.
Work Items: <ul style="list-style-type: none"> • Develop a federation operator best practice template in line with the federation policy template. • Develop a plain English mapping tool for federation assurance across common assurance profiles and make recommendations for an R&E assurance profile based on this work. • Further develop the 'Code of Conduct' to be applicable for international attribute exchange.



Sponsored Output: <ul style="list-style-type: none">• FOP Template.• Assurance mapping tool.• Recommendations for R&E assurance profile.• International Code of Conduct.
Time Allocation: <p>Up to 40 days of coordinator / editor effort across all the three work areas.</p>
Budget: <p>Up to €30,000. This does not include fees for lawyers for Code of Conduct work (for discussion with GEANT).</p>
Reference: <p>FOP: https://refeds.terena.org/index.php/REFEDS_Planning_Documents_2013#Federation_Operator_Best_Practice_Documents.</p> <p>Assurance: https://refeds.terena.org/index.php/REFEDS_Planning_Documents_2013#Levels_of_Assurance:_What.27s_My_Level.3F</p> <p>Code of Conduct: https://refeds.terena.org/index.php/REFEDS_Planning_Documents_2013#Data_protection_Code_of_Conduct_-_extending_beyond_the_EU.2FEEA</p>

3.3 REF13-3: Engaging with eResearch

In April 2012, a group of research organisations led by CERN published a report on Federated Identity Management for Research Collaborations: <https://cdsweb.cern.ch/record/1442597>. The report contains a number of recommendations that are relevant to REFEDS and the work of research and identity federations. The TERENA General Assembly requested that REFEDS formulate a response to this report and how REFEDS can support the recommendations made by the FIM report.

REF13-3: Engaging with eResearch

Lead: Licia Florio



Aim: <ul style="list-style-type: none">To work on the recommendations put forward by the FIM paper. This work item will identify specific topics and will offer proposals on how they could be addressed by the Identity Federations community, eduGAIN and the related e-Research communities.To offer an international forum where specific e-Research use-cases (i.e., LIGO) can be brought forward and discussed.To discuss how better leverage existing (inter)federation infrastructuresThis work will also consider the work planned by the "Attributes In Motion Work Group" operating within Kantara.
Work Items: <ul style="list-style-type: none">The specific work items will be listed in the paper (which is expected by end of Nov). Possible work items include, support for LoAs in existing federations, recommendations on attribute providers etc., Working group addressing the role of Attribute Authority / Provider within federations.
Sponsored Output: <ul style="list-style-type: none">Recommendations on how federations should address the role of Attribute Authority (Provider).
Time Allocation: <ul style="list-style-type: none">30 days.
Budget: <p>None requested at this moment, however budget may be needed if it is agreed to carry on specific work as result of the "Answer to the FIM document".</p>
Reference: <p>Attribute Authority: https://refeds.terena.org/index.php/REFEDS_Planning_Documents_2013#The_Role_of_the_Attribute_Authority_.2F_Provider</p> <p>'REFEDS Response to the FIM Paper' is currently in draft format and will be circulated shortly.</p>

3.4 REF13-4: Understanding and improving metadata flow across federations.

Despite the work done on interfederation within REFEDS, GEANT and other organisations, there is still a lack of understanding around how to operationalize metadata flow across federations in a way that is clear to IdPs and SPs, as well as the federations themselves. This work item will address three proposals working together to address this concern.



REF13-4: Understanding and improving metadata flow across federation Lead: Volunteer needed	
Aim:	<ul style="list-style-type: none"> To increase the exchange of metadata across federations and to improve the understanding of interfederation practises and process amongst federation members.
Work Items:	<ul style="list-style-type: none"> Run a pilot REEP service for the research and education community for 2013, making recommendations for a future service environment. Develop MET to provide clear information on Service Provider status, which federations they are part of and where metadata is being consumed by federations participating in interfederation agreements. Address the concerns of scaling for federations.
Sponsored Output:	<ul style="list-style-type: none"> Recommendations from REEP pilot to the community. REEP website and pilot service. Enhanced MET interface in use with federations, IdPs and SPs. Report on federation scaling.
Time Allocation:	<ul style="list-style-type: none"> 20 days coordinator work for REEP and MET.
Budget:	€10,000 for coordinator support and expenses, €5000 for infrastructure support and software installation.
Reference:	<p>Federation Scaling: https://refeds.terena.org/index.php/REFEDS_Planning_Documents_2013#Scaling_of_.28inter.29federation</p> <p>MET development: https://refeds.terena.org/index.php/REFEDS_Planning_Documents_2013#Service_Provider_Status_Tool</p>

3.5 REF13-5: Specialist Work Areas

REFEDS has been approached to address several specialist work areas that whilst not of high priority to all REFEDS participants do have value across the community. This work area will allow people to propose and run working groups under the REFEDS banner. It is expected that the proposer will take full responsibility for running the group, ensuring regular meetings and reporting on outputs. REFEDS will provide wiki / mailing list facilities, but it is expected that budget will not be allocated to these groups under this umbrella.

Specialist working groups may propose more substantial work items for REFEDS to address as part of funded activity as a result of their efforts.

REF13-5: Specialist Work Areas	
Lead: Groups lead by proposer as appropriate	
Aim:	<ul style="list-style-type: none"> To provide infrastructure and support for evolving ideas and areas in the REFEDS community.
Work Items:	<ul style="list-style-type: none"> Write to proposers of working groups explaining expectations and facilities for groups within REFEDS.
Sponsored Output:	<ul style="list-style-type: none"> None.
Time Allocation:	None.
Budget:	None.
Reference:	Entity Categories: https://refeds.terena.org/index.php/REFEDS_Planning_Documents_2013#Entity_Categories Federations beyond Education and Research: https://refeds.terena.org/index.php/REFEDS_Planning_Documents_2013#Identity_Federations_towards_other_worlds:_research_hospitals.2C_cultural_heritage.2C_higher_music_education

4. Budget Requirements

Work Area	Amount
REF13-1:	€30,000
REF13-2:	€30,000
REF13-4:	€15,000
TOTAL	€75,000

This proposal includes buying in 94 days of co-ordinator support from Nicole Harris across the workplan period.

5. Items Parked

Two proposed items from the community have not been included in this plan for the following reasons:

- IdP of last resort:** GEANT are planning to take this work forward. If this work is not pursued by GEANT it should be moved to the REFEDS workplan under the 'Response to FIM' work item as it is recognised as high priority for the community.
- Single LogOut:** Both SimpleSAMLPhP and Shibboleth have fully described



their current approach to SLO and their plans for this area. It is unclear what value REFEDS could add, whether this would make any difference to the current software base and who would lead on this item.



