

FINOS

Fintech
Open Source
Foundation

2022 Q3 - All Community Call

FINOS Team

Virtually held on August 10th 2022 at 4pm BST / 11am EST
<https://www.finos.org/hosted-events/2022-08-10-finos-all-community-call-q3-2022>

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Today's Agenda

11:05

State of the Foundation (20 mins)

- **State of the Foundation** - Gabriele Columbro (Executive Director)
- **State of the Community** - James McLeod (Director of Community)

11:30

FINOS Community and FINOS Team Updates (25 mins)

- Open Source in Finance Forum London Wrap Up
- OSFF London Stats, Figures and Achievements
- Latest FDC3 Standard Update
- State of Open Source in Financial Services Survey
- Save the Dates and Ways to Get Involved with FINOS

11:50

Q/A - Add your questions in the Q/A panel (10 mins)

12:00

FINOS All Community Call - Close

Calls to Action

Browse the [FINOS Landscape](#) and join a [FINOS Project or SIG](#).

Star and join the [FINOS 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.

Questions and Answers

Before we start ...

Remember to post your questions in the Zoom Q&A panel or email help@finos.org

State of the Foundation

Gabriele Columbro,
Executive Director, FINOS

FINOS Community in Numbers

PLATINUM

 **accenture**

BMO 

citi

GitHub

Goldman Sachs

J.P.Morgan

Morgan Stanley

  **UBS**

WELLINGTON MANAGEMENT

GOLD

 **SOCIETE GENERALE**  **Capital One**

 **AMERICAN EXPRESS**  **Fannie Mae**

HSBC   **Google**

intel.  **IHS Markit**

 **NatWest**

NOMURA  **redhat**

REFINITIV 

 **SYMPHONY**

 **SUSE**

 **Tradeweb**

 **MEND**

 **wipro**

SILVER

 **Adaptive**

 **Point72**  **BNY MELLON**

CANONICAL  **databricks**  **CloudBees**

 **Codethink**  **Cosaic**  **GitLab**

 **<epam>**  **Itaú**  **Glue42**  **genesis**
Code Less. Do More™

Luxoft
A DXC Technology Company

 **MIRANTIS**

REGnosys
THE REGULATORY TECHNOLOGY PLATFORM

SCOTT LOGIC
ALTOGETHER SMARTER

 **SMBC**

Synechron
PLM | Business Consulting | Technology

ASSOCIATE

 **aif** Alliance for Innovative Regulation

 **AlmaLinux**

CRTA | ACTR
COMPARISON REGULATORY TECHNOLOGY ASSOCIATION
ASSOCIATION CANADIENNE DE LA TECHNOLOGIE REGULATOIRE

 **EDM Council**

 **InterWork Alliance**



ISDA Safe, Efficient Markets

ISLA INTERNATIONAL SECURITIES LENDING ASSOCIATION

mojaloop foundation

Open:UK

ESOP

 **THE DIGITAL DOLLAR PROJECT**

42

Incubating & Active Open Source /Standard Projects

6

Special Interest Groups (SIGs)

1568

Contributors over time

59

Corporate and Associate Members

FINOS 2022 Q2 Highlights

MEMBERS

10 new members joined FINOS in H1:

PLATINUM

WELLINGTON
MANAGEMENT

GOLD

Google



SOCIETE
GENERALE

SILVER

luxoft
A DXC Technology Company



MIRANTIS

REGnosys
THE REGULATORY
TECHNOLOGY PLATFORM

ASSOCIATE

ESOP



PROJECTS

We continue to see an organic influx of proposed / contributed projects:

Proposed



[Compliance Horizon Scanning](#) by Synechron
[Security Scanning](#) by FINOS

RiSETTA by Regnosys

FINOS forming



Open Data Standard
for FS Regulations



Liquidity
Coverage
Ratio

FINOS incubating



[FDC3 Compliance Framework](#)

FINOS "Pilot" [Technical Steering Committee](#) kicked off with 13 participants (7 from financial institutions)

COMMUNITY & TEAM

Contributor Strength up 30.2% YoY

InnerSource SIG launches [Community Contributed Microsite](#) and hosts first FINOS 2022 [Virtual Panel Discussion](#).

FINOS hosts three in person [Open Source in Finance Meetup](#) between New York City and London

The Linux Foundation launches [Untold Stories of Open Source](#) podcast with FINOS collaboration.

Waltz launches FINOS hosted [Waltz Public Demo Instance](#) using [Waltz Juju Bundle](#).

Gabriele Columbro wins [Banking Tech Awards USA Tech Leadership Award](#)



The maturity of our Foundation

Governance

Board



Kim Prado

Vice Chair, FINOS
CIO, US Capital Markets,
I&CB and office of the COO
BMO Capital Markets



Nureen D'Souza

Director, Open Source
Program Office, Capital One



Madeleine Dassule

Senior Managing Director,
Partner and Co-Head
Technology, Wellington

TSC



Colin Eberhardt

<https://github.com/finos/technical-steering-committee>

FSI Upstream Engagement



TODO



CLOUD NATIVE
COMPUTING FOUNDATION



OS-C



OpenSSF

OPEN SOURCE SECURITY FOUNDATION

Morgan Stanley



J.P.Morgan



Contribution

+30%
Contributor
strength YoY

1500+
Contributors
over time

1+
Project
contributed/
month

Adoption

+2500%
NPM Downloads
In 3 years

+485%
NPM Downloads
In 2 years



We keep shining the light...

Building Industry Recognition

A **key win** for Q2 included Gab being named the **Tech Leader of the Banking Tech Awards USA**. Other opportunities include:

- [Money 20/20 EU](#), Gab spoke on the “What’s safe to open source? Balancing faster deployment with secure code” panel
- [ISLA 29th Annual Securities Finance & Collateral Management Conference](#), Gab spoke on the “Collaboration & Community for Standard Adoption” panel
- [World Economic Forum](#), Gab spoke on the FileCoin Foundation/CNBC Lounge

Crafting Compelling Content

Secured placement of the byline in *Dark Reading* after pitching to a variety of relevant outlets

Dark Reading (UVM: 315,497), Gab Colombo - [Why Financial Institutions Must Double Down on Open Source Investments](#)

Highlighting the Growing FINOS Community

Two new member announcements with a focus on the diversity in membership across the FINOS community. Our first release was centered around the addition of Wellington as a new buy-side platinum member and Madeleine’s joining as a board member, and the second encapsulated the larger additions of Google Cloud, Amex, Mirantis, Point72, The Digital Dollar Project & SocGen.



Technical Steering Committee “Pilot” Update

Status

- **Formed in Q3 “TSC Pilot” with 13 participants**
 - Colin Eberhardt as Chair
 - Majority from financial institutions
- **Created supporting infrastructure for transparent operations**
 - <https://github.com/finos/technical-steering-committee>
 - tsc@lists.finos.org
 - 2nd project fully managed via LFX platform
- **3 meetings held in June/July** (Over 60% attendance)

Q3 Focus

- Revision of the [FINOS contribution process](#) and definition of transparent acceptance principles
- Advise Governing Board on acceptance of [in flight contributions](#)
 - Includes REGnosys [RosettaDSL](#), FINOS [Security Scanning](#) and Synechron [Compliance Horizon Scanning](#)
- [Integrate OpenSSF badges in project lifecycle](#) as measure of “open source maturity”

Further Responsibilities

1. Advise ED on upcoming contributions
2. Evaluate Cross-project integration and use cases (at project maintainers request)

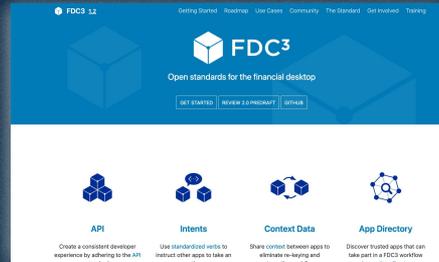
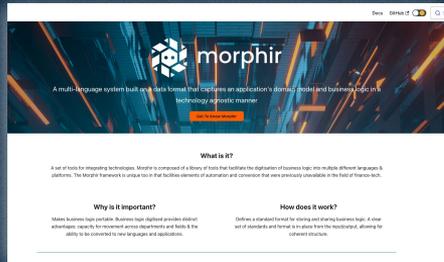
State of the Community

James McLeod,

Director of Community, FINOS

Recognising 22H1 Community Achievements

- [FDC3 draft specification 2.0](#) released
- [Spring Bot](#) achieves first FINOS OpenSSF pass badge
- [FINOS Resource Centre](#) launched with Zngly FINOS contributions
- New [Morphir Microsite](#) with business use cases released
- [Morphir and Rosetta techsprint](#) with Microsoft Bosque team
- Red Hat and Deutsche Bank contribute [Open Shift PR](#) into CFI
- [Legend](#) and [Waltz](#) automated with Juju / Charm operators
- FINOS & Scott Logic UK meetups are back
- FINOS celebrates OSFF London success!

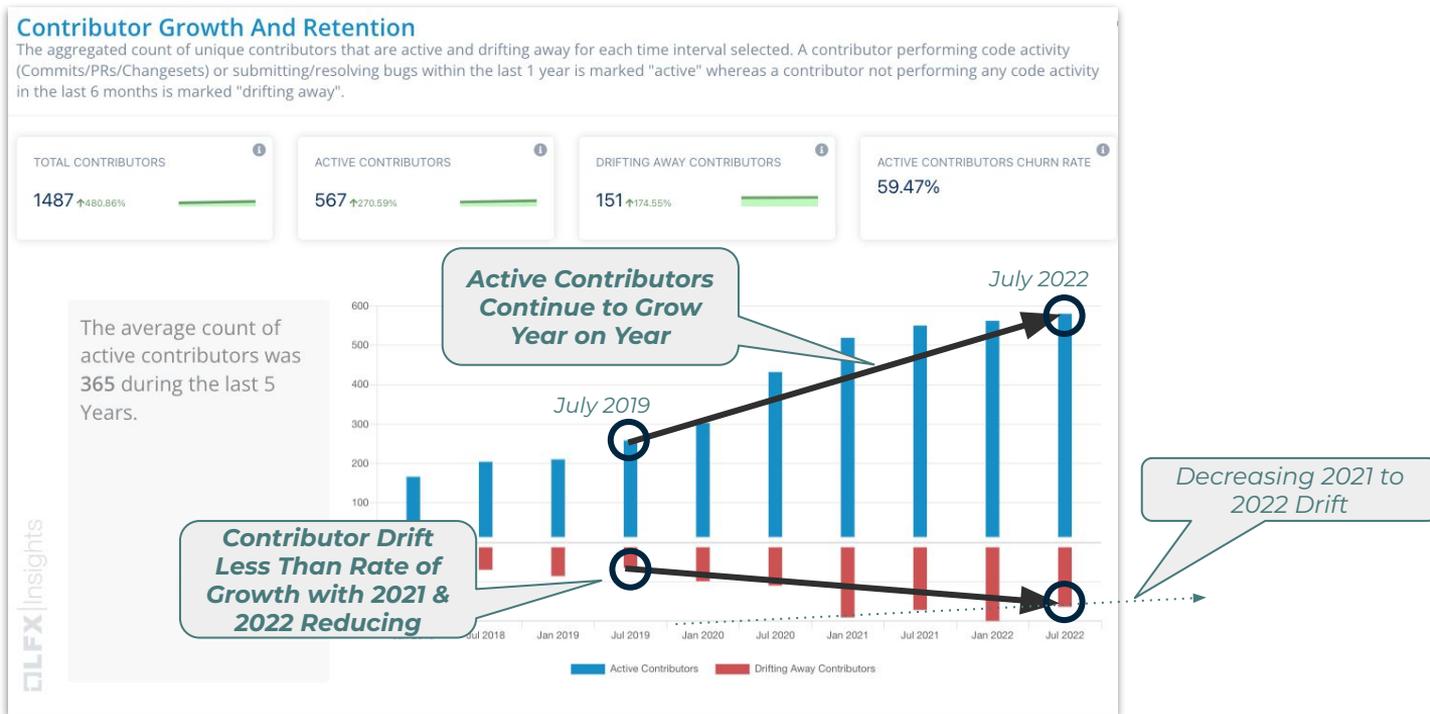


The FINOS Community Needs You!

- Security experts wanted from FINOS banks to join an Open Source Supply Chain Security webinar with FINOS and Mend. This is an awesome security in finance educational opportunity.
- We need FINOS banks to get involved with Compliant Financial Infrastructure to start using the projects AWS EKS service.
- The FINOS DEI SIG “Tech Gateway London” event on 22nd September needs FINOS members to get involved with our first DEI SIG event. We need stands, swag and inspirational people.
- The FINOS & Scott Logic Open Source UK meetup needs a FINOS community speaker for Leeds Digital Festival on 21st September.

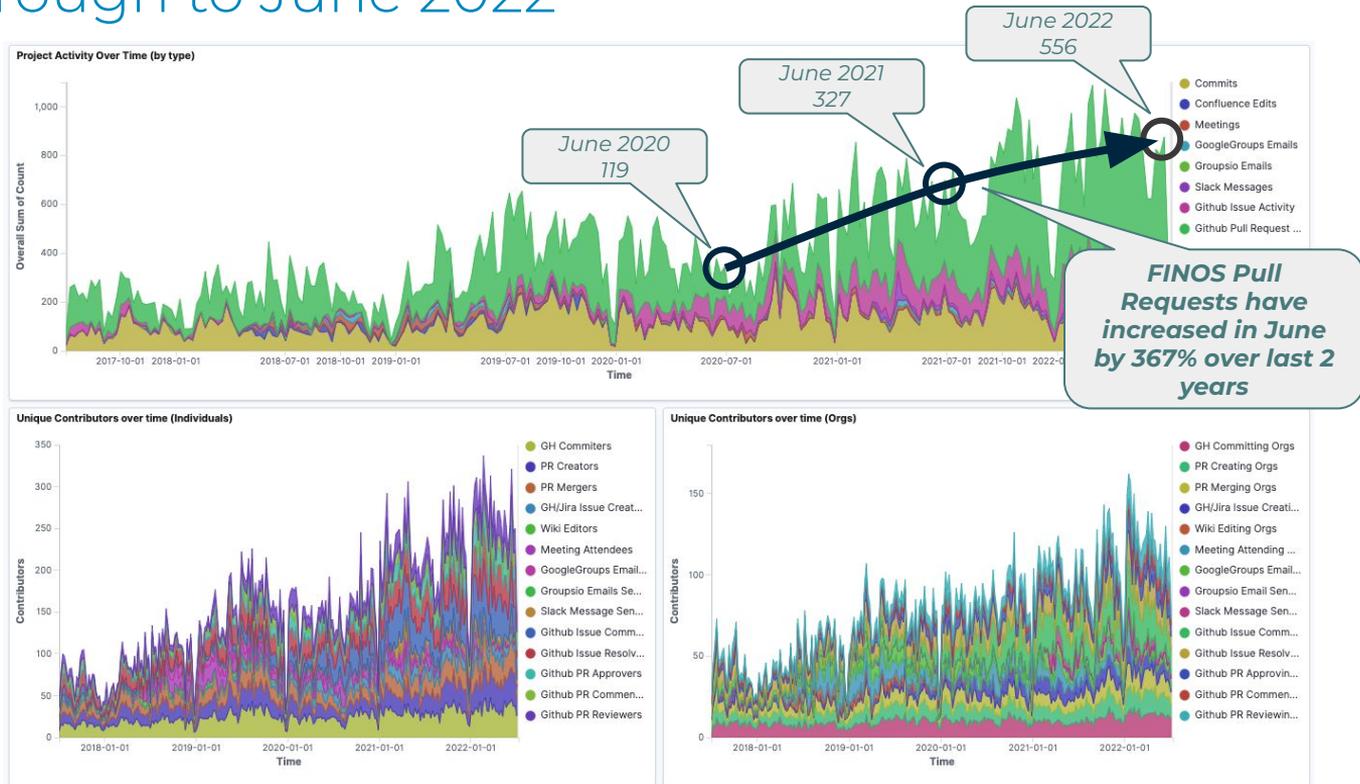
Contact james@finos.org for more information.

FINOS contributors continue to increase whilst drift continues to decrease from 2021 and into 2022



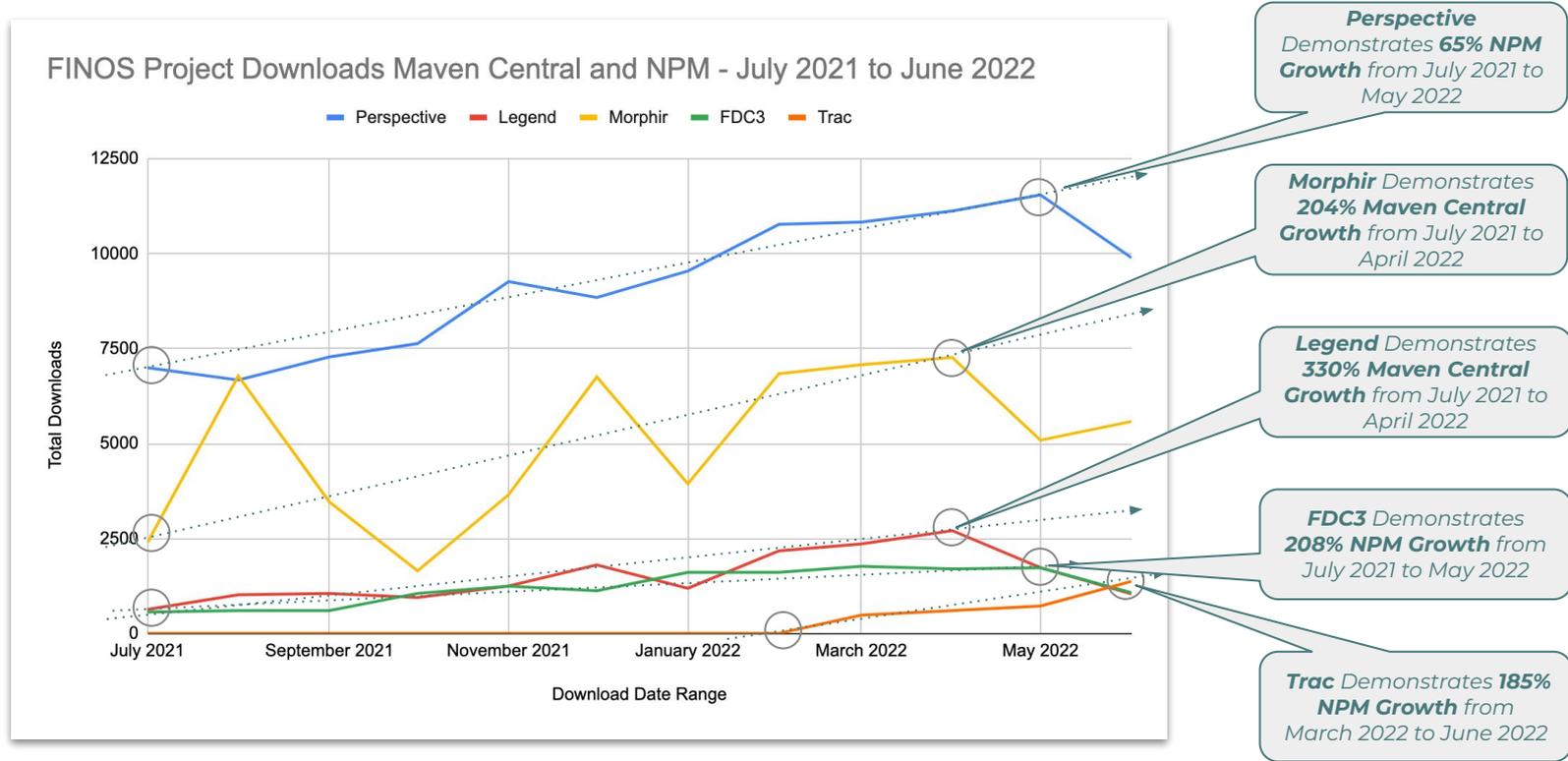
Keep an eye on our [COMMUNITY DASHBOARD](#) now on [LFX](#) (and with [trends](#))

FINOS summer pull requests increase by 367% from June 2019 through to June 2022



Keep an eye our **COMMUNITY DASHBOARD** now on [LFX](#) (and with [trends](#))

FINOS value increases with adoption steady growth



Keep an eye on our [COMMUNITY DASHBOARD](#) now on [LFX](#) (and with [trends](#))

Welcome the Community Microsite - Your one stop shop to everything FINOS community related!

community.finos.org

The screenshot shows the 'Learn' section of the FINOS Community website. On the left is a navigation menu with categories like 'OSS Journey', 'FINOS Governance', and 'Project Collaboration'. The main content area is titled 'Learn' and contains introductory text about the community. Below the text is a section titled 'Not sure where to get started?' with a list of suggestions for new members.

This screenshot shows the top part of the FINOS Community website. It features a blue header with the 'FINOS Community' logo and navigation links: 'Learn', 'Consume', 'Engage', 'Contribute', 'Lead', and 'GitHub'. Below the header is a large section titled 'FINOS Community Collaboration Space' with two prominent buttons: 'COMMUNITY' and 'FOUNDATION'.

This screenshot shows a 'Welcome to the FINOS community' message. It includes the FINOS logo, which consists of a stylized blue 'F' above the word 'FINOS'. The text below the logo says: 'This website hosts all the FINOS documents, Governance, communication channels, collaborations, validations, and much more.'

This screenshot shows a GitHub repository page for the FINOS community documentation. The repository is named 'community / docs / governance'. It lists several files and folders, including 'Software-Projects', 'Standards-Projects', 'special-interest-groups', 'Board-Election-Procedure.md', 'Charter.md', 'Code-of-Conduct.md', 'Collaborative-Principles.md', 'Individual-Supporter-Program.md', 'Meeting-Procedures.md', and 'Project-Branding-Guidelines.md'. Each item has a brief description of its content.

[Learn how to engage with FINOS including "How to Get Started"](#)

[Github Backed! Help us maintain it!](#)

2022 FINOS Europe Community Awards

SHINING STAR AWARD

- **PERSPECTIVE** - JPMORGAN CHASE

SPREAD THE WORD

- **ZNGLY & DITTO TEAMS**

OUTSTANDING LEADERSHIP

- **JESSICA WOODLAND-SCOTT** - DEUTSCHE BANK

NEWCOMER AWARD

- **CLAUDIU BELU** - CLOUDBASE SOLUTIONS

COACHING AWARD

- **COLIN EBERHARDT** - SCOTT LOGIC

MOST ACTIVE INDIVIDUAL

- **KRIS WEST** - COSAIC



Get engaged & help scale the FINOS Community

Stuff you should know, consider
engaging with and where your
participation is required

FINOS Open Source in Finance London key takeaways and updates



PRESENTED BY



FINOS



Open Source in Finance Forum London - Wrap Up



Didn't make it to OSFF - London?



Gabriele Columbro
FINOS Executive Director



Grizz (Aaron) Griswold
FINOS Head of Marketing

OSFF London 2022: Video Recordings
<https://bit.ly/3AbhoKp>

OSFF London 2022: Wrap Up Podcast
<https://bit.ly/3QvqVl1>

Open Source in Finance Forum London 2022

Celebrating the success of the London event using facts and figures.

- Final registration #: 392 (64% Members)
- Final attendees #: 319
 - 82% conversion
 - 217% attendance growth YoY (vs less than 9 months ago)
- Speakers #: 48
- The **LARGEST** FINOS event in Europe to date!



ation



FINOS Open Source in Finance Forum - London

Fantastic day of presentations, demos, roundtables, networking and getting stuff done!



See you in New York on December 8th!



PRESENTED BY  



FDC3 2.0 DRAFT Specification is out!

<https://fdc3.finos.org/docs/next/fdc3-intro>



Why FDC3?

Don't reinvent the wheel

Avoid vendor lock-in

Eliminate cat herding 

Easy to grok!



FDC3 2.0

API

Transactions & feeds, app instances (and lots more)

AppD

Massively improved and ready for multi-vendor

Context & Intents

Many new workflows!



What's ahead

Software Conformance

Desktop Agent Bridging

More workflows

Identity

CSL switch

FDC3 Community page

Part of the FDC3 Community?

Add your details to the FDC3 website:

- Apps with FDC3 integrated*
- Desktop Agents*
- Examples, Training materials

Add in-house implementations & apps to demonstrate support for FDC3 and help grow the ecosystem!

Email a product name, 100-word description, logo image and optional more info & docs links to:

fdc3-maintainers@finos.org.

The screenshot displays the FDC3 Community page with a navigation bar at the top containing 'PLATFORM PROVIDERS', 'APP PROVIDERS', 'EXAMPLES & TRAINING', and 'ALL'. The main content area features several project cards:

- Building an FDC3-enabled Web Application - Riko Eksteen, Adaptive Financial Consulting** (EXAMPLES-AND-TRAINING): Includes 'THE LINUX FOUNDATION' logo and a 'MORE INFO' link. Text: 'Riko Eksteen explains why and how to build an FDC3-enabled application at the December 2020 Open-Source Strategy Forum'.
- ChartIQ** (APPLICATION-PROVIDER): Includes 'COSAC, INC.' and 'MORE INFO | DOCUMENTATION' links. Text: 'ChartIQ is a powerful and flexible HTML5 charting library with millions of users worldwide. Written in JavaScript, it runs entirely within the browser. With state of the art integrations, including third-party apps, educational components, analysis, and more, you can create efficient workflows and streamline the way to work. ChartIQ works on any platform (mobile, web, desktop) and any framework (Angular, React). Most companies have at least one financial charting library for each platform or app they target—web, C#, Java, Android, iOS, etc., so developers have multiple code bases to maintain. With ChartIQ, write your code once and use it everywhere.' A 'FDC3 1.2 SUPPORTED' badge is present.
- Client Engagement and Data Driven Advisory** (APPLICATION-PROVIDER): Includes 'SINGLETRACK' and 'MORE INFO | DOCUMENTATION' links. Text: 'Singletrack uses FDC3 to provide smooth desktop workflows for Sales, Research and Corporate Access professionals as they move between tools such as Chat & Email and platforms such as Order Management, Authoring & our own to deliver their daily work. With FDC3 we increase efficiency and ensure rich, relevant information is always at hand.'
- Electron-FDC3** (PLATFORM-PROVIDER): Includes 'FINOS' and 'MORE INFO | DOCUMENTATION' links. Text: 'This project provides a fully open source implementation of the FDC3 interoperability standard. Includes a fully featured and secure electron desktop agent featuring intent resolution, channel linking, directory search and a local file-based app directory implementation.' Badges for 'FDC3 1.2 SUPPORTED' and 'OPEN SOURCE' are present.



fdc3.finos.org/community

FINOS FDC3 Certification



- Consumer assurance
- True interoperability
- Container and applications
- Surfacing adoption



Email info@finos.org if you'd like to be certified

 github.com/finos/FDC3-conformance-framework

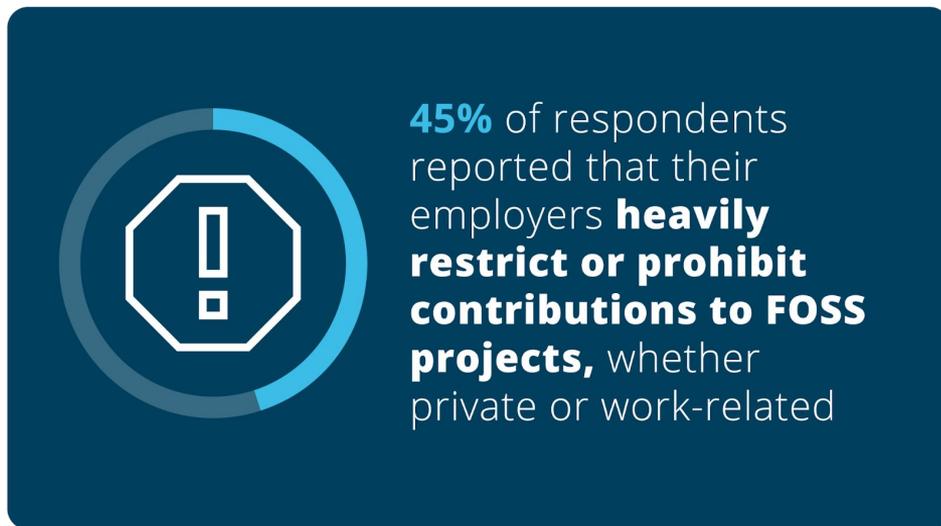
Announcing the 2nd Annual State of Open Source in the Financial Services Survey



Back by popular demand, this study will identify the extent to which the financial services industry is active in open source.

Objectives:

- **Understand corporate goals & individual contributor motivations,** and how they are drive adoption, contribution and participation in open source communities.
- **Understand existing barriers** that prohibit contribution to OSS.
- **Has anything changed since 2021?**



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FINOS

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Foundation

State of Open Source in Financial Services



**TAKE THE 2022 STATE OF OPEN
SOURCE IN FINANCIAL SERVICES**



IN PARTNERSHIP WITH



GitHub intel.



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Take the 2022 survey. Share your insights!



Contribute to valuable research in financial services knowing that:

- **Privacy** is respected and protected at all times
- **Anonymized survey results** are made publicly available on Data.World under CDLA Permissive 2.0
- **Insights** help to inform industry-wide activations and programming from which we can all benefit.
- **Qualitative interviews** are an important part of the primary research process. If you'd like to share your perspectives, we'd love to hear from you!



Save the Dates &
Get Involved with FINOS

Ways to get involved with FINOS

FINOS welcomes you to get involved with current and future FINOS Contributions, Projects and SIGs. Watch the [FINOS Community Repo](#) for new up and coming opportunities!



Present your FINOS
Project and SIG
production use
case demos at
OSFF New York

➔ **Propose a talk**
Email osff@finos.org

Submit your
proposals for OSFF
NYC! Deadline is
Sept 12!



Dec 8

Register here for OSFF NYC
If you register early (before Sept) we'll put
your name into a draw for your chance to
win FINOS swag.



Fintech
Open Source
Foundation



Take the 2022 State of Open
Source in Financial Services
Survey



Save The Dates / Promote internally

See full list of upcoming events at finos.org/events and [FINOS Community Calendar](#)



fintech_devcon

PRESENTED BY **MOOV**

DENVER (US) - AUGUST 23-25

[REGISTER](#)

THE LINUX FOUNDATION
OPEN SOURCE SUMMIT
EUROPE

September 13-16 • Dublin, Ireland & Virtual • #ossummit

Bringing Open Together.



DUBLIN (IR) - SEPTEMBER 13-16

[REGISTER](#)



OSFF
NYC Dec 8

[Submit a proposal](#)

[FREE MEMBER
REGISTRATION](#)



THE **LINUX** FOUNDATION
MEMBER SUMMIT

Linux Foundation
Member Summit
2022

[SAVE THE DATE](#)

Lake Tahoe, CA
Nov 8-10



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Open Source
Leeds Sep 21

FINOS Speaker
Wanted!!

Part of the Leeds
Digital Festival (TBC)

HELP@FINOS.ORG FOR ANY QUESTIONS ON
EVENTS (OR ANYTHING ELSE!)

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 or SIG Meeting](#)

Think big, start small

OSS ROI increases with **deeper engagement**

EVALUATE

FINOS training materials, tools, and enablement projects. Our **knowledge base** is a **great starting point!**

EVALUATE

CONSUME

Any of the **open source software and standards projects** in our landscape.

It's open to everyone, **it's open source!**

CONSUME

PARTICIPATE

In any our **Community, projects, and SIGs meetings** or one of our **Events** like the **Open Source Strategy Forum**

PARTICIPATE

CONTRIBUTE

A **new project or raise an issue/PR** into an existing project. You can also post **on our blog** by emailing **marketing@finos.org**

CONTRIBUTE

LEAD

An open source software or open standards **project**, or a **Special Interest Group (SIG)** or be an **advocate for FINOS in the public domain.**

LEAD

Three things to remember...



Sign up for updates at
finos.org/sign-up



Learn more on how to contribute
community.finos.org



Business value and success stories
resources.finos.org