



**SHELTON
WAGGENER**

Senior Vice President, Internet2

TICAL
JULY, 2013

**Technology Leadership
in Federate World:**

**The Role of The Next
Generation Chief
Information Officer
in the Cloud**

About Me



- Senior Vice President of Internet2
- 20 Years in private sector – Sybase, Octel, Lucent
- CIO of the INS Division at Lucent from 1998-2003
- UC Berkeley 2003-2005 to build Research Computing CIO from 2005-2012
- Past Board Member, Quali Foundation, Quali Ready, InCommon, Scholarship Foundation

4+
Years
Ago

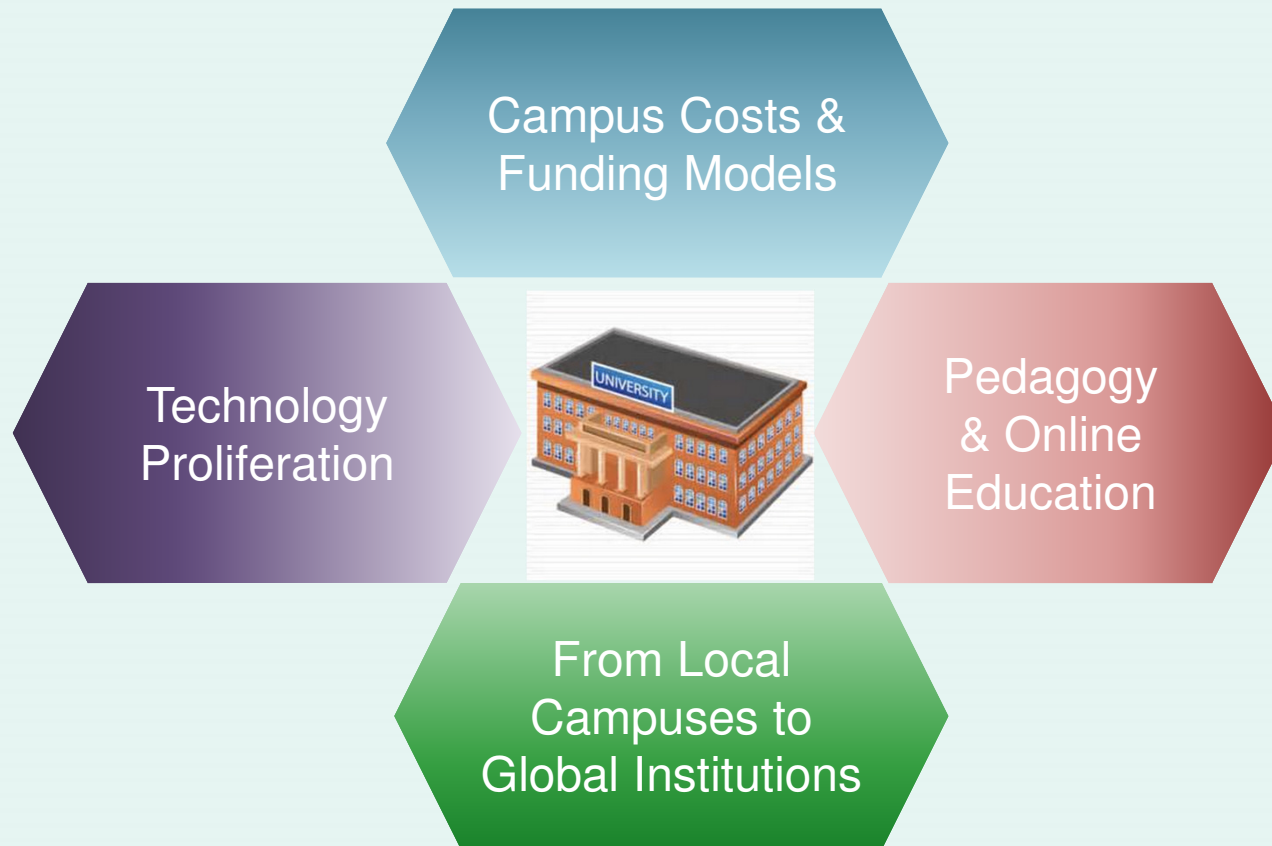
Above-Campus Services Shaping the Promise of Cloud Computing for Higher Education

by Brad Wheeler and Shelton Waggener

*Illustration by Randy Lyhus ©2009
EDUCAUSE Review, Nov/Dec 2009*

Creative Commons
Waggener

Recognize Change – In every direction



*"This is a tsunami...
The potential upside for this experiment is so big that it's hard for me to imagine any large research university that wouldn't want to be involved."*

*—Richard DeMillo,
Director, Center for 21st
Century Universities*



Cloud Technology Proliferation

Prepare your campuses community for cloud services by:

- Share experiences, learn from experiences of others
- Take part in exploring and validating solutions
- Learn methodologies, best practices and get help with training and development
- Leverage trusted identity solutions

Pedagogy & Online Education

Be prepared for online education which WILL impact your campuses. Change from being technology plumbing to being technology partner:

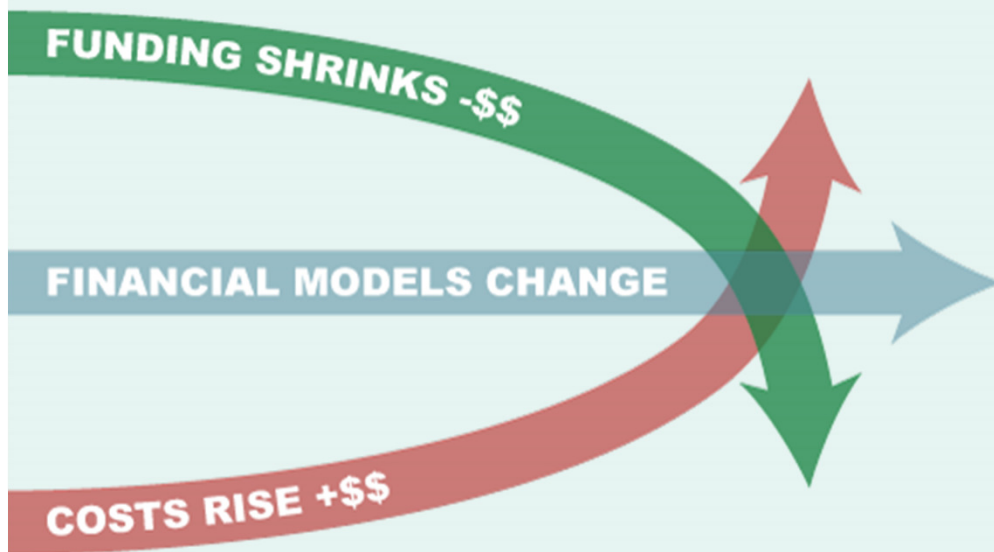
- Compete with a new breed of online providers
- Implement new higher education solutions more quickly, more easily and with lower risk
- Offer courses and services to broader national and international markets



Campus Costs & Funding Models

Work across campuses, institutions, nations to align with peer institutions

- Secure best-in-class pricing
- Obtain *customized*, not just *commodity* services
- Eliminate redundant admin/legal costs and efforts
- Mobilize our considerable ingenuity and clout to create our own solutions



“The cloud computing market will top \$241 Billion in 2020.”

—Forrester Research 2012, “Sizing the Cloud”



**Globalization
Is a Reality in
Education &
Research**

The Cloud (and campuses and learns) will think and act Global. Local matters – when connected globally.

- Leveraging National Research and Education Networks and international exchange facilities for global connections
- Offering courses and services to broader national and international markets
- Extending services throughout global R&E community with minimal investment but significant increase in benefit
- Leveraging connections throughout community for more efficient, effective solutions

Global Cloud Working Group

Volunteer charter member National R&E networks representing Europe, Americas, Asia-Pacific, dedicated to the widespread adoption of federated cloud services that benefit the global R&E community

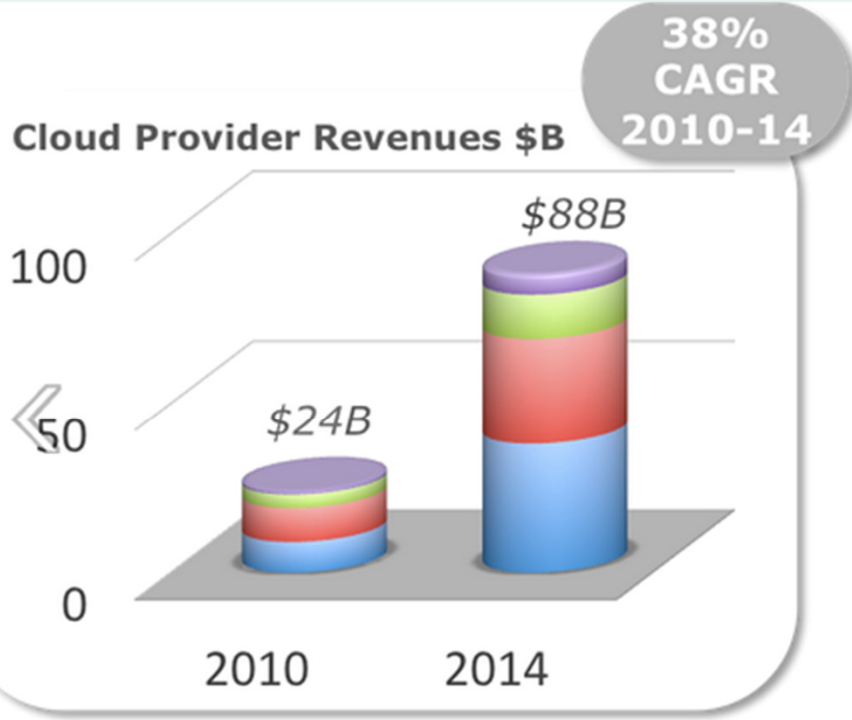


Why does cloud matter?

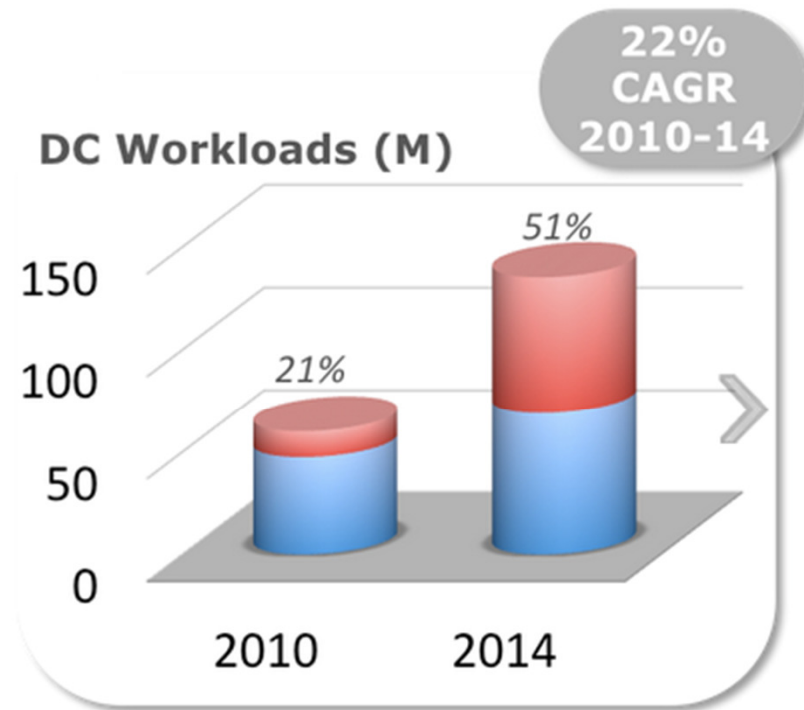
Because it will coexist
with traditional
education.

Is your IT team ready?

Yes, the Cloud Market is Growing...



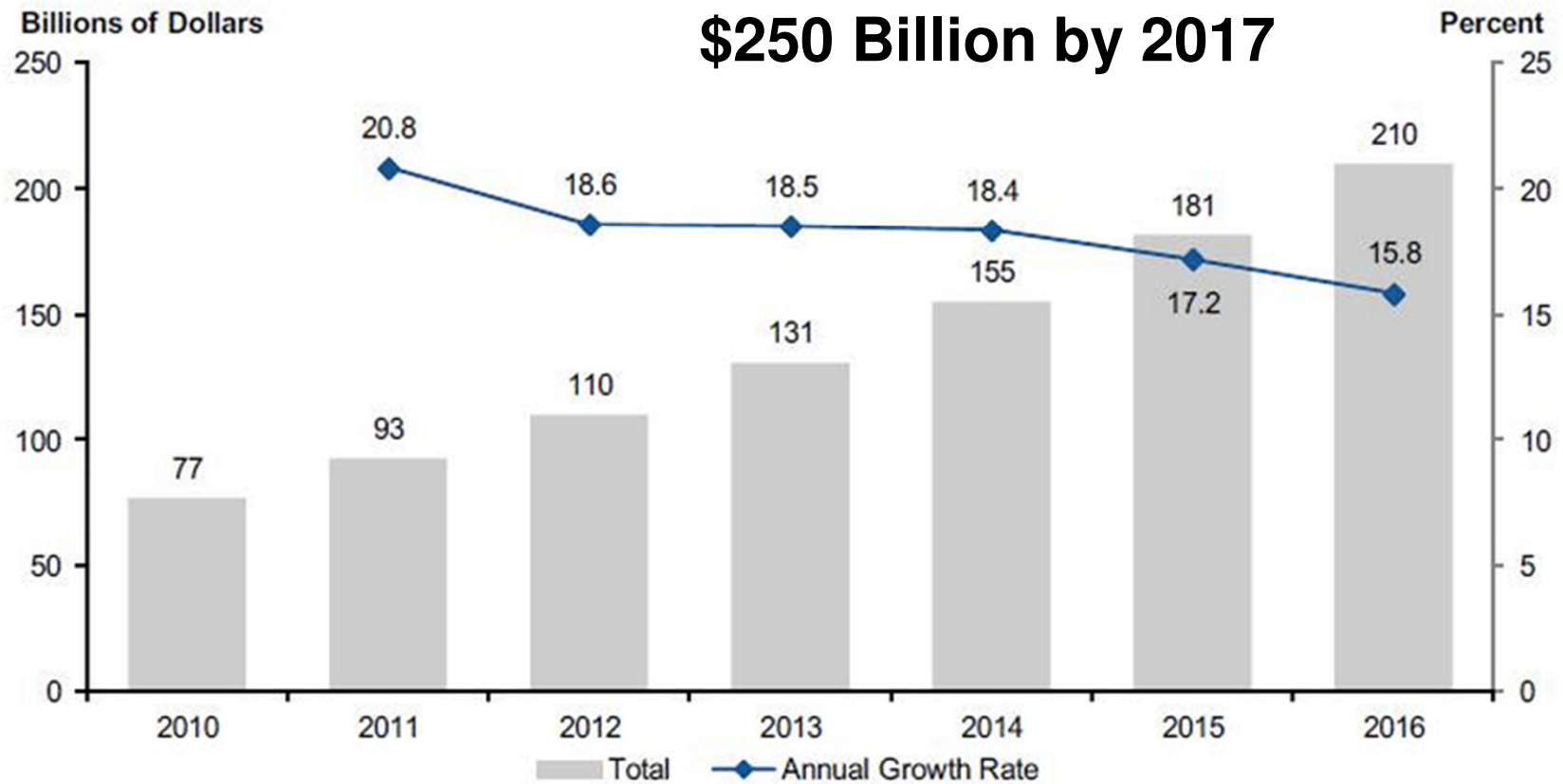
■ VPC ■ SAAS ■ IAAS ■ PAAS
Source: IDC, Gartner, Analysys Mason, Forrester, Cisco



■ Traditional DC ■ Cloud
Source: Cisco Cloud Index 2011

And growing ...

Public Cloud Services Market and Annual Growth Rate, 2010-2016



Source: Gartner (February 2013)



**IT has often
operated as a
craft...**



**Unfortunately its
HARD to do IT (as a
craft) at SCALE.**

Even when done perfectly – its not CLOUD SCALE



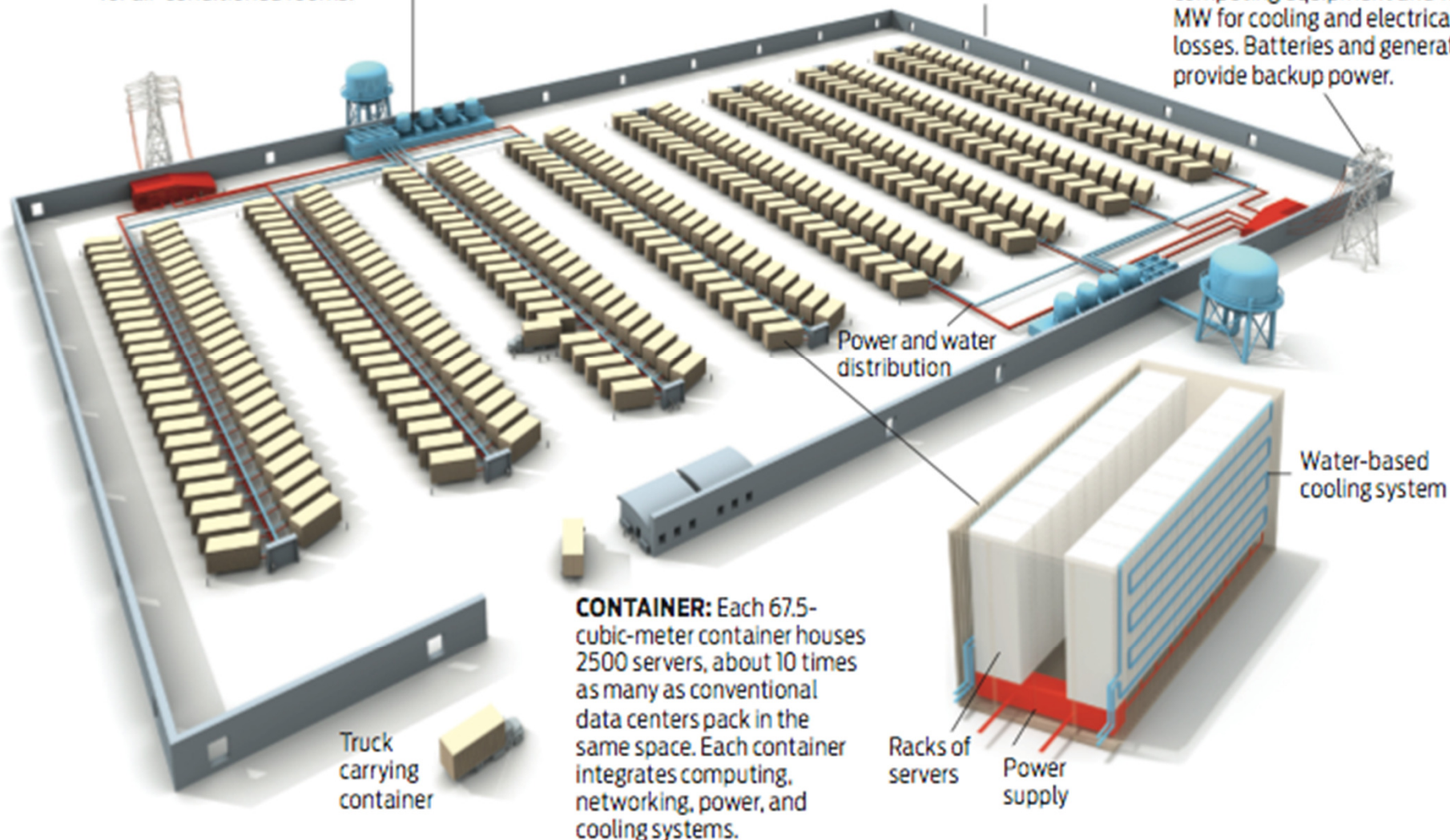
Individually we wont wont be at this kind of scale

Click to go back, hold to see history

COOLING: High-efficiency water-based cooling systems—less energy-intensive than traditional chillers—circulate cold water through the containers to remove heat, eliminating the need for air-conditioned rooms.

STRUCTURE: A 24 000-square-meter facility houses 400 containers. Delivered by trucks, the containers attach to a spine infrastructure that feeds network connectivity, power, and water. The data center has no conventional raised floors.

POWER: Two power substations feed a total of 300 megawatts to the data center, with 200 MW used for computing equipment and 100 MW for cooling and electrical losses. Batteries and generators provide backup power.





How do you start to move
from Craftsmen to the Cloud?

The Craft of Traditional IT

Project Delivery Approach

Waterfall

Software QA / Testing

Mostly manual with little automation

Release Frequency

Two major, two minor per year

Downtime during releases

36-48+ hours per release

Release Deployments

Manual activities on weekends

Support model

Traditional Application Support approach

Mindset Change



Automated regression test coverage



Automated build deployment



Zero systems downtime deployments



Bi-weekly releases during business hours



Business centric support model

The Future of Agile IT Leveraging Cloud



360 degree view

Take steps knowing impact to all involved



Approach

Step by step approach with checkpoints



Automated processes

Improvement through automation



Awareness

Educate your teams on what is possible



Measure

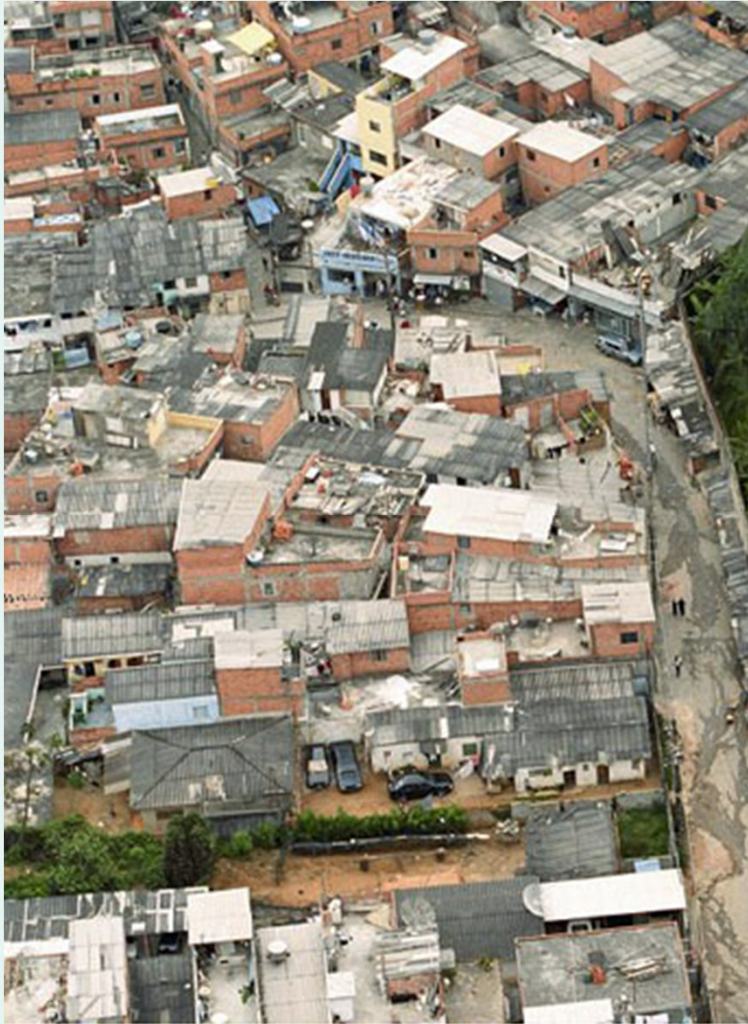
Develop & use SMART metrics



Teamwork

Involve all teams required for successful change

Thinking about IT at scale



Each of us can individually :
Buy or Build

then
Assemble,
Test,
Integrate,
Protect,
Maintain,

Yet even with thousands of
us we wont achieve scale,
just duplication

Thinking about it at scale

OR Universities can leverage our networks to jointly:

Share Designs,
Acquire Assembly,
Speed Testing
Integrate Valid Sources,
Protect Critical Data,
Maintain Less,
Deliver More

By Using Cloud Services at
GLOBAL Scale

Each of us can individually :
Buy or Build

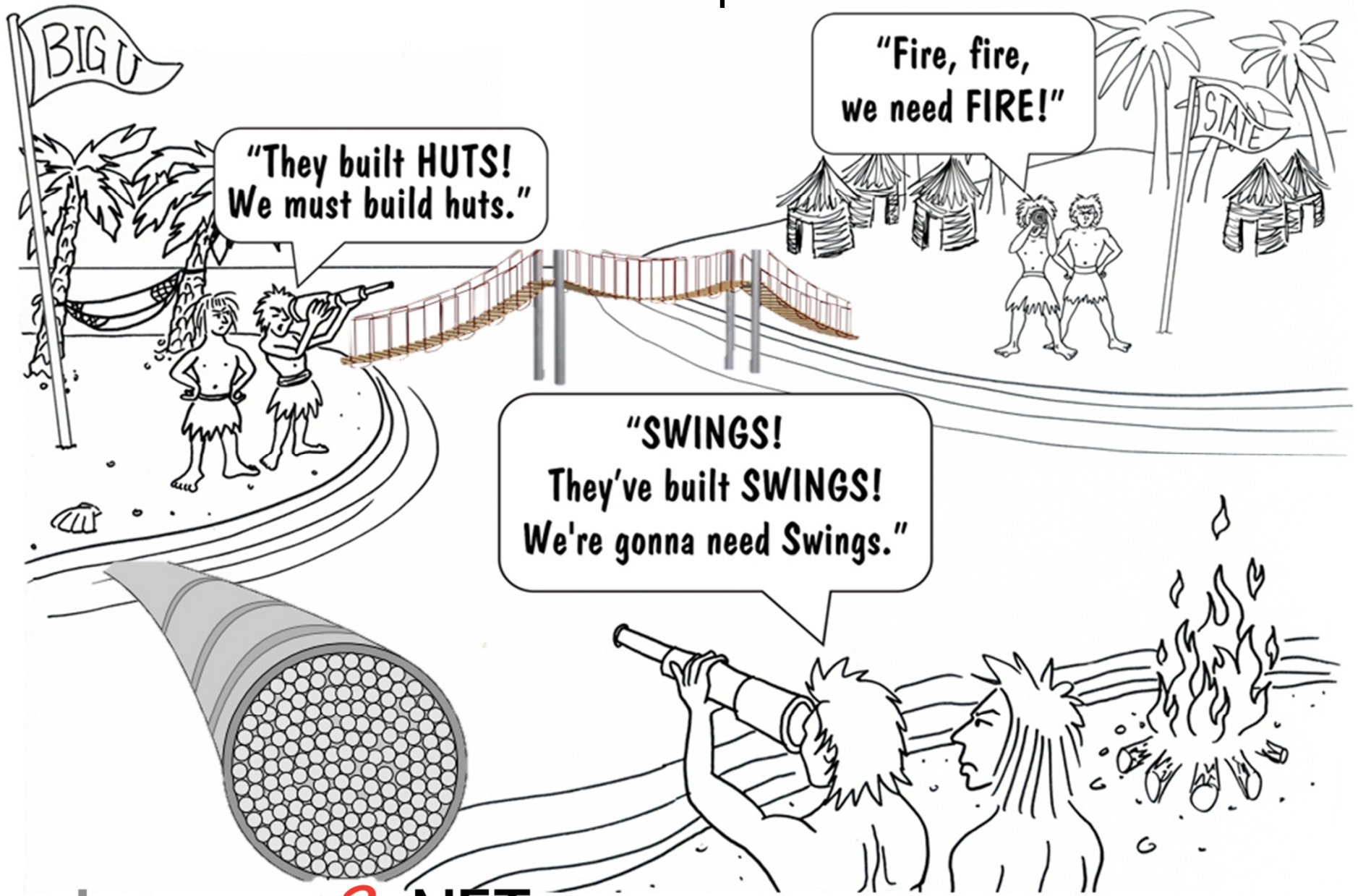
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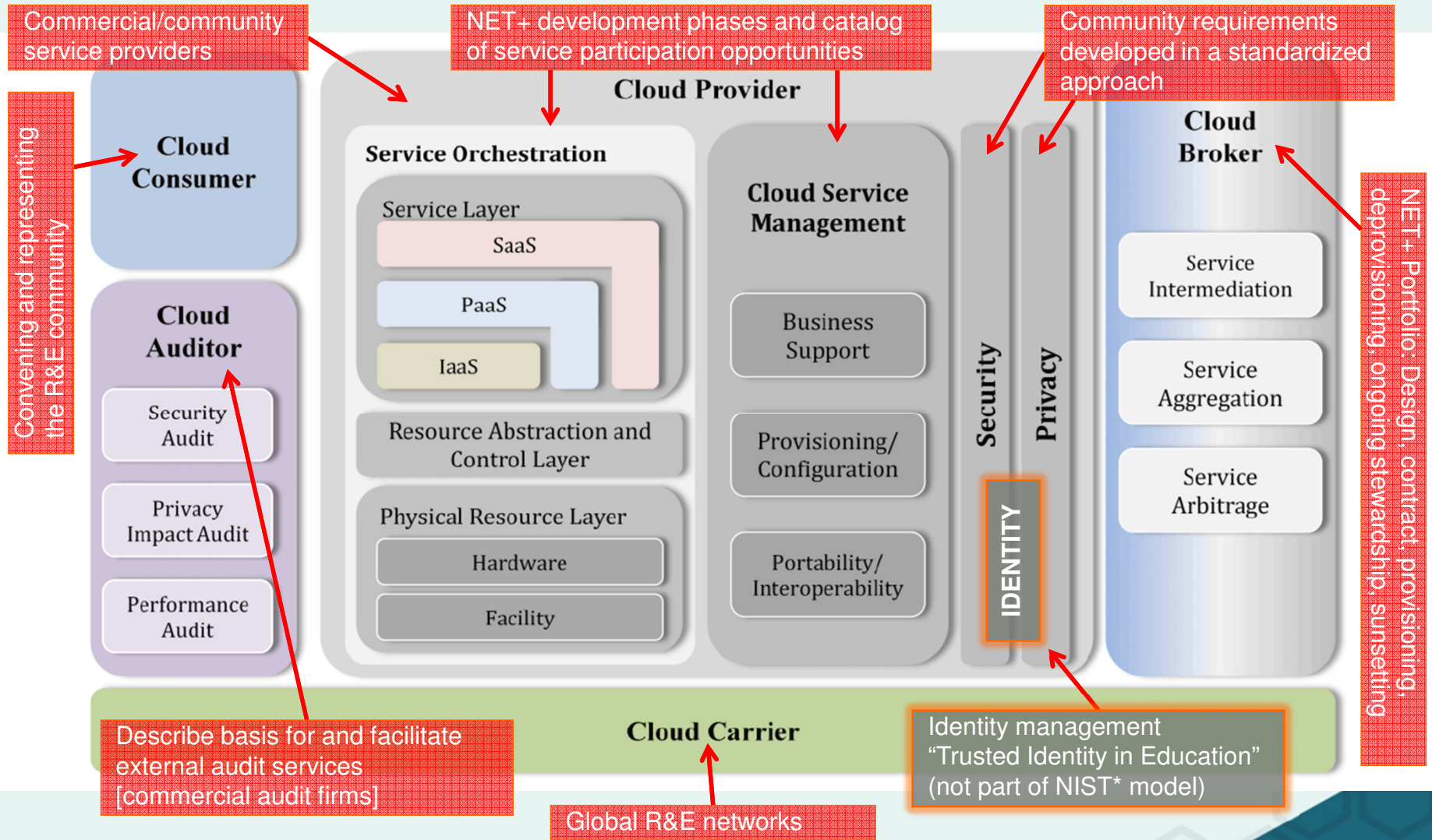
Cloud and Custom environments can coexist



But we MUST AVOID Duplication



Cloud Services with a Firm Foundation



Internet2 100G infrastructure topology



The NET+ Charter

“Dedicated to the widespread adoption of *federated cloud services* that benefit the global research and education community. In partnership with those we serve, the NET+ provides simple, consistent and streamlined access to highest value cloud services, offered at the best possible terms and conditions, to all participating institutions.”

Internet²NET+

What it is not

a buyer's club

a marketing system where providers
sell to higher education
primarily about price

a one-way street

driven by one campus, country,
NREN or provider
delivered over unreliable
networks

What it is

*services tailored for R&E, with
special pricing and business terms*

*a process where providers help
shoulder the risk as partners*

*primarily about delivering value to
both higher ed and providers*

*a collaboration to increase rewards
and reduce overhead*

*driven by the real needs of research
universities to benefit all*

*delivered over the most advanced
networks around the world*

Criteria for consideration of NET+ Providers

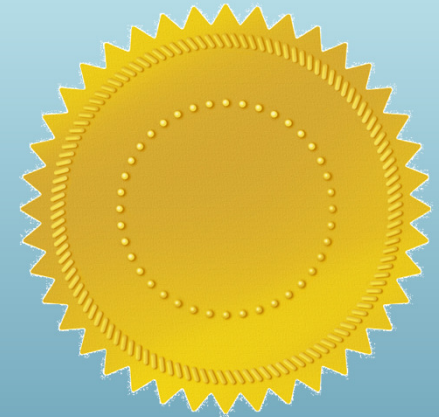
- Can the services scales at least nationally?
- Can it be delivered over global R&E networks?
- Develop a business model that scales globally and serves significant portion of community?
- Will provider work with community to meet unique R&E needs today and into the future?
- Adopts R&E federated identity standards?
- Commits to community's Security, Privacy, Compliance, and Accessibility needs?



Trusted Identity in Education

Community-developed identity and access management framework of trust enables:

- Secure, streamlined sharing of protected resources
- Consolidated management of user identities and access
- Delivery of an integrated portfolio of community-developed solutions



The standard for over 500 higher education institutions—and counting!

InCommon®



Shibboleth®

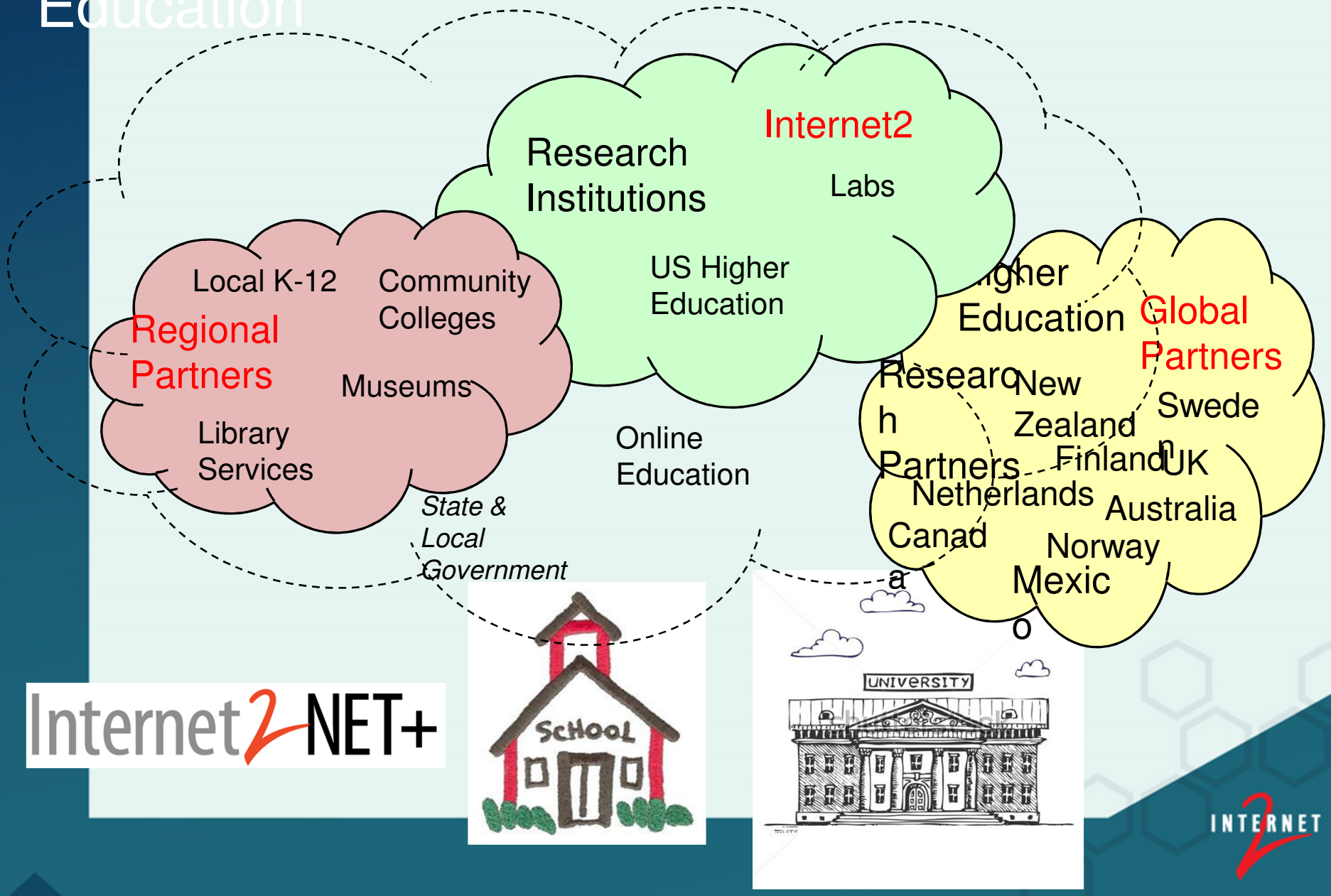


Grouper™

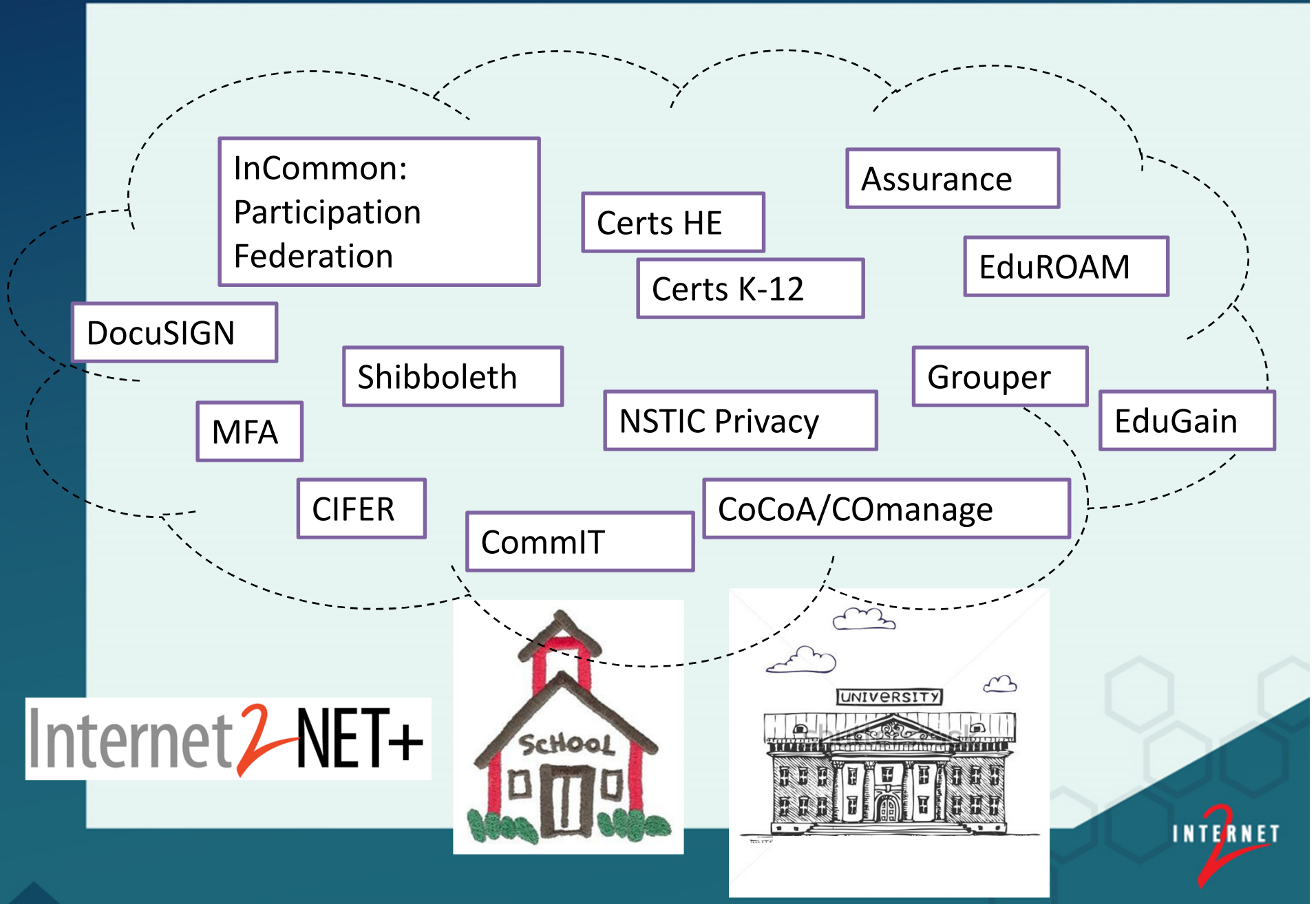


COmanage™

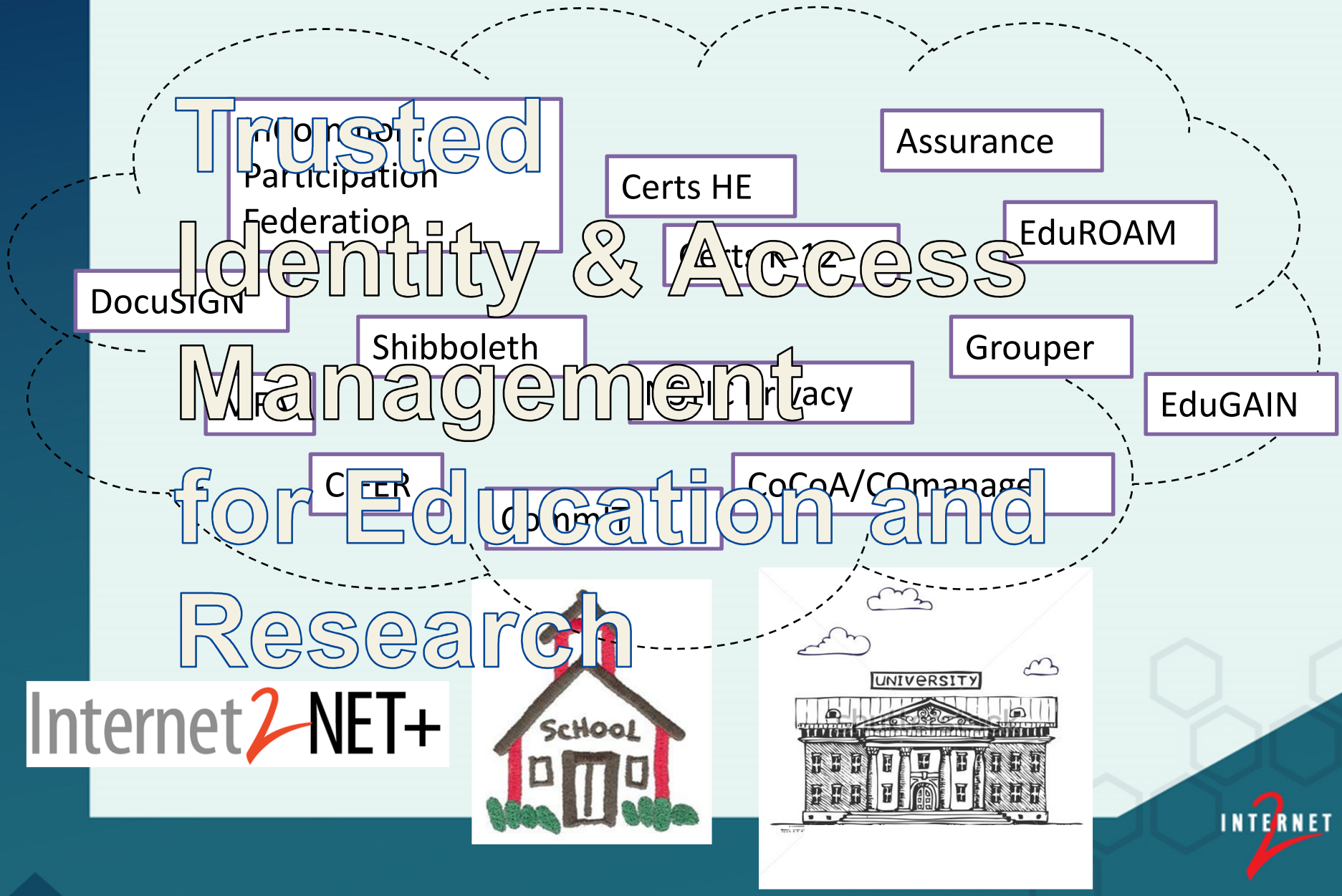
The Community: Global Research and Education



Scope of Internet2's Identity "CommIT"ments



Scope of the "CommITments"



Range of Services – Consolidated Process & Delivery



**Identity &
Access
Management**



**Infrastructure,
Platform,
Security**



**Software
as a
Service**



**Video,
Voice and
Collaborations**



**Digital
Content for
R&E**

Delivered via next-generation, high-speed R&E global networks

Built on federated identity and integration architectural standards

Administered via global agreements, contracts and provisioning

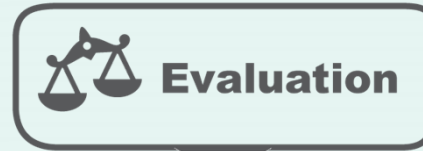
Cloud Service Lifecycle







Sponsorship by
Internet2 members

Subscription by
members and through
regional and global partners
to qualified entities

Designed by
participating campuses,
providers and Internet2

All delivered at global scale,
tailored to R&E needs, and
benefitting all participating
institutions.



| | Spring 2012 | Spring 2013 |
|--|-------------|-------------|
|  Inquiry | (NA) | 2+ |
|  Evaluation | (NA) | 7 |
|  Service Validation | 6 | 14 |
|  Early Adopter | 8 | 6 |
|  General Availability | 2 | 4 |
|  Sunset | (NA) | 0 |

Internet²NET+

cloud service
lineup expands

18 services

34 services

 Research Incubator

| | Spring 2012 | Spring 2013 |
|--|-------------|-------------|
| | 2 | 1 |

Growing Ecosystem of NET+ Services & Providers












*"We are seeing the...emergence of a meta-university—
a...dynamic, communally constructed framework of open materials and platforms on
which much of higher education worldwide can be constructed or enhanced."*

—Charles M. Vest, President Emeritus, MIT

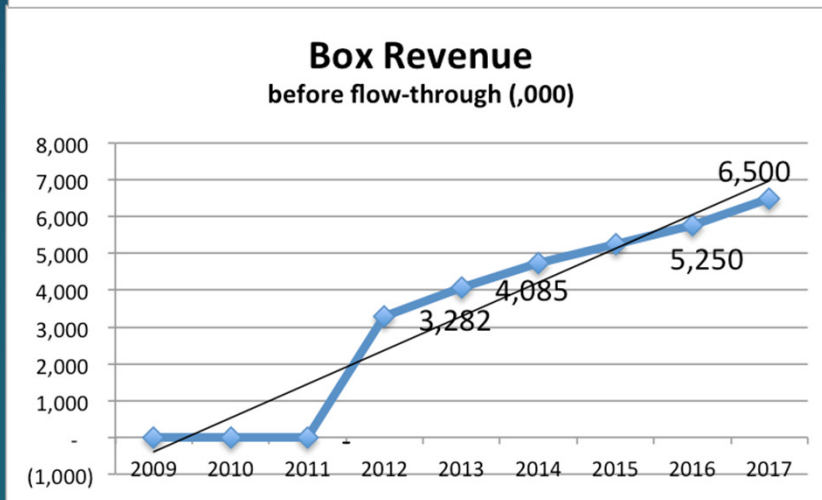
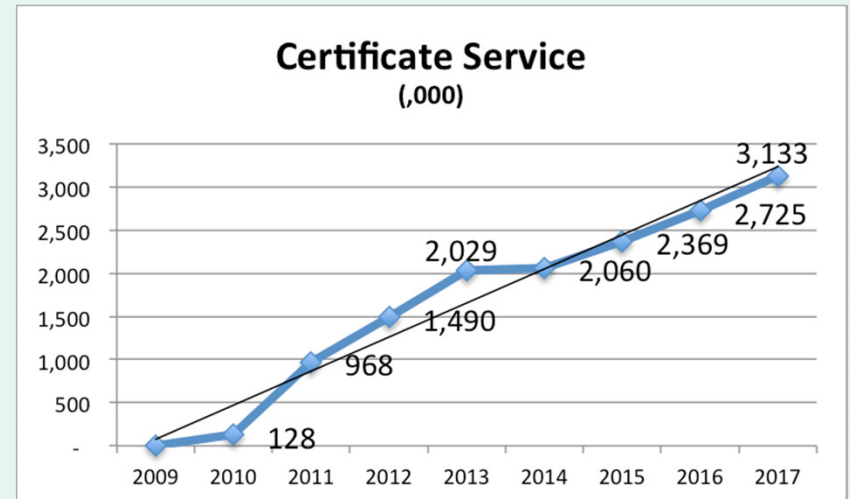
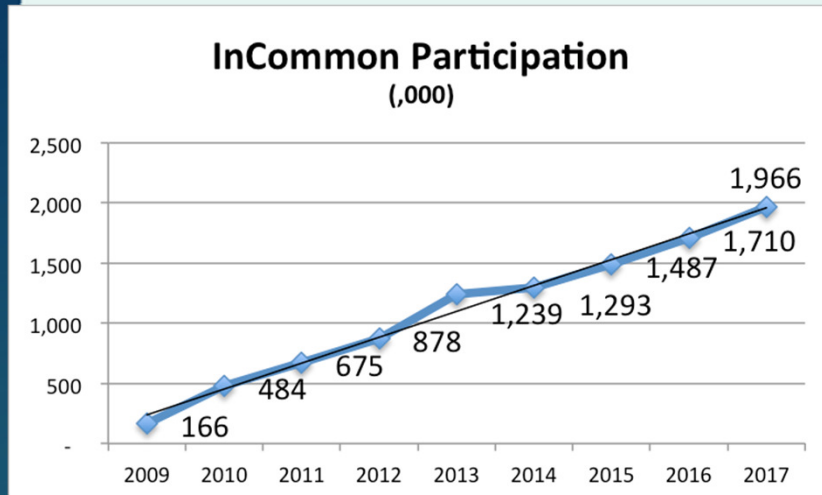
Regional and Global Partners

Voted on top service priorities - Top 10 services selected to deploy first

| SERVICE | LEAD | STATUS |
|---|-----------|-----------------------------------|
|  Adobe Connect | CUDI | Completed SV in US. ON HOLD |
|  Amazon AWS | Internet2 | In SV. Expect EA July |
|  Box | Internet2 | Agreement done. AARNET ready |
|  Canvas | UWash | EA in June |
|  Evernote | SURFnet | Inquiry |
|  Evogh | CalTech | In SV. TBD Cancel and Replace |
|  Microsoft 365 | JANET | EA in US |
|  Microsoft Azure | JANET | GA- New. 2 Subscribers in US |
|  vCloud (Dell) | Clemson | Evaluation. Expect SV Summer 2013 |

Growth in subscriptions through NET+

Net+ Services



“Program success is based on rapid revenue growth. Here are three examples of services in “general availability.”

Community cloud challenges

- Every [campus/network/country] thinks it can do better than the others—*but we can't succeed by going it alone*
- Sales efforts divide and conquer
- Providers lack executive sponsorship to make things work
- There's a temptation to customize legal agreements in this new area
- Procurement policies and laws vary considerably and are based on pre-cloud concepts
- Cloud security/privacy still evolving—*but we can't afford to wait for perfection*
- Must move beyond simple federated identity to provisioning and deprovisioning identity and access at scale
- Must coordinate across timezones and resources to move faster and remain efficient

Cloud Success takes more than technology



CHANGE MANAGEMENT

COMMUNITY

INTEGRATION

TEMPLATES

POSITION DESCRIPTIONS

SKILLS

BEST PRACTICES

REPOSITORIES

TRAINING: **RISK CONTRACTS**

DEVELOPMENT: **CLOUD ELEMENTS**

What are the components of Cloud Proud™?

CULTURAL CHANGE:

Recognize that moving to the Cloud is NOT just buying new technology.

PARTICIPATION:

Every member of your campus community will be involved. So *GET* them involved.

CHANGE MANAGEMENT: Planned

COMMUNITY: Coordination

INTEGRATION: Identity & System

TEMPLATES: Per Service

POSITION DESCRIPTION: Shared

SKILLS: New Jobs and Careers

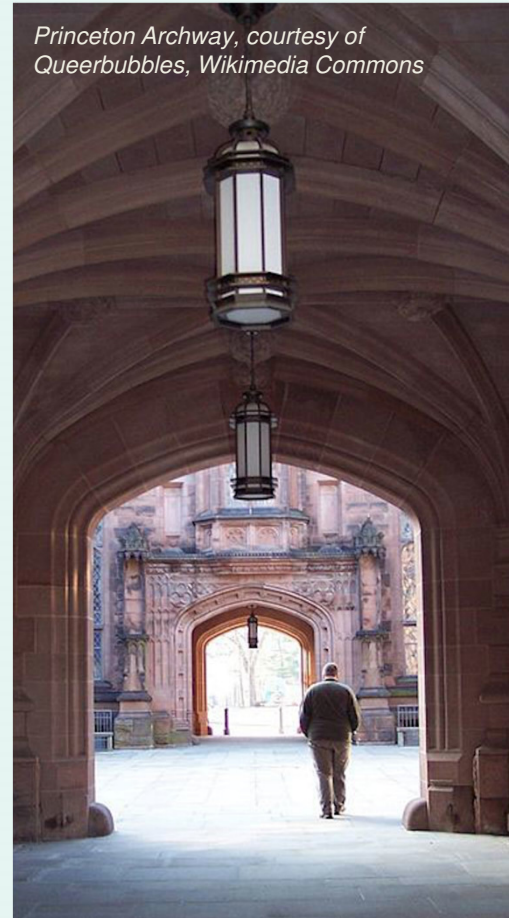
BEST PRACTICES: Shared

REPOSITORIES: Documentation

TRAINING: Risk Contracts

How can campuses prepare for the cloud?

- 1 Create campus strategy for internal and external cloud services
- 2 Shift from culture of central control to one of sharing, reuse, and value-added differentiation
- 3 Evaluate Internet2 NET+ portfolio, examine *your* portfolios, consider which projects could benefit from NET+ scale
- 4 Develop campus identity solution built on open standards
- 5 Support service competition choices—*but constrained, not unlimited choices*
- 6 Start implementing cloud-ready language *now* in all contracts
- 7 Create “cloud first” culture by partnering with legal and procurement teams, restructuring internal processes and policies with the cloud in mind



IT is hard. Work together to make Cloud easier.

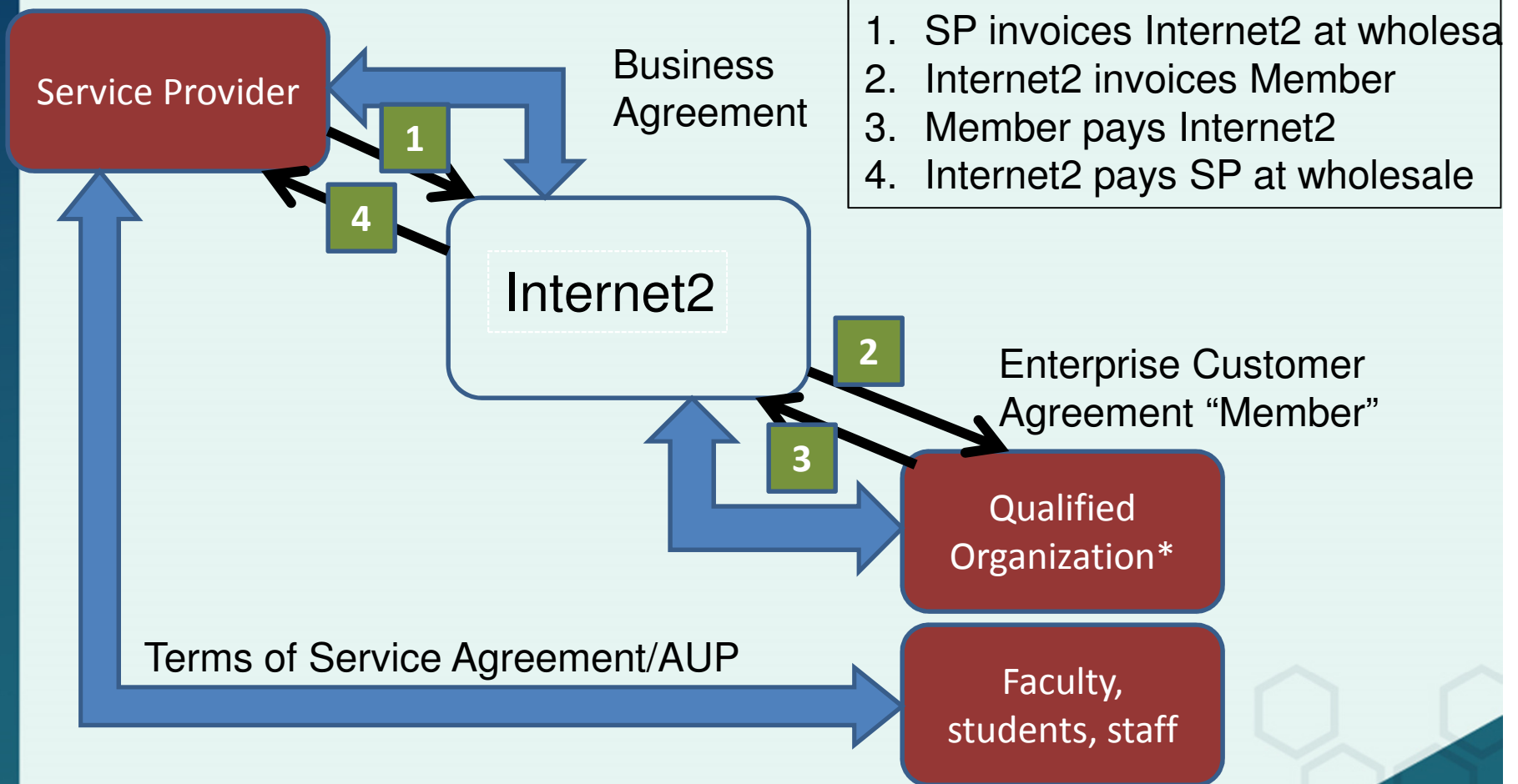




Unleashing new waves of global discovery, together.

BACKUP SLIDES ON SERVICE STATUS

Example: NET+ Contractual Relationships – Type B1



* Qualified Organization agreed upon with each SP

Amazon Web Services

Area: Infrastructure, Platform, and System Security as a Service

Solution: Amazon Web Services

Provider: DLT Solutions and Amazon Web Services

Sponsor: University of Virginia



Service Validation

Status

- Aggregation and volume discounts
- User friendly self-service portal to provision services
- InCommon integration
- Network peering
- Pilot program to reduce data transfer costs

Next Steps

Finalize business model and legal agreements



DLT SOLUTIONS

Box

Area: Infrastructure, Platform, and System Security as a Service
Solution: Storage and collaboration service
Provider: Box
Sponsor: University of California, Berkeley

The logo for Box, consisting of the word "box" in a blue, rounded, lowercase font.The logo for the University of California, Berkeley, featuring the word "Berkeley" in a large, blue, serif font, with "UNIVERSITY OF CALIFORNIA" in a smaller, blue, sans-serif font below it.

General Availability

Status

- 40+ universities
- Network peering being upgraded to 10G
- First phase of accessibility development complete
- New pricing tiers for smaller schools

Next Steps

Updated agreement & regional / global partner

Canvas

Area: Software as a Service: Academic, Research, and Administrative

Solution: Learning Management System

Provider: Instructure

Sponsor: University of Washington



canvas
BY INSTRUCTURE



Early Adopter

Status

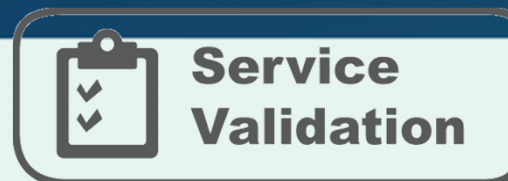
- Service validation complete
- InCommon integration
- Discounted and waterfall pricing
- Custom end user terms of use
- Other status item

Next Steps

Open to Early Adopters in May 2013

CrashPlan PROe

Area: Infrastructure, Platform, and System Security as a Service
Solution: Endpoint backup for faculty, staff, students
Provider: Code 42 Software
Sponsor: Multiple Universities



Status

- Service validation underway
- InCommon integration
- Network connection to Internet2 in progress
- Legal agreement under review
- Universities testing and deploying service already

Next Steps

Finalize business model and contract to enable early adopter signups



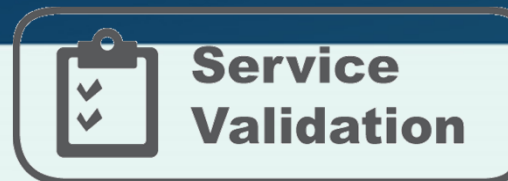
DocuSign

Area: Trusted Identity in Education:
Identity and Access Management

Solution: Electronic signature

Provider: DocuSign

Sponsor: Temple University



Status

- Service validation will kick-off in May
- InCommon integration planned
- Network connection being assessed
- Integrations with other NET+ services planned

Next Steps

Develop customized business model

The DocuSign logo, with "Docu" in a blue sans-serif font and "Sign" in a black script font, followed by a registered trademark symbol.



Fuze

Area: Video, Voice, and Collaborations as a Service

Solution: HD Videoconferencing

Provider: FuzeBox

Sponsor: Saint Louis University

FUZEBOX®



SAINT LOUIS
UNIVERSITY



Service Validation

Status

- Service validation underway
- Open to additional participants
- InCommon integration planned
- Network connection under review

Next Steps

Develop custom pricing and business model

Office 365 Education

- Area:** Software as a Service: Academic, Research, and Administrative
- Solution:** Office desktop suite in the cloud and cloud productivity platform
- Provider:** Microsoft
- Sponsor:** Colorado State University and University of Florida



Service Validation

Status

- Customized contract
- Additional no-cost support options
- InCommon testing being planned
- Online community of practice site will be established

Next Steps

Move to Early Adopter phase in next 2-3 months

Internet2 NET+ Splunk

Area: Software as a Service: Academic, Research, and Administrative

Solution: Machine data analysis

Provider: Splunk

Sponsor: Multiple Universities

The Splunk logo consists of the word "splunk" in a bold, lowercase, sans-serif font, followed by a grey chevron symbol pointing to the right. A small registered trademark symbol (®) is located above the chevron.

Service Validation

Status

- Service validation beginning in May
- Business model under development
- Waterfall pricing for the community
- Subscriptions billed through Internet2

Next Steps

Finish business model discussion and contract review

Vidyo

Area: Video, Voice, and Collaborations as a Service

Solution: Personal telepresence

Provider: Vidyo and ID Solutions

Sponsor: Arizona State University



Service Validation

Status

- Service validation finishing up
- Pricing and business model nearly finalized
- Accessibility testing
- InCommon development
- Network integration

Next Steps

Open to Early Adopters in May 2013



Adobe Connect

- Area:** Software as a Service: Academic, Research, and Administrative
- Solution:** Web conferencing platform for web meetings, eLearning, and webinars
- Provider:** Adobe
- Sponsor:** Case Western



Service Validation

Status

- Functional Validation complete
- Security Assessment in progress

Next Steps

Finalize contract

Desire2Learn Capture

Area: Software as a Service: Academic, Research, and Administrative

Solution: Lecture capture and webcasting solution

Provider: Desire2Learn

Sponsor: Tulane University



Service Validation

Status

- Functional validation complete
- Security assessment in progress

Next Steps

Early Availability targeted for Q3, 2013



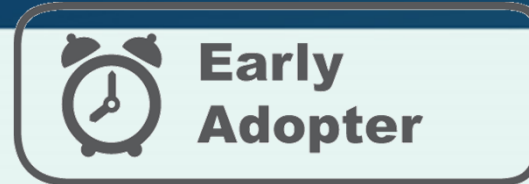
eduroam

Area: Trusted Identity in Education:
Identity and Access Management

Solution: International Internet access for
participating institutions

Provider: Internet2 and Anyroam

Sponsor: University of Tennessee Knoxville



Status

- Open – Internet2 members and other non-member organizations
- NSF Grant requirements being fulfilled by Anyroam
- Participation and non-member pricing complete

Next Steps

Finalizing Customer Agreement for full availability by Summer 2013

THE UNIVERSITY of TENNESSEE 
KNOXVILLE



WISCONSIN
UNIVERSITY OF WISCONSIN-MADISON

E-Content

- Area:** Content Services: eText, Research, and Academic Content
- Solution:** Pilot series to evaluate technology and business models as textbooks evolve from paper to electronic form
- Provider:** Several



Service Validation

Status

- Fall 2012: 27 institutions
- Spring 2013: 18 institutions
- Fall 2013: kick-off meetings, legal

Next Steps

Exploring options for moving from pilot to Net+ services



EDUCAUSE

ICE Health Systems

Area: Software as a Service: Academic, Research, and Administrative

Solution: Dental system for higher education

Provider: ICE Health Systems

Sponsor: University of Michigan



Service Validation

Status

- SV Participation closed
- Business Agreement in progress
- Security Assessment in progress
- Steering committees created for Clinical User Interface, Billing/Financials, Education

Next Steps

General Availability as-is by Fall 2013 as feature enhancement work continues with input from Service Validation institutions

Merit Network, Inc.

Area: Infrastructure Platform and
Security as a Service
Software as a Service: Academic,
Research, and Administrative

Solution: Hosted infrastructure and
application services

Provider: Merit Network, Inc.



Cornell University

FRESNO STATE
Discovery. Diversity. Distinction.



**General
Availability**

Status

- Open
- Internet2 member and InCommon participation required
- Higher education only
- Institutions testing many solutions before final implementation

Next Steps

Partnering effort with webinars

AT&T Synaptic Storage and Compute

- Area:** Infrastructure Platform and System Security as a Service
- Solution:** Cloud-based on-demand storage and compute services scaled for academic, and administrative needs
- Provider:** AT&T and Florida Lambda Rail
- Sponsor:** None



Evaluation

Status

- Participation is Open
- Intrenet2 member not required - InCommon participation required
- Open to all qualified research and education institutions



CenturyLink Savvis

Area: Infrastructure Platform and System Security as a Service
Solution: Savvis Virtual Private Data Center Services and Savvis Management Console
Provider: CenturyLink/Savvis
Sponsor: Florida State University



Evaluation

Status

- Participation is Open
- Continued evaluation of services and identification of use cases



CenturyLink™
Government



THE FLORIDA STATE UNIVERSITY

Dell Cloud On-Demand

- Area:** Infrastructure Platform and System Security as a Service
- Solution:** Multi-tenant Infrastructure-as-a-Service (IaaS) hosted in secured Dell datacenters
- Provider:** Dell
- Sponsor:** Indiana University



Service Validation

Status

- Participation is Closed
- InCommon participation required
- Higher education only is pending



INDIANA UNIVERSITY



DuraCloud

Area: Infrastructure Platform and System Security as a Service

Solution: Preservation and accessibility of irreplaceable documents, imagery, and videos

Provider: DuraSpace

Sponsor: University of Virginia



Early Adopter

Status

- Participation is Open
- Business agreement nearing completion

DURASPACE™



Fischer Ignite-Federation Service

Area: Trusted Identity in Education:
Identity and Access Management

Solution: Hosted, virtual identity provider
service that satisfies the IdP
related requirements for joining
the InCommon Federation

Provider: Fischer

Sponsor: None



Evaluation

Status

- Participation is being determined
- No Internet2 Membership required, InCommon required
- Open to qualified high education and research institutions



IU – Compute-Cluster-on-Demand

- Area:** Infrastructure Platform and System Security as a Service
- Solution:** HPC computing time by leveraging IU's access supercomputing cloud resources.
- Provider:** Penguin Computing and IU
- Sponsor:** Indiana University



Evaluation

Status

- Participation is being determined
- InCommon participation required
- Not only for Higher Education - K20, as well as U.S. FFRDCs.



Kaltura

Area: Video, Voice, and Collaborations
as a Service

Solution: Open Source Online Video
Platform

Provider: Kaltura

Sponsor: Open



Inquiry

Status

- Participation is Full
- Membership/participation requirements still to be determined
- High Education only



NCSU/IBM VCL

Area: Infrastructure Platform and System Security as a Service

Solution: Open source “Virtual Computing Lab” services (cycles and management) for the Internet2 community

Provider: NCSU and IBM

Sponsor: George Mason University



Service Validation

Status

- Participation is Open
- Service Validation kicked off in October 2012



SeeVogh

- Area:** Video, Voice, and Collaborations as a Service
- Solution:** Simplified interface, high-end, video collaboration
- Provider:** Evogh
- Sponsor:** University of Maryland Baltimore County



Early Adopter

Status

- Participation is Open
- InCommon integration completed
- Business agreement nearly completed



SHI International

Area: Infrastructure Platform and System Security as a Service

Solution: Highly secure VMWare solutions, seamless bursting to cloud, delivered directly through the R&E Network

Provider: SHI

Sponsor: Pending



Evaluation

Status

- Participation is Open
- Major enhancements is on-going
- Currently in proof-of-concept evaluation with another university
- Business agreement nearly completed



Solution Design Group

- Area:** Software as a Service: Academic, Research, and Administrative
- Solution:** Track and monitor service provider contracts and performance metrics
- Provider:** Solution Design Group
- Sponsor:** University of Maryland Baltimore County



**Service
Validation**

Status

- Participation is Open
- Kick off in September 2012



Tivli

Area: Video, Voice, and Collaborations as a Service

Solution: Provider of IPTV solutions to the College and University marketplace

Provider: Tivli

Sponsor: Yale University



Evaluation

Status

- Participation is Open
- InCommon participation required
- Higher Education only



Windows Azure

Area: Infrastructure Platform and System Security as a Service

Solution: Large data initiatives, such as genomics, can save on bandwidth charges, shifting those resources toward direct research-related activities.

Provider: Microsoft

Sponsor: University of Washington



Early Adopter

Status

- Participation is Open
- Internet2 membership not required - InCommon participation required
- Open to all educational and research institutions

Microsoft[®]

W

So Get Your Campuses Thinking NET+

- 1 Create campus strategy for internal and external cloud services
- 2 Shift from culture of central control to one of sharing, reuse, and value-added differentiation
- 3 Evaluate Internet2 NET+ portfolio, examine *your* portfolios, consider which projects could benefit from NET+ scale
- 4 Develop campus identity solution built on open standards
- 5 Support service competition choices—*but constrained, not unlimited choices*
- 6 Start implementing cloud-ready language *now* in all contracts
- 7 Create “cloud first” culture by partnering with legal and procurement teams, restructuring internal processes and policies with the cloud in mind

