



Open Source Strategy in Transition: From Prohibition to Managed Usage

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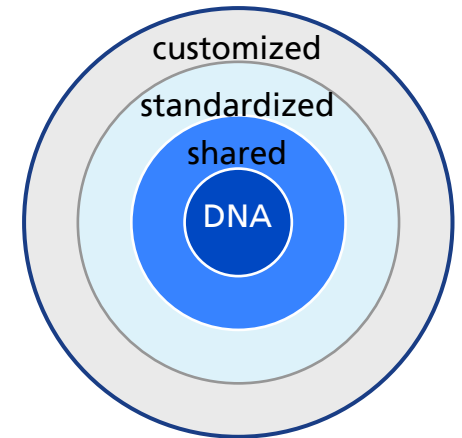
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Wealth Management & Swiss Bank IT (WM&SB IT)

Providing business-enabling technologies for Global WM&SB

- ◆ UBS Group Technology
 - Central IT organization with a federated operating model
- ◆ UBS Wealth Management & Swiss Bank IT
 - Providing *business-enabling technologies* for global WM&SB business
 - Complex application and technology landscape (mainly Java on UNIX, Cobol on the mainframe, commercial banking products)
 - Software development lifecycle crossing organizational boundaries
- ◆ UBS Wealth Management & Swiss Bank CTO
 - WM&SB CTO Mission: «Managed Evolution of Application and Technology Landscape and Software Development Lifecycle»
- ◆ «Former» Open Source Software (OSS) Strategy
 - Many in-house developed frameworks and tools
 - Restrictive position regarding OSS
 - OSS handling not integrated into the overall technology management



Technology classification within Group Technology

⇒ **Transition: Move from level «deny» to level «use» and «contribute»**
(according to Eclipse Foundation Open Source Maturity Model)

Elements of OSS strategy at WM&SB IT

OSS strategy in transition: «From prohibition to managed usage»

Strategy Element	Examples
<p>Use over buy over build <i>OSS is key element of technology strategy</i></p>	<p>Build technology (<i>use</i>: Maven), core middleware (<i>buy</i>: DBMS such as e.g. Oracle), advanced security (<i>build</i>)</p>
<p>Core vs. satellite <i>Technology usage classification into 'satellite' and 'core' to assess OSS' «fitness for purpose»</i></p>	<p><i>Core</i>: reliable, scalable, highly available data processing based on supported technology with <i>long</i> lifecycle</p> <p><i>Satellite</i>: Areas including front-ends (GUIs), administration, development based on technology with restricted requirements and <i>short</i> lifecycle</p>
<p>Engagement pattern <i>Dedicated handling of different OSS engagement pattern (use, contribute, distribute)</i></p>	<p>Eclipse Java Development Environment (<i>use</i>)</p> <p>Eclipse Modeling Framework (<i>contribute</i>)</p>
<p>Managed <i>OSS lifecycle handling is integral part of overall technology management.</i></p>	<p>Managed technology toolbox mapping a <i>problem</i> to a 'technology to be applied'.</p>
<p>Federated <i>OSS handling is integrated into the federated Group Technology operating model.</i></p>	<p>Group: OSS policy and general guidelines, general technology management, <i>shared</i> technology</p> <p>WM&SB: Group compliant implementation of policy and guidelines, <i>standardized, customized</i> technology</p>

Questions & Answers

Q & A

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