BIAN
Service Landscape V5.0
Webinar

16th November 2016
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BIAN Chief Executive

Guy Rackham
BIAN Chief Architect
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A Warm Welcome to YOU –
Dialing in From all around the globe!
The Power of Joint Standardization: BIAN

Founded in 2008, the Banking Industry Architecture Network (BIAN) is a global, not-for-profit organization that seeks to develop standard Service Landscape and Semantic IT Service (A2A) Definitions for the Banking industry.

BIAN will enable the next generation of banking industry solutions developed either in-house or commercially:

• By leading banks sharing their requirements for banking services
• By leading software and services vendors to implement them based on standard semantics.

74 Members
• 27 Financial Institutions
• 43 Software Vendors / Service Providers
• 4 Academic Partners
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BIAN Service Landscape V5.0 – November 2016

1. Context

The V5.0 Release continues the rapid development of the BIAN standard
The BIAN Working Groups continue to ratify and expand the content..

Terms (V3):
- Identified
- Invoked
- Complete

Terms (V4):
- Candidate
- Reviewed
- Mapped

Terms (V5):
- Provisional
- Reviewed
- NA
### 1. Context

**Service Landscape V5.0**

### Reference Data

- **Party**
  - Contact Handler
  - Party User Management

- **External Agency**
  - Product Broker Agreement
  - Contractor/Supplier Agreement

- **Market Data**
  - Reference Data
  - Financial Market Research

### Sales & Service

- **Channel Specific**
  - Interbank Relationship Mgmt
  - Product Deployment

- **Marketing**
  - Branding
  - Marketing Campaign Design

### Operations & Execution

- **Loans & Deposits**
  - Loan

- **Investment Management**
  - Investment Product Management

### Risk & Compliance

- **Bank Portfolio & Treasury**
  - Corporate Treasury Analysis

### Business Support

- **IT Management**
  - Software Asset Management

### Financial

- **Finance**
  - Financial Risk Management

### Human Resource Management

- **Employee Management**
  - Employee Access

### Non IT and HR Enterprise Services

- **Employees**
  - Operations & Execution

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1. Context

V3.0, V4.0 & V5.0 – Evolution of the BIAN standard – key stages

In simple terms the BIAN standard has evolved significantly over the major releases:

**V3.0**
- Defined Candidate Service Domains

**V4.0**
- Service Domains’ Default Service Operations (Offered)

**V5.0**
- Service Domains’ Default ‘First Order’ Connections

**V6.0+**

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Image Source: BIAN Service Landscape V5.0 – November 2016, Copyright BIAN 2016 | Banking Industry Architecture Network
1. Context

Design Foundation

A Service Domain’s business purpose/role is to apply a pattern of behavior to a type of asset. A ‘Control Record’ tracks this activity from start to finish. BIAN has defined a general breakdown of assets and standard behaviors:

Assets are identified using a “MECE” decomposition hierarchy

Exacting value through use, or by maintaining/enhancing the asset to increase its value creating potential

18 standard functional patterns of behavior have been identified and refined in use
Design Foundation

A service Domain has one associated Functional Pattern and offers (and consumes) a collection of service operations each characterised by an action term.

A Service Domain combines an Asset Type with a Functional Behavior

![Image](https://via.placeholder.com/150)

A Service Domain is accessed through its offered service operations. A selection from a standard set of service operations is matched to the specific functional pattern

<table>
<thead>
<tr>
<th>Service Operation Actions Terms</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Action Terms</strong></td>
</tr>
<tr>
<td>Register</td>
</tr>
<tr>
<td>Initiate</td>
</tr>
<tr>
<td>Activate</td>
</tr>
<tr>
<td>Create</td>
</tr>
<tr>
<td>Configure</td>
</tr>
<tr>
<td>Update</td>
</tr>
<tr>
<td>Record</td>
</tr>
<tr>
<td>Execute</td>
</tr>
<tr>
<td>Evaluate</td>
</tr>
<tr>
<td>Provide</td>
</tr>
<tr>
<td>Authorize</td>
</tr>
<tr>
<td>Request</td>
</tr>
<tr>
<td>Terminate</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Maintain &amp; Analyse (where only – no action terms apply)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Action Terms</strong></td>
</tr>
<tr>
<td>Load</td>
</tr>
<tr>
<td>Retrieve</td>
</tr>
</tbody>
</table>
1. Context

Summary of V4.0 Approach

The V4.0 candidate service operation technique was developed to accelerate the definition of service operations – creating ~2000 candidate service operation descriptions.
## 1. Context

### Summary of V5.0 Approach

The V5.0 Approach was defined to accelerate the development of Business Scenarios in order to capture the service operation connections between Service Domains. An interactive seven-step approach was developed. Steps 1-6 are completed to develop a foundation and only revisited as necessary during subsequent business scenario generation cycles.

<table>
<thead>
<tr>
<th>Step</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>WG – Review/Update Wireframe</td>
</tr>
<tr>
<td>2.</td>
<td>WG – Agree Product/Service List – ‘Primary’ Service Domains</td>
</tr>
<tr>
<td>3.</td>
<td>WG – Identify Business Events (defines Business Scenarios)</td>
</tr>
<tr>
<td>4.</td>
<td>WG – Describe Business Scenarios</td>
</tr>
<tr>
<td>5.</td>
<td>WG – Define Service Domain Business Information Profile</td>
</tr>
<tr>
<td>6.</td>
<td>WG – Identify Calling &amp; Delegated Service Domains</td>
</tr>
<tr>
<td>7.</td>
<td>WG – Develop Business Scenarios</td>
</tr>
<tr>
<td>8.</td>
<td>Loop</td>
</tr>
</tbody>
</table>

Mostly completed in the first cycle
BIAN Service Landscape V5.0 – November 2016

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3. V5.0 Deliverables and Status

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5. Direction for V6.0 – Options under consideration
2. Key Changes/Additions to the Standard

Wireframes/First Order Connections

Wireframes are used internally for defining the connections between Service Domains. For V5.0 they provided a framework for quickly identifying business events and deriving the associated service exchanges to develop Business Scenarios.

First Order connections for a Service Domain identify the known calling and called service operation connections....

The wireframe captures the service operation connections between a selection of Service Domains
2. Key Changes/Additions to the Standard

**Wireframes/First Order Connections**

For V5.0 a more detailed pattern of the connections has been used to define the service operation connections between every Service Domain:

Any Service Domain can offer a selection from a standard set of actions terms/service operations.
2. Key Changes/Additions to the Standard

Wireframes/First Order Connections

For V5.0 a more detailed pattern of the connections has been used to define the service operation connections between every Service Domain:

A Service Domain’s can also delegate to any other Service Domain calling on its offered service operations.
2. Key Changes/Additions to the Standard

Wireframes/First Order Connections

For V5.0 a more detailed pattern of the connections has been used to define the service operation connections between every Service Domain:

The Service Domain’s Functional pattern defines a default set of offered service operations.
BIAN Service Landscape V5.0 – November 2016

2. Key Changes/Additions to the Standard

Wireframes/First Order Connections

For V5.0 a more detailed pattern of the connections has been used to define the service operation connections between every Service Domain:

Showing all identified ‘first order’ service connections to the associated Service Domains – first calling Service Domains

Steady State

New Instances

Data Items, Forms/Reports, Scans, Topics & Analysis
2. Key Changes/Additions to the Standard

Wireframes/First Order Connections

For V5.0 a more detailed pattern of the connections has been used to define the service operation connections between every Service Domain:

Showing all identified ‘first order’ service connections to the associated Service Domain – and finally the delegated calls.
2. Key Changes/Additions to the Standard

**Wireframes/First Order Connections**

Wireframes are defined for selections of Service Domains and capture the known service operation connections that are discovered/ratified using business event and business scenario analysis...

The wireframe shows the service operations, detailing the types of connection and action **terms for each**...

With this detail in the tool it is possible to quickly develop Business Scenarios...
2. Key Changes/Additions to the Standard

Generic Artifacts – an update to the Control Record

The ‘Control Record’ was defined to be the concatenation of the Asset Type and the Functional Pattern. The Functional Pattern takes the verb form and so the Control Record was found to be too abstract. An associated generic “artifact” was defined for each functional pattern. This term is now used in the Control Record – note: this changes the default service operation names

<table>
<thead>
<tr>
<th>Functional Pattern</th>
<th>Generic Artifact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administer</td>
<td>Administrative Plan</td>
</tr>
<tr>
<td>Agree Terms</td>
<td>Agreement</td>
</tr>
<tr>
<td>Allocate</td>
<td>Allocation</td>
</tr>
<tr>
<td>Analyze</td>
<td>Analysis</td>
</tr>
<tr>
<td>Assess</td>
<td>Assessment</td>
</tr>
<tr>
<td>Design</td>
<td>Specification</td>
</tr>
<tr>
<td>Develop</td>
<td>Development Project</td>
</tr>
<tr>
<td>Direct</td>
<td>Strategy</td>
</tr>
<tr>
<td>Enroll</td>
<td>Membership</td>
</tr>
<tr>
<td>Fulfill</td>
<td>Fulfillment Arrangement</td>
</tr>
<tr>
<td>Maintain</td>
<td>Maintenance Agreement</td>
</tr>
<tr>
<td>Manage</td>
<td>Management Plan</td>
</tr>
<tr>
<td>Monitor</td>
<td>Measurement</td>
</tr>
<tr>
<td>Operate</td>
<td>Operating Session</td>
</tr>
<tr>
<td>Process</td>
<td>Procedure</td>
</tr>
<tr>
<td>Register</td>
<td>Directory</td>
</tr>
<tr>
<td>Track</td>
<td>Log</td>
</tr>
<tr>
<td>Transact</td>
<td>Transaction</td>
</tr>
</tbody>
</table>
2. Key Changes/Additions to the Standard

Service Domain Business Events

Business Events define the key business activities for each primary Service Domain. Each event is developed into a corresponding ‘First Order’ Business Scenario

<table>
<thead>
<tr>
<th>Service Domain</th>
<th>Business Events</th>
<th>ORIGINATION</th>
<th>INVOCATION</th>
<th>REPORTING</th>
<th>DELEGIATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate Lease</td>
<td>New Corporate Lease, Corporate Lease Recovery, Handle startup and service/infrastructure configuration events</td>
<td>Handling requests for services, resources or for update/feedback</td>
<td>Payment Processing, Missed Payment, Early Collection, Renegotiation/Update, Restructuring, Handle startup and service/infrastructure configuration events</td>
<td>Handle reporting &amp; notification requests</td>
<td>Delegated requests for Origination, Invocation &amp; reporting actions</td>
</tr>
<tr>
<td>Merchandising Loan</td>
<td>New Merchandising Loan, Merchandising Loan Recovery</td>
<td>Payment Processing, Missed Payment, Early Collection, Renegotiation/Update, Restructuring</td>
<td>Handle startup and service/infrastructure configuration events</td>
<td>Handle reporting &amp; notification requests</td>
<td>Delegated requests for Origination, Invocation &amp; reporting actions</td>
</tr>
<tr>
<td>Mortgage</td>
<td>New Mortgage, Mortgage Recovery</td>
<td>Payment Processing, Missed Payment, Early Collection, Renegotiation/Update, Restructuring</td>
<td>Handle startup and service/infrastructure configuration events</td>
<td>Handle reporting &amp; notification requests</td>
<td>Delegated requests for Origination, Invocation &amp; reporting actions</td>
</tr>
<tr>
<td>Syndicated Loan</td>
<td>New Syndicated Loan, Syndicated Loan Recovery</td>
<td>Payment Processing, Missed Payment, Early Collection, Renegotiation/Update, Restructuring, Handle startup and service/infrastructure configuration events</td>
<td>Handle reporting &amp; notification requests</td>
<td>Delegated requests for Origination, Invocation &amp; reporting actions</td>
<td></td>
</tr>
<tr>
<td>Credit Facility</td>
<td>New Credit Facility, Credit Facility Recovery</td>
<td>Payment Processing, Missed Payment, Early Collection, Restructuring, Handle startup and service/infrastructure configuration events</td>
<td>Handle reporting &amp; notification requests</td>
<td>Delegated requests for Origination, Invocation &amp; reporting actions</td>
<td></td>
</tr>
</tbody>
</table>

Note: the terms used in earlier releases to group service operations have been simplified and used to also categorise business events:
- Initialise & Register becomes **Origination**
- Invoke & Execute becomes **Invocation**
- Maintain & Analyse becomes **Delegation**
- Reporting & Notification becomes **Reporting**
2. Key Changes/Additions to the Standard

Service Domain Information Profile

The Service Domain’s Control Record is used to help define create an ‘Information Profile’. In V5.0 general information content has been described based on the functional patterns.
(Note: alignment to Semantic APIs)
2. Key Changes/Additions to the Standard

Service Domain Information Profile

The Service Domain’s service operation ‘Action Terms’ are then used to extract the service operation payload (detail for reference only)

<table>
<thead>
<tr>
<th>Service Operation Type</th>
<th>Action Term</th>
<th>Identifiers</th>
<th>Depiction</th>
<th>Instructors</th>
<th>Analyses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Register</td>
<td>Extract artifact properties</td>
<td>Registered details</td>
<td>Registration result</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Initiate</td>
<td>Extract artifact properties</td>
<td>Initiation details</td>
<td>Initiation result</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Activate</td>
<td>Extract artifact properties</td>
<td>Activation details</td>
<td>Activation result</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Create</td>
<td>Extract artifact properties</td>
<td>Creation details</td>
<td>Creation result</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Configure</td>
<td>Action reference</td>
<td>NA</td>
<td>Configuration result</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Update</td>
<td>Action reference</td>
<td>NA</td>
<td>Update result</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Record</td>
<td>Action reference</td>
<td>NA</td>
<td>Record result</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Execute</td>
<td>Action reference</td>
<td>NA</td>
<td>Transaction result</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Evaluate</td>
<td>Action reference</td>
<td>Evaluation analysis/report</td>
<td>Evaluation result</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Provide</td>
<td>Action reference</td>
<td>Provisioning details</td>
<td>Provisioning result</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Authorize</td>
<td>Action reference</td>
<td>Authorization report</td>
<td>Authorization result</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Request</td>
<td>Action reference</td>
<td>Request analysis/report</td>
<td>Request result</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Terminate</td>
<td>Action reference</td>
<td>NA</td>
<td>Termination result</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Notify</td>
<td>Action reference</td>
<td>Analysis/report content</td>
<td>Notification result</td>
<td>Analysis/Report Type</td>
</tr>
<tr>
<td></td>
<td>Retrieve</td>
<td>Action reference</td>
<td>Analysis/report content</td>
<td>Selection result</td>
<td>Analysis/Report Type</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Service Operation Type</th>
<th>Action Term</th>
<th>Identifiers</th>
<th>Depiction</th>
<th>Instructors</th>
<th>Analyses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Register</td>
<td>NA</td>
<td>Complete artifact</td>
<td>Registration parameters</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Initiate</td>
<td>NA</td>
<td>Complete artifact</td>
<td>Initiation parameters</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Activate</td>
<td>NA</td>
<td>Complete artifact</td>
<td>Activation parameters</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Create</td>
<td>NA</td>
<td>Complete artifact</td>
<td>Creation parameters</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Configure</td>
<td>Extract artifact properties</td>
<td>Selected artifact elements</td>
<td>Configuration parameter</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Update</td>
<td>Extract artifact properties</td>
<td>Selected artifact elements</td>
<td>Update parameters</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Record</td>
<td>Extract artifact properties</td>
<td>Recorded activity details/NA</td>
<td>Record (&amp;) parameters</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Execute</td>
<td>Extract artifact properties</td>
<td>Transaction content/NA</td>
<td>Transaction (&amp;) parameters</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Evaluate</td>
<td>Extract artifact properties</td>
<td>Subject details for evaluation/NA</td>
<td>Evaluation (&amp;) parameters</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Provide</td>
<td>Extract artifact properties</td>
<td>Provision request details/NA</td>
<td>Provisioning parameters</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Authorize</td>
<td>Extract artifact properties</td>
<td>Subject details for authorization/NA</td>
<td>Authorization (&amp;) parameters</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Request</td>
<td>Extract artifact properties</td>
<td>Service request details/NA</td>
<td>Request (&amp;) parameters</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Terminate</td>
<td>Extract artifact properties</td>
<td>NA</td>
<td>Termination parameters</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Notify</td>
<td>Extract artifact properties/NA</td>
<td>NA</td>
<td>Notification parameters</td>
<td>Analysis/Report Type/NA</td>
</tr>
<tr>
<td></td>
<td>Retrieve</td>
<td>Extract artifact properties/NA</td>
<td>NA</td>
<td>Report selection parameters</td>
<td>Analysis/Report Type/NA</td>
</tr>
</tbody>
</table>
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3. V5.0 Deliverables and Status

4. V5.0 Tooling

5. Direction for V6.0 – Options under consideration
The V5.0 Release Process was adapted over the year
The approach evolved over the year as the approach and tooling was refined

Actual:
- After first roadshow, WG involvement was through the scheduled WG bi-weekly sessions
- Central team developed provisional content
- WG tool based reviews initiated in Aug/Sept

The Plan

1. WG – Review/Update Wireframe
2. WG – Agree Product/Service List
3. WG – Identify Business Events (defines Business Scenarios)
4. WG – Describe Business Scenarios
5. WG – Define Service Domain Business Information Profile
6. WG – Identify Calling & Delegated Service Domains
7. WG – Develop Business Scenarios (using defaults/patterns)
8. Loop

Mostly completed in the first cycle
3. V5.0 Deliverables and Status

BIAN Service Landscape – Release 5.0 Components

The BIAN specifications are accompanied by a How To Guide to explain the BIAN Design Concepts & Principles, Content Development and emerging Deployment Approaches.
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4. V5.0 Tooling

Tooling

BIAN uses an integrated collection of tools. The addition of the Web Tool fills out the range of available tools. The membership will be polled to determine if and how the initial tooling should be enhanced.
4. V5.0 Tooling

Tooling – Web tool – used to generate content

A checklist of business events is defined under categories origination/invocation/reporting & delegation for each primary Service Domain. Each business event provides the basis for deriving a first order business scenario:

- Origination – creates a new Control Record (CR) instance
- Invocation – acts on an existing CR instance
- Reporting – get details of current CR instances
- Delegation – calls to other Service Domains

Each Business Event is translated into a corresponding Business Scenario that shows the triggering caller and any dependent delgations made by the ‘primary’ Service Domain. These are defined to the ‘First Order’ interactions for the event.
4. V5.0 Tooling

Tooling – Web tool – used to generate content

The tool is web based with largely automated upload capabilities to the UML database where integrity checks are performed and an HTML view and Excel Extract is supported.

1 - Provisional content was developed for all active Working Groups...

2 – Primary & Secondary Service Domain selections focus the design work...

3 – Business Events and the associated ‘First Order’ Business Scenarios are outlined for each Primary Service Domain

4 – The tool organizes the Business Scenarios for each Primary Service Domain
4. V5.0 Tooling

Tooling – Web tool – used to generate content

The tool is web based with largely automated upload capabilities to the UML database where integrity checks are performed and an HTML view and Excel Extract is supported.

5 – A general description and name is generated and the Wireframe shown for the selected Business Event.

6 – Service Operation connections are predefined but easily added when necessary.

7 – The tool enables the user to quickly select triggering and delegated Service Domains.

8 – Finally the user selects the most appropriate service operations and the tool generates the Business Scenario.
5. Direction for V6.0 – Options Under Consideration

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3. V5.0 Deliverables and Status

4. V5.0 Tooling

5. Direction for V6.0 – Options under consideration
The priorities for V6.0 will be discussed at the upcoming BIAN Board Meeting.
BIAN’s Internal Wiki and Official Homepage
BIAN is a member driven organization

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**Intellectual Property**
- BIAN Intellectual property policy
- WG membership triggers IPR Policy
- Members surrender IP on contributions to WG’s
- Members warrant that all WG contributions are their IPR
- BIAN deliverables are royalty free

**Fees (annual membership)**
- **Software / Tech vendors / Integrators** (250 employees or more)
  EUR 30.000,-
- **Banks / FI’s that are not vendors**
  EUR 20.000,-
- **Software / Tech vendors / Integrators** (less than 250 employees)
  EUR 10.000,-
- **Software / Tech vendors / Integrators** (less than 50 employees)
  EUR 5.000,-
- **Federal Banks / Central Banks**
  EUR 10.000,-
- **Academic Partners** EUR 0,-
## Model for Gradually Increased Engagement in BIAN

### Engagement Level 1: Membership and Limited Engagement

- Member contributing membership fee to support funding of third party resources
- Access to BIAN internal wiki, including work in progress (e.g. documents currently under review)
- Engagement limited to participation in physical BIAN Core Team Meetings
- **Next event: November 29 -31, 2016 at PNC bank, Pittsburgh, USA**

### Engagement Level 2: Participation in (virtual) Reviews

- See above – in addition:
  - Participation in Document reviews – Contribution to Quality Assurance
    - Virtual or physical review sessions with other subject matter experts
    - Recently finalized documents prior to final approval and publication

### Engagement Level 3: Active Contribution

- See above – in addition:
  - Active engagement in 1 Service Definition Working Group / 1 Architecture Working, for example:
    - Service Definition Group: WG Business Partner or Lending
    - Architecture: Service Landscape (alternatively: Architecture Framework and Foundation)

### Financial and Marketing Support

- In addition approx. 2 PDs*) per expert review: Prep., guidelines, review)

### Network

- 6-9 PDs*) per member representative per year

### Guidance through Participation in Reviews

- In addition approx. 10 PDs*) per working group per year (mainly virtual collaboration once every 2 - 3 weeks for 1 - 1.5 hrs)
  - *) PDs = Person Days
Questions?
BIAN
Service Lanscape V5.0
Webinar

16th November 2016
Hans Tesselaar
BIAN Chief Executive

Guy Rackham
BIAN Chief Architect