FINOS

Fintech
Open Source
Foundation

2021Q3 - All Community Call

FINOS Team
FINOS Project / SIG Leads
FINOS Community

Virtually held on July 21st 2021 at 3pm BST / 10am EST
https://www.finos.org/hosted-events/2021-07-21-finos-all-community-call-q3-2021

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Today's Agenda

10:00 State of the Foundation *(15mins)*

- **Welcome Jane, Julia, Win and our new Governing Board representatives**
- **EasyCLA, LF Insights, FINOS (Community) Store**
- **OSSF Closing CFP, Possible Survey, TimeBase and New Projects**

10:15 Community Recognition *(10 mins)*

- **FINOS Community Spotlight and Recognitions**
- **Rolling LF/FINOS Leaderboard**
- **Call for interest around open data strategy - Jane**

10:25 FINOS Project and SIG Updates *(30 mins)*

- **Cloud Service Certification, Legend, Waltz, Symphony BDK Java.**
- **Open Source Readiness, Morphir, FDC3.**

10:55 Q&A *(5 mins)*

- **Open Source in Finance Meetup - Can the Internet of Things Transform Retail banking?**
  - Wednesday 28th July @ 10am EST / 3pm BST - Register here and find our more

11:00 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.

State of the FINOS Community

Gabriele Columbro,

Executive Director

FINOS Community by the Numbers

PLATINUM

accenture
citi
Goldman Sachs
GitHub
J.P.Morgan
Morgan Stanley
NOMURA
RBC
UBS

GOLD

Capital One
HSBC
IHS Markit
intel
redhat
REFINITIV
SUSE
SYMPHONY
Tradeweb
wipro

SILVER

Adaptive
armory
BNY MELLON
CANONICAL
(Cloud9
CloudBees.
CloudLinux
CodeThink
Cosaic
databricks
Digital Asset
diffblue AI for Code
epam
EGAR NoCode
genesis Code Less, Do More
GitLab
GLUE42
Itaú
SCOTT LOGIC ALTOGETHER SMARTER
SMBC

ASSOCIATE

air Alliance for Innovative Regulation
AlmaLinux
CRTA | ACTR CANADIAN REGULATORY TECHNOLOGY ASSOCIATION ASSOCIATION CANADIENNE DE LA TECHNOLOGIE REGLEMENTAIRE
InterWork Alliance
ISDA Safe, Efficient Markets
OpenUK

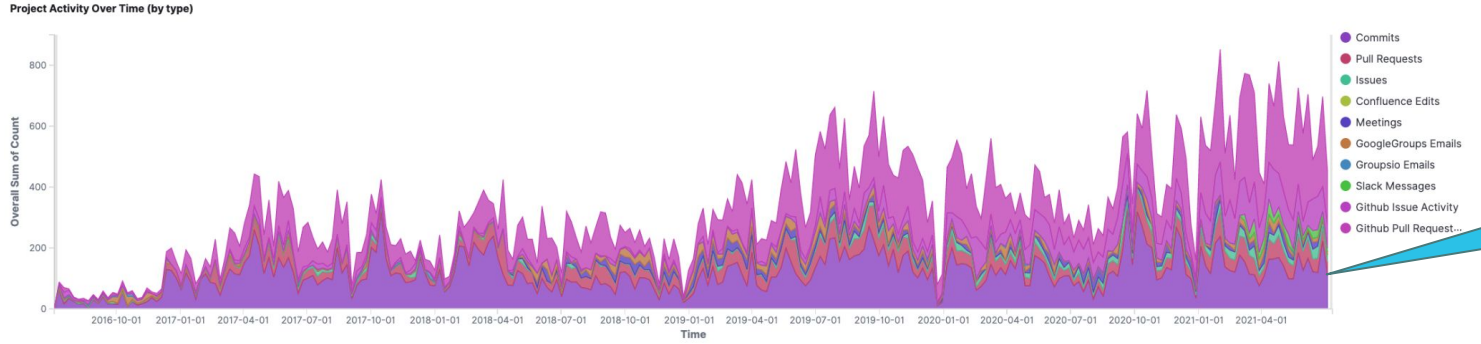
17
Active Open Source Projects and SIGs

31
Incubating Open Source Projects and SIGs

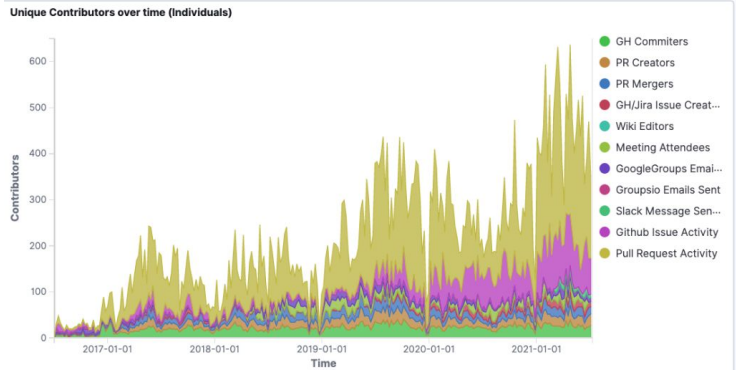
1000+
Contributors

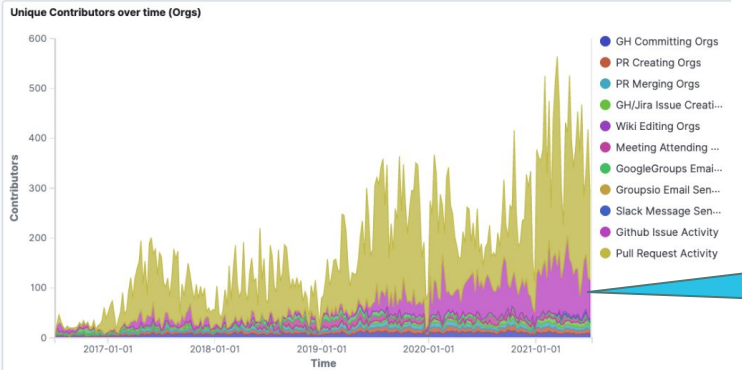
47
Corporate and Associate Members

The state of the Community



Great activity all year - driven by Legend and other key projects.





We continue to attract new contributors and organization!

Keep an eye our **COMMUNITY DASHBOARD** now on **LFX**!

Welcome to our new Representatives

Gold Representative

Dietmar Fauser

Symphony

Dietmar is Symphony's chief information officer. He specializes in the design and implementation of large-scale IT systems that require high performance and availability.

Previously the SVP of Platform Engineering and Global Operations at Amadeus, Dietmar has a deep network in the IT industry. His focus is around open-source development, distributed systems, and general mission critical systems engineering. He is a member of Symphony's global executive team.

Silver Representative

Traci Robinson Williams

GitLab

Traci Robinson-Williams currently leads the M Insights team for GitLab where she previously served as a senior product market leader focused on driving DevOps transformation in Regulated Industries, including FinServ, FinTech, and Public Sector. Before joining GitLab, she helped envision, develop, and evangelize emerging technology solutions and capabilities for the U.S. Public Sector at Accenture Federal Services.

Traci has led strategic go-to-market initiatives, particularly related to Digital Transformation and Customer/Citizen Experience (CX), in organizations across a variety of industries, including management and technology consulting, professional and IT services, cyber security, wireless, telecom, hospitality, IT hardware and software, and Public Sector.

Welcome to our new Chairs

Chairman

John Madsen

Goldman Sachs

John is global co-head of the Enterprise Platforms team. He serves on the Technology Executive Leadership Group. Prior to joining the Technology Division to assume his current role in 2014, John led the Securities Division Core Strats team. He joined Goldman Sachs in 2003 as an associate on the FICC Core Strats team and was named managing director in 2008 and partner in 2014. Prior to joining the firm, John worked for several Internet start-up companies and pursued a PhD in Philosophy at the University of California at Berkeley and Rutgers University. He earned a BA in Philosophy from Wesleyan University in 1992.

Vice-Chairman

Russell Green

Deutsche Bank

Russell Green is a Managing Director, and the Global Head of Architecture, at Deutsche Bank AG. He spent time as a software engineer in a number of industries before focusing on software architecture and system design in the Financial sector. His current focus is on ensuring that Deutsche Bank has a well-articulated IT Strategy across all business lines and a supporting technology approach. This includes the impact and adoption of new technology trends to increase the efficiency and reduce the costs of the organisation. Russell is a post doctorate of Imperial College where he studied Physics.

Announcement upcoming - please keep under wraps until then!

Services & opportunities you don't want to miss!

FINOS (+LF) is delivering a professional experience to our Community...

- LFX Insights
- LFX EasyCLA
- New Website (WIP)
- The FINOS Store
- The AIR Accelerator

So many opportunities for you to engage...

- Legend + Relational is Open Source & hosted in FINOS
- State of OSS in Financial Services - Survey closing!
- OSSF Keynotes / CFPs - closes Friday!
- OSR SIG revamp - More later today!
- FDC3 2.0

...and our team keeps growing!

Welcome **Julia Ritter** as new **FINOS Community Manager**, started **June 1st!**

Additional hire expected in Q3, Sr Director of Marketing! Referrals welcome!

Welcome **Jane Gavronsky** as new **FINOS CTO** - started **May 10th**!
Former MD and Head of Data Services at Credit Suisse. Full profile in Appendix C.

Q2 continues strong + planning for Q3 focus

The Community keeps growing...

TimeBase

FINOS incubating

CloudLinux

EGAR NoCode

Digital Asset

SMBC

New Silver Members

InnerSource Commons

AlmaLinux

New Associate Members

Join us weekly for the

Open Source in Finance Podcast

Now #8 in open source podcasts

https://anchor.fm/finos

Welcome Win Morgan as new FINOS Marketing Intern, started July 1st!

FINOS Announces

The State of Open Source in Financial Services Survey

CLOSES FRIDAY
Take It Today!

IN PARTNERSHIP WITH

THE LINUX FOUNDATION | Research

SCOTT LOGIC

wipro

GitHub

Yes, we're targeting in person!

LONDON: October 4-5
NYC: November 9-10

#OSfinserv

CALL FOR PROPOSALS CLOSES FRIDAY
ADD YOURS TODAY!

PRESENTED BY FINOS THE LINUX FOUNDATION

Reaping the benefits of one year with the LF

LFX | EasyCLA

- ✓ **FINOS is live**
  - All CCLAs and contributors migrated to production EasyCLA v2
  - CLA Managers added (where we had name and LFID)
  - New ICLAs can be executed by submitting a PR (thank you GitHub for executing via ODP)
- ❑ **Rollout to FINOS projects is in progress**
  - Updating our Community GitHub repo with Contribution details including for EasyCLA
  - ODP complete
  - Waltz and Cloud Service Certification rollout is in progress

LFX | Insights

- ✓ **FINOS is Live**
- ✓ **More visualizations**
  - Per data source
  - Per project
  - Community Leaderboard
  - Trends
- ✓ **More data points** - Docker and Groups.io
- ✓ **24/7 Support**
- ❑ **More features coming soon**
  - Social Media Metrics
  - More advanced technical trends

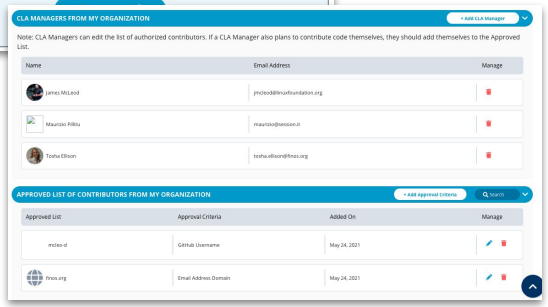
LFX | EasyCLA

Organizations

Enable all your developers to contribute code easily and quickly while remaining compliant with contribution policies.

- Approved developers based on email, domain, GitHub handle, or GitHub organization
- Enable your signatories and contributors to sign CLAs using DocuSign® electronic signatures
- Enforce signing of the Corporate CLA by your developers without slowing them down with manual bureaucracy

Are you a CLA Manager for your organization?



BENEFITS

Developers/Contributors

Start contributing code faster through streamlined ICLA and CCLA execution/review processes

Corporate CLA Managers

Review and manage your company's authorized contributors directly in EasyCLA

Corporate CLA Signatories

Workflow helps enable signatures with appropriate corporate authority

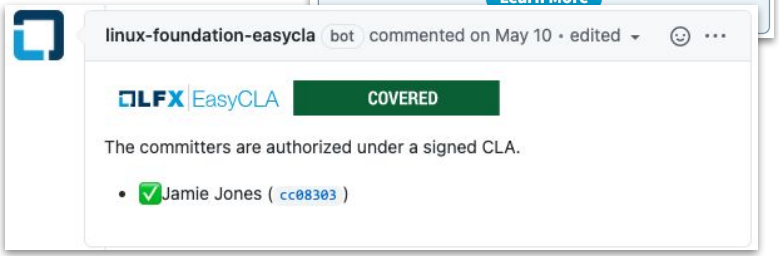
Developers

Get started contributing code faster and with less friction.

- Receive an automatic notification in GitHub or Gerrit if you need to be authorized
- Sign your Individual CLA with an e-signature
- Start contributing faster with a streamlined authorization workflow for Corporate CLAs

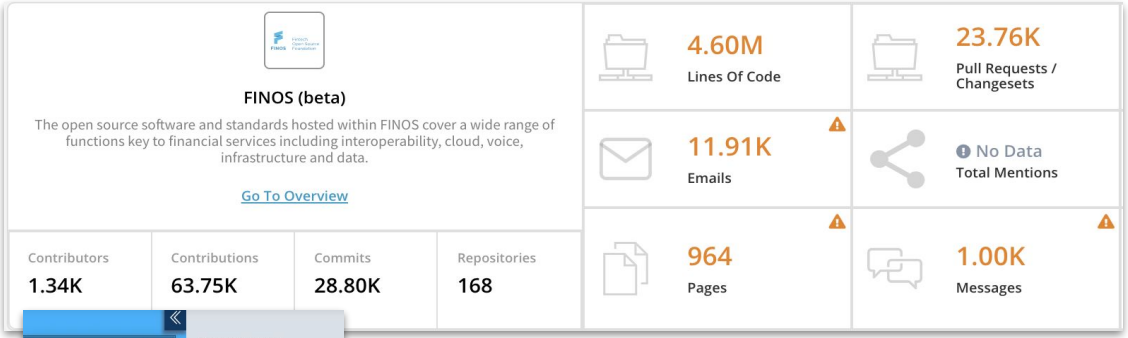
Do you contribute code to a project that uses CLAs?

Learn More

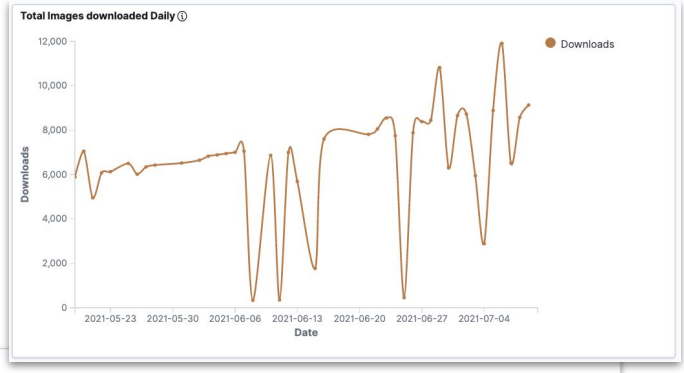


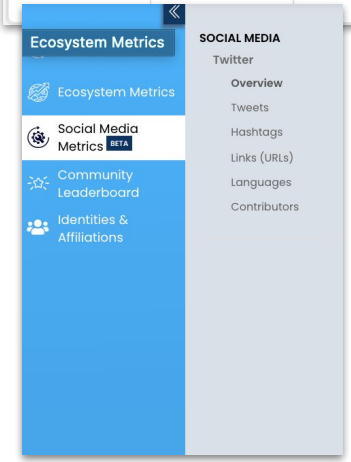
FINOS Dashboard is live at
https://insights.lfx.linuxfoundation.org/projects/finos!

LFX | Insights

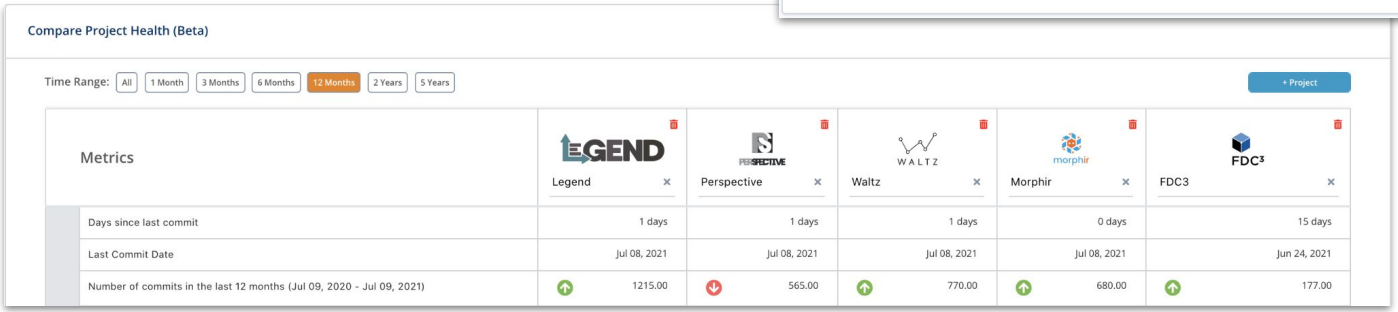


(Alpha) Container consumption stats
at https://tinyurl.com/yzj5jope (handle with care!)





Review and compare key **Project Health metrics** at
https://insights.lfx.linuxfoundation.org/projects/health



Social Media metrics is member only advanced feature. **Manage your affiliations** at https://myprofile.lfx.linuxfoundation.org/code/affiliations.
Organizational dashboard upcoming!

The FINOS store

- Have you always wanted to make your colleague envious with some cool tech swag? Well, **now you can!!!**
- ***Introducing our brand new FINOS STORE!***
- More items **coming soon!**
- Get 20% off until Sept 1st **FINOSWELCOME20**

Community Recognition

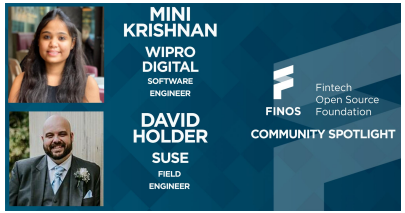
James McLeod,

Director of Community

FINOS Community Spotlight

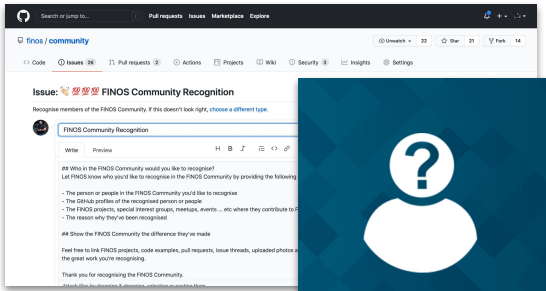
Well Done FINOS Community

Congratulations to our FINOS Community Spotlight winners for the dedication and hard work demonstrated in financial services open source.

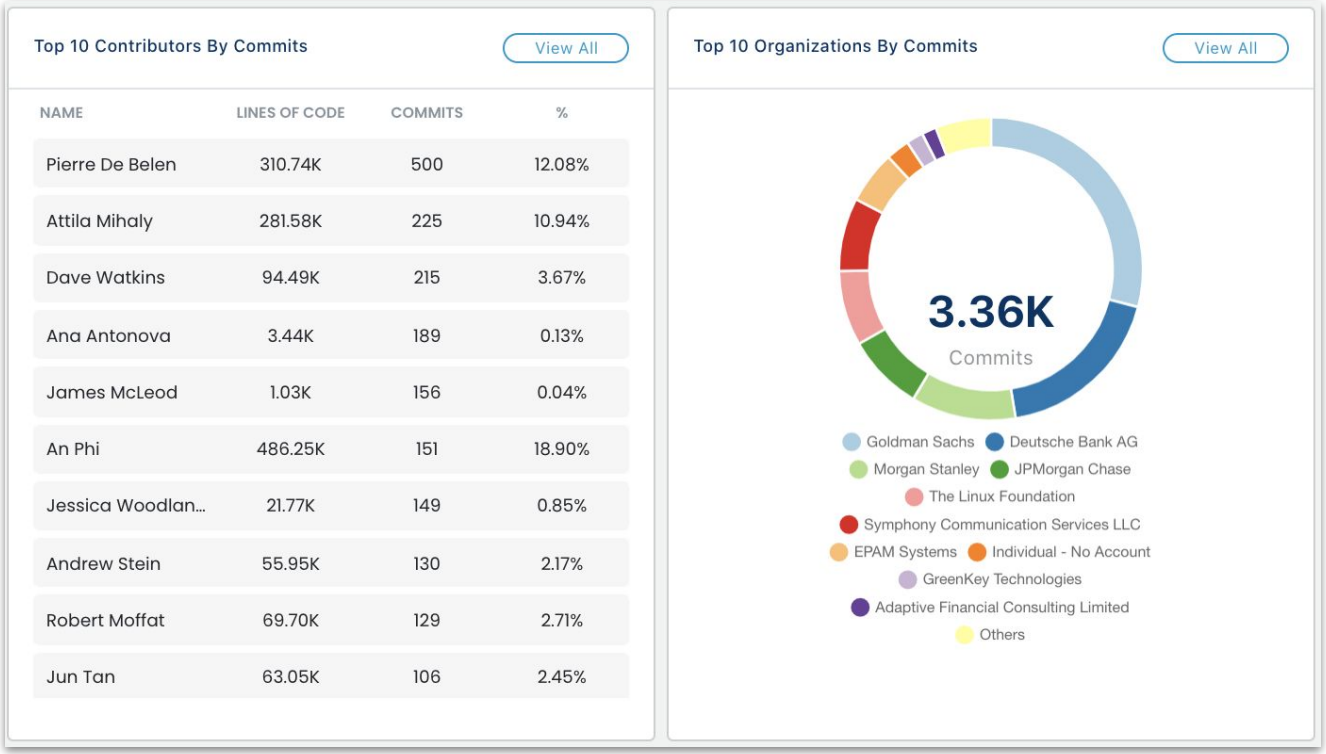


How to recognise a FINOS contributor

Raise a FINOS Community Recognition to highlight the positive contributions of the FINOS open source community.



Top 1 Year Active FINOS Community Contributors

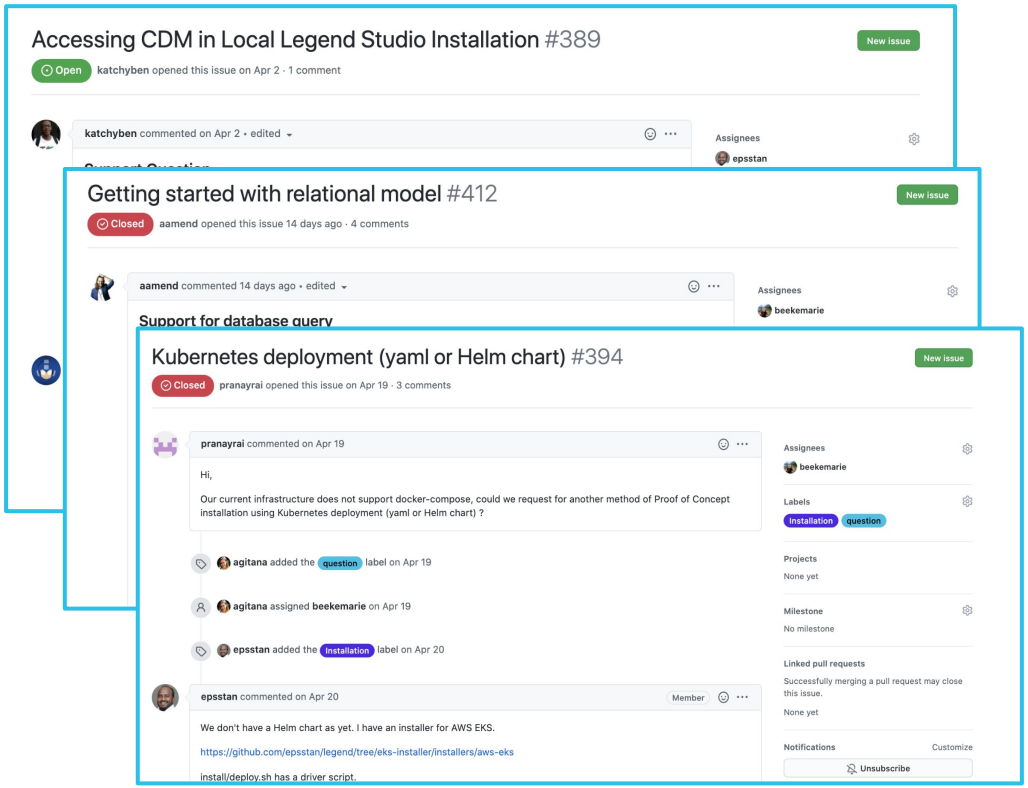


LF Insights - Active Community Contributor Board - Year to Date

Awesome Community Engagement!

Thank you Ephrim Stanley (@epsstan), Beeke-Marie Nelke (@beekemarie), An Phi (@akphi) for demonstrating **responsiveness** and **engagement** with the Legend Community on GitHub!

- Raise your Legend questions at github.com/finos/legend/issues/new/choose
- Review previously asked questions at github.com/finos/legend/issues?q=label%3Aquestion

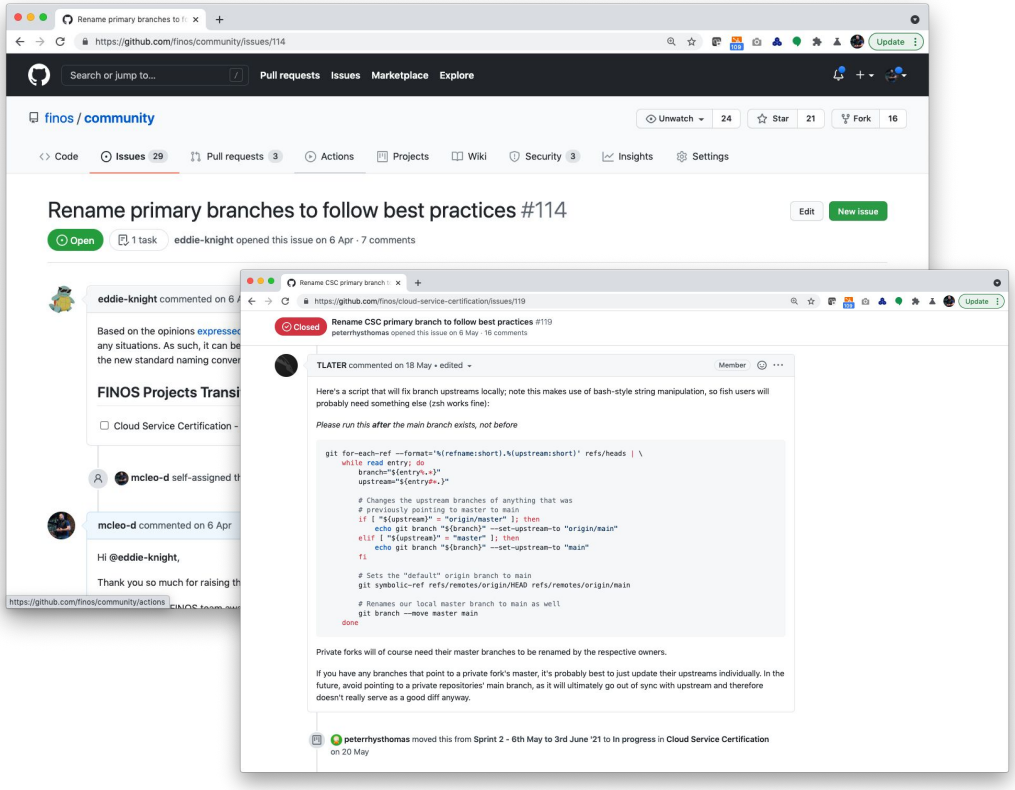


Renaming Origin from Master to Main

CLOUD SERVICE CERTIFICATION

Thank you Tristan Matt (@TLATER), Mao Pillitu (@maoo) and Eddie Knight (@eddie-knight) for kicking off the renaming of master to main through Cloud Service Certification and giving FINOS projects a beacon to follow.

- Take a look at Tristan's change here https://github.com/finos/cloud-service-certification/issues/119
- See how CSC updated their README https://github.com/finos/cloud-service-certification/pull/132
- Eddie's issue to the FINOS Community https://github.com/finos/community/issues/114



RoY - Key dates to remember

	What	Where	When	Notes
Q3	OSS in FSI survey closes	Online	July 23rd 2021	Circulate and complete the survey!
	Open Source Readiness SIG Kick-off	Online	August 4th 2021	Please send all your relevant folks to provide feedback.
Q4	Publishing results of State of OSS in FSI	Online	Early Q4	Members first, then public.
	OSSF + Member meeting Europe	London	October 4th and 5th	Depending on pandemic evolutions. Members meeting portion limited to FINOS members
	LF Membership Summit	Napa Valley	November 2nd - 4th	Limited to Linux Foundation Members. Depending on pandemic evolutions
	OSSF + Member meeting US	NYC	November 9th & 10th	Depending on pandemic evolutions. Members meeting portion limited to FINOS members

We need your active participation and advocacy to make 2021 another huge year for FINOS.

Open Data Strategy update

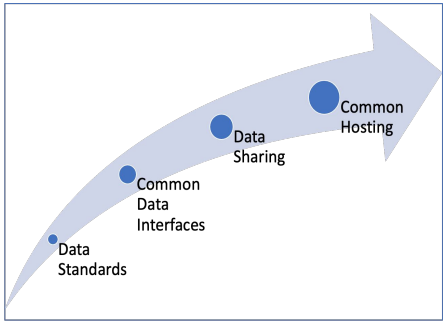
Jane Gavronsky, CTO FINOS

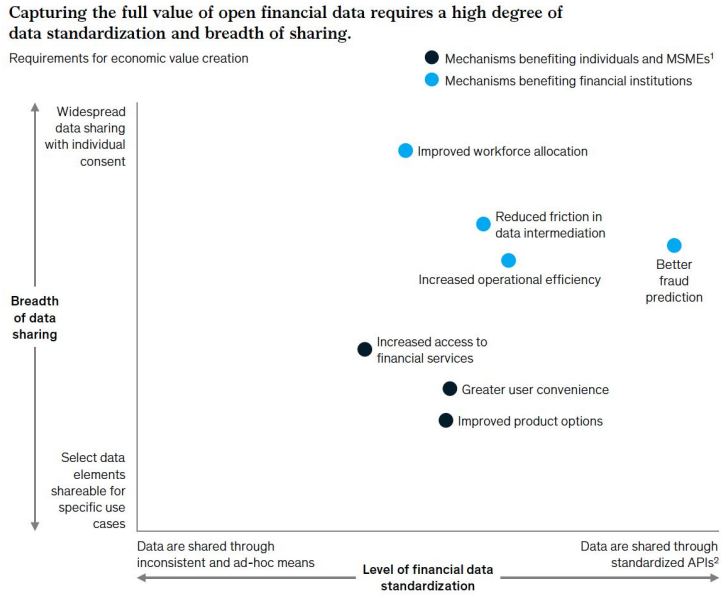
Open Data Strategy

Reference Framework for Defining the FINOS Open Data Strategy
-- Board presentation on July 14, 2021

- **What:** Open Data is achieved by increasing ***data standardization and data sharing*** (McKinsey).(*)
- **Why: Impact** - Financial institutions will attain benefits if they increase their participation along both axes (see diagram), and will deliver benefits and improved engagement to their customers.
  McKinsey estimates that by 2030 Open Data practices can impact GDP by 1-1.5% in developed countries, and by 4-5% in countries such as India.
- **Where:** Benefit will be seen across all business operating cycles, with manifest improvements in:
  - operational efficiency
  - fraud protection
  - workforce allocation
  - manual data interventions
- **How:** FINOS, of course!

Request: Participate in ***Data-focused Advisory group*** sessions, to define a strategy for 2022 and to direct efforts across FINOS SIGs and Projects more specifically.





***Note:** While the McKinsey paper seems to focus on retail consumers and MSME's, their metrics do not distinguish between retail and corporate banking, and we believe the benefits would be applicable in both categories.

FINOS Project and SIG Updates

FINOS Team and the FINOS Community

Cloud Service Certification

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

Cloud Service Certification provides contributed and curated service designs for GCP, AWS and Azure that meets external and internal regulatory and security controls.

Cloud Service Certification 2021 H1 Achievements

- Fully documented CSC Agile Workflow that includes monthly sprints and team agile ceremonies.
- IAC for Kubernetes services contributed for GCP and AWS. Service accelerator for Azure contributed and ready for scripting. First pull request for OpenShift service accelerator WIP.
- BDD approach for specification, configuration, acceptance tests defined and ready for implementation.
- CSC up-to-date and aligned with EDMC / CDMC approach and ready for integration planning.
- CSC Migration to EasyCLA agreed and being scheduled with FINOS

Cloud Service Certification needs from the FINOS Community

- CSC recruiting Project Maintainers from FINOS banks for steering and implementation opportunities.
- CSS inviting cloud service contributions from FINOS banks and the wider FINOS Community.
- CSC inviting engineers from FINOS Community to join CSC project meetings and potential collaboration.

Join CSC fortnightly meetings to participate in sprint ceremonies and potential collaboration.

Legend

https://github.com/finos/legend

Legend is an end-to-end data management platform that provides solutions to data challenges across the entire data life cycle. Find out more here.

Recent highlights:

- Major upgrade of the Legend shared instance: The Legend shared instance now supports 1) mapping data models to an h2 test database, 2) a query component as well as a 3) new mapping editor interface.
- Legend roadmap & Studio issues: Moved roadmap to GitHub (WIP) and opened up issues in Studio repository for increased transparency.

Next up on the roadmap:

- Legend community session: Legend 101 (July 27th), Legend new feature deep dive (July 29th)
- GitLab migration: Migrating shared Legend instance to gitlab.com on August 10th
- New feature & component: Pipelines – build & release of JARs and artifacts + Legend-depot to enable project dependencies
- Legend tutorial videos & docs: Series of tutorial videos and updated Studio user guide
- New relational connectors: Building out a Legend <> BigQuery & Redshift connector

Waltz

https://github.com/finos/waltz

2021 H1 Achievements

5 Releases, 5 Tutorial / Screencast / Blog Posts, ~110 Issues Closed, ~700 Commits

New Waltz 2021 H1 Features

- **Report Grids** - *Flexible mechanism to show Waltz data in a single grid control*
- **Flow Diagram Overlays** - *Enrich lineage diagrams with other Waltz data*
- **Surveys** - *Lots of usability enhancements*
- **Attestations** - *Granular control over the rules which govern attestations*
- **Custom Environments** - *User defined groups to align application terminology*
- **Admin Features** - *Moving Waltz configuration into a managed UI*
- **EasyCLA** - *Migration to EasyCLA agreed and being scheduled with FINOS*

Waltz Requirements for the FINOS Community

- **FINOS Banks Needed to Consume, Use and Join Waltz Team**
- **Developers Needed**
  - *Help shift development away from AngularJS (1.x) to Svelte*
  - *Get involved with Waltz Good First Issues*

Symphony BDK for Java

Bot Developer Kit: Develop Bots in Seconds!
https://github.com/finos/symphony-bdk-java

Stabilization Phase

Improvements to provide a robust core

- Sync between BDK & Symphony Java Toolkit (split of core and extended services)
- Message parsing improvements
- System truststore loaded in the SSL Context
- Datafeed v2 support (Webinar Aug 4th)
- Bug fixes & dependencies update
- Migration guide

We contributed a Python version of the Symphony BDK (*currently under Finos due diligence*)

Morphir

Find Morphir in the FINOS organisation on GitHub https://github.com/finos/morphir

Overview:

Morphir is a multi-language system that captures an application's domain model and business logic in a technology agnostic manner to make it automatically processable. It seeks to break down barriers across users, technologist, systems, and organizations. Read more on the Morphir Landing Page.

Highlights:

- Active work to integrate Morphir with Legend and Bosque at the IR level.
- Collaboration with FINOS Regulation Innovation SIG.
- Progressing with Morphir as a Low-code Toolkit.

Get Involved:

Language enthusiasts: See Morphir Open GitHub Issues.

Open Source Readiness SIG

Find OSR in the FINOS organisation on GitHub
https://github.com/finos/open-source-readiness

Overview:

- An evolution of the current working group into a SIG
- Will enable individuals and organizations to understand their current state of readiness, define their ideal state based on goals, objectives and resource limitations, and define a path to success
- Will be based on an industry best practices maturity model and other tools and frameworks

Highlights:

- To be created/finalized: Charter/Strategy/Maturity model

Get Involved:

- Attend launch announcement during the scheduled **OSR call on August 4th!**
- **Join the slack channel** - https://odp.finos.org/docs/project-collaboration#finos-slack
- **Join the calls** once they are announced (on the **Slack** channel and **by emails**)

FDC3

An open standard for interoperability on the financial desktop

Find out more at https://fdc3.finos.org, or at https://github.com/finos/FDC3

Highlights:

- FDC3 1.2 released on the 9th of April!
- Discussions are underway for FDC3 2.0: Main areas of interest:
  - App Directory (Vote on issue #413)
  - Improving Channels and enabling new use-cases (Feeds & Transactions)

Get Involved:

• FDC3 Standard Working Group meeting:	22nd July	10am EDT / 3pm BST
• Channels, Feeds & Transactions discussion group:	29th July	9am EDT / 2pm BST
• FDC3 General Meeting (focus on use-cases):	3rd August	10am EDT / 3pm BST

The Asks:

- We need financial institutions to drive the **use cases** that will define the version 2.0 of the standard.
- We need **1/2/3 representatives from banks and/or buyside firms to lead from a functional standpoint**

Please reach out to julia@finos.org, aitana@finos.org or gab@finos.org for volunteering

FINOS Open Source in Finance Meetup

Can the Internet of Things Transform Retail Banking?

- Wednesday 28th July @ 10am EST / 3pm BST
- Intel, FINOS Gold Member, and Lloyds Banking Group
- Register and find out more on FINOS.org

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
- Meet James and Julia at FINOS Office Hours