

**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-finoss-all-community-call-q3-2022>

# Antitrust Policy Notice

- › Linux Foundation meetings involve participation by industry competitors, and it is the intention of the Linux Foundation to conduct all of its activities in accordance with applicable antitrust and competition laws. It is therefore extremely important that attendees adhere to meeting agendas, and be aware of, and not participate in, any activities that are prohibited under applicable US state, federal or foreign antitrust and competition laws.
- › Examples of types of actions that are prohibited at Linux Foundation meetings and in connection with Linux Foundation activities are described in the Linux Foundation Antitrust Policy available at <http://www.linuxfoundation.org/antitrust-policy>. If you have questions about these matters, please contact your company counsel, or if you are a member of the Linux Foundation, feel free to contact Andrew Updegrove of the firm of Gesmer Updegrove LLP, which provides legal counsel to the Linux Foundation.

# 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](mailto: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**

**WELLINGTON  
MANAGEMENT**

## GOLD

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

 **AMERICAN EXPRESS**



**Fannie Mae**

**Google**

**HSBC** 

**intel.**



**IHS Markit**



**NatWest**

**NOMURA**



**redhat**

**REFINITIV**



**SYMPHONY**



**SUSE**



**Tradeweb**



**MEND**



## 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



**Synechron**  
Digital · Business Consulting · Technology

## ASSOCIATE



**air**



**AlmaLinux**



**ACTR**



**EDM Council**



**InterWork Alliance**



**ISDA**

Safe, Efficient Markets

**ISLA**

INTERNATIONAL SECURITIES LENDING ASSOCIATION

**mojaloop**  
foundation

**OpenUK**



**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



### SILVER



### ASSOCIATE



## PROJECTS

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

### Proposed



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

R<sup>2</sup>SETTA by Regnosys



Open Data Standard  
for FS Regulations



[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



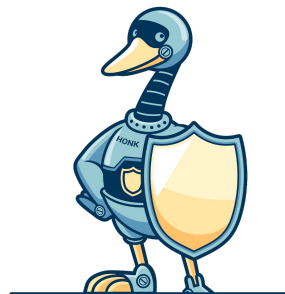
TODO



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 Columbro - 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](mailto: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

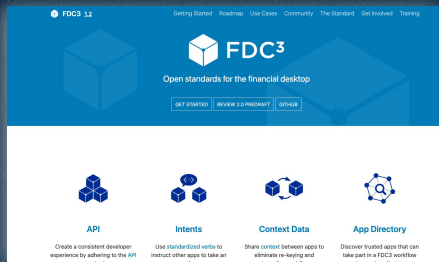
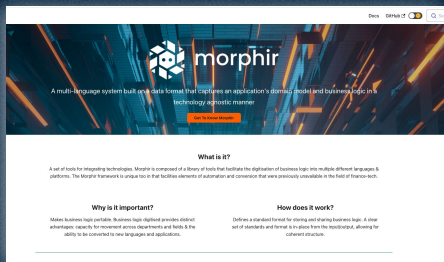
James McLeod,

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!



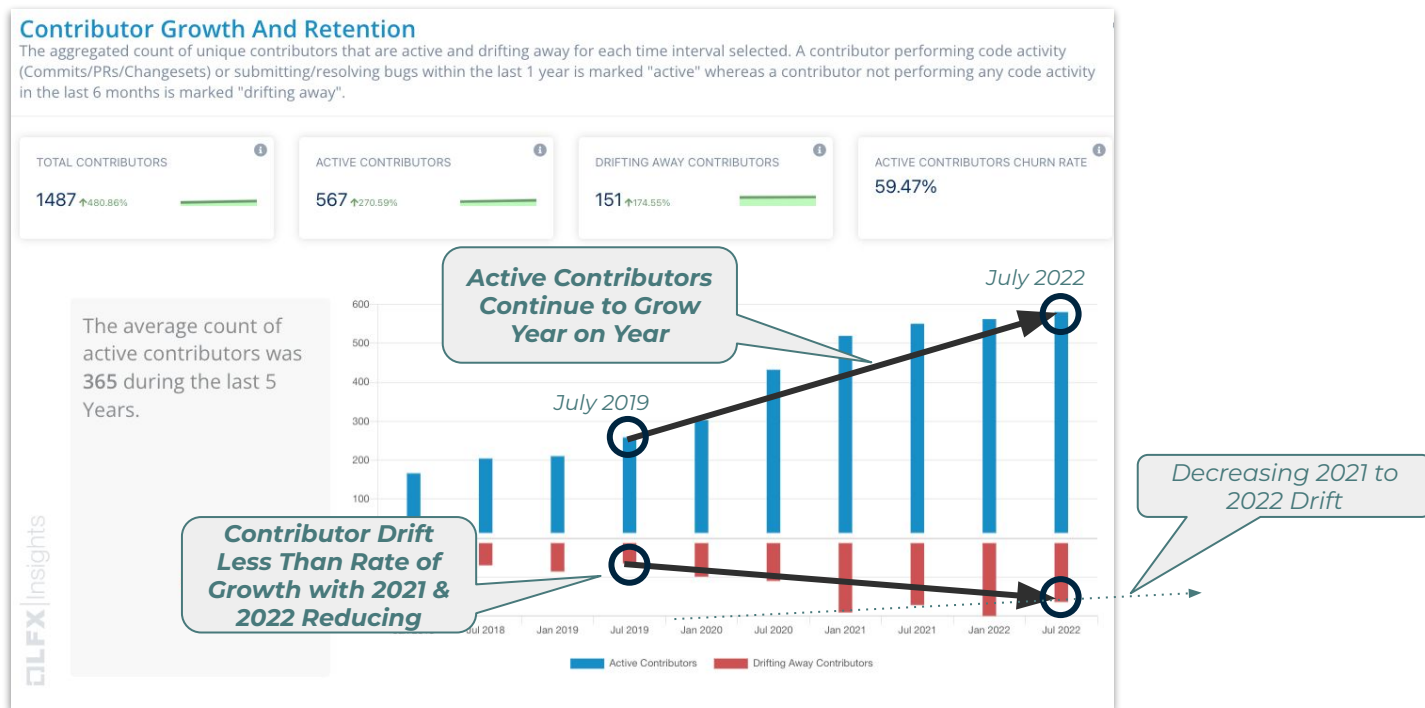


# The FINOS Community Needs You!

- 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.

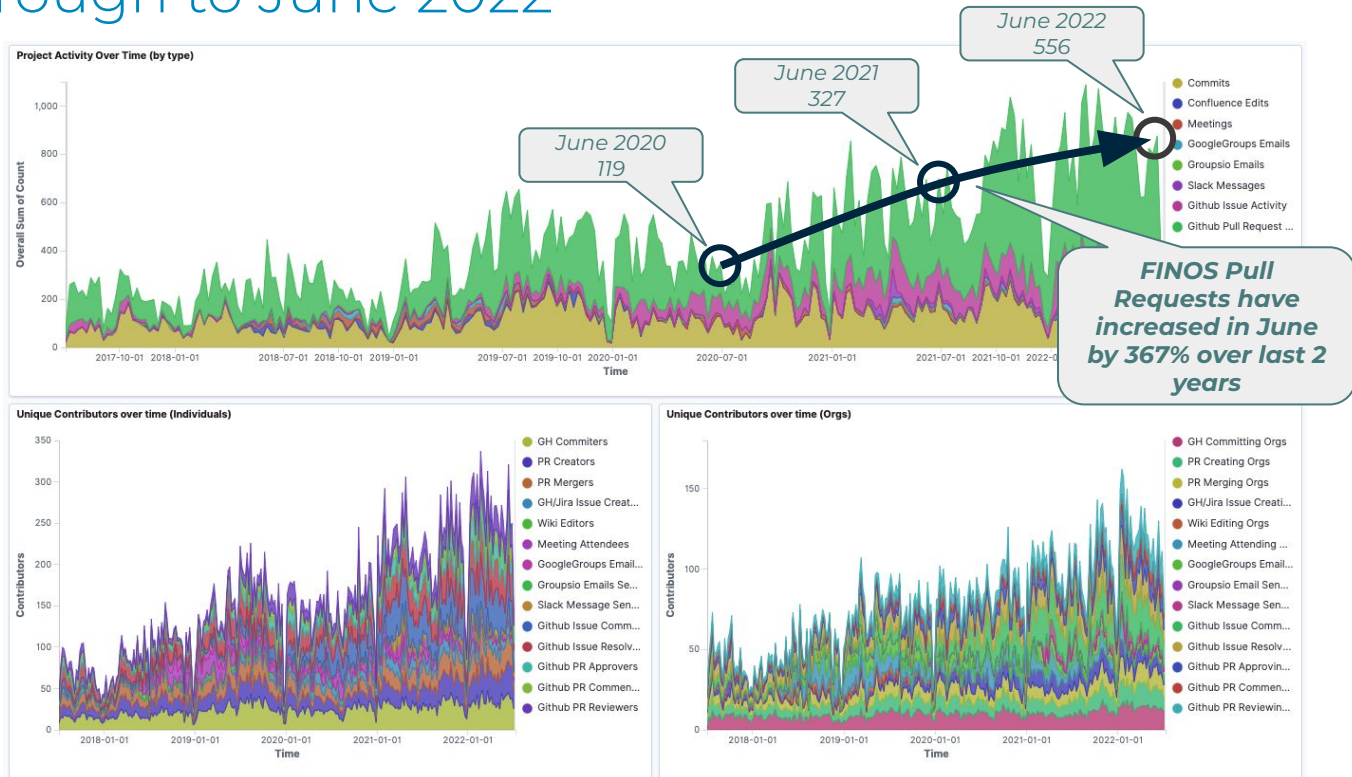
Contact [james@finos.org](mailto:james@finos.org) for more information.

# 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](#))

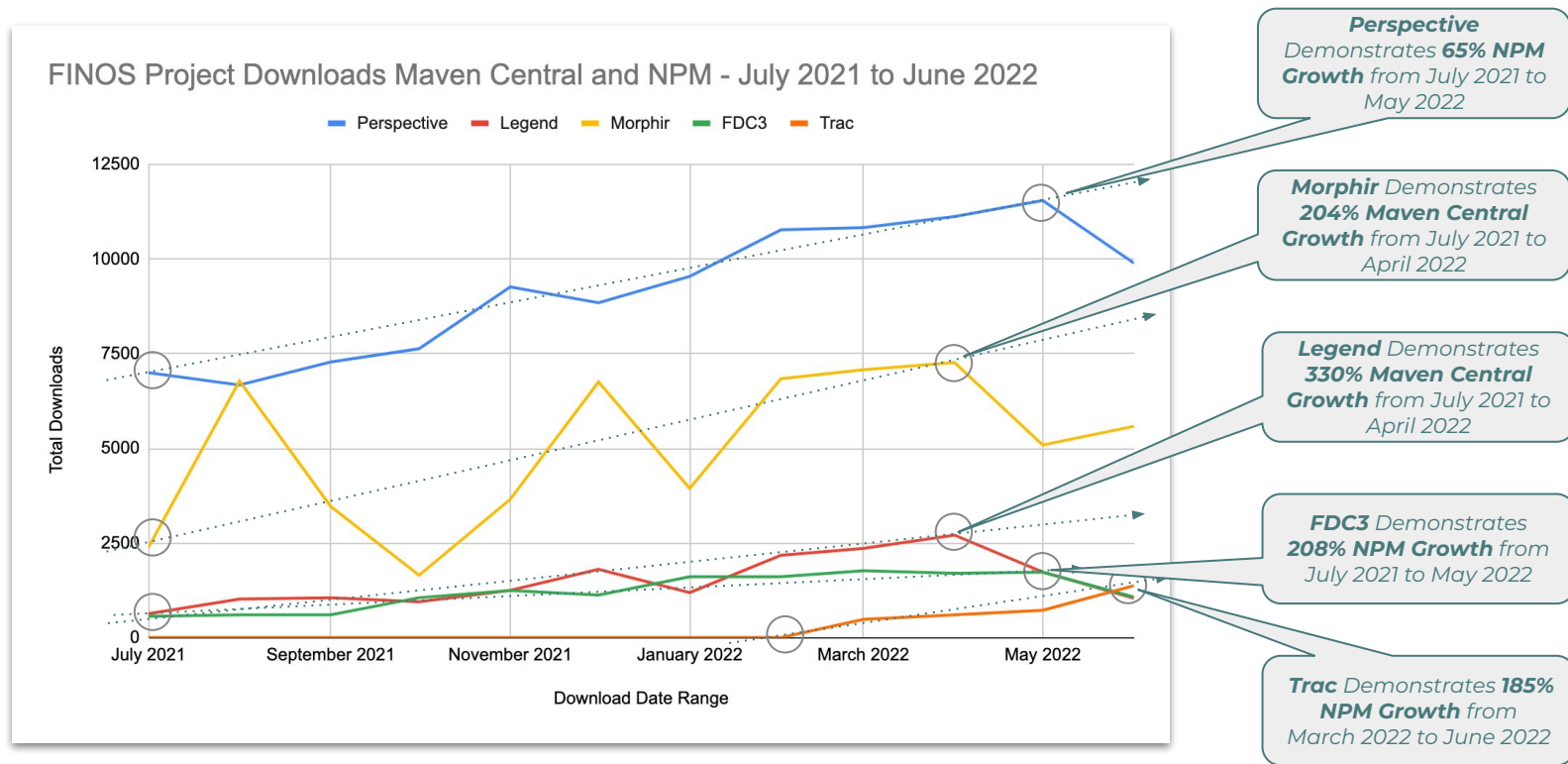
# FINOS summer pull requests increase by 367% from June 2019 through to June 2022



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



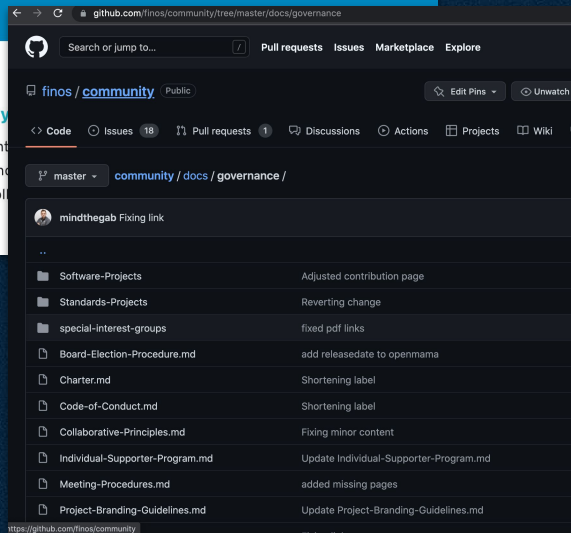
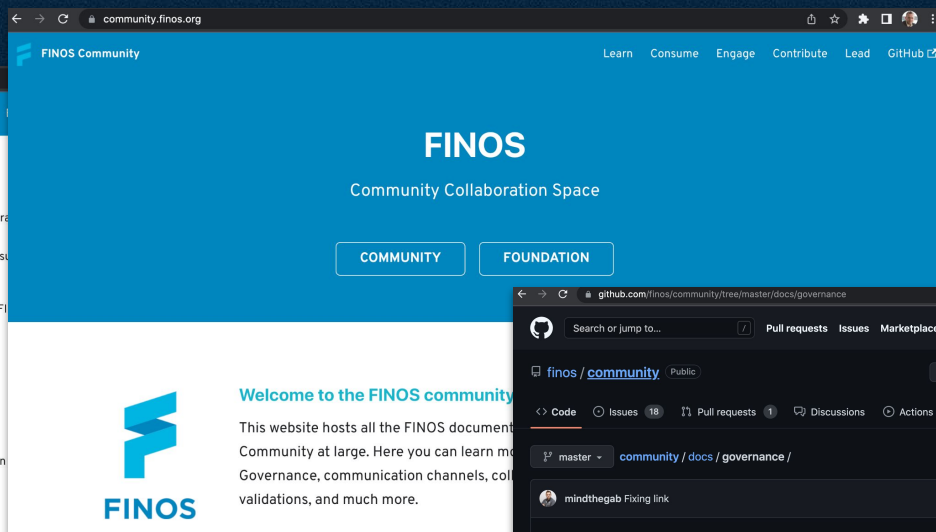
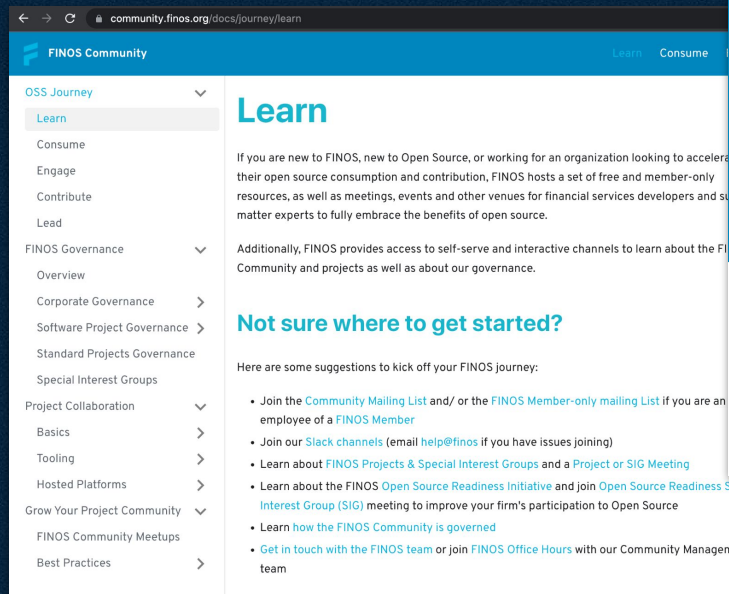
# FINOS value increases with adoption steady growth



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](https://community.finos.org)



[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





# 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



FINOS

Fintech Open Source Foundation

finos.org

# 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](mailto:fdc3-maintainers@finos.org).

[PLATFORM PROVIDERS](#) [APP PROVIDERS](#) [EXAMPLES & TRAINING](#) [ALL](#)

### Building an FDC3-enabled Web Application - Riko Eksteen, Adaptive Financial Consulting

THE LINUX FOUNDATION



**THE LINUX FOUNDATION**


[MORE INFO](#)

Riko Eksteen explains why and how to build an FDC3-enabled application at the December 2020 Open-Source Strategy Forum

### ChartIQ

COGSIAC, INC.

[MORE INFO](#) | [DOCUMENTATION](#)



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.

FDC3 1.2 SUPPORTED

### Client Engagement and Data Driven Advisory

SINGLETRACK

[MORE INFO](#) | [DOCUMENTATION](#)




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

FINOS

[MORE INFO](#) | [DOCUMENTATION](#)



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.

FDC3 1.2 SUPPORTED [OPEN SOURCE](#)



[fdc3.finos.org/community](https://fdc3.finos.org/community)

# FINOS FDC3 Certification



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



Email [\*\*info@finos.org\*\*](mailto:info@finos.org) if you'd like to be certified

 [github.com/finos/FDC3-conformance-framework](https://github.com/finos/FDC3-conformance-framework)

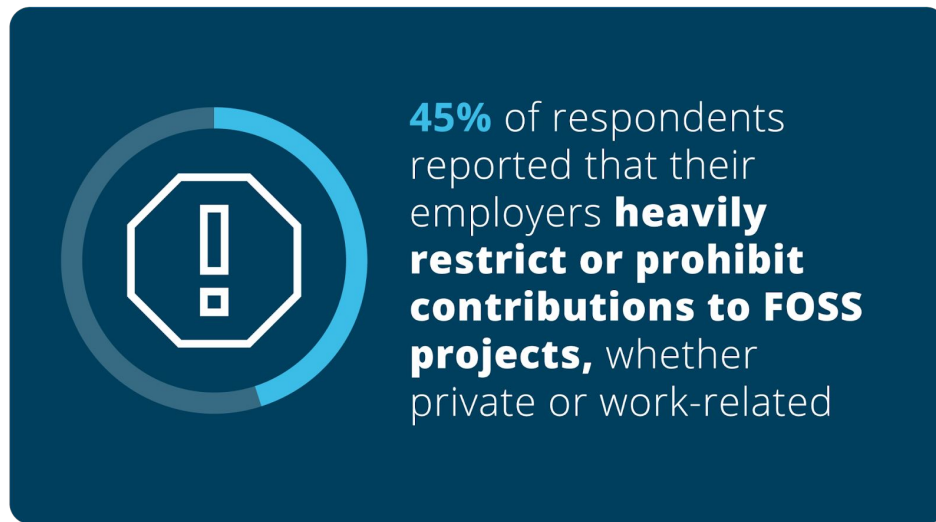
# Announcing the 2nd Annual State of Open Source in the Financial Services Survey



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 drive adoption, contribution and participation in open source communities.
- **Understand existing barriers** that prohibit contribution to OSS.
- **Has anything changed since 2021?**



SCOTT LOGIC  
ALTOGETHER SMARTER





# State of Open Source in Financial Services



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



IN PARTNERSHIP WITH



**GitHub intel.**



# Take the 2022 survey. Share your insights!



Fintech  
Open Source  
Foundation

## 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](mailto: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



Research



**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](https://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](#)



**OPEN SOURCE**  
IN  
**FINANCE FORUM**  
New York

**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**



SCOTT LOGIC  
ALTOGETHER SMARTER



**Open Source**  
**Leeds Sep 21**

**FINOS Speaker**  
**Wanted!!**

**Part of the Leeds**  
**Digital Festival (TBC)**

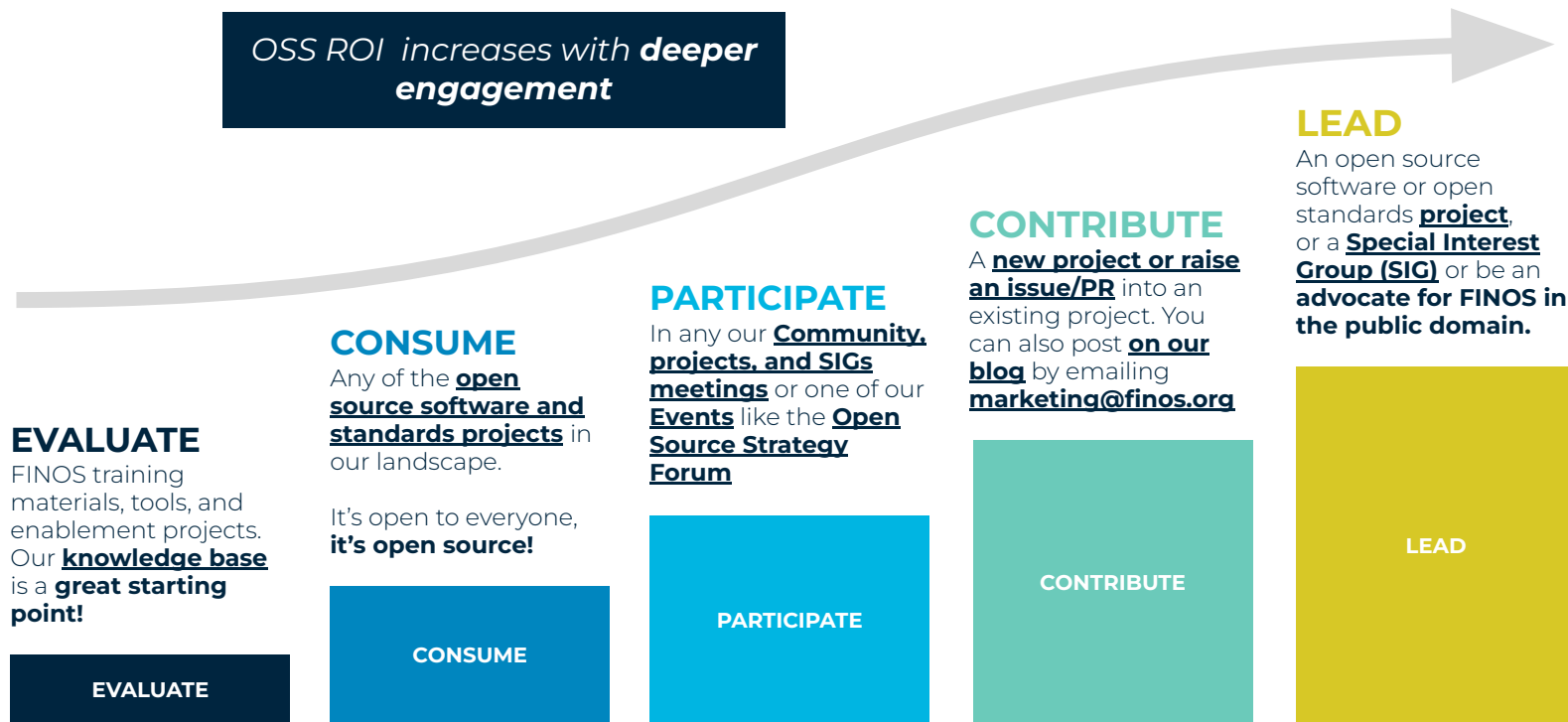
[HELP@FINOS.ORG](mailto:HELP@FINOS.ORG) FOR ANY QUESTIONS ON  
EVENTS (OR ANYTHING ELSE!)

# 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



# Three things to remember...



Sign up for updates at  
[\*\*finos.org/sign-up\*\*](https://finos.org/sign-up)



Learn more on how to contribute  
[\*\*community.finos.org\*\*](https://community.finos.org)



Business value and success stories  
[\*\*resources.finos.org\*\*](https://resources.finos.org)