

FINOS

Fintech
Open Source
Foundation

2021Q1 - All Community Call

FINOS Team
FINOS Project / SIG Leads
FINOS Community

Virtually held on January 27th 2021 at 3pm GMT / 10am EST
<https://finos.webex.com/finos/j.php?MTID=m05a7c30c31848c6275410cf07f96a99e>

Today's Agenda

10:00

State of the FINOS Community

- **FINOS community and new member update**
- **FINOS 2020 Q4 recap, FINOS 2021 guiding principles**

10:10

Marketing and Community Engagement

- **2021 marketing and community engagement**
- **Open Source Fintech Meetups - Andrew King (APAC) & Claire Cocks (UK)**

10:20

Community Recognition

- **FINOS community spotlight and award winners**
- **Recruit, reward, retain FINOS contributors**

10:25

FINOS Project and SIG Updates

- **Morphir, Cloud Service Certification, Currency Reference Data**
- **Git Proxy, DevOps Mutualization, InnerSource**

10:50

Community Socialization, Q&A and AOB

- **Understanding the complexity of IoT within retail banking - Daniel Brookes**
- **AOB and Q&A**

11:00

FINOS All Community Call - Close

Calls to Action

[Pick a project](#) to contribute to by EOY.

Star and join the action in the [Community repo](#).

Write to the [Community Mailing list](#) or join [FINOS office hours](#) if you don't know where to start!

Sign up for the FINOS [Newsletter](#) if you haven't already.

If you are a maintainer, and need extra help, consider becoming a [quarterly focus project](#).

State of the FINOS Community

Gabriele Columbro,
Executive Director

FINOS Community by the Numbers

PLATINUM



GOLD



SILVER



ASSOCIATE



15

Active Open Source Projects and SIGs

26

Incubating Open Source Projects and SIGs

350+

Contributors

37

Corporate and Associate Members

Q4 was our busiest quarter ever!

The FINOS Landscape growth is accelerating...

DevOps Mutualization

FINOS Special Interest Group



Regulation Innovation
SPECIAL INTEREST GROUP

FINOS Special Interest Group

openMAMA

FINOS active



682% increase in social (LinkedIn & Twitter) clicks
98.5% increase in social interactions
20% growth in social followers
190% growth in social shares
YouTube Channel updated with all OSSF videos, meetups and guest presentations



Community Spotlight recognized 4 community contributors
OSSF Awards recognized 3 contributors (evaluated over all of 2020)
Virtual Meetups Fewer in Q4 with increased focus on OSSF
FINOS Podcast 360 downloads and five stars with plans to grow in 2021



American Financial Technology Awards 2020

Press Releases promoted Open RegTech, record contributions, new members, associate membership and Legend launch
OSSF Virtual 632 registrations, 66 speakers, all content available on platform and YouTube
Awards FinTech Futures Banking Tech, Waters Technology AFTA, OpenUK Influencers
Coverage 232% increase in media coverage in 2020 over 2019 w/no material change in media briefings

... and kept open source in financial services in the news

waterstechnology

FINTECH INSIGHT
TRENDING FINANCIAL TECHNOLOGY NEWS



efinancialcareers



TECHGIG

MARKETSMEDIA

Finextra



institutionalassetmanager

OpenSource
The complete portal on open source ForU.com

FINOS 2021 Guiding Principles: Focus on...

Existing FINOS Projects

Primary focus is on helping existing projects succeed. Less proactive outreach on bringing in new projects.

Sample Initiatives: Project best practices, EasyCLA, [2021 Q1 FINOS focus projects](#)

Existing FINOS Members

Primary focus on supporting existing members. Reduced new member targets.

Sample Initiatives: Member Success; LFX Insights

Value for the Business

Increased FINOS team focus on initiatives that drive value for “the business”, in addition to technology teams.

Sample Initiatives: State of Open Source in FSI

Surfacing Adoption

Surface adoption of FINOS projects within banks, FinTechs, etc., in addition to measuring contribution.

Sample Initiatives: State of Open Source in FSI, LFX Insights

Scalable Project Enablement

Deliver project “self-serve” tools/materials and introduce new project coordination options.

Sample Initiatives: Project funding, FINOS project coordinators

Value (& motivation) for Individuals

Increased focus on the value of OSS for individuals in addition to the corporate value proposition.

Sample Initiatives: Recruit, reward, retain

Value for FinTechs & Regulators

Additional focus showing value to fintechs and regulators in addition to FSIs.

Sample Initiatives: Open RegTech, FINOS Labs

REFER

New Members
New Projects
Internal SMEs
Strategic challenges

SUSTAIN

Incentivize Individuals
Drive internal adoption
Strategic commitment to FINOS OSS projects

ADVOCATE

FINOS / Open Source
Internally / Externally
For Diversity

FOUNDATIONAL

LFX
CRM and backend services
Legal and G/A

EMPOWER

Open Source Readiness
Neutral venue
Compliant OSS toolchain
IP Management

SUPPORT

Infrastructure
Coaching & Advisory
Initial setup
Focus projects

PROMOTE

Marketing channels
Events
Awards
Incentives / rewards

ORGANIZE

Project coordination
Project ownership
Day-to-day Operations

MAINTAIN

Development
Release
Manage inbound contributions

GROW

Leadership
Governance
Advocacy

UPSTREAM

Projects
ESG / OS-Climate
Hyperledger / CNCF
SIGs

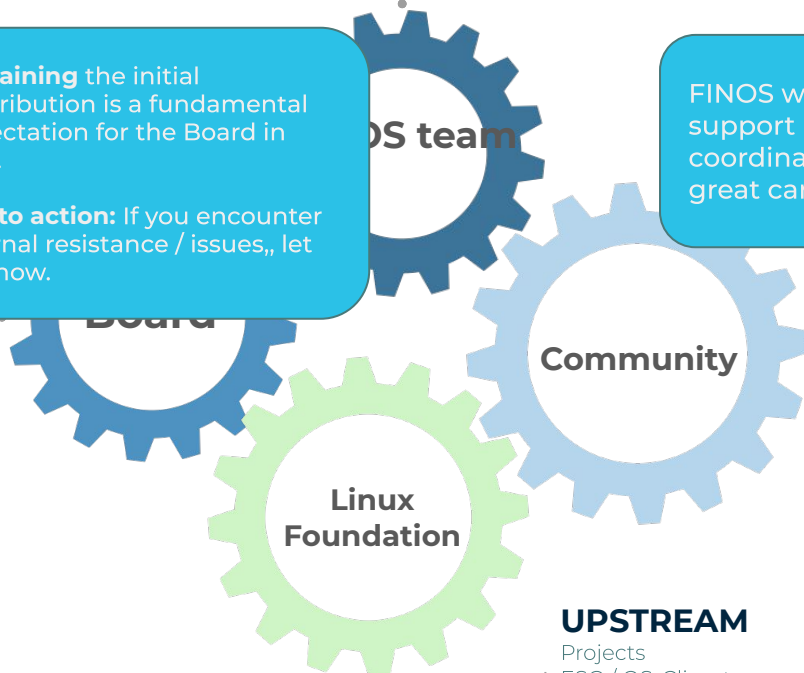
VALUE ADD SERVICES

Training Mutualization
Membership meetings
Legal Summit
Research (coming!)

Sustaining the initial contribution is a fundamental expectation for the Board in 2021.

Call to action: If you encounter internal resistance / issues,, let us know.

FINOS will resource to support project coordination.- any great candidate? :)



Marketing and Community Engagement

Tosha Ellison,
Chief Operating Officer

2021 Marketing and Community Engagement

- Recruit, Reward and Retain FINOS Contributors
 - Training, recognition, swag and employer engagement
- FINOS Events and Meetups
 - FINOS hosted meetups (email marketing@finos.org with ideas)
 - Events organised with the Linux Foundation, including virtual, hybrid & in person
 - Meetups scaled through members / partners, regional events, virtual & in person
- FINOS Podcasts
 - Expanding formats, federate and do more!
- Tech Sprints, Innovation Projects & Onsite Bootcamps
- Scale and nurture project self-sufficiency

Open Source Fintech Meetups Updates

- Welcome **Andrew King**, APAC meetup (Virtual), Suite2Go
- **Claire Cocks**, UK meetups (Virtual, London, Edinburgh, Bristol), Scott Logic



- Evolving customer needs and expectations
- Increasing personalisation
 - Connected, seamless experiences
 - Safety and security
 - Convenience and ease
 - Simpler products with greater transparency

Open Source in Fintech Event Series

UK Meetup collaboration
Scott Logic/FINOS

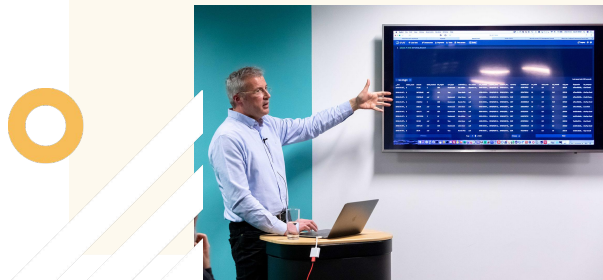


Contribution



Community

Covid (as Catalyst)



Collaboration



Our history and plans for the future.

Get involved

Next event, 11 Feb @ 4pm GMT / 11am EST

'How to create a data mesh with open source tools' <http://bit.ly/datameshOS>

Bristol: <https://bit.ly/bosfm>

London: <http://bit.ly/losfm>

Edinburgh: <https://bitly.com/eosfm>

Video playlist: <http://bit.ly/osf-videos>

ccocks@scottlogic.com



Community Recognition

James McLeod,

Director of Community

FINOS Community Spotlight and Award Winners

Well Done FINOS Community

Congratulations to our [OSSE 2020 Community Award Winners](#) and to those featured in the [Community Spotlight](#).

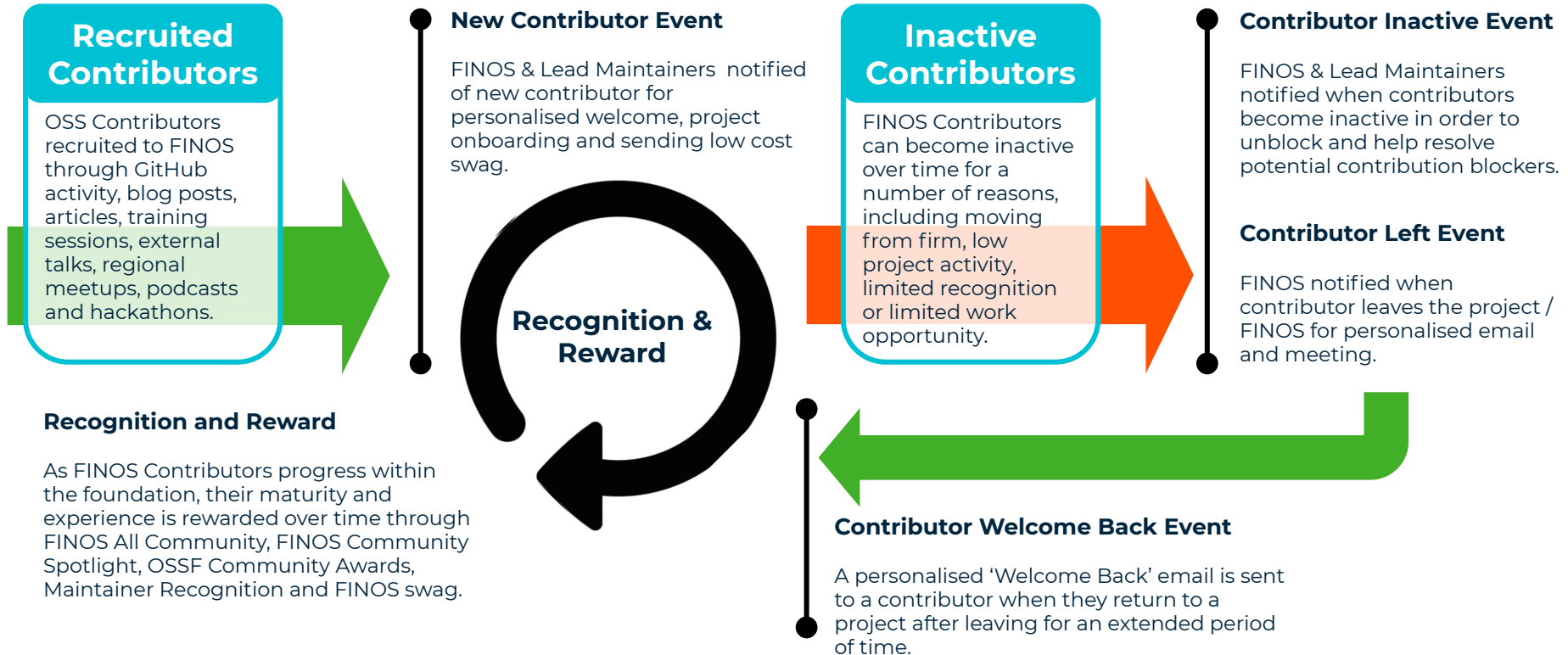


Raise Community Recognition

Raise a [FINOS Community Recognition](#) to highlight the positive contributions of a member of the FINOS open source community.



Recruit, Reward and Retain FINOS Contributors



FINOS Project and SIG Updates

FINOS Team and the FINOS Community

Morphir



Find Morphir in the FINOS organisation on GitHub

<https://github.com/finos/morphir>

What is Morphir?

Morphir is a multi-language system built on a data format that captures an application's domain model and business logic in a technology agnostic manner. Read more on the [Morphir Documentation Microsite](#).

Morphir Contribution Opportunities:

- Multi-Language Support, Application Modeling, Unified Stream & Batch Data Processing, Visualization Tools.
- We anticipate applicability to the FINOS Legend and FinReg initiatives.

Explore Morphir GitHub issues to collaborate and engage in current and future project requirements - <https://github.com/finos/morphir/issues>

Cloud Service Certification



**CLOUD SERVICE
CERTIFICATION**

Find Cloud Service Certification in the FINOS organisation on GitHub

<https://github.com/finos/cloud-service-certification>

Google Cloud Platform GKE Journey Update

- [GKE Service Accelerator Template](#) contributed by Alfred Tommy
- [Terraform IaC](#) contributed following GKE Service Accelerator Template
- Lee Faus and Eddie Knight formed BDD team to complete GKE journey
- CSC epic created to explore [Functional and Declarative BDD Testing](#)

BDD Investigation and Next Steps

- [Open Policy Agent](#) spiked and demonstrated for IaC pre-deployment verification
- [Probr](#) OSS project demonstrated for post-deployment validation of security standards
- Lee and Eddie engaging with Alfred to engage GKE BDD requirements

Explore Cloud Service Certification issues to engage with project meetings and requirements - <https://github.com/finos/cloud-service-certification/issues>

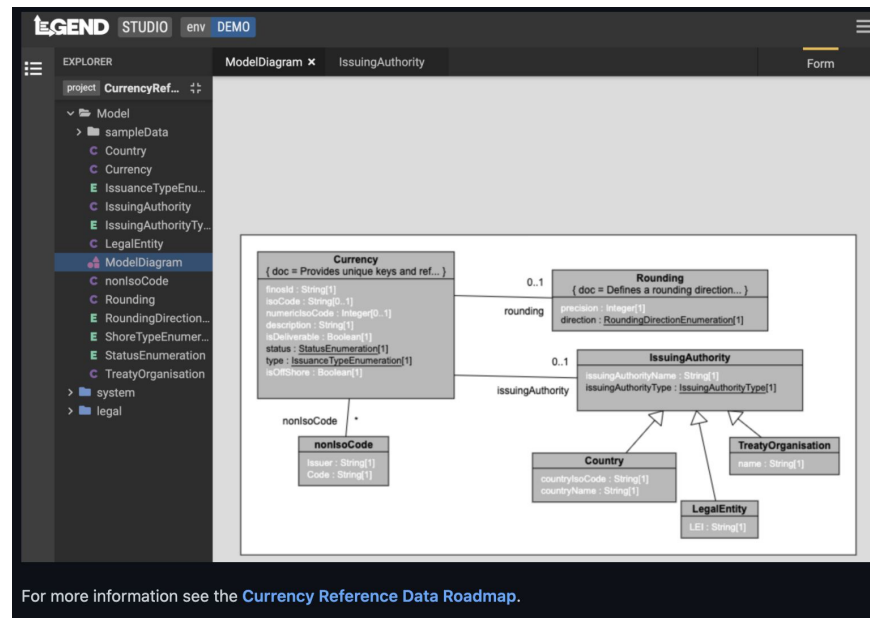
Currency Reference Data



Using **Legend Studio** to create a **standard currency object** and a central cloud based repository using **ISO Currency Code data** as a baseline

Get involved!

- Read about CurRef Data in [GitHub](#)
- Request an account at finos.org/legend and check out the current [model](#)
- Join the [next meeting](#) (February 9th @ 10am ET / 3pm GMT)



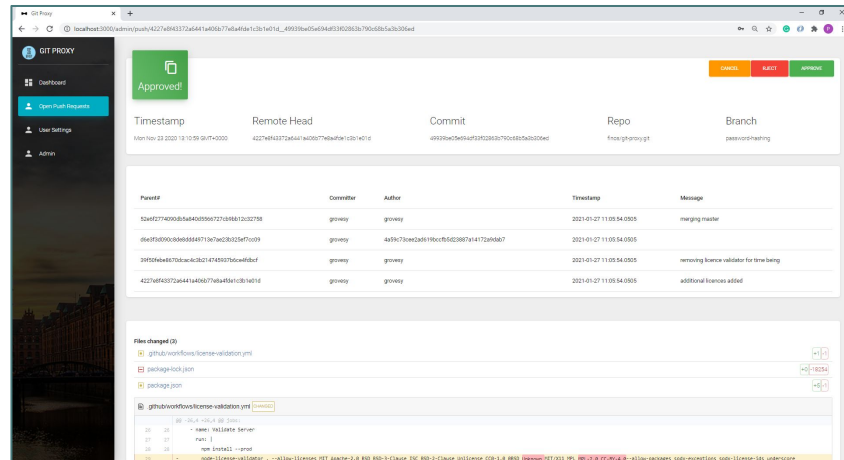
Git Proxy

Q4 Achievements

- Code is contributed to FINOS on github.com/finos/git-proxy
- **255** commits, **23** Pull Requests, **4** collaborators
- Great progresses towards MVP
 - Active Directory authentication
 - MongoDB persistence support
 - Improved UI

Next Steps

- **Git Proxy 2021 Kickoff call Thursday 28th (9am EST / 2pm GMT)** - Find call details on the [FINOS Project Calendar](#)
- **Presenting at [Open Source Readiness](#)** on Wednesday 3rd February at 10am EST
- **Complete the MVP**
- Gather **more project participants**
- Gather **more banks to run the MVP** (behind their corporate firewall)



Help needed

- **Node backend developers**, building services and controls, dealing with persistence and git protocol payloads
- **React developers**, delivering features to end users
- **Early users**, updating existing documentation and building more

DevOps Mutualization



- DevOps Mutualization was contributed to FINOS in Q4 2020 and is found on GitHub
 - <https://github.com/finos/devops-mutualization>
- SIG Lead: Amol Shukla (Morgan Stanley); Secretary: Anders Wallgren (CloudBees)
- DevOps adoption in banking is accelerated by collaborating and sharing approaches
- Goals
 - Develop common understanding of DevOps through practices, tooling and projects
 - Influence DevOps, Cloud, and Ecosystem vendors
 - Document common approaches for compliance and assurance across banks
- Objectives
 - How are banks orchestrating DevOps to create existing self-service workflows?
 - The different types of SDLC evidence that needs to be produced and stored
- Get Involved
 - Join the next SIG call and engage the SIG through our GitHub issues
 - <https://github.com/finos/devops-mutualization/issues>
 - Email devops-mutualization+subscribe@finos.org to join our mailing list

InnerSource SIG - Approved Jan 20th

- SIG Goals:
 - **Create a safe space to identify and share challenges and solutions that accelerate regulated enterprises' efforts to implement InnerSource within their organisations.**
 - Collaborate with the broader FINOS community to share outputs.
 - Work with InnerSource Commons by sharing relevant outputs upstream to the broader ISC community.
- SIG Leadership Team includes: Daniela Zheleva, DB (Co-lead); Arthur Maltson, Capital One (Co-lead); Clare Dillon, InnerSource Commons (Secretary); Aaron Searle, Morgan Stanley; Anthony Vacca, RBC; Danese Cooper, InnerSource Commons.
- Next Steps:
 - Form SIG; Set-up SIG operations
 - Continue collaboration with Open Source Readiness Group



Follow our progress & help spread the word:

<https://github.com/finos/community/issues/84>

Community Socialization

Daniel Brookes, Intel Partner and Alliances
Manager

IoT and EdgeX for Retail Banking

FINOS Community Issue [#98](#)

Understanding the complexity of IoT within the retail bank
environment.

Q&A and AOB

Finally ...

- Watch the [FINOS Community Repository](#)
- Raise a [FINOS Community Recognition](#)
- Find a Project / SIG on the [FINOS Landscape](#)
- Join a [FINOS Project Meeting](#)