EGI Foundation INDIGO IAM support and evolution Agreement

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DOCUMENT LOG

Issue	Date	Comment	Author
v. 1.0	2021-10-05. 2021-11-25	first draft; definition of the milestones; document finalised	Alessandro Paolini, Baptiste Grenier, Andrea Ceccanti

TERMINOLOGY

The EGI glossary of terms is available at: http://go.egi.eu/glossary

Contents

1 Introduction

The present Agreement is made between **EGI Foundation** and **INFN (the Lead Beneficiary)** to define the provision of the activity included in task 7.6 of EGI-ACE project[1] and described hereafter.

This Agreement is valid from **1st January 2021** to **30th June 2023**. It was discussed and approved by the EGI Foundation and INFN on **25th November 2021**.

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[1] https://www.egi.eu/projects/egi-ace/

2 Activity description and milestones

The effort in this activity is focussed on the following goal:

- Evolve and extend the INDIGO IAM solution[2] to fully support the needs of research communities in line with the latest version of the AARC blueprint architecture. This includes support for the current version of INDIGO IAM as well as its evolution to a Keycloak-based version fully integrated with the overall EGI AAI

2.1 Milestones

In order to achieve the aforementioned goal, the following milestones will be achieved:

- Improve IAM maintainability and stability by migrating to the latest Spring framework dependencies.
- Improve client application management APIs, to support automatic unused client expiration, implement search functions and improve user experience.
- Introduce support for managed group membership expiration in order to better support membership lifecycle in multi-tenant IAM deployments.
- Improve IAM dashboard usability by consolidating the user interface appearance.
- Improve documentation.
- Extend the SAML support to properly integrate with identity federations, i.e. support federation metadata validation and usable integration with a SAML discovery service in the Keycloak login page.

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[2] https://indigo-iam.github.io/v/current/

3 Communication, reporting, and escalation

3.1 General communication

The following contacts will be generally used for communications related to the service in the scope of this Agreement.

EGI Foundation contact	Alessandro Paolini operations@egi.eu EGI Foundation Operations officer/ EGI-ACE WP7 leader
Lead beneficiary contact	Luciano Gaido luciano.gaido@to.infn.it Francesco Giacomini francesco.giacomini@cnaf.infn.it Enrico Vianello enrico.vianello@cnaf.infn.it Andrea Ceccanti andrea.ceccanti@cnaf.infn.it

3.2 Regular reporting

As part of the fulfilment of this Agreement, the Lead Beneficiary is requested to periodically report over the activities conducted in the related period. The frequency of the reports is 10 months (first report covering the period Jan – Oct 2021).

The reports are collected in a form of a survey that EGI Foundation will circulate and the Lead Beneficiary will fill in.

3.3 Violations

The Lead Beneficiary agrees to inform the EGI Foundation if this Agreement is violated or violation is anticipated. The following rules are agreed for communication in the event of violation:

● In case of any violation of the expected roadmap, the Lead Beneficiary will provide justifications and a remedial plan for fulfilling the agreed goals to the EGI Foundation in an agreed timeframe. The Lead Beneficiary will produce a status report and an enhancement plan for improving the activity within one month from the date of the first notification.

3.4 Escalation and complaints

For escalation and complaints, the Lead Beneficiary contact point shall be used, and the following rules apply.

- Complaints or concerns about the activity provided should be directed to the Lead Beneficiary contact who will promptly address these concerns. Should the EGI Foundation still feel dissatisfied, about either the result of the response or the behaviour of the Lead Beneficiary, EGI Foundation Director director@egi.eu should be informed.

4 Responsibilities

4.1 Of the Lead Beneficiary

Additional responsibilities of the Lead Beneficiary are as follows:

- Adhere to all applicable operational and security policies and procedures[3] and to other policy documents referenced therein.
- Use communication channels defined in the agreement.
- Ensure that the service is accessible only by users belonging to countries that are part of EGI Council or of MoUs.
- Attend EGI-ACE and other operations/technical meetings when needed.

4.1.1 Software compliance

Unless explicitly agreed between EGI Foundation and the Lead Beneficiary, software being used and developed to provide the service should:

- Be licensed under an open source and permissive license (like MIT, BSD, Apache 2.0,...).
- The license should provide unlimited access rights to the EGI community.
- Have source code publicly available via a public source code repository (if needed a mirror can be put in place under the EGI organisation in GitHub[4].) All releases should be appropriately tagged.
- Taking security aspects into consideration from the start
- Adopt best practices (more information on those topics is available on our documentation site[5]):
  - Defining and enforcing code style guidelines.
  - Using Semantic Versioning.
  - Using a Configuration Management frameworks such as Ansible.
  - Follow security best practices
  - Having automated testing in place.
  - Using code reviewing.
  - Treating documentation as code.
  - Documentation should be available for Developers, administrators and end users.

4.2 Of the EGI Foundation

The responsibilities of the EGI Foundation are:

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[3] https://www.egi.eu/about/policy/policies_procedures.html

[4] https://github.com/EGI-Foundation

[5] https://docs.egi.eu/internal/guidelines-software-development/

- Raise any issues deemed necessary to the attention of the Lead Beneficiary.
- Collect requirements from the Resource infrastructure Providers.
- Support coordination with other EGI services.

5 Ownership of Results

The EGI Federation asks in return of its investment permanent free non-exclusive usage rights for the EGI Foundation and its participants and proper credit for the funding in the license distributed with the project. The EGI Strategic & Innovation Fund, through the EGI Foundation and its participants, also has the rights to extend, modify and evolve any software or any other IP generated as part of the projects. A licence compatible with the open source principles and with the unlimited reuse by EGI should be selected. Publication of results in scientific papers, conferences or other means is welcome.

6 Information security and data protection

In addition to the security requirements documented in the **Software compliance** section, the following rules for Information Security and data protection must be enforced by the Lead Beneficiary:

- Lead Beneficiary must make every effort to maximize the security level of users' data and minimise possible harm in the event of an incident. Incidents must be immediately reported to the EGI CSIRT (abuse@egi.eu) according to the SEC01 procedure[6].

- The Lead Beneficiary must meet all requirements of any relevant EGI policies or procedures[7] and also must be compliant with the relevant national legislation. Regarding EGI requirements, please refer to the following reference documentation:
    - EGI-doc-3015: e-Infrastructure Security Policy
    - EGI-doc-3601: Service Operations Security Policy
    - EGI-doc-2732: Policy on the Processing of Personal Data
    - EGI-doc-3600: Acceptable Use Policy and Conditions of Use
    - EGI-doc-2934: Security Traceability and Logging Policy
    - EGI-doc-2935: Security Incident Response Policy

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[6] https://wiki.egi.eu/wiki/SEC01
[7] https://www.egi.eu/about/policy/policies_procedures.html

7 Review, extensions, and termination

There will be reviews of this Agreement at planned intervals according to the following rules:
- Technical content of the agreement and targets will be reviewed on a yearly basis.