

# 未來企業，以平台啟動

## Create platforms to unleash Digital Darwinism

—  
Jamie Cattell  
Global Leader, Digital Strategy

think 2019



## 三大重點

## Key take away

面對終端市場的平台正在加速演進及促成各產業的顛覆式破壞

Market facing platforms are accelerating and driving disruption across all industries

籌碼不斷變化。贏者全拿，許多老字號企業也在存亡之秋，特別是在B2C產業

Value pools are changing, winners are taking all and many incumbents risk survival, especially in B2C

企業已無餘裕決定是否要定義平台策略。

沒有選擇，它已成必要選項

Defining a platform strategy is no longer an option – it's an imperative

# 面對市場之商業平台

## What is a market-facing platform business?

Uber



amazon



Vitality

NETFLIX

Tencent



面向終端市場的「**平台商業模式**」，透過促成兩個或更多相互依存的群體（通常是客戶和供應商）之間的交流來創造價值

A market-facing **'platform business model'** creates value by facilitating exchanges between two or more interdependent groups, usually customers & suppliers

面向市場的平台隨需駕馭及建立大型、**可擴展**的用戶網絡與資源

Market facing platforms harness and create large, **scalable networks** of users and resources on demand

這些平台透過**網絡效應**創建社群和市場，允許用戶間進行互動和交易

These platforms create communities & markets with **network effects** that allow users to interact and transact

平台的滲透  
不斷加速中

Platform  
penetration  
is  
accelerating

**\$7T**

2018年全球平台經濟  
的預估市場價值

Estimated market  
value of global  
platform economy in  
2018

**7 years**

頂尖數位平台每年營收  
達10億美元的平均時間

Average time for  
top digital platforms  
to reach revenue of  
\$1B/year

**30%**

2025年數位商業模式  
於全球經濟活動的預估  
占比

Share of global  
economic activity that  
could be driven by  
digital business  
models in 2025

**6 years**

頂尖數位平台每年營收從  
10億美元增加到100億美  
元的平均時間

Average time for the  
same digital platforms to  
scale revenue from \$1B  
to \$10B/year

**70%**

獨角獸新創公司中（估  
值為10億美元以上），  
屬於平台公司的占比

Share of unicorn  
startups (\$1B  
valuation or more) that  
are platform  
companies

遊戲規則正在改變

The rules of the game are changing

籌碼正在顛覆

Value pools are getting disrupted



贏者全拿

Winners take all (or most)



既有優勢不再

Traditional advantage is not enough



# 如何定義平台策略

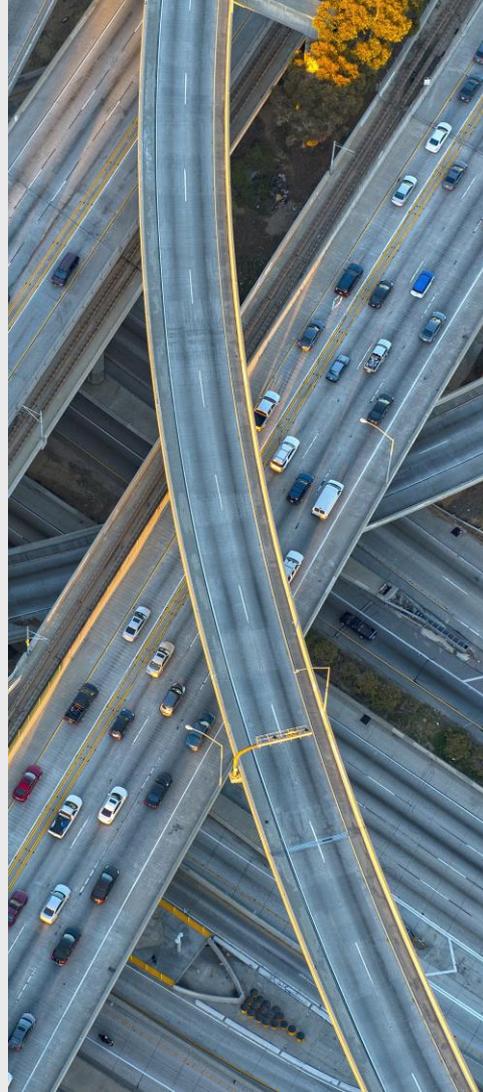
## How to define a platform strategy

1. 何為價值創造策略?  
What is the value creation strategy?
2. 何為傳遞該價值之必要元素?  
What is needed to deliver that value and what are the key components required?
3. 誰是傳遞該價值之團隊/人物/組織?  
Which participants are needed to deliver the value?
4. 平台間的互動應如何被組織起來?  
How should interactions among the platform participants be structured?
5. 該價值如何被掌握 (例: 創造收益)?  
How should the value be captured (e.g., monetization)?

# 1. 決定角色與價值

## Identify the roles and value creation

- 定義產業價值鏈中的角色  
Define the role to play in their industry value chain
- 決定該平台如何為不同成員提供價值  
Identify how the platform will create value for different players (e.g., suppliers, users / buyers, and partners)
- 釐清平台中各利害關係人的角色  
Clarify the role of the stakeholders on the platform



## Uber的平台 如何創造價值

### How Uber's platform creates value



乘客：超值享受  
Superior experience and lower cost for customers



駕駛：直搗需求  
掙得額外收入  
Access to demand and additional income for drivers



企業與股東：盈利  
Fees, revenue streams for Uber and partners

## 2. 定義產生價值的必要元素

Define what is needed to deliver the value

### 搜尋 Search

- Platform provides the functionality of searching for products & services
- User can search for item of interest

### 信任 Trust

- Platform provides feeling of security and enables it with technology (e.g., encrypted)
- Platform provides low-price guarantee
- Users can transact with unfamiliar parties

### 金流交易 Financial transactions

- Platform facilitates transaction and payment
- User saves time / effort and receives favorable prices

### 交付服務或產品 Physical / digital delivery

- Platform provides the buyer with full service for their transaction
- Users get end-to-end service for their purchase

Examples:



### 3. 要找夥伴，或是自己來？

Decide if going  
mostly alone  
or with partners

定義「自建、購買、合夥」  
策略，決定開放與風險承  
擔程度

Define “build, buy,  
partner” strategy and  
determine degree of  
openness and risk  
sharing

協作的選項

Orchestration options:

1. 整合多位合作夥伴以促成  
平台  
Bring together multiple  
partners to enable the  
platform
2. 主導平台協作  
Be the single owner and  
orchestrator of the  
platform

關鍵思考點 Key Considerations

- 能力 Capabilities required
- 資金 Investment needed
- 風險 Risk capacity
- 上市速度以及關鍵大眾 Go-to-market speed  
and critical mass

# 4. 選擇最適平台模式

## Choose the most suitable platform model

Monetization model

### Direct

Subscription or commission based

### Indirect

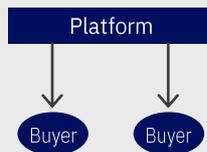
Ad-based, client data, other benefits



## 面對市場之平台原型 Market Facing Platform Archetypes

### Sales / services

- One to many
- Transaction focus



Examples:

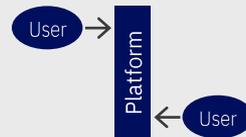
### Marketplace

- Many to many
- Transaction focus



### Peer-to-peer

- Many to many
- Interaction focus



# 5. 發展價值獲取模式

## Finally, develop the value capture model

Monetization model

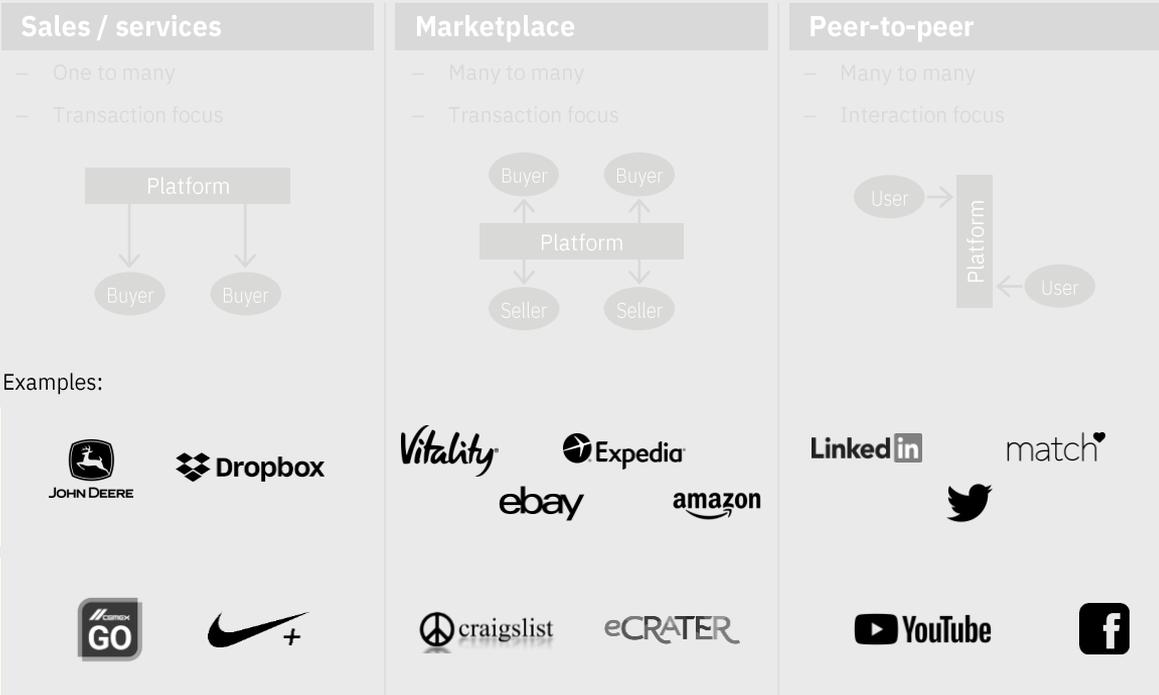
### Direct

Subscription or commission based

### Indirect

Ad-based, client data, other benefits

## 面對市場之平台原型 Market Facing Platform Archetypes



# 打造平台時之常見挑戰

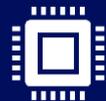
## Typical challenges when building platforms



市場領導者  
Market leadership



側重和客製  
Focus and customization



技術與合作夥伴  
Technology and partnerships



平台價值及用戶採納  
Platform value and adoption



建構平台之資本  
Cash to build platform

# 卓越的平台需要結構化之戰略定義方法

## Platform leadership requires a structured strategy definition approach

### 1. Understand



### 2. Envision



### 3. Design



### 4. Create & scale

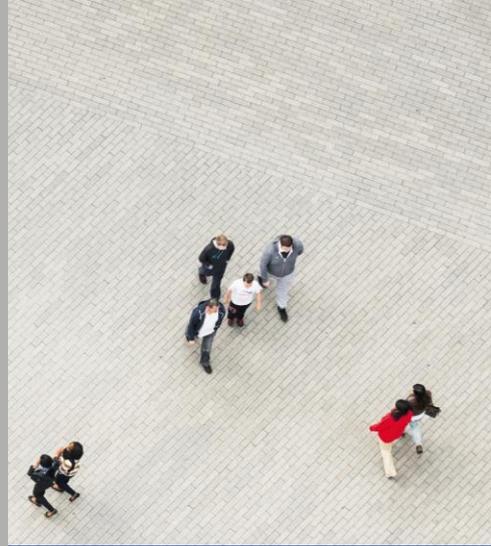


平台將造就數位世界中的贏家和輸家

Platforms will create winners and losers in the digital world

缺乏清楚平台策略者  
即是冒著出局風險

Players that are not  
devising a clear  
platform strategy  
risk being  
outcompeted or  
openly disrupted



**What is  
your  
platform  
strategy?**



# Failed platforms consistently exhibit pitfalls in stakeholder value proposition, inadequate focus, reaching critical mass and



## Failure to engage developers

Limited number of developers and did not create a feedback loop leading to **engagement erosion**



## Failure to share the surplus

Extracted value for auto companies, and left little for the part manufactures, thus **destroying ecosystem**



## Failure to launch the right side

Failed to balance prioritization of users over providers **reducing partner engagement**



## Failure to optimize openness

Allowed any user to post. Openness led to lack of trust and quality, **marginalizing value prop**



## Failure to identify the value proposition

Meant for third-party developers was only used internally or by paid partners due to **improper value communication**



## Failure to put critical mass ahead of money

Focus on platform monetization over user adoption, led to failure driven by **short term immediacy**



## Failure to maintain tech development

Legacy social network platform, was **slow to adopt** and invest in emerging technology spaces



## Failure of imagination

Lost the maps battle when it failed to pivot its focus from physical assets to digital maps, thus **failing to jump the digital chasm**