



REFEDS Meeting

31 October 2010

Atlanta, USA

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1. Welcome and Apologies

The following attendees were welcomed to the meeting:

- Jim Basney NCSA
- Scott Cantor The Ohio State University / Internet2
- Steven Carmody Internet2
- Andrew Cormack JANET(UK)
- Licia Florio TERENA **CHAIR**
- Randall Frank Internet2
- Renée Woodten Frost Internet2
- Brian Gilmore the University of Edinburgh
- Jens Haeusser Canadian Access Federation
- Nicole Harris JISC Advance **MINUTES**
- Michael Helm ESnet
- IJ Kim Internet2
- Ken Klingenstein Internet2
- John Krienke InCommon C
- had La Joie Itumi, LLC
- Janne Lauros csc
- Mikael Linden CSC
- Lucy Lynch Internet Society

Iara Machado RNP
 Patricia McMillan Australian Access Federation
 RL 'Bob' Morgan InCommon
 Motonori Nakamura National Institute of Informatics
 Karen O'Donoghue ISOC
 Alex Reid AARNet
 Noemi Rodriguez RNP, PUC-Rio
 Tom Scavo InCommon
 Philip Smart Cardiff University
 Rhys Smith JANET(UK)
 Jerry Sobieski NORDUnet
 Milan Sova CESNET
 Eefje van der Harst SURFnet
 David Wasley Internet2/InCommon
 Rod Widdowson Edinburgh University/SDSS
 Stephen Wolff Cisco Systems
 Kazu Yamaji NII (Japan)
 Ian Young SDSS

The following apologies were noted:

Thomas Lenggenhager SWITCH
 Miroslav Milinovic Srce /CARNet
 David Simonsen WAYF - Where Are You From

2. Approval of Agenda

The agenda was approved by the REFEDS members as circulated.

3. Minutes of Last Meeting and Update of Action List

- Minutes

The minutes of the previous meeting were circulated via the list and are available at:
http://www.terena.org/activities/refeds/meetings/may10/REFEDsMinutes_1_0.pdf.

- Actions from Previous Meetings

Reference	Who	Action	Status
30052010-01	LF	To circulate the final REFEDS document including budget and list of work items.	Complete
30052010-02	NH, AC, SC	To provide a description of the specific work to be addressed in the publishers area.	Complete
30052010-03	NH, MS	To circulate the eduID Business Case when ready.	Complete
30052010-04	ML, MM, AR	To provide use-cases that would benefit from a new (SCHAC or eduPerson) attribute	Ongoing – discussion on the SHAC list

30052010-05	LF, LJ, KK	To discuss solutions to share metadata for orphans SPs.	Ongoing
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4. Introduction and REFEDS Background

Licia Florio gave a background on why we had decided to establish REFEDS as a formal organization, using the terminology 'voice' to establish our position as the combined federations working together. The most important part of REFEDS is clearly its role as a united group of federations.

A workplan has been established as per decision taken during the REFEDS meeting in May 2010 with 5 core workpackages (LOA work has been temporarily parked). These are:

- REF1: Raising the profile of REFEDS;
- REF2: Domesticating applications;
- REF3: User interface and discovery;
- REF4: Federation harmonisation;
- REF5: Interfederation.

Information about all of these work areas can be found on the REFEDS wiki:

https://refeds.terena.org/index.php/REFEDS_Planning_Documents.

Things still to be established in terms of establishing REFEDS are:

- Sponsoring Group list. Sponsors will have a yearly meeting and agree budget. The entire REFEDS group will have input in to work planning as part of the strength of the group, but sponsors will have input in terms of what and who gets funded based on the group discussion.

ACTION31102010-01: Licia and Nicole to circulate details for managing the sponsoring group.

Steven Carmody: Does REFEDS see any role for itself in the world of collaboration services?

- Not one of the core workpackages at the moment, but it would not be excluded if it was felt that this was important for all the federations.

Ken Klingenstein: is 'domesticating applications' the right work area for REFEDS? Should this be focus on virtual organizations?

- This currently encompasses two areas – signing up publishers and domesticating other areas. This might suggest another area for virtual organizations as a REFEDS workitem. REFEDS 7: VO Support?

Ken Klingenstein: what about attributes as a work item?

- This is under REF4. What we actual need to focus on is what our models for interaction are, how do we establish work groups and how do we establish ownership of a work area? We need a written process about how a work item is established and managed.

Steven Carmody: what is the process for creating a working group?

- Currently an informal basis, we could do more work to define this. Steven noted that there should be a process to get 'approval' from the REFEDS group as a whole on what should be branded REFEDS.

ACTION31102010-02: Licia and Nicole to poll list on the definition of REF2 and the requirements for VO support work items.

ACTION31102010-03: Licia and Nicole to circulate process for establishing a working group.

5. REF1: Raising the Profile of REFEDS, Licia Florio

Licia Florio presented the proposed design for the new REFEDS website. The principles for the design of the website were articulated in the strategy document previously circulated to the REFEDS list and available on the REFEDS wiki. The site is intended to be a simple communication tool and not an award winning design statement. It has also needs to subtly fit in with other TERENA activities in the same 'family'.

The website is not the only activity under this workpackage, which includes general management of REFEDS but also directs the outreach and communication for REFEDS as a whole. Focus will move on to other areas when the content for the website has been completed (end November 2010).

Ken Klingenstein: what about other countries that are not currently represented well in REFEDS?

- This is included under REF1 – Raising the Profile. This goes beyond just the website.

ACTION31102010-04: Licia and Nicole to circulate the website design for comment.

6. REF3: EduID and Shibboleth Discovery, Nicole Harris and Rod Widdowson

Nicole presented the main findings of the eduID business case (BC), funded by JISC and delivered in August 2010. The BC [1] proposes a few options to move eduID's idea forward; Nicole solicited comments so that consensus can be reached in what concerns the whole eduID idea and its implementation. Please note that discussion on this topic is ongoing on the REFEDS mailing list.

Rod presented the work done on the Embedded Discovery, which relates very much to the issues eduID aims to address.

ACTION31102010-05: Nicole to circulate the eduID business case document for comment.

7. REF3: User Consent, Chad La Joie and Lucy Lynch

User consent currently forms part of the 'User Interface and Discovery' workpackage but it is important to remember that its impact stretches across a range of REFEDS work items. Chad La Joie presented the 'uApprove' developmentsⁱ which are tackling the issues of how to make user consent usable by end-users. Lucy Lynch presented slides from Eve Maler describing the Kantara UMA initiativeⁱⁱ, which takes the management of identity and puts it in the hands of the end-user.

Ken Klingenstein: what about multi-valued attributes and are there audit logs?

- This is possible. Remember there is a difference between the IdP policy on what is released (which can choose between the multi-values) and the users consent to that.
- There are audit logs for consent modules.

Ingrid Melve: Is there support in non-shib software for consent flags?

- Question for the developers of the software!

Jens H: how do we articulate the information about how and why information is required?

- Don't want to make this more complicated, but we could include links to pages where this information is available.

Ingrid Melve: What about timers on consent?

- The standard release won't do this but should be possible via changes to the core database.

Steven Carmody: UI / API for prior consent at an institution (Out of band consent)?

- There are APIs available for manipulating the datastore, but there is no existing toolkit for achieving this, would need to be done on an institutional basis.

There is currently no active work in REFEDS regarding consent beyond tracking developments and inviting presentations from relevant parties at REFEDS meetings.

8. REF5: Interfederation Policy Developments, Mikael Linden and Valter Nordh

Mikael Linden and Valter Nordh gave members an update on the eduGain ⁱⁱⁱpolicy developments. The eduGain policy has been available for consultation via two tranches and has attracted comments from REFEDS members. eduGain is led by GEANT3 so has a clear European focus, but does not preclude input from non-european federations and interested parties.

Ken Klingenstein: How many people populate attributes?

- Generally very low, but UK feels that we can encourage institutions to populate if we give them a good reason.

Ken Klingenstein: where does the data protection law apply?

- There are ongoing problems with the data protection space and how we cope with moving data across boundaries. The law is applicable anyway, so the profile should not be asking something new of the providers.
- Data protection is governed by the law of the country where the data processing physically takes place.

Steve Carmody: how do we manage the opt-in process?

- Role for REFEDS in helping Service Providers in helping people understand the opt-in process? A cookbook, series of steps you have to go through to make sure that you as an individual organization are able to opt-in?
- Interfederation use-cases for REFEDS.
- The test for any federation (including eduGain) is being simpler than doing it another way. Are killer apps really necessary? Scalability is the use case, not the application.

ACTION31102010-06: examine the role for REFEDS in helping to manage the 'opt-in' process for organizations who want their entities to be in the eduGain metadata.

9. REFEDS and Interfederation, panel and group discussion

Members from the REFEDS community were invited to sit on a panel to discuss the generalities of interfederation and the role of REFEDS in relation to these developments. A series of questions were posed at the beginning of the session to help focus on how REFEDS can support developments:

- Does REFEDS need to have an opinion on this? (as opposed to your federation)
- How do we articulate that opinion?
- What are our concerns?
 - Sustainability? (eduGain SEER)
 - Policy Direction? (eduGain, Kantara) – can we direct as a 'group'
 - Participation?
 - Education / Research perspective?
- What would you like us to do to ensure REFEDS is meeting its requirements, and when should we just go with the flow?

Panelists described the interactions between education and research federations and developing government in various countries. Whilst it was felt that the primary dialogue had to take place at a national level, it was felt that more could be done to help R&E federations make convincing arguments around standards compliance. The saml2int profile was raised as an example of this.

ACTION31102010-07: Licia and Nicole to poll list regarding a statement of support for saml2int from REFEDS.

The business case for interfederation was discussed in terms of how it impacts the business development of federations. Viewed from this position, interfederation is a potentially disruptive business model. Panelists also raised the issue that on occasions a national level entity implementation will still be necessary, thus Service Providers will still need to register with multiple federations.

ACTION31102010-08: REFEDS to review the potential business impact of interfederation on existing federations.

Other issues raised in discussion were:

- The potential role for REFEDS in dispute resolution, including the idea that REFEDS could appoint a body / expert to take on this function across multiple federations. The participants felt that the federation better deals with litigations taking place at federation level, whereas for international issues REFEDS may be consulted to find experts on the specific matter. However it was agreed that at this stage it would be out of scope for REFEDS to mediate litigations.
- Sustainability of eduGAIN beyond the GEANT framework.

10. TCS and LOA, Milan Sova

Milan Sova presented two case studies which raise questions about how to practically manage interfederation and identity assurance. In order to effectively manage the issuing of personal certificates within the TERENA Certificate Service framework, an SP centric federation has been established that positions the Certificate Authority as a service provider and Registration Authorities as identity providers. This is working at a very practical level, but it challenges the

assumption of interfederation (there is no legal framework) and harmonization (there is no unified attribute set from IdPs).

The second presentation reviewed the CILogon service which allows users to obtain cyberinfrastructure certificates via InCommon Silver. CILogon wants to be IGTF accredited, but there is a mismatch between the InCommon framework and the requirements of the IGTF. Milan asked the question – how do we achieve globally understandable LOAs?

Leif Johansson raised the importance of the Kantara Initiative Identity Assurance Framework in this area and cautioned that creating new work was likely to duplicate this effort. He described an environment where an LOA profile such as InCommon Silver could be effectively profiled as part of the KI IAF. Discussion via Adobe Connect members also raised the issue of whether profiling would need to be done on a per country / per federation basis or whether more generic profiles could be used by REFEDS members.

ACTION31102010-09: Nicole to look at the KI IAF in the context of federation use cases and profiling under the IAF for federation requirements, in discussion with Lucy Lynch and Leif Johansson. (NB, this effectively triggers REF6 as an active work area).

11. Metadata Aggregation and PEER, Chad La Joie and Ken Klingenstein

Chad La Joie and Ken Klingenstein presented two initiatives that are looking at different models for federations. The metadata aggregation tool (MDX) is looking to provide new ways of effectively managing metadata which allow for aggregations to be formed and published via specified groupings. The tool is currently aimed at federations in terms of usecase rather than individual institutions, but this does not preclude its use at this level.

PEER (formally the BEER project) aims to provide a lightweight registration service for entities. Validation will be minimal and it will recognize SAML metadata without posing any constraints on its contents. More information about PEER can be found here:

<https://spaces.internet2.edu/display/PEER/Home>.

Scott Cantor: What is PEER validating? Domain as declared in end-point or in entityID?

- EntityID assumed but there is still some work to do here.
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Nicole Harris: What is the sustainability model for PEER?

- Something that REFEDS should maintain a healthy interest in.

It was noted that PEER does not have any policy attached to it. There was general discussion amongst attendees as to whether a federation should be defined by its policy, or whether policy-free federations can exist. There is ongoing disagreement in this area.

12. Date of Next Meeting, AOB and Close

The next meeting will be held on Sunday 15th May 2011 in Prague, prior to TNC2011.

Action List

Reference	Who	Action	Status
31102010-01	LF and NH	Circulate details for managing the REFEDS sponsoring group.	Assigned
31102010-02	LF and NH	Poll list on the definition of REF2 and the requirements for VO support work items.	Assigned
31102010-03	LF and NH	Circulate process for establishing a working group.	Assigned
31102010-04	LF and NH	Circulate the website design for comment.	Complete
31102010-05	NH	Circulate the eduID business case document for comment.	Complete
31102010-06	TBA	Examine the role for REFEDS in helping to manage the 'opt-in' process for organizations who want their entities to be in the eduGain metadata.	Assigned
31102010-07	NH	Poll list regarding a statement of support for saml2int from REFEDS.	Assigned
31102010-08	Commission	Review the potential business impact of interfederation on existing federations.	Assigned
31102010-09	NH, LL, LJ	Look at the KI IAF in the context of federation use cases and profiling under the IAF for federation requirements	Assigned

ⁱ uApprove: <http://www.switch.ch/aai/support/tools/uApprove.html>.

ⁱⁱ Kantara UMA:

<http://kantarainitiative.org/confluence/display/uma/Home;jsessionid=7100058C9B1F3C93A533119090D4A324>.

ⁱⁱⁱ eduGAIN: <http://www.edugain.org>.