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## **REFEDs Roadmap**

Final Document

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### **Background**

The REFEDs (Research and Education Federation) activity started in 2005 as part of TF-EMC2 with the aim of addressing issues, at both the technical and policy levels, that arise when different federations try to inter-operate with each other.

REFEDs aimed to take up some of the work that was initially envisaged by the Cotswolds group, which included TERENA members from CERN, Finland, Netherlands, Spain, Switzerland and the United Kingdom in addition to AARNet (Australia) and Internet2 (US).

The Cotswolds group met in early 2004 and agreed that a number of actions were needed to drive forward the establishment of trust between different countries' Research and Education federations.

Some of the more technical work in this area has already been embraced by the GN2-JRA5 project, which has developed a framework (eduGAIN) to allow inter-operation between different European federations. Other technical work on attributes coordination and usage of dynamic metadata is being carried out within TF-EMC2. However, due to the closed nature and the very technical focus of GN2 project, it is felt that some more global co-ordination work is needed.

REFEDs participants agree to prepare a roadmap describing the work to be undertaken to provide best practices, guidelines and whenever possible recommendations to address those issues.

The aim of this document is to define such a roadmap, based on the feedback received during the REFEDs meeting in December 2008.

### **Aim of REFEDs**

REFEDs wish to address to need of existing and emerging e-identity federations operating in the field of education and research in Europe, America and Asia to collaborate on policy issues. Collaboration in this area is needed to learn from each other, to align policy in order to facilitate inter-federation work, and to reach outside the research and education community to enable federated access in the larger world.

REFEDs main focus will be on related to policy issues; particularly those concerning inter-federation collaboration of SAML based federations.

REFEDs will confine its activities to the production of guidelines and best practices, mainly concerning federation policies operating in the higher education.

## **Roadmap of work to be undertaken**

REFEDs group took up the task to draft a proposed roadmap describing the relevant activities envisaged for REFEDs. TERENA has been proposed as the body to coordinate REFEDs work.

### **The (Inter)Federation business – [Mikael Linden, CSC]**

This work item should concentrate in preparing best practices to describe the federation business models and federation governance. Topics to address also include:

- documenting best practices for federation governance (2-3 examples) analysis and comparison;
- collecting membership models;
- describing federation business models (2-3 examples);
- collecting use cases for inter-federation mainly at international level. An obvious candidate for this would be how federations plan to support eScience.<sup>1</sup>

### **Policy Coordination – [TERENA]**

This work item will focus on policy issues, particularly those that arise when two or more federations try to inter-operate with each other. Work in this area will include, but it is not limited to:

- Definition of a common template for federation's agreements – The outcome of this item would be a recommendation on how federation's agreements should be structured. [JISC]
- SAML Metadata Aggregation Practice Statement (SMAPS) and for SAML Metadata Signing Policy (SMSP). - SMAPS and SMSP would be the equivalent of PKI CPS /CP documents in a federation environment. [Rodney McDuff, Univ of Queensland]
- SAML auditor's framework – Such a framework might be useful in the event in which federations needed to audit IdPs and in some case SPs. [Rodney McDuff]

### **Privacy and data protection – [Andrew Cormack, JANET]**

This work item aims to develop suggested good practice for identity federation operators and participants to use federated technologies to reduce the transfer of personal data while supporting accurate access management decisions.

This will be informed by European law on personal data, in particular Directive 95/46/EC and the Opinions of the Article 29 Working Party.

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<sup>1</sup> The eScience use case might also include supporting for VO, facilitating federated collaboration tools for use with VO's and related activities.

### **Alignment and maintenance of LOA profiles - [Nicole Harris, JISC]**

Some of work in this area will include:

- Investigating existing definitions of LoAs and their applications in the research and education federations operating at international level;
- Agreeing on standard definitions of LoAs;
- Defining documents to provide recommendations on the usage of the appropriate LoA, depending on sensitivity of the resources to access.

### **Attribute coordination - [Victoriano Giralt, Univ. Malaga]**

Potential activities include aggregating information about use of specific attributes in federations and identification of needs for new schema for new communities (for instance K-12).

### **Outreach – [TERENA]**

One of the first requirements is to make REFEDs more visible, with an independent website. The use of the federations.org domain (or something equivalent depending on the availability of the name) was suggested.

The website should explain what REFEDs is, who the stakeholders are, and its objectives.

The website should also contain a simple roadmap that would help new R&E federations understand the steps needed to set-up their own federations. It will also contain an expanded and maintained inventory of existing R&E federations. The inventory is already available on the REFEDs wiki.

REFEDs will proactively try to reach out communities such as IDABC, STORK and Article 29 Working Party.

Collaboration with other relevant bodies, such as the Liberty Alliance and with IETF should be encouraged, especially in what concerns standards.

Several federations indicated a willingness to contribute funds on an ad hoc basis to support some of the work above. Participation in REFEDs however is not linked to contributions or "membership".