

Business Ecosystem Design

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Role: Ecosystem Modelling Team Leader Co-Chair

Building on a strong foundation - Digital platform ecosystem White Paper: GIO White Paper on Industry-specific Ecosystems V3.0 release

The release of Digital platform ecosystem White Paper: GIO White Paper on Industry-specific Ecosystems V3.0, builds on a strong base from the previous two white papers released

2024 - V3.0



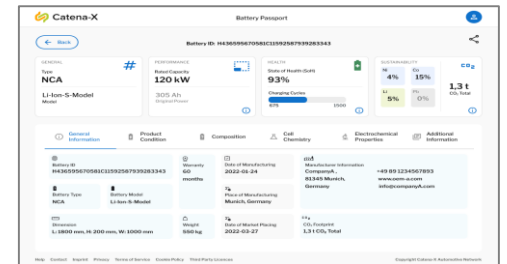
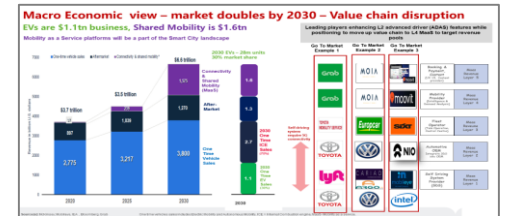
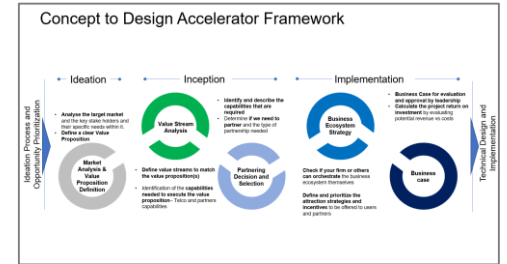
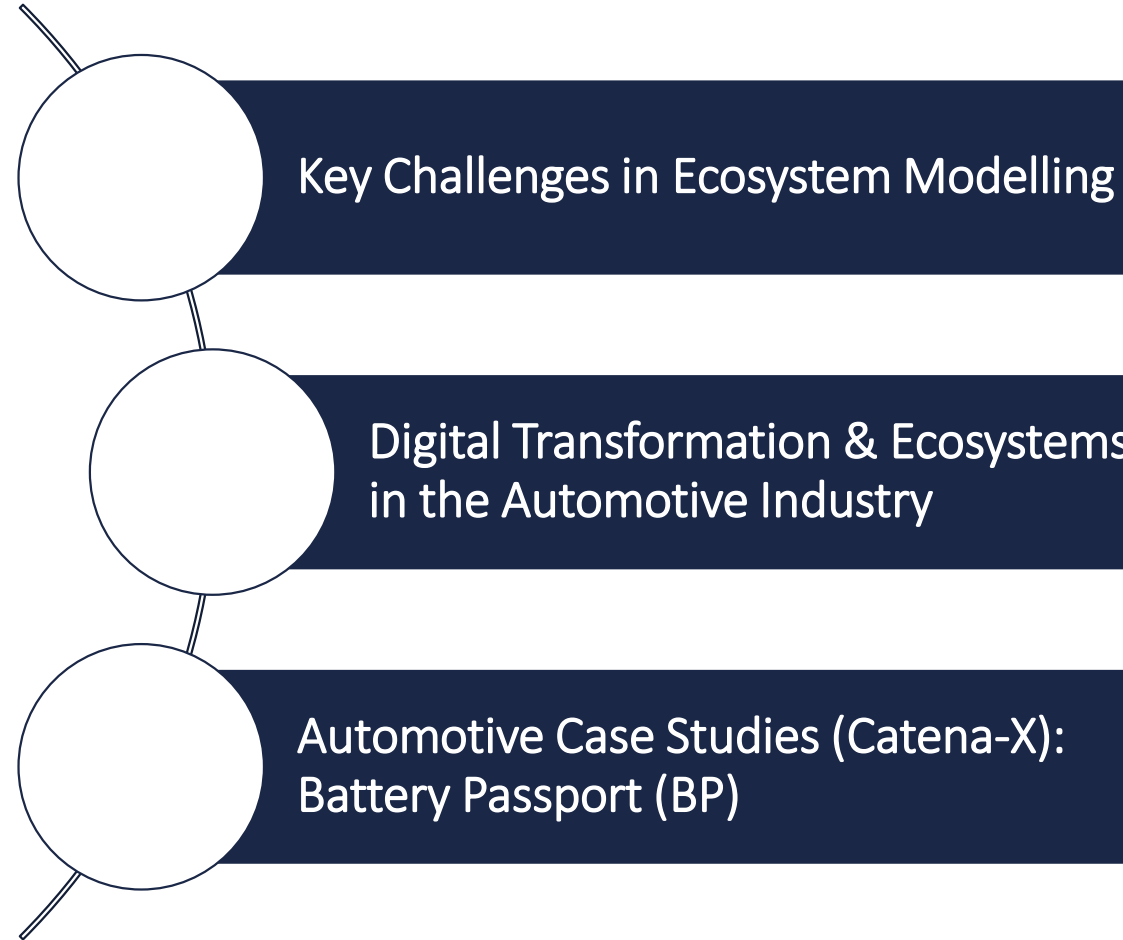
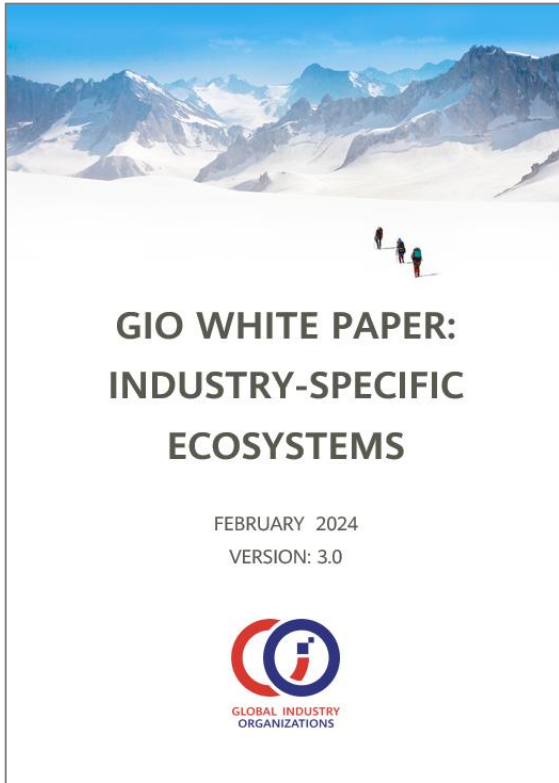
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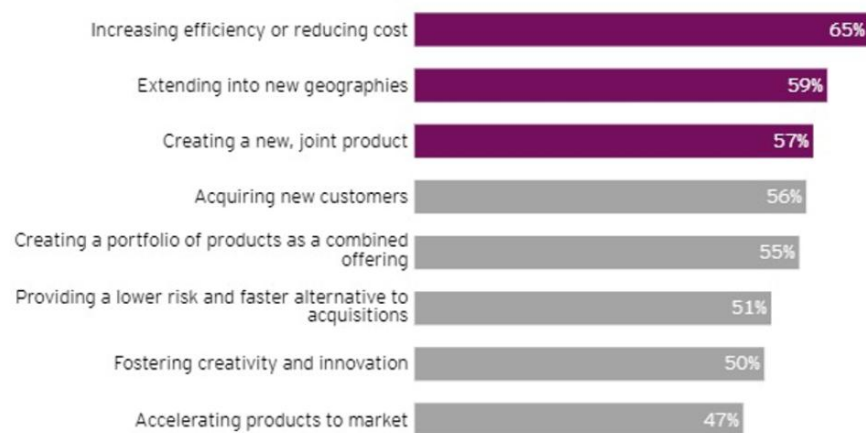
Digital platform ecosystem: GIO White Paper on Industry-specific Ecosystems V3.0 release



World Economic Forum - Competition vs collaboration: rethinking how businesses innovate and grow

Advantages of ecosystem business models over traditional business models for driving growth

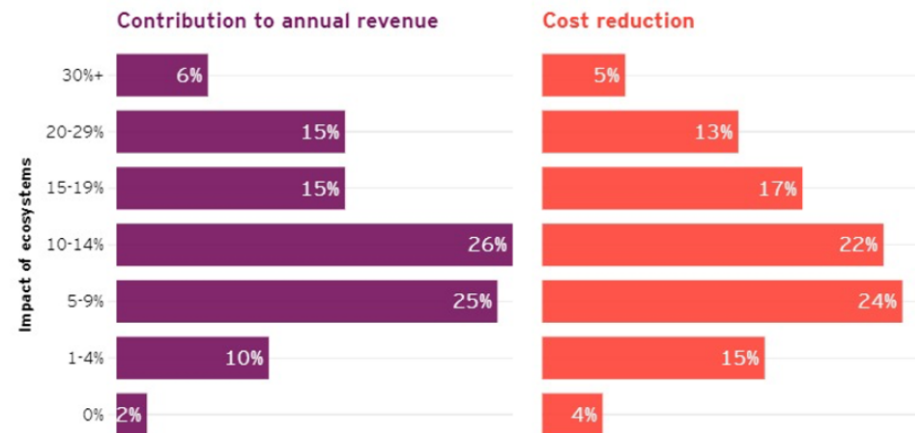
% of respondents with a high-performing ecosystem citing a specific advantage



The ecosystem model is more efficient and helps businesses expand. Image: EY

The financial impact of ecosystem business models

% of respondents



To fully reap the benefits of collaboration, businesses must deploy ecosystem business models effectively – but that doesn't happen overnight.

Image: EY

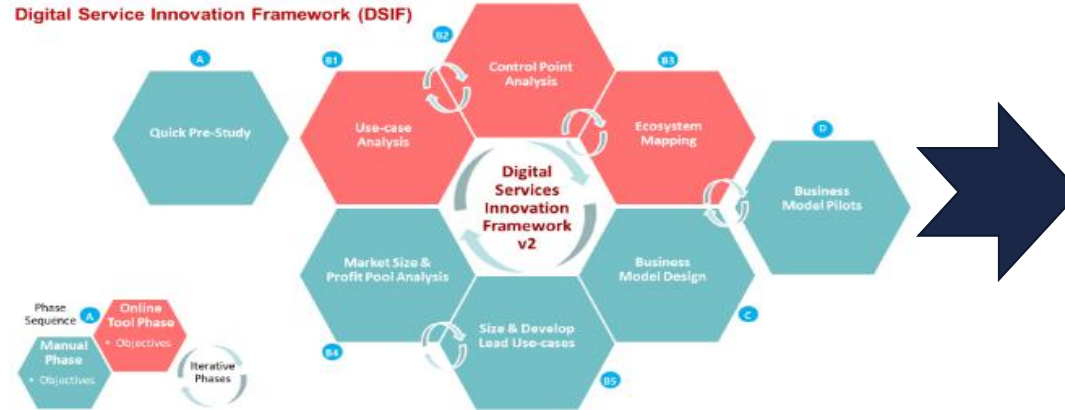
Source: <https://www.weforum.org/agenda/2023/01/competition-vs-collaboration-ey-innovation-wef23/>

Author: Carmine Di Sibio: Global Chairman and Chief Executive Officer, EY

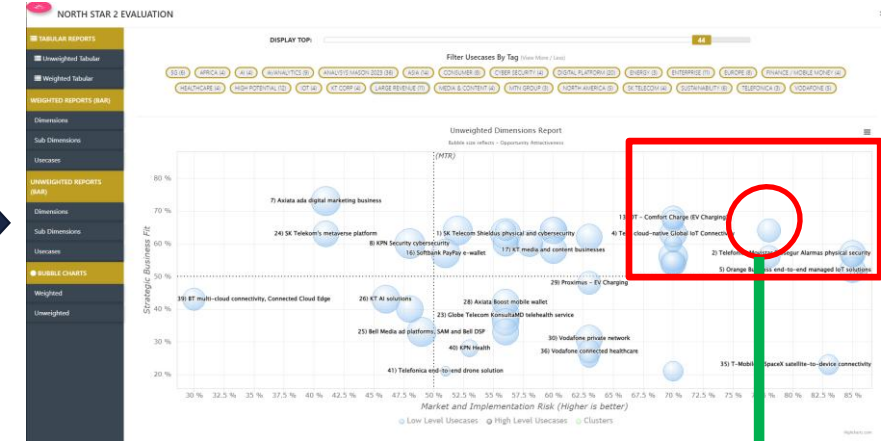
<https://www.weforum.org/about/licence-terms-on-the-use-of-forum-publications-and-materials-licence-terms/>

De-risk Digital Service Innovation – Repeatable methodology for identifying opportunities and designing the ecosystem

Explore New Digital Services Opportunities – How to pick winners?



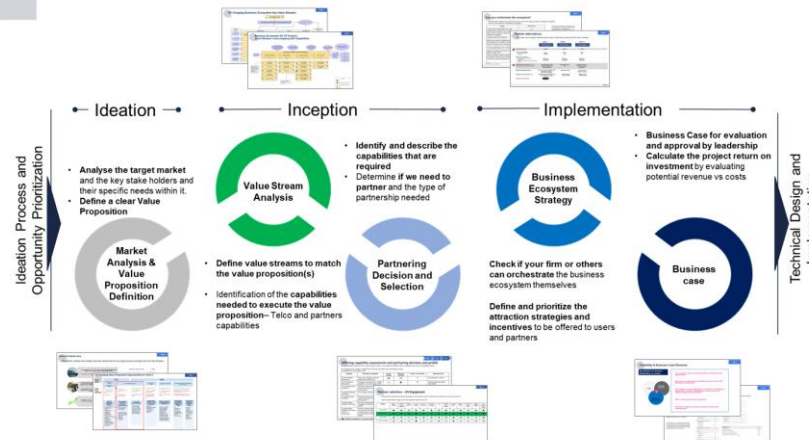
Lead opportunities identified



Concept to Design

For a lead opportunity identified in exploring the new digital services execute the 'Concept to Design' process from TMF Ecosystem Working group.

Concept to Design Accelerator Framework



Concept to Design Accelerator Framework

Ideation Process and Opportunity Prioritization

Ideation

- Analyse the target market and the key stake holders and their specific needs within it.
- Define a clear Value Proposition

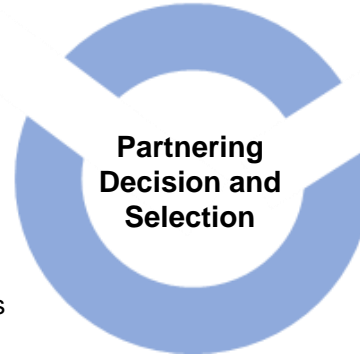


Inception



- Define value streams to match the value proposition(s)
- Identification of the capabilities needed to execute the value proposition– Telco and partners capabilities

- Identify and describe the capabilities that are required
- Determine if we need to partner and the type of partnership needed



Implementation



Check if your firm or others can orchestrate the business ecosystem themselves

Define and prioritize the attraction strategies and incentives to be offered to users and partners

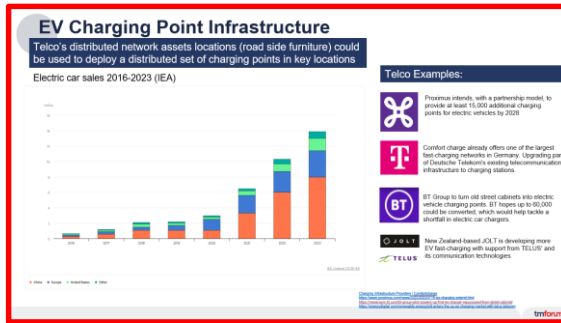
- Business Case for evaluation and approval by leadership
- Calculate the project return on investment by evaluating potential revenue vs costs



Technical Design and Implementation

Concept to Design Accelerator Framework

- Example for EV Charging Infrastructure Business

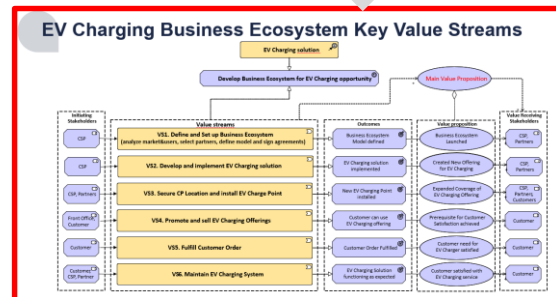
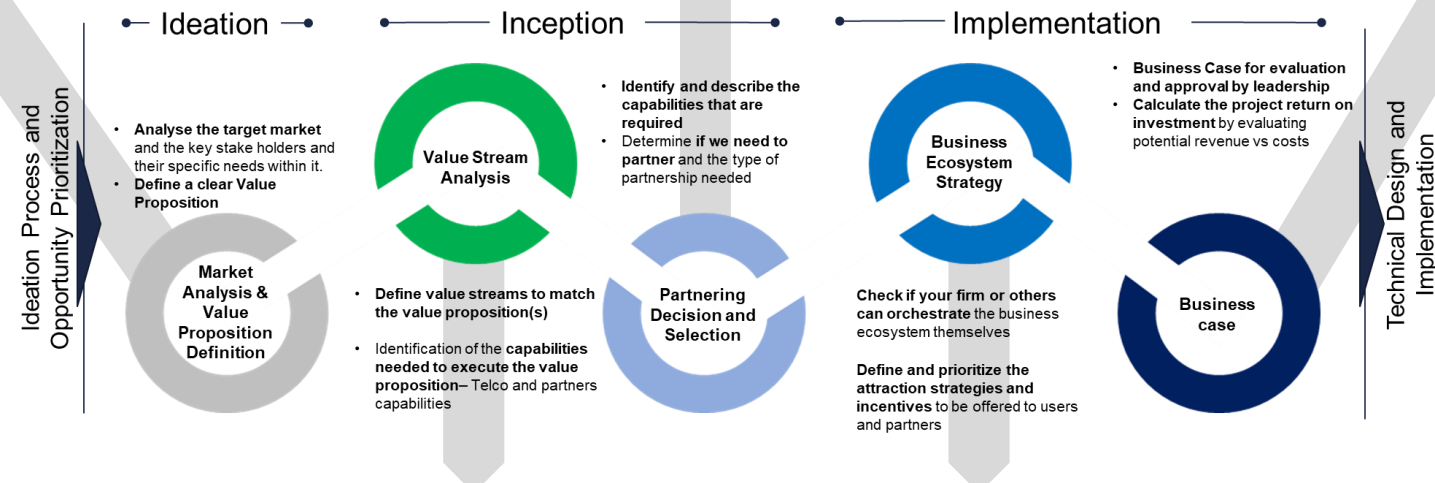
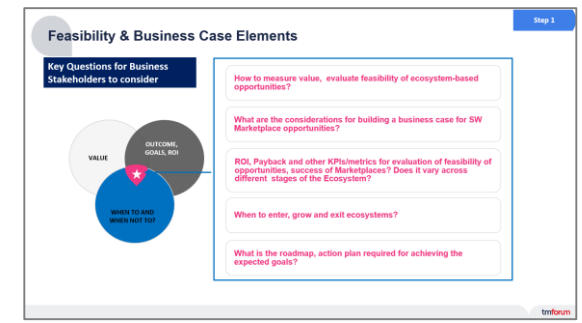


Offering capability assessment and partnering decision and profile

For each capability, assess the firm's current strength to deliver it, also assess the difficulty it faces in acquiring some or all of the capability required. Use guidance the need it takes to help.

Capability	Description of Capability	Current Strength	Difficulty of acquiring	Partner / Yes No When	Partnership Type
Do Site Suitability Assessment	Have a site suitability process for existing telco infrastructure	<●>	<○>	No	No partnership - Internal
EV CP Equipment Manufacture	No ability to manufacture EV Charger equipment, but can manage tenders	<○>	<●>	Yes	Traditional Business Model Open Market
EV CP Charger Field Installation	Field teams have basic skill set but need to be retrained, may acquire a firm with skills	<○>	<●>	Yes	Traditional Business Model Vertical
Arrange and Manage Civil Works	This is always subcontracted	<○>	<●>	Yes	Traditional Business Model Hierarchical
EV Charger System Integration	Field teams have basic skill set but need to be retrained, may acquire a firm with skills	<○>	<●>	Yes	Traditional Business Model Vertical
Charging Station Location (Third Party)	Non telco charging stations on board a charging as a service marketplace (eMSP)	<○>	<●>	Yes	Business Ecosystem (Type 1 Marketplace)
Charging Station Backhaul Connectivity and EV IT Infrastructure	Non telco charging stations can choose Telco connectivity and EV CP IT infrastructure in collaboration with others providers to build a EV CP solution	<○>	<●>	Yes	Business Ecosystem (Type 2 Marketplace)

● = high coverage, ○ = low coverage, ●○ = represent degrees of partial coverage



Can you orchestrate the ecosystem?

The table below contains some of the most common criteria for rating ecosystem orchestration capability

Criteria	Market Position
Current scale / market share (i.e. is the company large enough, does it have resources)	<○>
Ability to offer incentives needed develop and sustain the ecosystem	<●>
Leadership and brand influence	<○>
Ability to scan, sense and integrate capabilities for the ecosystem into a platform, standards	<●>
Ability to modularize value activities	<●>
Connect geographical focus for stakeholders	<○>
Ability to coordinate, optimize & manage the external supply chain	<●>
Ability to business model to sustainably creates and captures value from the ecosystem	<○>
Control over primary stakeholder relationship	<○>

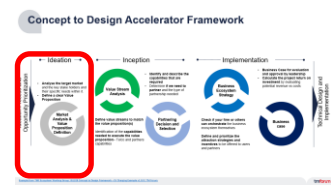
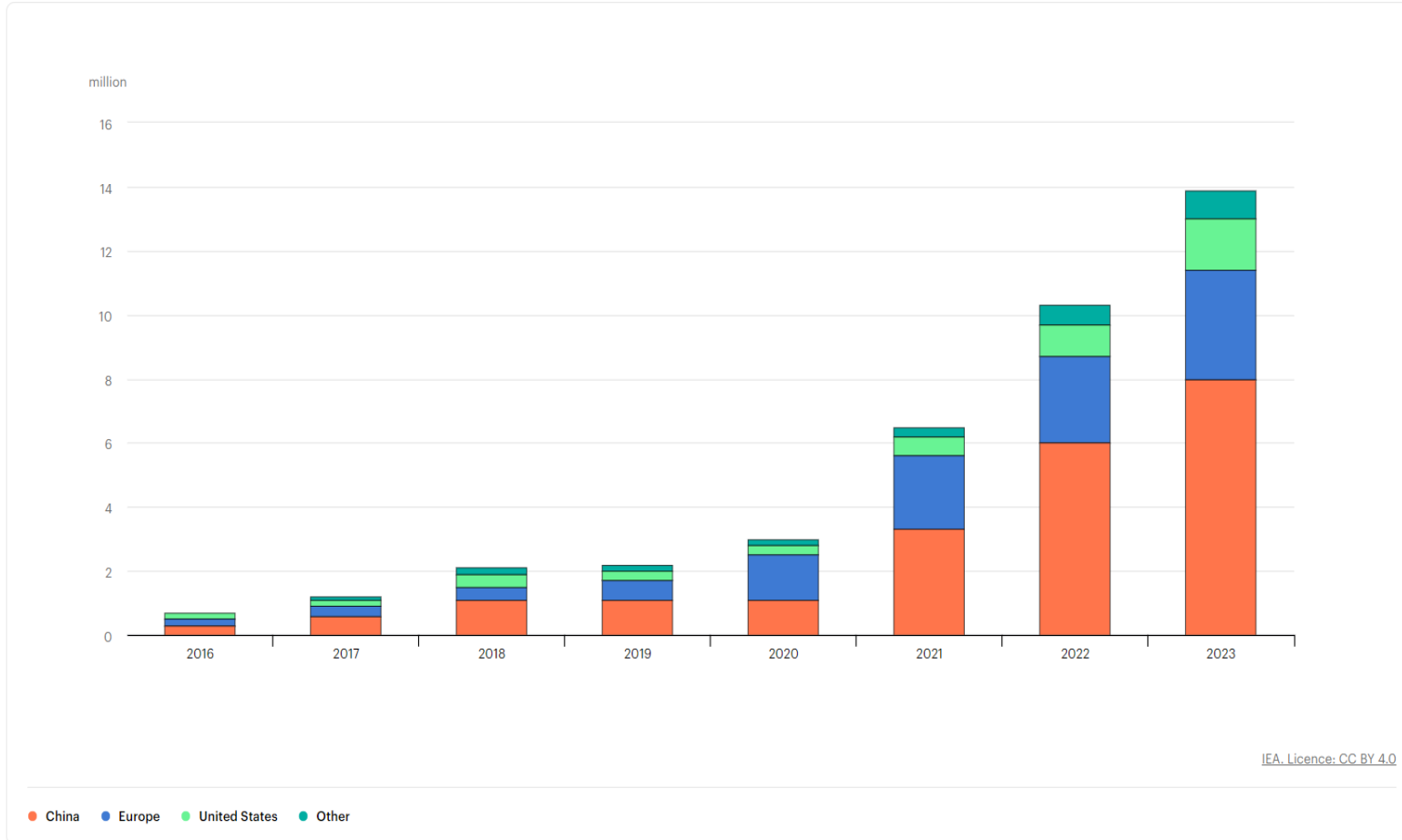
Drill down on these stages

Market Opportunity Analysis

Example: EV Charging Point Infrastructure

Telco's distributed network assets locations (road side furniture) could be used to deploy a distributed set of charging points in key locations

Electric car sales 2016-2023 (IEA)



Telco Examples:



Proximus intends, with a partnership model, to provide at least 15,000 additional charging points for electric vehicles by 2028



Comfort charge already offers one of the largest fast-charging networks in Germany. Upgrading parts of Deutsche Telekom's existing telecommunications infrastructure to charging stations.



BT Group to turn old street cabinets into electric vehicle charging points. BT hopes up to 60,000 could be converted, which would help tackle a shortfall in electric car chargers.



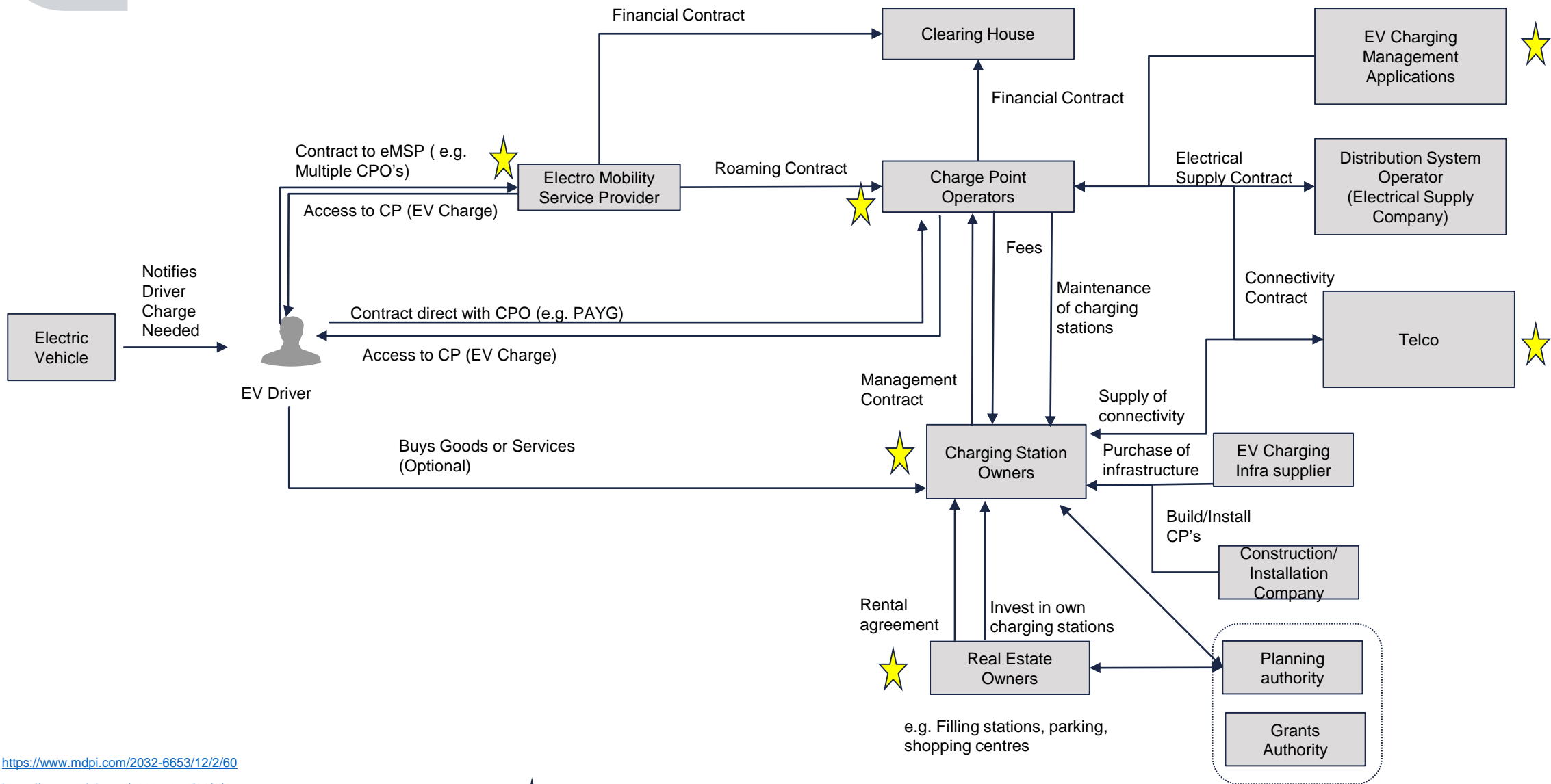
New Zealand-based JOLT is developing more EV fast-charging with support from TELUS' and its communication technologies



- Charging Infrastructure Providers | Comfortcharge
<https://www.proximus.com/news/2022/20220715-ev-charging-extend.html>
- <https://newsroom.bt.com/bt-group-pilot-powers-up-first-ev-charger-repurposed-from-street-cabinet/>
- <https://energydigital.com/renewable-energy/jolt-enters-the-us-ev-charging-market-with-telus-telecom>

Map the Key Stakeholders and their interactions

Example: EV Driver Stakeholder Interaction map



<https://www.mdpi.com/2032-6653/12/2/60>

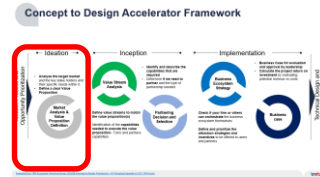
<https://www.mdpi.com/2032-6653/14/1/25>

★ Potential roles for Telco

High Level Opportunity Evaluation

Example: EV Charging Point network launch

This evaluation has been done from the perspective of a Telco launching an EV Charging network for public access



Telco Provider / Ecosystem Business Fit | Market Timing Risk | Addressable Need and Opportunity Attractiveness

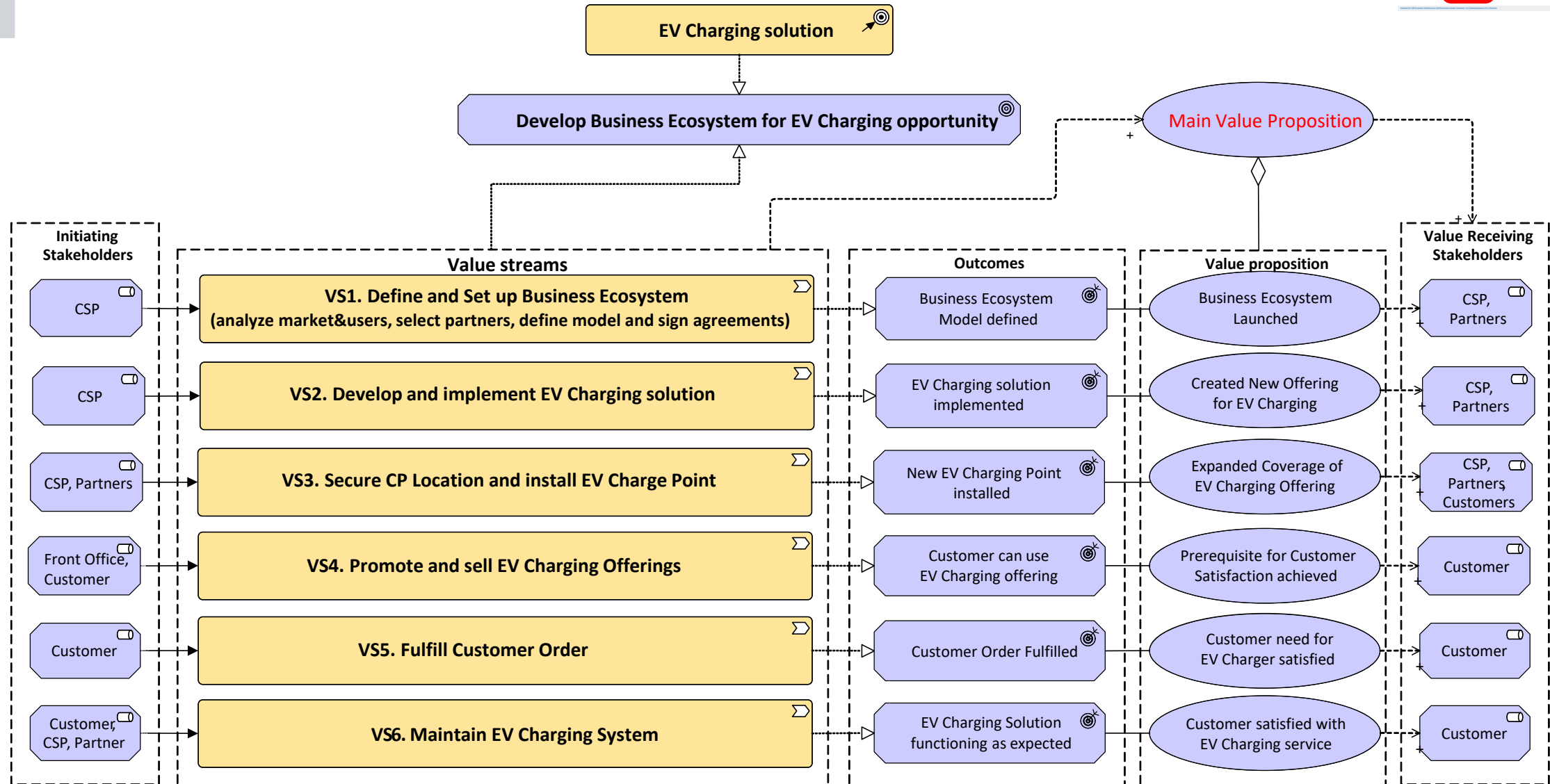
Telco Provider / Ecosystem Business Fit			Market Timing Risk			Addressable Need and Opportunity Attractiveness		
Benefits	Capabilities	Partners	Environment	Adoption	Alternatives	Value	Scale	Adjacency
<p>Does the use-case deliver significant benefits for industry and / or society?</p> <ul style="list-style-type: none"> EV Car owners/users can charge on the go with network of EV charging stations Access to a large network of distributed CP's Possible linkage to existing Telco consumer and business offerings (bundle) 	<p>Does the telco provider have the resources (finance, time, skills, etc.) to participate in the delivery of the use-case</p> <ul style="list-style-type: none"> Telco's distributed network assets locations used to deploy a distributed set of CP's in key locations (power and connectivity in place) Leverage existing field teams, and partners for the installation/ maintenance of charge point infrastructure. Experienced in managing own national network, so could manage their own charging infrastructure, or manage third parties for them. Billing, support and roaming capabilities 	<p>Are there partners (technology, channel etc.) that could be ready and able to contribute to the deliver of the use case ?</p> <ul style="list-style-type: none"> Telco's are used to dealing with hardware, software, installation and construction partners Existing relationships with local and regional authorities for existing networks. Also electricity suppliers Develop relationships with eMSPs 	<p>Is the environment (regulators, society etc) in the right state for the use case</p> <ul style="list-style-type: none"> European Commission has announced the ban on sales of all combustion engine cars by 2035 to ensure its progress towards its 2050 objective of being climate neutral. Across Europe, there are many electric vehicle (EV) charging incentives available for both private citizens and businesses. Seen as key to accelerating electric vehicles adoption across the continent 	<p>Adoption – Is the market receptive to the use case ? Is there good traction that signifies adoption at scale is underway</p> <ul style="list-style-type: none"> The global electric vehicle market size accounted for USD 205.58 billion in 2022 and it will increase at USD 1,716.83 billion by 2032. An EV charging network investment is key to the success of the EV roll out 	<p>Are there better alternative solutions? Could the 'status quo' be maintained?</p> <ul style="list-style-type: none"> CPO's - Owner-operators with significant experience in fast-charging solutions Energy companies (oil and gas players) - has been diversifying toward renewables – with many key locations Energy utility companies Automotive OEM's While there is a lot of competition, its also early & fragmented. Telco's have an opportunity to leverage their network locations 	<p>Is there enough quantifiable and persistent value/income for all parties (consumer, telco, partners) to sustain the business</p> <ul style="list-style-type: none"> The global electric vehicle charging infrastructure market size is expected to be worth around US\$ 221.9 billion by 2030 from at US\$ 25.56 billion in 2022, growing at a CAGR of 31.02% during the forecast period 2023 to 2030. Target markets would need to be modelled 	<p>What is the potential, scale and growth rate for the use-case ? nationally and internationally</p> <ul style="list-style-type: none"> As seen from the forecasts, there will be a significant need for EV Charging. Telco's will need to invest quickly to build the business and brand for EV charging 	<p>How adjacent and/or congruent is the use case with other telco solutions and the existing customer base</p> <ul style="list-style-type: none"> Very adjacent to Telco's who have roadside furniture/assets that could be used where suitable for CP installation. This could give the Telco a significant advantage in the number of CP's across a wide spread area. Large consumer and business relationships

Legend

- No blockers
- Challenges (quantified)
- Unquantified
- Blocker

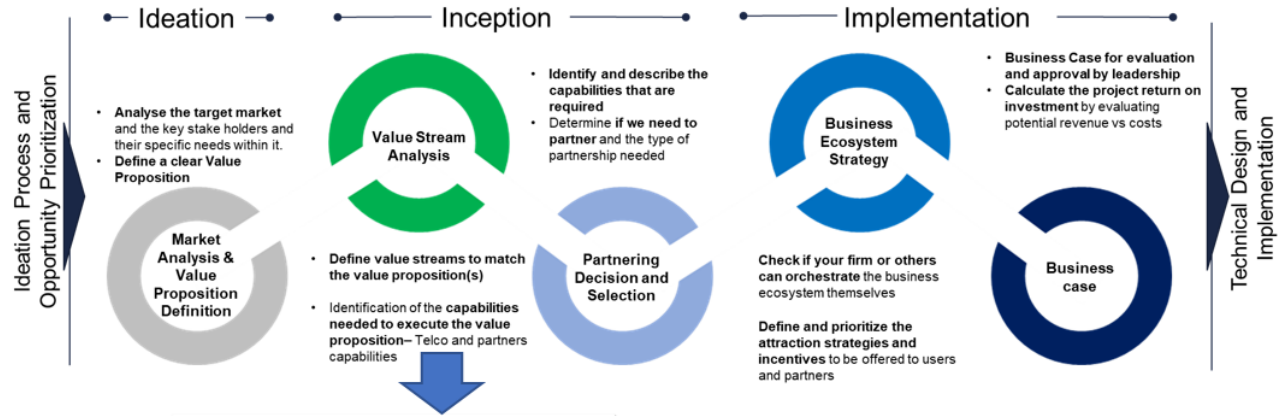
Value Stream Analysis – Decompose the Value Propositions

Example: EV Charging Business Ecosystem Key Value Streams

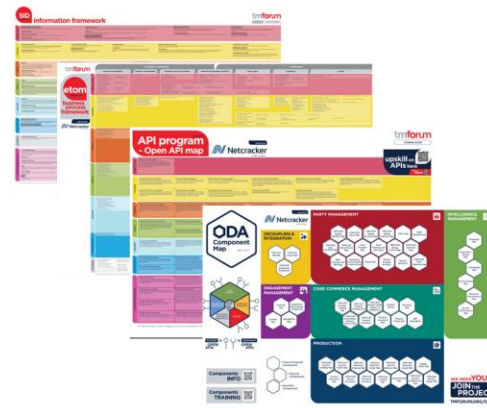
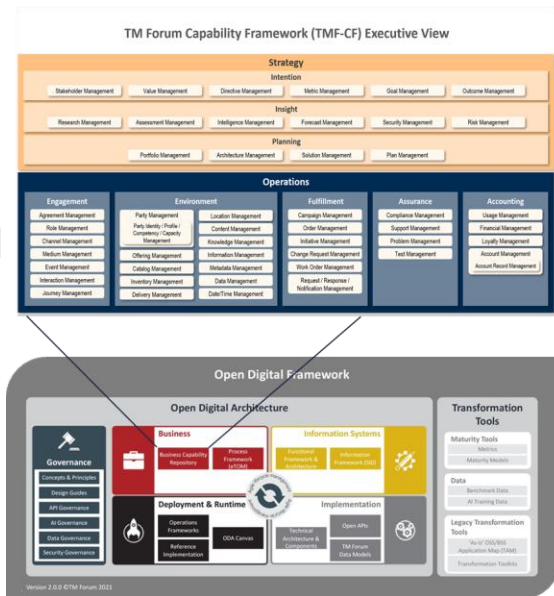


Repeatable Approach to Ecosystem Design and Implementation

Business Ecosystem Design



Linked to Telco capabilities and ODA Building blocks



Links to key TM Forum Resources

[GB1029C TM Forum Capability Map v3.0.0 | TM Forum](#)

[GB1029V TM Forum Value Stream Framework v1.0.0 | TM Forum](#)

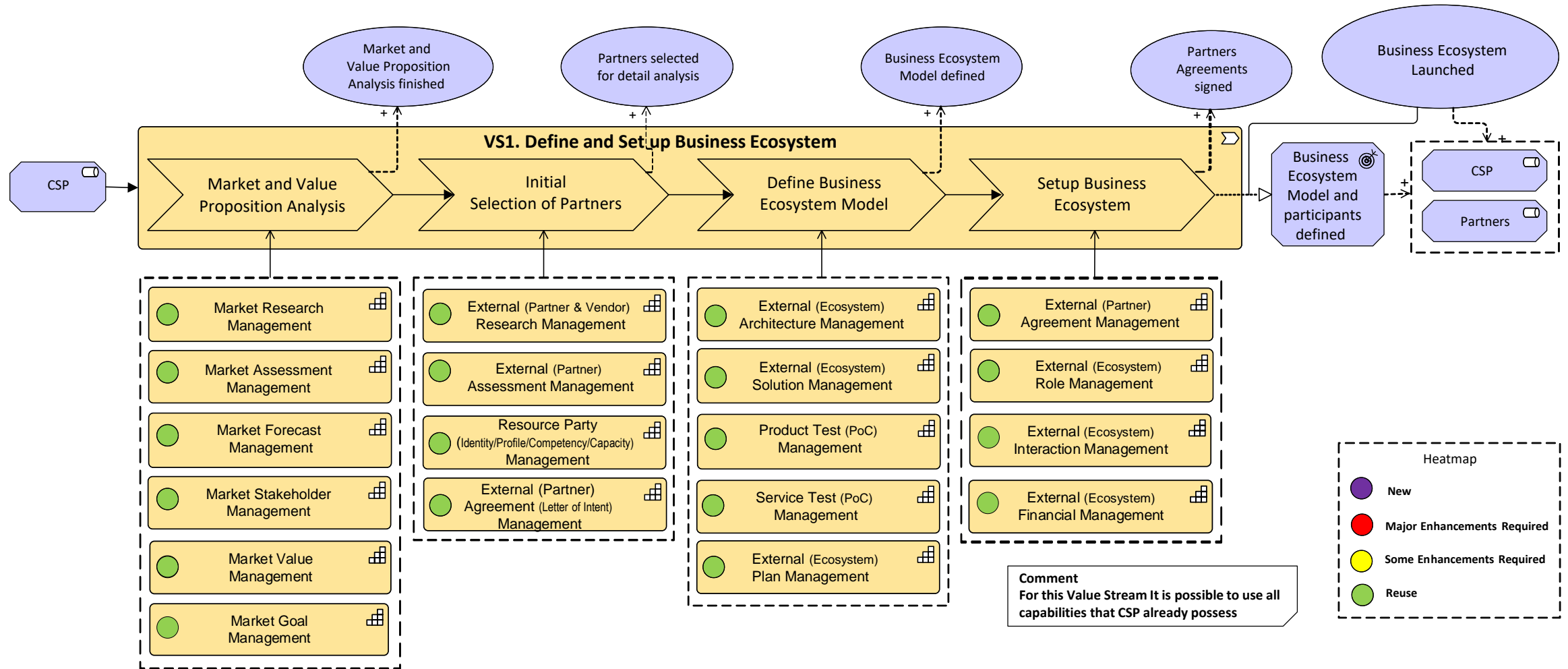
[GB1044 New Value Creation: Concept to Design Framework v2.0.0 | TM Forum](#)

[IG1328 Concept to Design Framework – EV Charging Example v1.0.0 | TM Forum](#)

[IG1328B Concept to Design Framework – Managed Solar Example v2.0.0 | TM Forum](#)

Define and Set up Business Ecosystem

Value Streams cross-mapping with Capabilities



Thank You

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