Federation 2.0 Working Group Meeting Notes

Fed2 WG Google folder: https://drive.google.com/drive/folders/1PImB85xOfP9tNwSxamo7oR6mqm7Nxo?usp=sharing

Meeting https://internet2.zoom.us/j/8853848902?pwd=ZzNZ80QUcrVkJ6VlW1txE2VdFbdz09

time: https://www.timeanddate.com/worldclock/fixedtime.html?msg=REFEDS+Federation+2.0+Conference+Call+%28every+two+weeks%29&iso=20190626T11&p1=179&ah=1

Tasks

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Wednesday August 18, 2021

Attending: Judith B, Tom B, David W, Laura P, Craig L, Richard F, Dedra C, Alan B

Regrets:

Agenda:

- Next steps
  - List in comment at top of report
  - Text can stand some further polishing
- Check consensus on some judgment calls Tom made.
  - Middle of page 17
  - First Steps
  - Recommendations
- Next meeting: September 1, 2021
- AOB

Re agenda #1, the working group tasked itself thusly:

- Review the summaries of the scenarios - Richard
- Resolve items in Examples from the Field - Dedra; Judith will shortly before next meeting
- British spelling - confirm, correct to British - Alan B
- Authorship - Judith
- Further references - all
- Review Appendices to see if anything needs to be done there - all
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Re consensus items, the working group agreed with the conclusion Tom added to the Analysis section, though some had thoughts about presenting it, or that section, differently. The discussion around First Steps was very active, with members wanting a different treatment, especially an additional step in which marketing and outreach starts to happen, or perhaps participation in some specific technical communities (like the browser stuff happening now), should be recommended. All agreed to express more strongly the urgency with which the A-I community should approach first steps. Some members will try to meet in the off-week to reflect some of that discussion in the draft report.

The plan is to get the completed report to REFEDS Steering by Fri Sep 10. Prospective authors will have until Wed Sep 8 to positively affirm their wish to be cited in the report.

Wednesday, July 21, 2021

Attending: Judith B, David W, Tom B, Alan B, Dedra C, Craig L

Regrets: Laura P, Lucy L

Agenda:
1. Authorship details
2. Review latest updates and changes to the draft Fed2 report
3. AOB

Authorship: we will invite everyone who has participated to be authors. Judith is excerpting names from the meeting notes “attending” line algorithmically. The authors of the scenarios will be removed from the scenarios.

Members discussed a few observations Tom made during his initial editorial pass through the early part of the report. One concerning absence of “challenges” in the Exec Summary, which will be remedied before editing is complete, another concerning the next steps bullets in the Exec Summary being too abstract/high level for that purpose, to be replaced with more concrete ones taken from the bottom half of the report. Also noted a couple of potential items to add to next steps recommendations, and we discussed whether or not to leave a reference to “zero trust” in the introduction. No resolution, but agreed that if it is to remain, there needs to be a little more support for the statement that federated access is a good choice for SPs in a zero trust security environment that has external users.

Wednesday, July 7, 2021

Attending: Tom B, Judith B, Craig L, David , Dedra C, Alan B

Regrets: Lucy L
Agenda:

1. Use ORCID IDs for authors?
2. Review latest updates and changes to the draft doc. draft Fed2 report
   a. Are there any more substantial chunks still to come?
3. Action Items

Yes to ORCID IDs. Tom will provide a place in which authors can write down their ORCID IDs.

Dedra completed an initial pass over the examples in the Examples from the field section, conceived as a way to introduce key A-I concepts by examples, for readers not very familiar with all this. Some comments were added to that section to be taken into account by Tom during an editorial pass.

WG members should look through the report to look for citations that should be referenced in support. Added a References section at the end of the draft report, and WG members should add potential refs there. It’ll get cleaned up and linked to the text later.

Study Process section still being worked on (by Judith, though Community Observations is complete). Judith will add a section to the Fed2 wiki about the Stone Soup process and the artifact we captured of all of the stones that were produced. That wiki section will be referenced in the report.

Tom will do an editorial pass over the doc, aiming to complete before our next meeting on July 21.

Re authorization, give it a positive spin (the ‘let them in” process rather than the “keep them out” process). Maybe refer to Zero Trust Architecture, but be careful of the hypiness of the term.

Wednesday, June 23, 2021

Attending: Judith B, David W, Craig L, Dedra C, , Alan B

Regrets: Tom B

Agenda:

1. Authorship of the report
2. Next meetings: July 7, July 21st
   a. Reconvene after the Consultation period, in October

Notes

1. Dedra will be working on the real world use cases in the next week.
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2. Authorship: those who participated in stone soup and on. (Scenarios have those authors).
3. The lightning talks will be about 7 minutes each and the session is scheduled for Tuesday, October 5, 1:35 – 2:25 pm ET.

From Craig: Craig is asking to find if a non-official draft document can be made available for review.

The IEEE P2302 WG has a complete draft of the Standard for Intercloud Interoperability and Federation (SIIF) and has entered the final IEEE review process.

This means that interested parties can:
- Join the IEEE SA Ballot process (as per the instructions below) and vote on the standard, and also
- Provide comments during the 60-day Public Comment period.

Obviously, we’d like to get comments and ballots from people that know federation inside and out. If interested, please note that the deadline for joining the ballot is 14 Jul 2021, 23:59 UTC-12.

** Sending on behalf of Christy Bahn, IEEE SA Program Manager **

Dear WG members,

In order to receive an invitation to ballot, you must have a myProject account. To be a part of the SA ballot you must be an SA member or pay the per ballot fee. This allows you to comment and vote on the draft.

To ensure you receive the invitation to ballot please follow the instructions below.

Login to myProject:
https://development.standards.ieee.org/myproject-web/public/view.html#landing
NOTE: myProject is free. If you have an IEEE account use your login credentials to log into myProject. If you do not have an IEEE account, you can free one here, free.

Follow the instructions on page 9 of the myProject user guide to indicate an interest in the working group/project

Instructions:
- After you login to myProject, click on Menu (top right)
- Manage Profile & Interests
- Click on the Interests tab
- Click on Add Groups
- You will need to search/look for IEEE Computer Society, expand it open
- Search/Look for Cloud Computing Standards Committee, expand it open
- Look for Intercloud Working Group (ICWG), expand it open
- Click on the circle to the left of the project/task group.

There are 2 options, click on Follow.

Follow the rest of the instructions in the user guide or on your screen. When the invitation to ballot opens you will receive an email notifying you. You have 30 days to sign up for the ballot once the invitation opens.

As explained above, you must be an SA member in order to enroll in the SA ballot. This should be done prior to the opening of the invitation to ballot which will open this month.

If you are an IEEE or Society member you can add the SA membership for $57.00. SA membership only is $256.00 and the SA ballot fee is $306.00. It might be less expensive to become an IEEE member or Society member and then add the SA membership rather than paying for only the SA membership. Membership information can be found here: https://www.ieee.org/membership/index.html. If you do not know if you are an SA member or IEEE/Society member please let me know. I can look this up for you.

If you have any questions please let me know. Thank you.

Regards,
Christy
Wednesday, June 9, 2021

Attending: Judith B, Lucy L, David W, Tom B, Craig L, Dedra C, Alan B

Regrets:

Agenda:

1. Debrief result of Google Docs move
2. A deadline for our work. Possible arc:
   a. Initially complete draft report by end of July
   b. Consultation all of August - September.
   c. Fold in Consultation feedback during October, November if needed.
3. Review David’s First Steps draft Fed2 report
4. Check in on in progress tasks
   a. Laura - Recommendations
   b. Dedra - Study Process Examples from the Field
   c. others?
5. Authorization missing - go make changes in suggestion mode (or comments)
6. AOB

Google Docs move resulted in losing some date details of files not owned by Tom.

WG members agreed to the suggested arc of work and dates above. Tom & Judith will consult with Nicole and Heather about the time frame for the Consultation.

WG members had extensive discussion based on the First Steps draft section, and some editing ensued live. Additional questions raised include:

- Are there additional arcs of work, in addition to A-I governance & voice, that need some first steps articulated?
- Should delegation be mentioned in some fashion as an essential enabler for authorization, and connecting it to the trust that R&E federations operationalize?

Tom will do an editorial pass to try to bring a single voice and consistent terminology to the paper, try to ensure that each desired point is appropriately modulated, and, as much as possible, try to draw the connection from values to its major points.

Wednesday, May 26, 2021

Attending: Judith B, David W, Alan B, Dedra C,
Regrets: Tom B., [ NEED TO ADD OTHERS] C. Lee

Agenda:
1. Check in on in progress tasks
2. How will we enable various types of readers (GEANT, Internet2, eduGAIN steering, REFEDS steering, NRENs, Fed Operators) to know how they may follow up in support of some of the report’s various recommendations?
   a. REFEDS cover letter
   b. Other support, either within the report or in accompanying materials?
3. For next time:
   a. Authorization missing - go make changes in suggestion mode (or comments)
   b. Think about a deadline for our work
   c. Tom retiring from U Chicago:
      i. Calendar coming from a new address from Tom at Internet2
      ii. Moving Fed2 WG google stuff to other Google place

Reviewed Dedra’s and Judith’s recent changes.

We discussed the state of the W3C Federation and Browsers Workshop - how might this be folded into the draft report? Eg, cite as an instance in which it would have been best for Acad Interfed to already have unified leadership, so report should say to fix that before next time.

Dedra agreed to address Laura’s comment on the Study Process section.

Reviewed REFEDS cover letter, discussed reaching out to various parties to encourage their review of the report. Resolved that David W would draft a First Steps section. The REFEDS cover letter will be just to notify REFEDS SC that the report is ready for Consultation.

Wednesday, May 12, 2021

Attending: C. Lee, Tom B, Lucy L, David W, Alan B, Laura P,
Regrets: Dedra, Judith B

Agenda:
1. InCommon/Geant CAMP is Oct 4-5 and will be online again this year (ACAMP is Oct 6-8). [CAMP Submission form](#) due 14 May: Abstract & Panelists?
   a. The REFEDS Federation 2.0 Working group’s report highlights the importance of the interfederation between national R&E federations and proposes the establishment of a global leadership, advocacy and governance body that will lead the process to move forward into the next ten years. We need to ensure a coordinated effort is well supported, make things work, and ensure that the right people are involved.
2. Judith & Tom debrief of CACTI conversation
3. Next steps with the [draft Fed2 report](#)
   a. Overall editing pass(es)
b. Did we miss or underemphasize something?
c. Does it enable readers to know how they might follow-up?
d. Target dates for consultation, cover letters, other process tasks
e. Else?

CAMP Panel
Consider asking Kevin/Klaas/Nicole if they’d like to participate, in case they’ve a response prepared. Tom to check with Judith about panelist names. Laura is willing to represent the WG if she’s available, though she has several CAMP commitments already. Craig will circulate Consultation doc to NIST colleagues, which might produce another panelist. Tom will send in a generic session proposal.

Next steps
AuthZ grand challenge (verified attribute flows that enable collaborations to happen) is effectively missing from the report - it should be presented as a major next step or driver after leadership gets addressed. AuthZ & leadership are codependent aims.

Craig will integrate the Context Beyond R&E Federation material within Implementation Beyond Academic Interfederation.

[DONE] Tom will agendize discussion about the REFEDS cover letter, or any others like that, for the next meeting. That will also be our cue to ensure that the report, together with any associated docs, such as a publicly readable cover letter to REFEDS, helps readers of various sorts to understand how they might follow up to support the various recommendations.

Wednesday April 28, 2021
Attending: David W, Judith B, Craig, Tom, Alan, Laura, Dedra
Regrets: Lucy L

Agenda: draft Fed2 report
Review & discuss
- Page 2 of the draft Executive summary
  - “The key outcome is to address global challenges with a coordinated response which we have coined the term “Academic Interfederation”, this would be achieved by establishing an effective global leadership, advocacy and governance body.”
  - Focus on “coordinated response” instead of leadership
- Updated draft Fed2 report Recommendations from Laura
- Other writing/editing work to be completed before Consultation?
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- Top to bottom review looking for issues/bugs/gaps.
- Cover letter(s)
  - InCommon’s CAMP is Oct 4-5 and will be online again this year (ACAMP is Oct 6-8). CAMP Submission form due 30 April: Abstract & Panelists?

The WG discussed the executive summary draft and articulated some reactions and suggestions that David and Alan will fold into a revision. They’ll place it into the report at the right place.

We then reviewed some of the recommendations section that Laura had worked on. Along the way we revisited the discussion about whether there should be next steps in addition to, or as one aspect of, the recommendations. We thought that the top-level bullet points in the recommendations section are really the recommendations, and sub-bullets are thoughts about how to go about pursuing the recommendation, or further elucidation of what the recommendation means. Members also wondered whether this type of presentation would obviate any need to separately indicate next steps. Laura will take another pass over that section to present the material in that fashion.

Tom mused about a tabular summary of the recommendations, or some other aid to help those who will look at the report with an eye to identifying what part they can play in moving its recommendations forward.

Tom wondered whether the Fed2 Report will, deep down, suggest that the core value of Acad-Interfed isn’t about attributes as so many currently think, but about enabling collaboration.

Tom said he’d make a top-to-bottom pass through the report, normalizing terminology, noting gaps, sequencing issues, and the like, and try to ensure that it addresses the reader consistently all the way through. Dedra said she’d be doing much the same.

Wednesday April 14, 2021

Attending: Judith Bush, David Walker, Raja, Lucy, Laura, Craig, Alan Buxey, Dedra Chamberlin, Richard Frovarp
Regrets: Tom Barton

Agenda: draft Fed2 report
  Review/discuss Craig’s refactoring of his material into the sections Laura created.
  Review/discuss Laura’s pass over the Recommendations section.
  Go top-to-bottom through the report to ensure that it reflects the themes and ideas we’ve discussed, all in a reasonable flow
    - And highlight opportunities and challenges with trust/authz/risk networks.
CALL FOR INPUT

We are writing to ask you to participate in an important 90-minute focus group and be a named contributor to a once in a lifetime conversation about the future of research infrastructure.

Recently, the Biden Administration has unveiled an ambitious set of investment priorities for infrastructure that includes a substantial focus on research infrastructure. The package is in a formative stage, and we believe that the research infrastructure community has a generational opportunity to define infrastructure more broadly and in a way that this investment will have a transformative impact on research infrastructure, competitiveness, and inclusivity.

Our hope is that with your direct input, we can craft a broad definition of research infrastructure that tells the story of how people, software, hardware, facilities and sustainability can come together in a 21st century definition of “infrastructure” that advances American competitiveness, inclusivity, facilities, security and STEM workforce to support research, science and education.

Over the next two weeks, we will be convening a series of focus groups to gain insights from the research and research support community about this vision. We would like to ask you to directly participate in one of these focus groups and ask you to express your vision and needs for a broadly defined set of research infrastructure investments. We have planned seven 90-minute sessions. Once you select a preferred session and a backup time, we will work to sort participants into small and diverse focus groups.

Focus group registration link:
https://app.smartsheet.com/b/form/acaffe1c1f24c7488a0f6b122f9ced5

With the input from the focus groups, we will then craft a roadmap document that can be used in advocacy as the infrastructure package develops in Congress and as related efforts
develop in state and local government. Once we have a draft document, we will seek further input from you. Our hope is that this process and the resulting product will allow individual institutions, regional networks, and other partners to align our collective advocacy priorities for research infrastructure in the coming months.

Wednesday March 31, 2021

Attending: Judith Bush, Tom Barton, Lucy Lynch, Alan Buxey, Laura Paglione, Craig Lee, Dedra Chamberlain, David Walker

Regrets:

Agenda:

1. Review latest edits to the draft Fed2 report
2. AOB

The WG reviewed Craig’s substantial contribution. Dedra thought of two further examples perhaps to be added to the report:

- Airline and Insurance industries leverage “federation services” provided by the big companies in these sectors that have many of the other companies in the sector as their customers.
- Mergers & acquisitions. Parent company incorporates new subsidiaries, uses federation to integrate disparate IAM systems.

Craig thought of yet another: feature film supply chain, as one example of supply chain use cases for federation.

Lucy: airspace itself is sort of a multilateral federation.

Laura: proposed amendment to the report’s structure to flow Craig’s contributions into/across (cf. “Context Beyond R&E Federations” top level section).

Lucy: Privacy Pass work: https://datatracker.ietf.org/wg/privacypass/about/ which is related to google ID verification efforts. As the big centralized federations mature, they start to need some of the things that have been developed for Academic Interfederation.

For the next call:

- Craig will refactor his material into the sections Laura created.
- Laura will complete her pass over the Recommendations section.
Once that’s done, the WG will go top-to-bottom through the report to ensure that it reflects the themes and ideas we’ve discussed, all in a reasonable flow. That initially complete draft report will be put through the REFEDS Consultation process. The WG’s final effort will be to take Consultation feedback into account in producing a final version of the report, and to respond to each bit of feedback provided.

Wednesday, March 17, 2021

Attending: Judith B, Craig L, Alan B, David W, Tom B

Regrets: Laura P

Agenda:

1. Review latest edits to the draft Fed2 report
2. AOB

The WG moved some Purpose of Academic Interfederation material to an appendix with the goal of asking those who draft or revise the Recommendations section to check if any of those items should be incorporated in some way.

We revived a previous statement of purpose, revised it slightly, and placed it in The Role of Academic Interfederation subsection of the Introduction, in bold. It might also be good to use it to lead off the Executive Summary section. We eliminated the former Purpose of Academic Interfederation subsection as its remains substantially overlapped with the previous subsection. Just prior to doing so, a named version of the report was saved with the name “After end of 2021-03-17 workgroup meeting”.

We decided to put a few illustrative examples as a new third subsection of the Introduction. Discussion about how far afield those should be, with the resolution to include one each from libraries, research, and enterprise use cases, and one or more TBD beyond what Academic Interfederation has been used for to date. Craig agreed to do a first draft of those “beyond” examples.

Judith will work on the Future-Looking Scenarios section for next time.

Wednesday, March 3, 2021

Attending: David W, Tom B, Judith B, Alan B, Lucy L, Craig L, Laura P, Dedra C

Regrets: Raja V
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Agenda:
1. Review latest edits to the draft Fed2 report
2. Should there be a recommendation bearing on authorization?
3. AOB

Notes:
Should there be a recommendation bearing on authorization?
● Read the clean doc and identify the places where we might be more specific about access controls and authentication.
● Grand challenges >> First section, “next work” — SOCIAL WORK (Railroad tracks + who are the parties to address these)
  ○ Genuine multilateral federation
    ■ No matter who your identity provider is (anchor of the authentication) that other parties can make assertions about you. “Passport issued by part A carrying grants from other parties”
    ■ Virtual organization; virtual administrative domain
  ○ AuthZ & assertions
    ■ Transition between institutions
    ■ Need better link between the SPs that need assertions and the assertion claims and linking
      ● Discipline/community specific claims
    ■ This is the existential risk
    ■ Supporting new entrants into the multilateral fed space

Wednesday, February 17, 2021
Attending: Judith Bush, Lucy Lynch, Tom Barton, David Walker, Laura P, Alan B, Craig Lee, Dedra C

Regrets:

Agenda
1. Confirmation we are take-away/action complete
   a. Alan’s review of the Scenarios with linkage to Messages.
   b. David on Community recommendations
2. Review the new draft Fed2 report structure resulting from our work last time.
3. AOB

WG members reviewed Alan’s analysis of how the Stone Soup Messages relate to managing how Academic Interfederation can navigate future scenarios identified and developed during the F2F meeting back in June 2019 in Tallinn. Lucy captured it thusly: the center of this plane
(formed by the two dimensions that define the four scenarios) is the special niche of Academic Interfederation - these dimensions pull us away. The Messages are levers that can be pulled to keep us centered.

David found that all suggested actions provided in survey responses are addressed in some manner by the Recommended Actions in the draft fed2 report, so that’s good. The WG digressed a bit about the User Intermediation (by Libraries) community suggested action, sort of reflecting the ambivalence of the suggested action - at least one survey respondent suggested that happen while another suggested the opposite. We decided that the larger point is about authorization, ie, that the next big step for Academic Interfederation beyond federated authentication is to enable federated authorization.

We had an editorial discussion at the conclusion of which Dedra and Laura decided they’d be able to complete editing of the Key Takeaways and Recommendations sections by next Monday. Judith said that on Wednesday she’d clean up the stricken text that’s cluttering the doc, after saving a named version in the doc history.

NB: While writing these minutes I reviewed the draft Fed2 report to see what we say about authorization. Not much. Maybe we need to add that in - our next technical, policy, and organizational grand challenge is to make federation the de facto means for managing access across local, national, and global scales.

Wednesday, February 3, 2021

Attending: Alan B., Judith B, Craig L, David W, Dedra C.

Regrets: Lucy L. Tom B.

Agenda
4. Review the new draft Fed2 report structure resulting from our work last time.
5. Alan’s review of the Scenarios with linkage to Messages.
6. Dedra on the Key Takeaways section.
7. David on Community recommendations
8. AOB

Notes:

We had really delightful progress. We’ve come to clarity that the recommendations in the report will be for a broad audience and specific REFEDS recommendations will go in a cover letter for REFEDS. This addresses some circling around specific vs general, narrow vs broad. The general sense of needing to advocate outside of R&E for the value of multilateral federation to ensure interoperability with vendor products leads us to want to report to be for a broad
audience, but the urgency is for REFEDS to move forward with next steps. This clarity in how we will address the two helps identify which recommendations go where.

Wednesday, January 20, 2021
Attending: Tom B, David W, Alan B, Lucy L, Dedra C, Laura P, Craig L
Regrets: Judith B

Agenda:
9. Review the new draft Fed2 report structure resulting from our work last time.
10. Alan’s review of the Scenarios with linkage to Messages.
11. Focus on the Key Takeaways section.
12. Focus on the Recommendations section.
13. AOB

The WG reviewed the revised report structure and as well as Laura’s recent comments and suggested edits. Net: it’s shaping up nicely!

We discussed whether or not to add some material (appendix?, side material?) about suggestions for how to do some of the actions to be recommended. Pros: illuminate what we mean with concrete examples, capture what the WG knows about FWIW. Cons: we might distract “ourselves” from the important next steps: organizing ourselves, understanding our own use cases, and moving onwards from that strengthened position.

Consider separating the “Process” material as “What We Learned” and “Process”.

David W will review the Community Input appendix material to look for things we shouldn’t forget to think about in the main report.

Laura and Dedra will coordinate their work on the Key Takeaways and Recommendations sections.

Wednesday, Jan 6, 2021
Regrets:

Agenda (really, upcoming arc of work):
1. Dedra’s drafting
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2. Laura’s recommendation & actions
3. Alan’s review of the Scenarios with linkage to Messages
4. Organization exercise Preview Here:
   a. Send Judith email to be added as a collaborator
5. TBA: Review Actions for missing items that should be continued or discontinued, not just new stuff (in Summary of the Stones section)
6. Should the report advocate that specific organizations or types of orgs start taking specific steps, ie, analogous to how the FIM4R paper did it, or should it stop short of that and say “here’s some things that need to get done” and let others figure out who does what?
7. (Group consensus) Decide organization of the report, if that’s still indeterminate at this point.
8. Divvy up writing tasks.

The WG reviewed Dedra’s suggested reorganization of the draft fed2 report. They continued discussion and further evolution of the new outline using a tool Judith had at the ready, called Ginkoapp.com (see link above).

[Judith] will reflect the new structure in the fed2 report google doc by Monday Jan 11.

[ Dedra] will work on drafting the Key Takeaways section,
[ Laura] will work on drafting the Recommendations section,
and they will coordinate to try to match the two sections up.

Wednesday, Dec 9, 2020

Attending: Tom B, Judith B, Craig I, Raja V, Nathan Dors, David W, Alan B

Regrets: Lucy L

Agenda (really, upcoming arc of work):
1. Dedra’s drafting
2. Laura’s recommendation & actions
3. Alan’s review of the Scenarios with linkage to Messages
4. Craig’s thoughts on inclusion
5. TBA: Review Actions for missing items that should be continued or discontinued, not just new stuff (in Summary of the Stones section)
6. Should the report advocate that specific organizations or types of orgs start taking specific steps, ie, analogous to how the FIM4R paper did it, or should it stop short of that and say “here’s some things that need to get done” and let others figure out who does what?
7. (Group consensus) Decide organization of the report, if that’s still indeterminate at this point.
8. Divvy up writing tasks.

From Me to Everyone: (11:04 AM)
https://docs.google.com/document/d/1U-7t9e0PwMyvIDV_HTWF9CYGQGL2-_j2MzqEN-e9iDE/edit

From Me to Everyone: (11:10 AM)
https://docs.google.com/document/d/1W47ff5flt7BzvdNbxzUXOsikGBbTGDw-7/edit Craig’s doc in the drive

From Nathan Dors (he/they) to Everyone: (11:37 AM)
It's also to a degree about autonomy.

From Tom Barton to Everyone: (11:41 AM)
autonomy to pursue a different mission?

From Nathan Dors (he/they) to Everyone: (11:41 AM)
Exactly

From Me to Everyone: (11:47 AM)
(Summarizing) A vision for federation 2.0 is that multilateral (_heterogenous_) federation be a technology — like the internet — that becomes pervasive across different verticals. Then, managing a carved out section of identity and authorization tooled for the academy still continues but like NRENs have dedicated pipes reserved for academic work, a virtual administrative domain sets off the community for the academy.

From Me to Everyone: (11:50 AM)
A vision for federation 2.0 is that multilateral, open federation be a technology — like the internet — that becomes pervasive across different verticals. Then computing, instruments, data and collaboration resources would all have the same access control protocols and principles. Then, managing a carved out section of identity and authorization tooled for the academy still continues but like NRENs have dedicated pipes reserved for academic work, a virtual administrative domain sets off the community for the academy.

From Me to Everyone: (11:52 AM)
Then computing, instruments, data and collaboration resources would all have the same access control protocols and principles that rely on the global multilateral federation administrative tooling- basic protocol for exchanging identity plues

From Me to Everyone: (11:54 AM)
- a protocol layer for establishing trusted administrative boundaries

From Nathan Dors (he/they) to Everyone: (12:00 PM)
@Laura is the report you mentioned comparing commercial providers an open or proprietary report? Interesting posit that they’re very much the same.

From Laura Paglione to Everyone: (12:01 PM)
It's just for the client, but I can talk to that if interested

From Nathan Dors (he/they) to Everyone: (12:01 PM)
Thx Laura

ASK THE QUESTION: at the federation operator level
Wednesday, Nov 25, 2020

Attending: Tom, Judith, Craig L, Alan B

Regrets: Lucy L, Raja V, Laura P

Agenda (really, upcoming arc of work):
1. Dedra’s drafting
2. Laura’s recommendation & actions
3. TBA: Review Actions for missing items that should be continued or discontinued, not just new stuff (in Summary of the Stones section)
4. TBA: Review Scenarios for specific links with Messages
5. Should the report advocate that specific organizations or types of orgs start taking specific steps, ie, analogous to how the FIM4R paper did it, or should it stop short of that and say “here’s some things that need to get done” and let others figure out who does what?
6. (Group consensus) Decide organization of the report, if that’s still indeterminate at this point.
7. Divvy up writing tasks.
8. Verify there is clarity of a vision of the 10 year future of R&E federation being one of many communities with federations that share the tooling and infrastructure, bringing what we have learned to a wider community and addressing sustainability issues.

[Alan] will undertake a review of the Scenarios relating to links with the Messages.

Members spoke about the reality that even the core audience for the report - R&E feds - need not share a common perspective about their community, and so perhaps might not understand that there is currently no unified voice. So explain that in connection with one of the Messages (noted in one of them).

We agree that A-I should be more inclusive and expand to other sectors/markets/whatever, but should the report address them as one audience? Ie, if the report will recommend that steps be taken to achieve a unified voice for A-I, should it encourage sectors beyond to engage with A-I before A-I has a capability to engage, as a whole?

[Craig] will draft something for potential inclusion in the report that addresses readers outside A-I, identifying broader inclusion goals and prospective means to reduce barriers to adoption. Cf. agenda item #8 above, added during this part of the discussion.
Wednesday, Nov 11, 2020

Attending: David W, Tom B, Judith B (late), Dedra C, Craig L, Raja, Alan B, Lucy L

Regrets:

Agenda (really, upcoming arc of work):
1. Dedra’s drafting
2. Laura’s recommendation & actions
3. TBA: Review Actions for missing items that should be continued or discontinued, not just new stuff (in Summary of the Stones section)
4. TBA: Review Scenarios for specific links with Messages
5. Should the report advocate that specific organizations or types of orgs start taking specific steps, ie, analogous to how the FIM4R paper did it, or should it stop short of that and say “here’s some things that need to get done” and let others figure out who does what?
6. (Group consensus) Decide organization of the report, if that’s still indeterminate at this point.
7. Divvy up writing tasks.

“Who should do things” compare to the FIM4R work :

The difference with FIM4R is we are proposing the unified voice organization: perhaps the shorter term goals of what the unified voice organization does should be scoped?

Whether the unified voice organization is REFEDs or another should be from a follow on organization/group/effort that

External perception of one place to go and “branding” needs to happen sooner. Another working group won’t get us in time. A charter, statement of principles, for external groups to recognize is needed soon.

Governance questions may take longer and may.

Follow-on group to be comprised of leaders of Federation Operation and REFEDS?
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Report needs to lean into the existential risks and the need to move urgently in establishing a single unified voice that can advocate the position that academic interfederation has unique needs that are valuable to support beyond.

The current structure of our community -- which may seem unified and cohesive to those of us in the community -- is not a clear entity but a multiplicity of organizations -- to the actors and entities that we wish to influence.

Digression about the tension between communities of interest and technical commons; who is privileged in determining the technical commons, what approach do we have to support the communities of interest?

“When do we do OIDC” -- how do we address this?

Authentication almost at just works, authorization is the challenge -- the entitlements….

Wednesday, Oct 28, 2020

Attending: Judith B (although may be called away), David W, Tom B, Alan B, Raja, Craig L,

Regrets:

Agenda:

1. Depending on availability:
   - Dedra’s drafting
   - Alan’s alignment
   - Laura’s recommendation & actions
   - Judith’s review of early comments

https://docs.google.com/document/d/1hFFS0XJ9DH4DY2VLqxKMzKjZXFxIDySk-YiB5YSq_Xc/edit

2. Next steps

WG members discussed Judith’s comments (link above), with the overall conclusion that her review of survey answers validated the selection of “messages” or categories that emerged from our stone soup exercise. Recall that these categories are found in the Summary of the Stones section of the draft report.

Members also discussed Alan’s review (link in the agenda above) of the Stones themselves against the categories in Summary of the Stones, noting for each Stone which, if any, of the categories it aligned with. This served as a sort of data-based check on the categories we earlier arrived at by more of a “gut check” process. The overall conclusion of this exercise again confirmed the set of categories in the Summary of the Stones.
It was observed that these categories, and the Stones themselves, are overall rather negative, ie, address things that aren’t happening in Academic Interfederation but should, and that what is happening that should continue perhaps should also be reflected in the report. One way we might address this is to review the Actions for each category (which needs to be done anyway) and see if some “keep doing this” types of Actions should be added.

Craig noted federation activity happening in parts of the US Federal government and wondered whether our eventual report might be of value to them, or probably more substantially, whether experience learned by R&E orgs in operating federated identity systems might be of value there, and whether “we” might see this as a useful partnership to engage in.

Unfortunately, the group ran into a technical problem with sharing Alan’s gsheet: some could open it and others could not, despite its link sharing being set to anyone in the world can edit, like most other Fed2 docs. Subsequent investigation indicated that Alan’s employer may have made an administrative change to their google instance that produced this effect. Tom made a copy of Alan’s gsheet which does not have this issue. The copy is what is linked (now) in the agenda above.

Wednesday, October 14, 2020

Attending: David W, Laura P, Judith B, Raja V, Lucy L, Tom B, Dedra C, Alan B, Craig L

Regrets:

Agenda:

1. Reflect on Dedra’s work at organizing the Summary of the Stones (Messages) into a flow
2. Reflect on Alan’s work at somehow aligning Messages, or perhaps Dedra’s flow, with the Scenarios
3. Reflect on David’s work on identifying Messages that are actionable and those that are opportunities
4. Next steps
5. AOB

Dedra and David led WG members in discussion of their work. Dedra’s email about that is further below. Some elements of the WG’s discussion are noted below, others are in comments in the draft Fed2 report.

WG members really liked Dedra’s themes and saw them giving form to the report’s recommendations. Perhaps something about sustainability/resource sharing should be added to them, or reflected within one of them, eg, “Keep focus on Modernization and Expansion”.
WG members also liked David’s Actions associated with each element in the Summary of the Stones and saw these as giving form to a section in the report on next steps towards implementing the recommendations.

The WG will consider reaching out to leaders from orgs that have already gained understanding of the landscape across nations, like eduGAIN, eduroam, and seamless access perhaps, as “early reviewers” of the draft report, with the aim to also understand how this report can be put into hands that are able to act on it in each nation.

For our next meeting in 2 weeks:

- Judith will review the Community Observations from the perspective of the 5 categories that Dedra has articulated.
- Laura will take a stab at presenting the Recommendations and Actions for next time.
- Alan will proceed with his task using Dedra’s format and categories.
- Dedra will experiment with overall structure and flow of the draft Fed2 report.

Text from Dedra’s email

**Themes for Stones**
I went through all the stones again. In my mind, five main themes emerge:

| Ensure and fund supported Global Governance | Provide and develop clear International Standards | Establish a Unified Voice and Clearly Articulated Value for Academic Interfederation | Regularly define a clear Roadmap and Priorities | Keep focus on Modernization and Expansion |

I put the stones into a table to show how I think they fall into these themes:

[https://docs.google.com/spreadsheets/d/1JqdydAO3dj1OunkDSzkAU6GU6mt2IFyD1vxREywrmgc/edit#gid=0](https://docs.google.com/spreadsheets/d/1JqdydAO3dj1OunkDSzkAU6GU6mt2IFyD1vxREywrmgc/edit#gid=0)

I think these themes could inform some of the recommendations for the report, especially as they overlap with other ways we gathered input, like the Scenario exercise.

**Scenarios and Stone Soup**
I reviewed our earlier work on the scenarios, and I think they overlap with the Stone Soup exercise by pointing out things that can happen if we fail at the five themes from the Stone Soup exercise:

- If we don’t have good global governance and a clearly articulated value for academic interfederation, we won’t be able to negotiate effectively with large institutions,
governments, and corporations. If those organizations don't see the value of academic interfederation, they will overwhelm it with new technologies and standards that don't take academic interfederation into account.

- If we don't define and develop clear standards, and demonstrate their value, no one will adopt them. Instead, governments and corporations will drive standards setting and adoption.

The importance of pooling resources in the face of scarcity was clear in the Scenario exercise, but didn't come up as much in the Stone Soup directly. But I think the need for global governance was very present in the Stone Soup exercise, and pooling resources is much easier if there is supported global governance.

**Overall Organization of the Report**

There is a rough outline for the report now, and I'd recommend a slight adjustment. There is a section called "process" which hasn't been written yet. I see this section as describing the overall process for the group, which in my mind had 3 main phases: community observations (survey), scenarios, and the Stone Soup Exercise. I see section Heads for Community Observations and Scenarios, but not for the "Stone Soup" Exercise. I think it would make more sense to describe each part of the process, and main points that came out of it. Then the report can conclude with the sections listed in the outline: "Opportunities" and Recommendations.

The section now titled "Academic Interfederation" seemed like it was in the wrong place? Like maybe that is part of the Intro/background section, or part of the recommendations?

**Wednesday, September 30, 202**

Attending: Judith B, David W, Tom B, Dedra C, Raja V, Alan B, Lucy L

Regrets: Craig L

**Agenda:**

1. Decide how each message in the Cauldron section of the Draft Fed2 Report should help shape which section(s) of the Fed2 report.
   a. Recall earlier discussion about the audience for the Fed2 report
   b. Recall that we overcame difficulty in communicating among ourselves by coining the term “Academic Interfederation”

2. AOB

The WG consensus is that “Voice of Academic Interfederation” (A-I) is the most important message to be conveyed by the report.
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Some of the Summary of the Stones items are actually Recommendations. They are actionable. Others are more like Opportunities, for which next steps are not clear to us. Should this be expanded into a SWOT? Threats might be addressed in the Scenarios section, but perhaps we don’t need to rely on the SWOT approach to say what the WG wants to say. Or perhaps there should be Threats. Eg:

- Scenarios
- Threats
- Purpose of A-I
- Opportunities
- Recommendations

Sprinkle “Voice of A-I”, which is our biggest message, wherever it connects with material in a section. Perhaps in Community Observations, likely in Scenarios and in Purpose of A-I, top of Exec Summary, main Recommendation. Related, DavidW’s early comment and draft section “Importance of Wise Governance”.

Perhaps this Voice of A-I can be realized through a confederacy rather than a top-down, resource allocating organization. Analogous to how eduGAIN was established and continues to attract members to it.

Should we recommend that eduGAIN become much more than it currently is, the locus of the Voice of A-I? Possible leverage points: EduGAIN, Eduroam, SeamlessAccess, REFEDS, GÉANT, Internet2

Do we want to recommend an evolution or a revolution to change the status quo?

Dedra will take a stab at organizing the Summary of the Stones (Messages) into a flow. Alan will also take a stab at this - somehow aligning with the Scenarios. David W will review the Messages to identify things that are actionable and those that are opportunities.

Wednesday, September 16, 2020

Attending: Lucy, Judith, Tom, Alan B, Dedra C, Craig Lee, Raja V, David W

Regrets: Thilina

Agenda:

1. Continue summarizing/organizing the Cauldron’s contents: what is this soup we’ve made, ie, what are the messages the WG wants to tell people?
   a. Peruse the notes from August 5th and August 19th below before heading over to the Cauldron section of the Draft Fed2 Report and filling in the blank space under
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the heading “Summary”. (There’s a backup of the list of stones, so feel free to move stones around).

2. Decide how each message should help shape which section(s) of the Fed2 report.
   a. Recall earlier discussion about the audience for the Fed2 report
   b. Recall that we overcame difficulty in communicating among ourselves by coining the term “Academic Interfederation”

3. AOB

This WG session as well as the previous one was entirely spent accomplishing agenda item #1, with the result of having a dozen or so “messages” and a short heading for each.

Wednesday, September 2, 2020

Attending: Judith B, Tom B, Lucy L, Richard F, Craig L

Regrets: Raja V

Agenda:

1. Summarize/organize the Cauldron’s contents: what is this soup we’ve made, ie, what are the messages the WG wants to tell people?
   a. Peruse the notes from August 5th and August 19th below before heading over to the Cauldron section of the Draft Fed2 Report and filling in the blank space under the heading “Summary”. (There’s a backup of the list of stones, so feel free to move stones around).

2. Decide how each message should help shape which section(s) of the Fed2 report.
   a. Recall earlier discussion about the audience for the Fed2 report
   b. Recall that we overcame difficulty in communicating among ourselves by coining the term “Academic Interfederation”

3. AOB

Wednesday, August 19, 2020

Attending: Tom B, David W, Alan B, Richard F, Judith B, Craig L, Dedra C

Regrets: Lucy L

Agenda:

1. Brief review of Stone 26 onwards. Any further ingredients for the soup?
2. Summarize the Cauldron’s contents (not to worry about the whole paper at this point). What is this soup we’ve made, ie, what are the messages the WG wants to tell people?
   a. Peruse the notes from last time before heading over to the Cauldron section of the Draft Fed2 Report and filling in the blank space under the heading “Summary”. Each WG member put their cursor on a line with no other cursors and start typing!

3. Decide how each message should help shape which section(s) of the Fed2 report.
   a. Recall earlier discussion about the audience for the Fed2 report
   b. Recall that we overcame difficulty in communicating among ourselves by coining the term “Academic Interfederation”

4. AOB

The WG completed a review of all remaining Stones, which took the entire hour. Among the thoughts that materialized from this, we add to the things that a Voice of Academic Interfederation may need to articulate and promote:

- Parsimony of policies and standards across federated entities sufficient to make it easy to use Academic Interfederation
- Sufficient monitoring to detect malfunctions and interop issues, as another aspect of making federation easy
- Partnerships with non-federated identity providers
- Partnership with other industry sectors that stand to benefit from multilateral federation, and in that way also gain new and substantial supporters of Academic Interfederation.
- Additional trust frameworks layered on top of Academic Interfederation each designed to manage some specific form of liability. Eg, CoCo v2 for GDPR.

Wednesday, August 5, 2020

Attending: Lucy, Dedra, Thilina, Tom, David W, Craig Lee, Richard

Regrets: Judith, Raja

Agenda:

1. Continue view of and reflection on Stones placed into the Cauldron section of the Draft Fed2 Report. We’ll pick it up with Stone 19.
2. Stir the soup: consider what all has been written and see where that leads us.
3. AOB

The WG continued discussion of Stones, getting through #25. In part, the discussion further highlighted roles that the “Voice of Academic Interfederation”, something not currently embodied, should play. These include
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- Marketing
- Identifying commonalities among national federations to enhance their alignment with Academic Interfederation
- Identifying commonalities between Academic Interfederation and strategies of commercial providers and CIOs
- Leading the way through changes, articulate what works, what the focus should be
- Providing an ambitious vision that motivates and energizes, draws support.
- Providing an alternative to national federations for organizations that lack one.

Wednesday, July 22, 2020

Attending: David W, Tom B, Richard F, Judith B, Craig Lee, Raja, Alan Buxey

Regrets: Lucy L, Dedra C, Laura P

Agenda:
1. Continue view of and reflection on Stones placed into the Cauldron section of the Draft Fed2 Report. We’ll pick it up with Stone 12.
2. Stir the soup: consider what all has been written and see where that leads us.
3. AOB

We reviewed Stones 12-18, left many comments, and added a few linkages. We’ll continue next time with Stone 19.

Wednesday, July 8, 2020

Attending: Lucy, David W, Tom, Richard F, Judith B, Laura P, Raja, Alan B, Dedra C, Raja, Craig Lee

Regrets:

Agenda:
1. Today’s activity: making stone soup. First, add your stone to the soup:
   a. Pick a Stone N section in the blank Cauldron section of the Draft Fed2 Report
   b. Put your name there, pick one thought you’d like to add to the soup, and write it down. No cooking needed. You can add more than one thought if you like.
2. After a while, we will stir the soup: consider what all has been written and see where that leads us.
3. AOB
The stone soup activity was quite successful, with WG members contributing 32 (stones 1-31 plus stone 4.1) stones to the soup in about 30 minutes. These are pasted in below, without comments attached (which is beyond Tom’s google foo). The version of the Draft Fed2 Report as of the end of the call was given a name of “20200708 Stones 1-31” in the document’s version control so that we might refer to the stones and comments about them later on as the report evolves.

The remaining 30 minutes or so were spent reviewing stones for the purpose of ensuring that we all understood what they meant. We got through the first 11 stones, and will pick things up next time with the 12th.

Stone 1
Play by the same rules (Lucy)

Stone 2
Share and Share Alike (Lucy) - also mutual aid

Stone 3
Speak with One Voice (Lucy) see also 7

Stone 4
Respect My Authority (Lucy)

Stone 4.1
Defending the Faith

Stone 5
Our goal is the Academic Interfederation. National federations, etc. are means to that end. (David Walker) See 19, 7, 6

Stone 6
We need to foster more open interfederation. Currently, there are barriers in the form of federation-specific metadata filters and the fact that each federation must support certifications like R&S for SPs. (David Walker, +1 Laura) - also see Stone 12, 7, 5
Stone 7

One working group charge was to provide a statement of purpose for the whole of research, scholarly, and educational federations. We recognize each federation may have internal goals and purposes that are driven by the needs of the communities the federations serve. Extending federated identity beyond the reach of local connections to global interoperation, however, is the promise that the many federations work towards, together. This goal does not have a common brand and or a single voice. We swim in the intention, like fish in water, but naming the obvious and pervasive intention was a challenge. We have settled on labeling this as Academic Interfederation, and the scenarios drove home that dystopian futures can be averted if all the R&E federations can speak with one voice about the value of Academic Interfederation and label it in a recognizable manner. (judith) See 3, 5, 6

Stone 8

(Craig) Follow-up with specific action plans. Actively recruit stakeholders to participate.

Key goals:

- Drive Suggested Actions into specific plans
- Rack and Stack Suggested Actions to identify specific actions that can be effectively supported with available resources (time, money & people)
- Find the “sweet spot” in the Suggested Actions that can be done with available resources and will have the most effect in promoting academic federations.
- Chase Money
  - Connect academic and societal benefits that are enabled by academic federations
  - Selling infrastructure is always hard, but this connection has to be made
- For each of the Suggested Actions, build a matrix of
  - Who are the stakeholders -- Chase Stakeholders
    - Make this as broad as possible
    - Academia, Industry, Government
  - How this Action can be connected to a stakeholder benefit
  - Identify specific subtasks to pursue this Action
  - How to support each subtask w/ resources (time, money & people)

Stone 9

The perceived benefits that we provide have shifted. (providing a trusted network > provisioning specific, unique information (attributes) about individuals) We need to evolve to ensure that we remain relevant (Laura Paglione, +1 Dedra) - Also see Stone 21, 4, 31
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Stone 10
Expand the benefits of federation to those that don't have the expertise to take advantage of federations in house. (Richard Frovarp) - See Stone 26

Stone 11
Leverage the experience gained building national federations to support the growth of industry-specific federations (make the technology we have shown to be successful in R&E relevant in other sectors). Federation as a Service (Dedra, +1 Laura)

Stone 12
If we don’t do it, someone else will (Laura Paglione) - also see Stone 6, 13, 15, 29, 30

Stone 13
R&E space used to be up there with the latest tech and advanced ideas….where is OpenID? (Alan, +1 Laura)

Stone 14
It's gotta be easier than this! (Laura Paglione) - also see Stones 10, 11, 16, 21, 24

Stone 15
On-campus directories going? As institutions move to outsource with Google/MS their directories are now in the cloud (Azure etc service integration) (Alan) - Also See Stone 12 and Stone 17

Stone 16
People are not aware about Federated access. need to create more awareness programs about the Federated Access especially countries like India. (+1 Dedra) See 7 (brand needed) See also Stone 20

Stone 17
Managed services are not the enemy. Need to provide the kind of services people are looking for (Dedra, +1 Laura, +1 Judith)
Stone 18
Are R&E federations only of use to R&E institutions? Why no adoption for access/single sign-on etc at other levels of education (or colleges/universities with no/low academic research functions)? (Alan, +100 Laura)

Stone 19
Are national federations the real barrier to world-wide federated access? (Alan) See stone 5

Stone 20
We need to be better at telling success stories for federation (Dedra)

Stone 21
We keep on getting hooked up on what’s wrong with now (and taking that as a ‘it won’t change’) rather than where we want to be and the future we aim for (Alan, +100 Laura) - Also see Stone 9

Stone 22
The key to success is adoption. Be patient, facilitate adoption through collaboration (bottom up over top down) (Dedra, +1 Laura)

Stone 23
Future proofing/sustainability? The current Federation people are getting older….where’s the next generation? Who will support what is being done into the future? (Alan)

Stone 24
Need balance between making clear decisions on direction and applying resources to execute, and maintaining open-mindedness to changing priorities, marketplaces, technology, and expectations. Don’t be rigid about how things have been done in the past, but don’t be in constant experimentation mode, either. (Dedra, +100 Laura) - also see Stone 14

Stone 25
We should be more agnostic to authentication/authorization protocols. (David, +1 Laura, +1 Dedra - See Stone 13)
Stone 26

(Laura) What is the easy (straight-forward) path for implementation? Does complication work against us? - See Stone 10
- More experts needed to do our work (but those new in their career and not choosing this)
- Complex configurations needed (but to what end? What would we lose if we remove the complexity?)
- Long startup times (“plug and play” solutions are selling their ease of implementation, at least some are choosing this - do we provide a better alternative to the easy path?)
- Implementation/engagement out of reach for too many (can we bring them into the community without their technical & engagement overhead going up?)

Stone 27

There is a distinction between academic (or global) interfederation (perhaps much broader in community than that of some of the R&E federations) - stone 11, 18 - and the specific authorization claims Stone 4 (judith)

Stone 28

Survey current industrial efforts that are relevant to federations, e.g., identity linking capabilities of Radiant Logic.

Stone 29

How to leverage commercial efforts and standardization efforts? - Also See Stone 12

Stone 30

There is a whole ecosystem of different ID solutions out there - are the current federations too isolated from other activities? (Alan)- Also See Stone 29, 12, and Stone 28

Stone 31

Trust who? We put a lot of energy to talking about ‘trust federations’ though there are times when this aspiration falls apart. Do IdPs trust SPs? Does federation A trust federation B? And, what are the conditions of this trust? Is trust really the cornerstone of our offering, or is it something else? (Laura)
Wednesday, June 24, 2020

Attending: Judith Bush, Lucy Lynch, David Walker, Tom Barton, Craig Lee

Regrets:

Agenda:

1. WG process checkpoint
   a. Do you think we are going in a valuable direction?
   b. What adjustments should we make?
2. AOB

Are we being cautious? Or should we be more prescriptive? These things need to happen: shared standards, eg, and being more clear perhaps about authorization and not authentication -- this would be a specific thing, is this too general, more so? We need to become more specific in our recommendation -- or do we suggest the structure to support that body that makes the specific recommendations. If we are handing off, maybe just the strategies are sufficient. The charge came from REFEDS … what is REFEDS expecting? Presumably REFEDS is looking for a forward looking document that also connects to some prescriptive/actionable next steps. Doesn’t seem like handing off is really best.

EG: Individual federations committing to maturation? Who are the organizations to follow up with? Who do we pass the charge on to?

Is the overall organization of the academic interfederation the best one? Do we need a stronger center?

Judith asks SO…. who is REFEDS? Organized program of Geant and funded independently by sponsors (because broader than Europe). What kind of governance does it have with respect to other federations?

It’s hard to add new things (policy, etc) within individual federations, and hard to motivate without the larger Academic Federation structure.

[Example of a center structure] There’s the DOI Foundation, that then delegates registration to other registrars -- central flowing our instead of distributed. There’s a plan in place for dealing with how if a registrar goes away that the namespace may be taken over for another.

Is there a linkage between the scale of what we are recommending and who we are?
The recommendation could be that REFEDs convene a group that could make decisions about how a strong center could be organized.

Does the process (data collection and scenario) & group representation allow us to have the standing for these …

**Exercise:** going back to the scenarios, (1) is there value in academic federation? (2) if there is value in academic federations and they continue for ten years, what is the value they are offering then? (3) If there is value that is needed in ten years, then how do we get there?

Federation operators’ involvement missing?

We make a recommendation that isn’t quite as high level that is more direct to what federation operators can do.

Tom: REFEDS Steering Committee & eduGAIN Steering Group

REFEDS steering needs to be more than a framework for bottom up work. EduGAIN has been reluctant to be more of a center of control.

[Another example of a center structure] What about eduROAM governance? Have reach into emerging areas. Have ability to deal with standards & commodification of service.

[A method for creating a structure] David notes a center can be a shared agreement between the federation operators. Edugain very oriented in technology, is it the right place for policy? Might require changes to Edugain’s make up to be more policy oriented

By building up an organization that can represent all academic interfederation it may have clout to negotiate with

What can Acad Interfed stop doing? Authentication, and instead authorization and eventually assurance.

*If we had the ideal academic interfederation, the strategic goal would be to offer assurance in contracting (in ten years of maturity - goal).*

Strategies cover academic interfederation AND federations themselves

Structure as academic interfed or federation operators? Strategies stay, description focus on academic interfederation (the more local … discovery of difference between the interests of national fed versus the global academic interfederation.
Linkage between scenarios & strategies (in part): Acad Interfed is a good way to mitigate the dystopian outcomes in the scenarios. The “center” is about connecting and aligning the independent (national) pieces rather than issuing orders that must be followed.

If there are snags between federation operators, what is the way to resolve? (a within academic federation structure) “What is the weakest form of federation that is still useful” << and then this goes to Lucy’s observation as a goal of assurance?

Within decision making is consensus then a commitment that members act on the consensus. Caution on consensus (be clear that newcomers don’t renegotiate)

Membership?
Speaking on its behalf?

PREVIOUS NOTES:
https://docs.google.com/document/d/1xCe9v9kgFkD- _G4aARxMiPTfmQRzOliUWz4RtXvu42E/edit