

Ecosystems

Key Content Presentations

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Key Aspects of Ecosystem Management

→ The Ecosystem Foundations

Ecosystems are on the rise – Their significance has been constantly increasing across several industries

Relevance of Ecosystems



Status Quo

11/35¹

of the world's leading brands have actively built BES

\$2.6¹

Billionen USD

Market capitalization of the top 15 BES (2016)



Outlook

40%¹

of organizations have the resources to build BES

32%²

Expected share (2025) of cross-industry sales global



Management estimation

82%¹

Believe that BES will shift industry boundaries

46%¹

Actively strive for a BES

1) Accenture 2017: Ecosystem Strategy

2) McKinsey 2017: Competing in a world of sectors without borders

The term «Ecosystems» includes Knowledge-, Platform-, and Business Ecosystems

Overview on different concepts of Ecosystems

	Industry Ecosystem	Knowledge Ecosystem	Platform Ecosystem	Innovation Ecosystem
Concept				
Logic	Buzzword without meaning	Exchange of knowledge, networking	Digital marketplace with network effects	Superior value proposition by partner alignment
Examples	"The start-up ecosystem in Zurich"	 	 	 
			Product focus	

Introduction to Innovation Ecosystems

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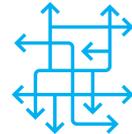
Innovation Ecosystems lead to a trade-off between growth potentials and orchestration efforts as well as risks

Chances and risks of Innovation Ecosystems

Characteristics Innovation Ecosystems



Value Proposition



Modules



Orchestrator

+

Growth

- › Higher prices
- › Competitive advantage
- › Entering novel markets

Access to critical resources

- › Usage of partner resources
- › Focus of own (core-) competencies



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Effort of orchestration

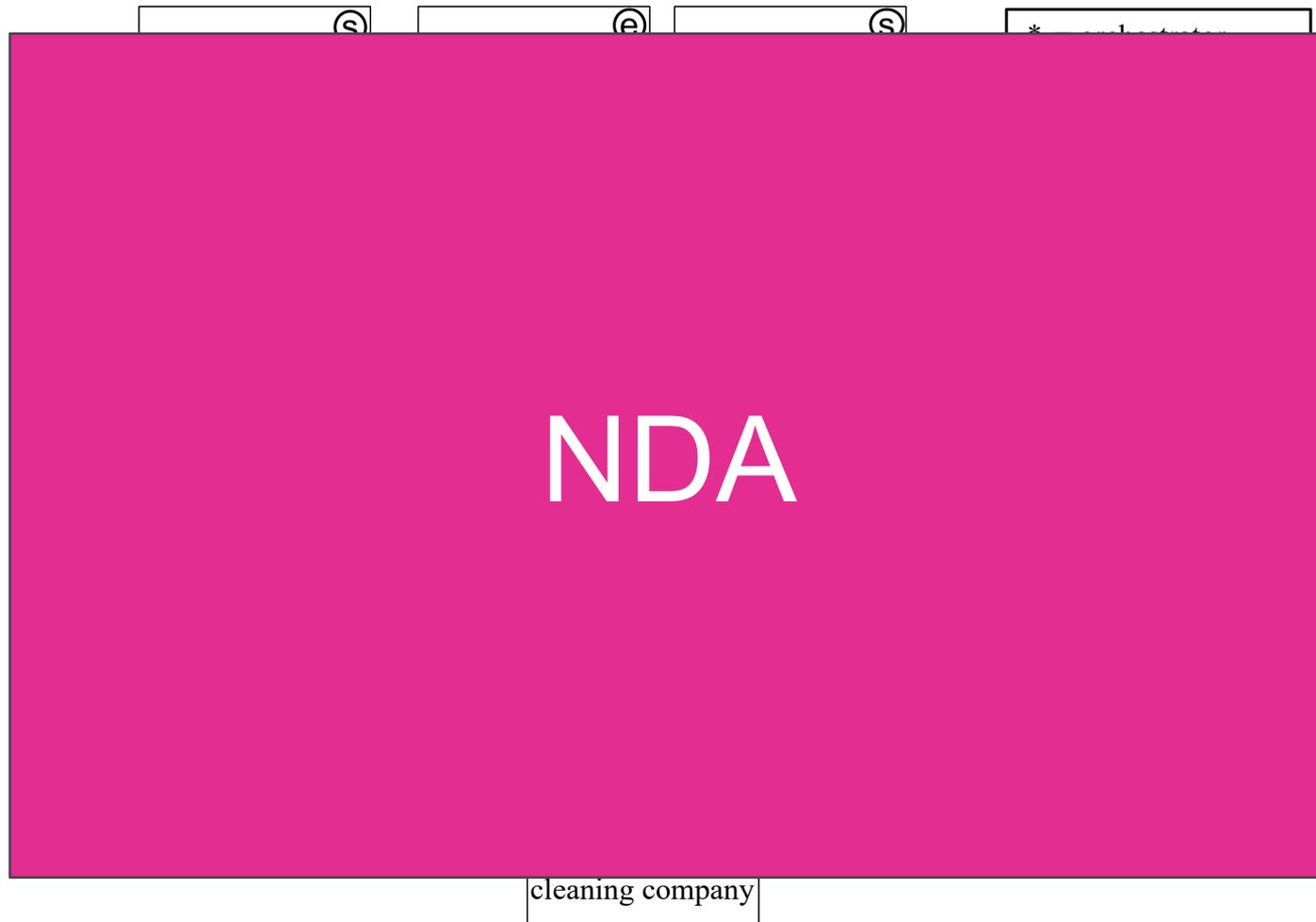
- › Coordination among partners
- › Alignment towards joint value proposition

Risk due to dependency

- › Value Proposition can only be achieved if all/ most of the partners are involved
- › Resulting risk of losing a partner and, thus, joint value proposition

Platform and innovation ecosystems can occur at the same time, driven by the same firm

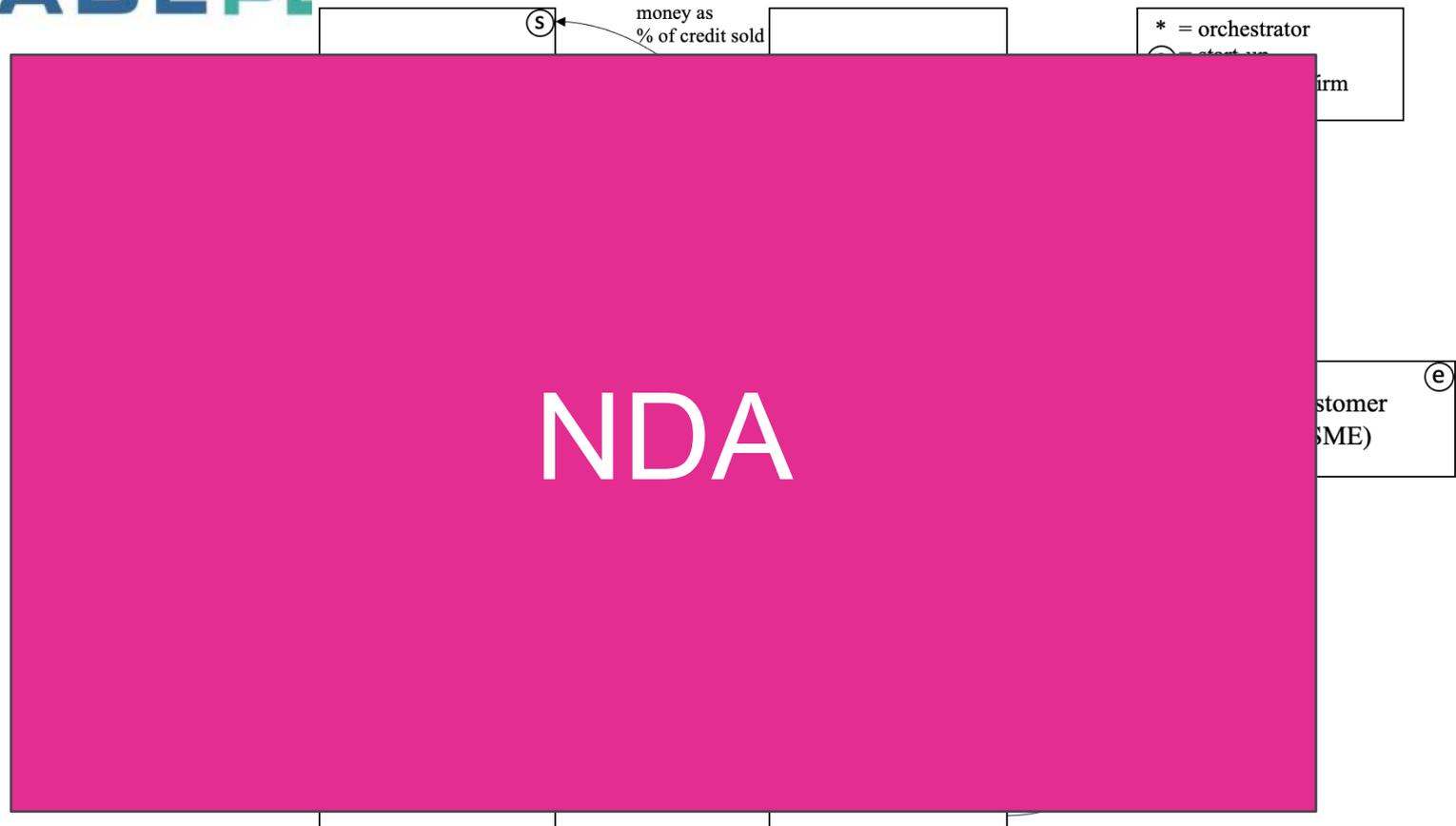
Platform vs. innovation ecosystems



...but innovation ecosystems can also scale towards platform ecosystems

Platform vs. innovation ecosystems

TRADEPLUS24



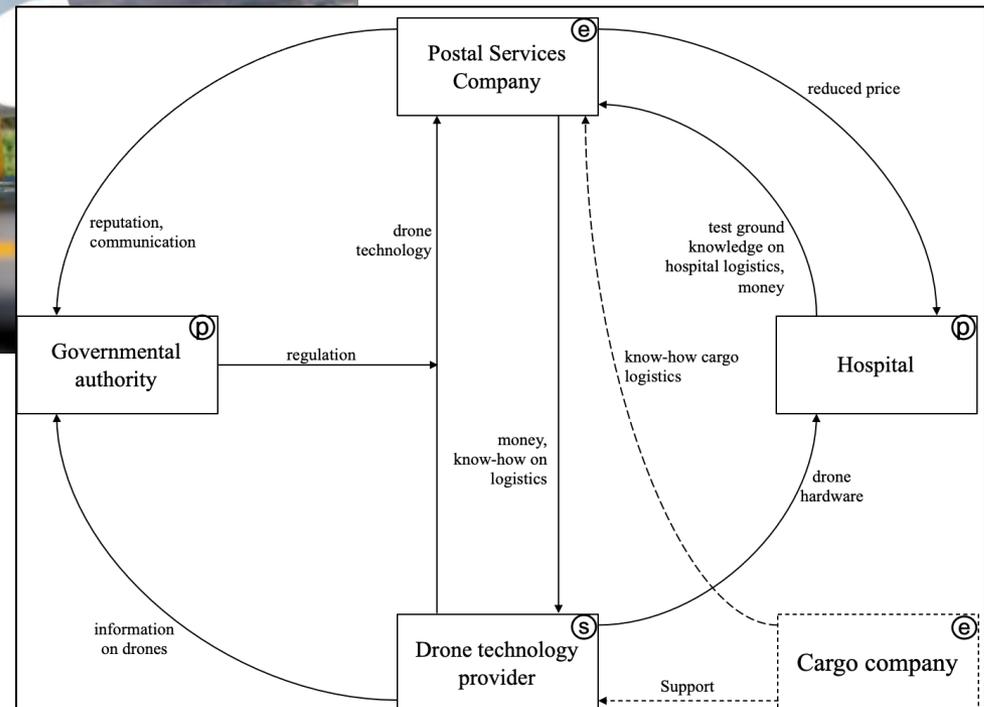
Some examples for
Ecosystems with
different purposes

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Innovate the core offering with ecosystems: The example of Swiss Post – Corporate as orchestrator

Example for ecosystems 1/4



Extent/ enrich the core offering with ecosystems: The example of Tradeplus24 – Corporate as a complementor

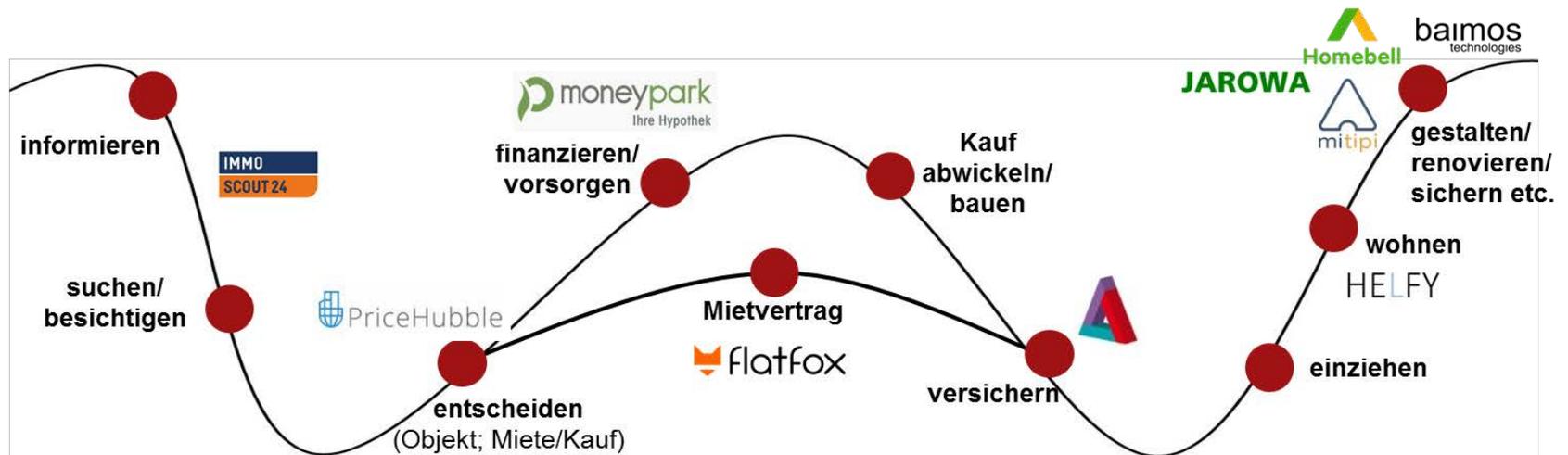
Example for ecosystems 2/4

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Grow into adjacent fields with ecosystems: The example of Helvetia Insurance

Example for ecosystems 3/4

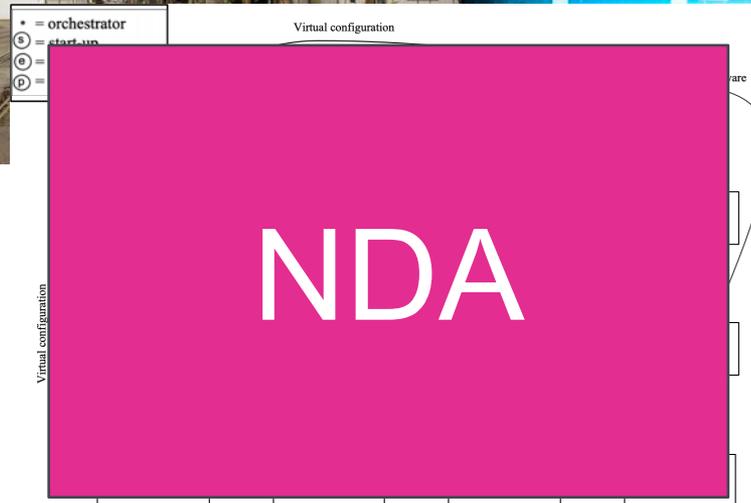
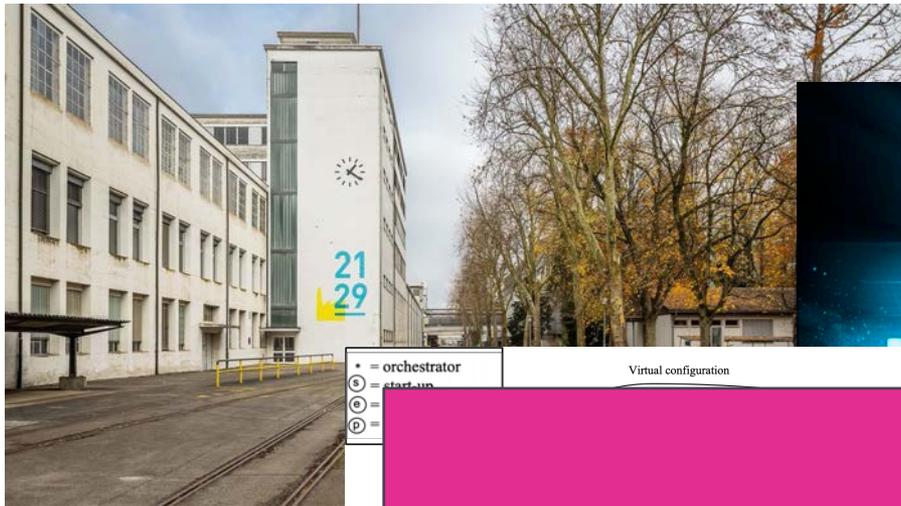


Grow into completely novel field with ecosystems: The example of HIAG Data

Example for ecosystems 4/4

HIAG

HIAG DATA

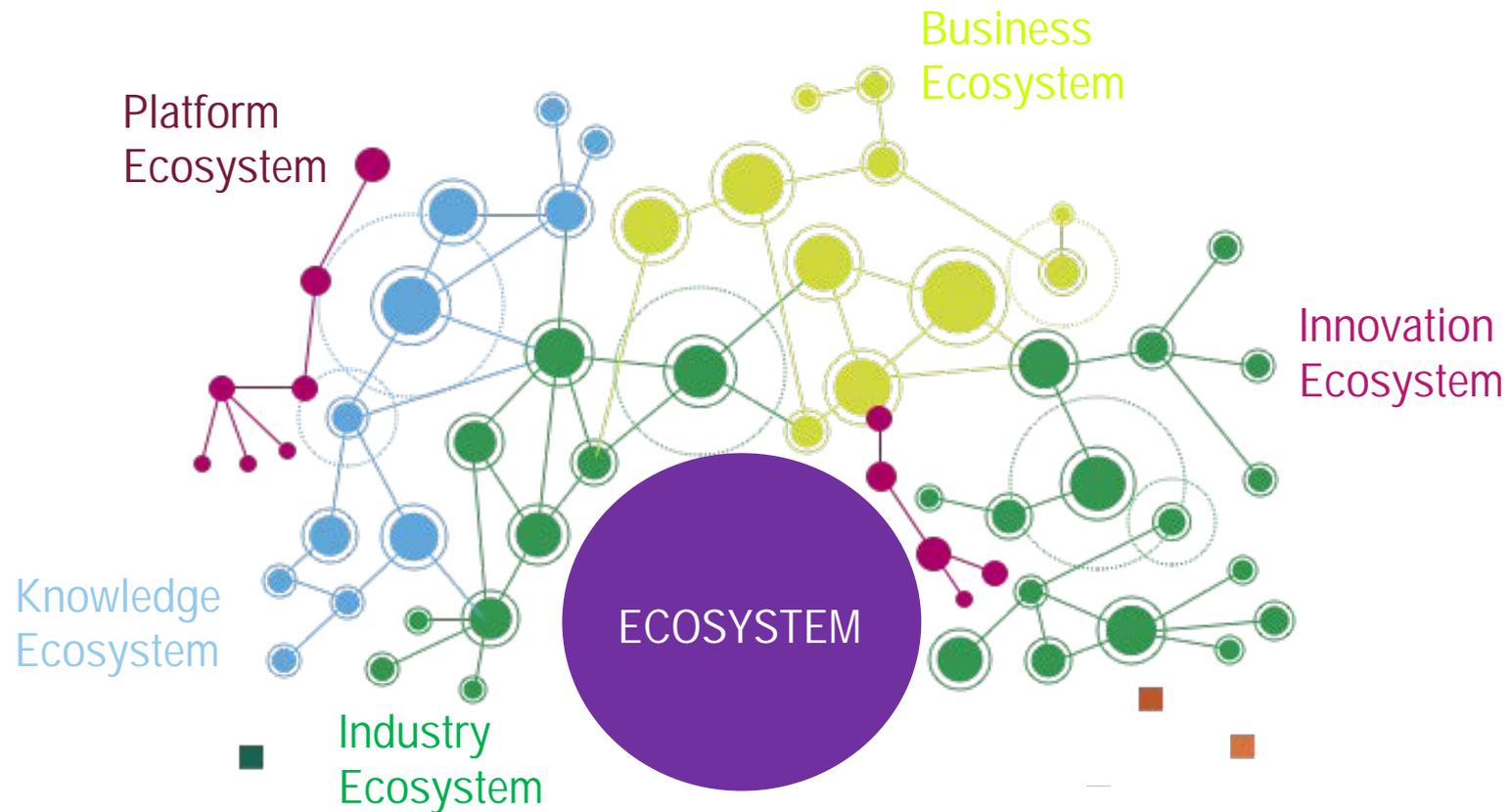


The truth behind some myth about ecosystems

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Myth Nr. 1: Ecosystems are everywhere and the hot topic today – «We need an ecosystem»



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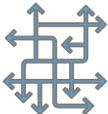
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Myth Nr. 2: Corporates are the natural orchestrators of the ecosystem world



The orchestrator role can be split into strategic and operative tasks – different profiles required

Skills of strategic vs. operative orchestrators

Orchestration		roles		
		Strategic	Operative	
		Define VP / Involve partners	Develop VP / Coordinate Partners	
Required skills for orchestration		Network amongst potential partners		Organisational and structural flexibility
		Credibility amongst potential partners		Speed of product development
		Low distance of knowledge to field of business/ market		Low distance of knowledge to technology and product

Myth Nr. 3: Stepping into ecosystem world means doing several roles at once – Highly resource consuming



In an ecosystem, firms are usually acting as an orchestrator, module-provider and/or customer interface

Three typical roles in an ecosystem



Orchestrator: Strategic/ operational tasks for setting-up, managing, and developing the ecosystem as well as its partners



Module Provider: Provision of one or several modules to the joint value proposition. Directly (as part of the product) or for go-to-market or aftersales



Customer Interface: Interface to the customer, usually taking over the sales activities, too. Existence of ecosystem can be communicated to customer or not.

Myth Nr. 4: Ecosystems are huge and dominate whole markets



Myth Nr. 5: Ecosystems are a chance for some innovative companies – Others can «wait and see»



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