



# Ecosystem partnerships: Research summary

Advisory Insights

December 2024



GenAI was utilized in the creation of this image

# Overview of partner ecosystem primary research

## Research objectives

**Understand what organizations must do to evolve their ecosystem partnerships to support the strategy and business of the future.**

**Specifically, this survey assessed:**

- What organizations are challenged with today in managing their ecosystems
- How ecosystems are changing for the future
- How organizations should design, architect, and manage their partner ecosystem to drive growth and deliver value

## Methodology

- Defined partner ecosystem as “*Any third party an organization uses to enable and progress strategic and operational objectives, initiatives, and / or programs*”
- Respondent criteria for participation included:



**Geography:**  
US-based



**Industry:**  
Any (except public sector)



**Level:**  
Approx 50% Director/Sr. Director and 50% VP+



**Company Revenue:**  
\$1B+ annually



**Function:**  
Back, middle, and front-office roles



**Role:**  
Decision-maker, leader, influencer in the ecosystem partnerships where the company participates, with a plurality (37%) responsible for establishing and managing partnerships

Note: Fielded a **quantitative survey to 258 respondents** in partnership with GLG

# Our research provides insight into the plans and challenges of organizations to grow their partner ecosystems and drive future value

## Key Takeaways



Partner ecosystems are growing, with almost **50%** exploring new types of partnerships to expand capabilities



Organizations see ecosystems having a significant role in advancing growth strategies



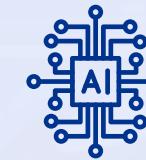
Tech advancements (i.e., AI) and evolving market demands are top drivers of partner ecosystem changes



A top challenge organizations face is aligning goals and expectations among partners



Technology and strategic/business partners both play a significant role in organizations' ecosystems



Nearly **50%** of organizations feel that Gen AI has influenced their ecosystem strategy and planning



Only **36%** of respondents consistently measure ecosystem performance

# Partnerships have surged in the last 3 years, with a majority of respondents experiencing an increase driven by tech advancements and market demands

## How has the number of your organization's partnerships changed over the past 3 years? <sup>(a)</sup>

1 - Significantly decreased

1%

2

1%

3

7%

4 – Neither increased nor decreased

15%

5

47%

6

16%

7 - Significantly increased

13%

## What key factors drove significant changes in your organization's ecosystem? <sup>(b)(c)(d)</sup>

72%



72%



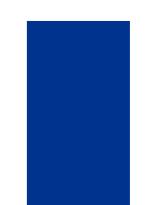
50%



38%



26%



Technological advancements

Evolving market demands

Restructuring or realignment of ecosystem

Mergers and acquisitions

Regulatory changes

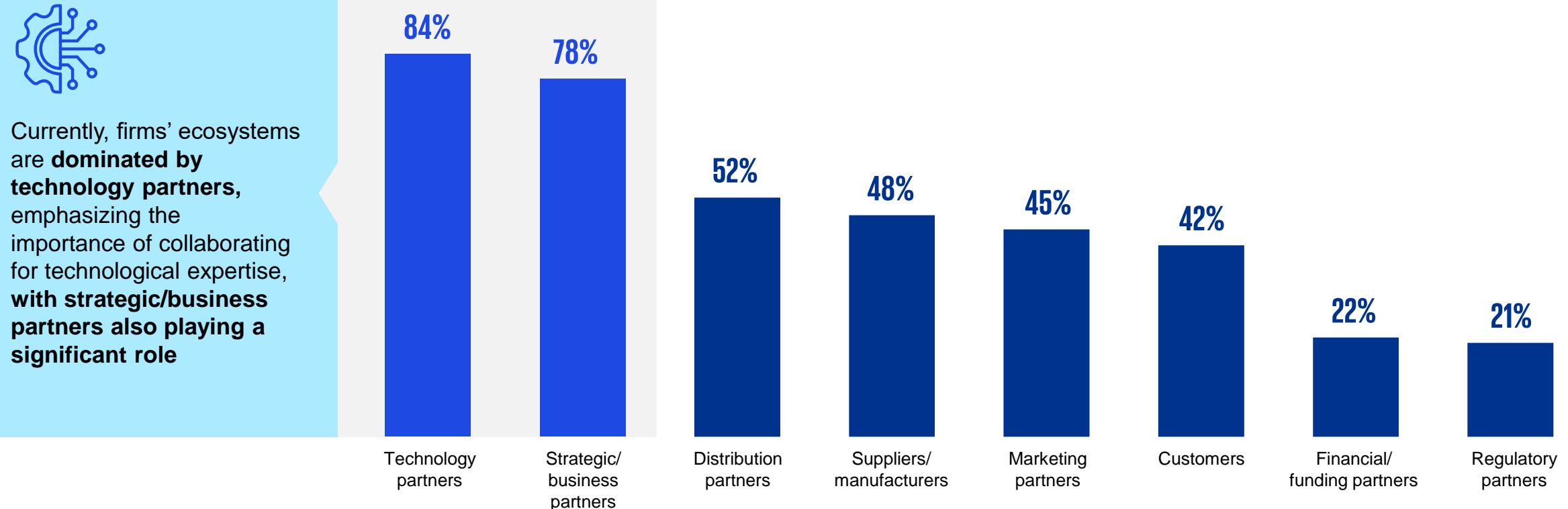
Note(s):

(a) Sum of percentages may not add up to 100% due to rounding off; (b) For respondents who selected 'Neither increased nor decreased' in Q "How has the number of your organization's partnerships changed over the past 3 years", didn't answer this question; (c) Sum of percentages may not add up to 100% as it is a multi-select question; (d) Other, please specify" option is not included in the graphical representation, due to low number of respondents

Source(s): Partner ecosystem survey, Sep 24

# Technology partners dominate firm ecosystems; yet strategic / business partners play a significant role

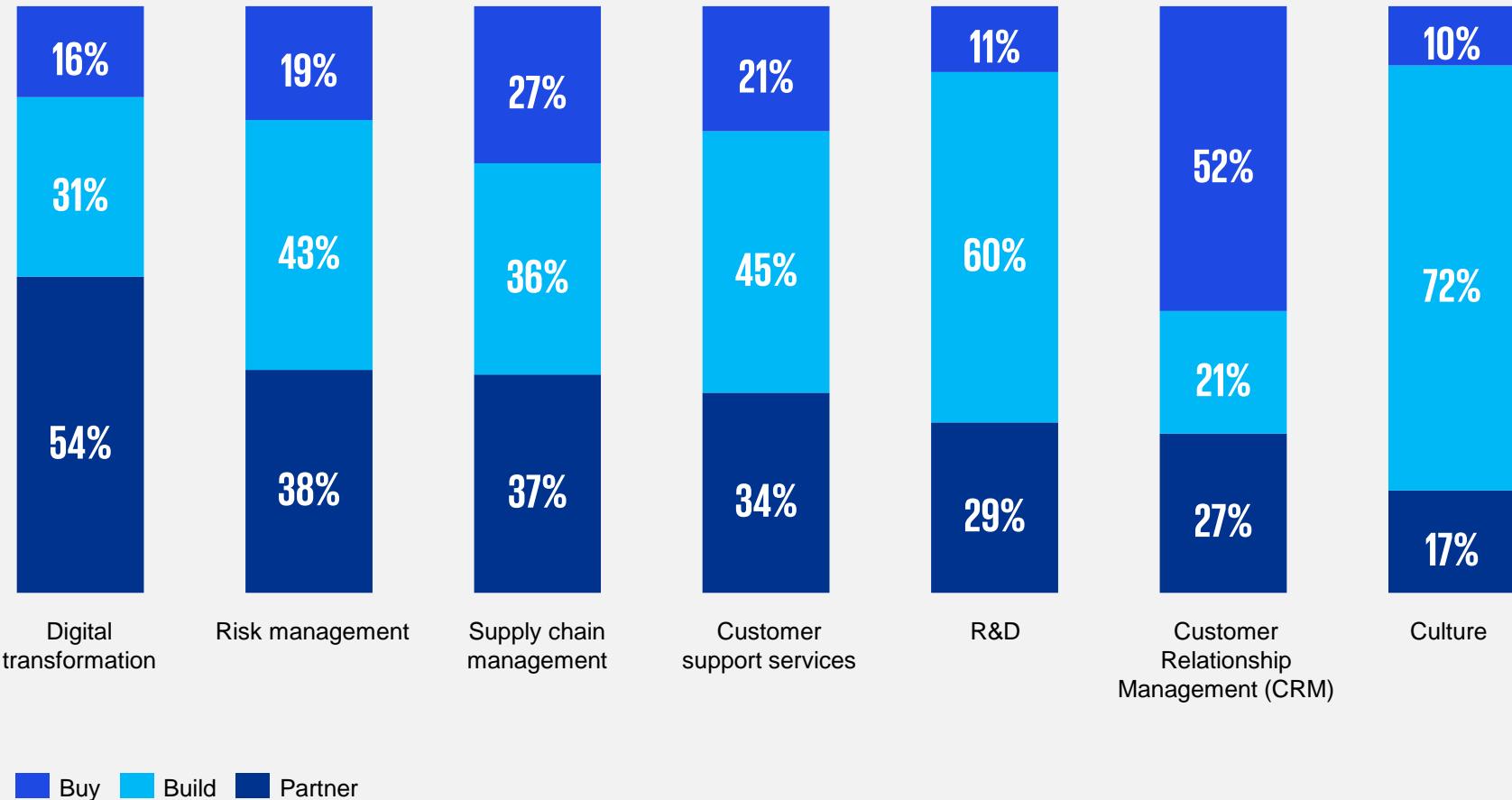
What type of partners are currently part of your ecosystem?<sup>(a)(b)</sup>



Note(s): (a) Sum of percentages may not add up to 100% as it is a multi-select question; (b) Other, please specify" option is not included in the graphical representation, due to low number of respondents  
Source(s): Partner ecosystem survey Sep 24

# Digital transformation is a top capability for partnership, but culture and R&D are leading capabilities that respondents aim to build themselves

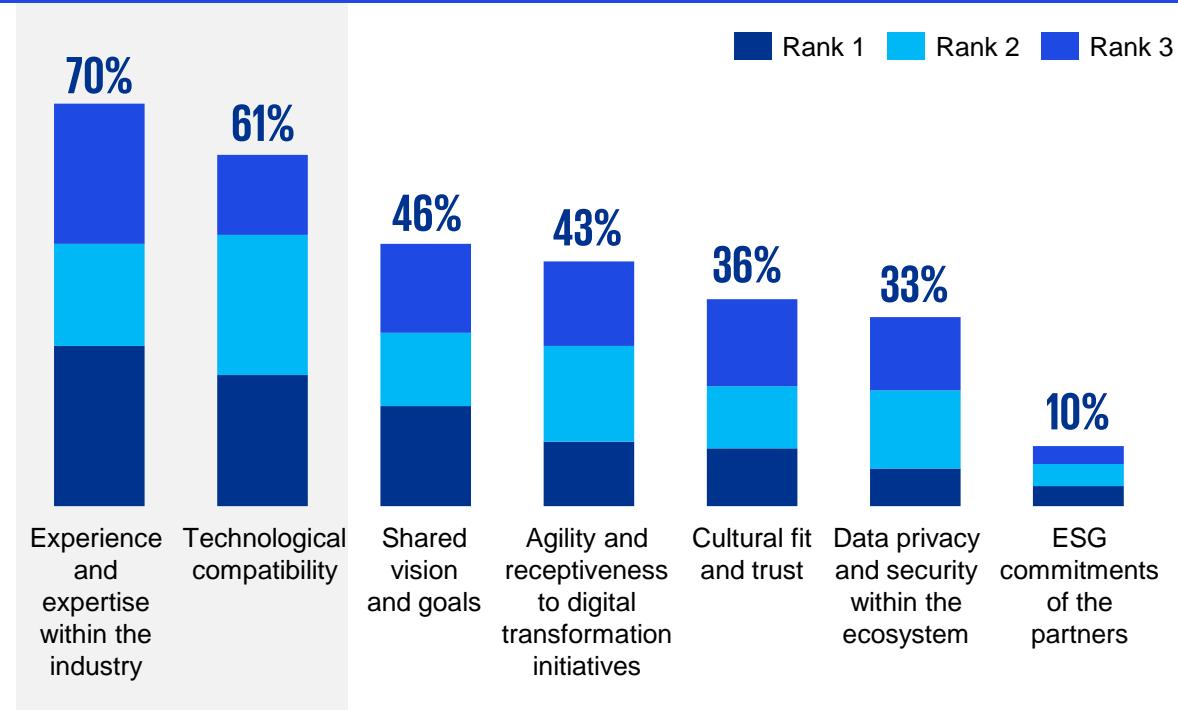
Thinking of the ecosystem you would like to build to achieve objectives for the future, what capabilities need to be...<sup>(a)(b)</sup>



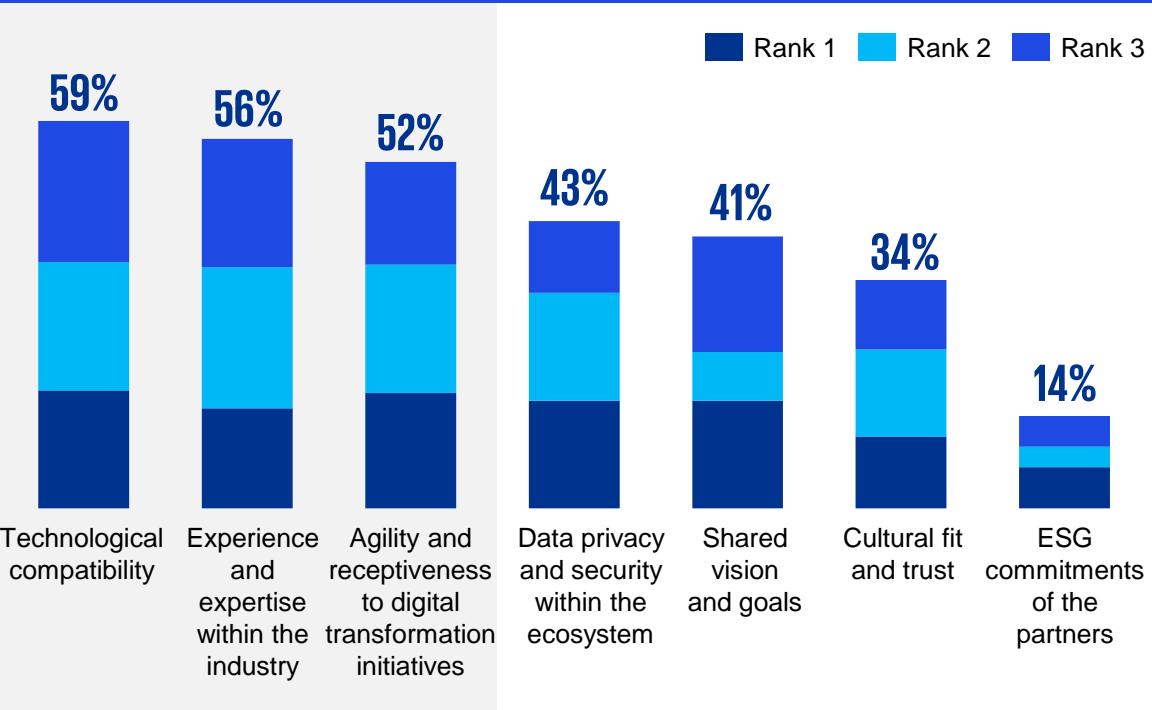
Note(s): (a) Sum of percentages may not add up to 100% due to rounding off; (b) Other, please specify" option is not included in the graphical representation, due to low number of respondents  
Source(s): Partner ecosystem survey, Sep 24

# Current priorities in ecosystem building focus on experience and expertise, but the next 1-3 years will emphasize technology compatibility

## Which partner attributes are currently most important in your ecosystem? <sup>(a,b)</sup>



## Which partner attributes do you anticipate will become more important for your ecosystem in the next 1-3 years? <sup>(a, b)</sup>



Currently, **experience, industry expertise, and technological compatibility** are prioritized by respondents when building their ecosystem



However, in the next 1-3 years, **technological compatibility, industry expertise, agility, and receptiveness to digital transformation** will prove to be more important for ecosystems

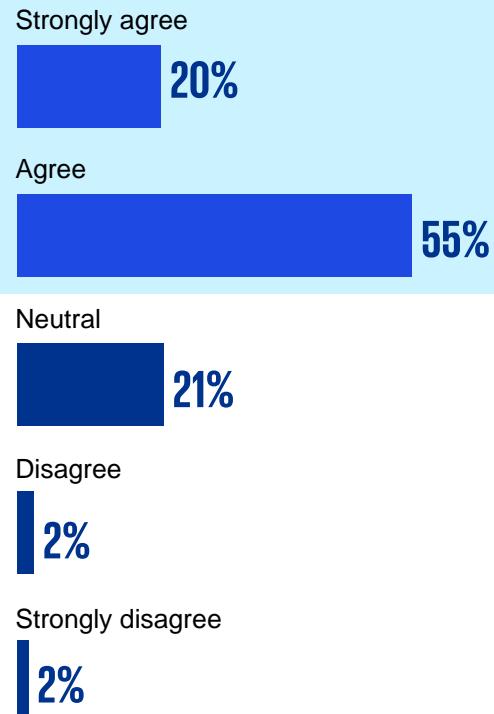
Note(s): (a) Other, please specify" option is not included in the graphical representation, due to low number of respondents (b) Sum of percentages were based on respondents ranking top 3 attributes  
 Source(s): Partner ecosystem survey, Sep 24

# Organizations see ecosystems having a significant role in advancing growth strategies

Please rate your level of agreement with the following statement “Ecosystem partnerships help organizations accelerate their growth strategy”<sup>(c)</sup>



3/4th respondents (75%) agree and recognize the benefits of ecosystem partnerships in accelerating their growth strategies



How do you anticipate your partnerships facilitating strategic growth within your organization's transformation efforts?<sup>(a)(b)</sup>

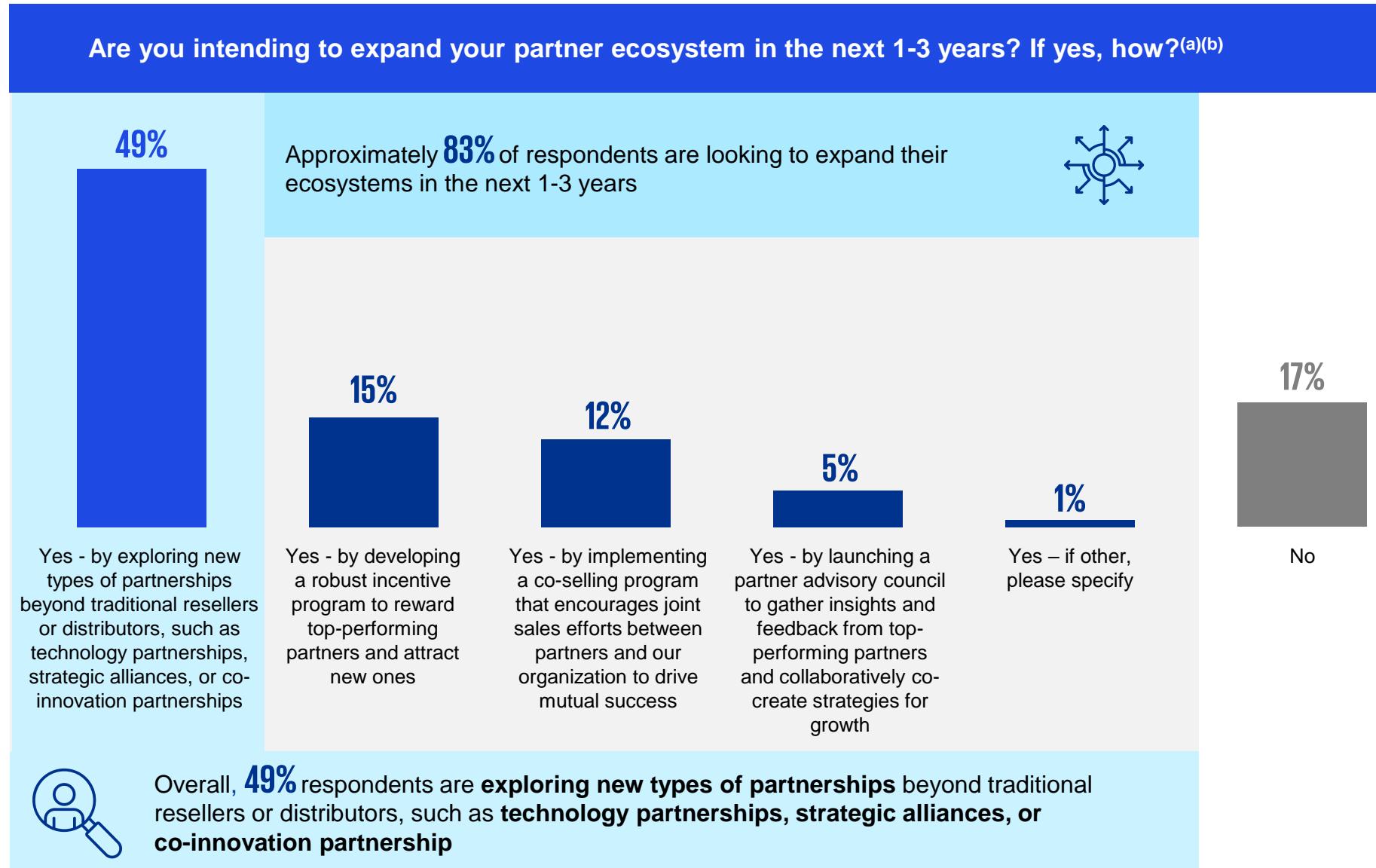
Among “Agree” & “Strongly agree”



Partnerships are seen to effectively navigate industry shifts, enhance innovation and drive transformation by collaborating with industry experts and leveraging their resources, contributing to strategic growth within organizations

Note(s): (a) Sum of percentages may not add up to 100% as it is a multi-select question; (b) Other, please specify" option is not included in the graphical representation, due to zero respondents; (c) Sum of percentages may not add up to 100% due to rounding off  
Source(s): Partner ecosystem survey, Sep 24

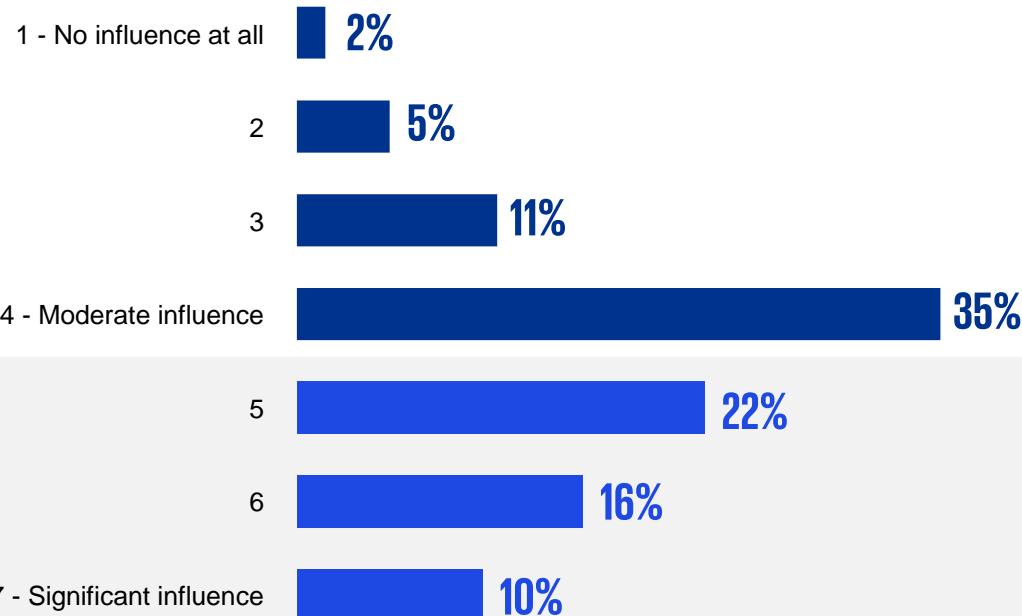
# Organizations are exploring new types of partnerships beyond traditional resellers or distributors to expand their ecosystems in the future



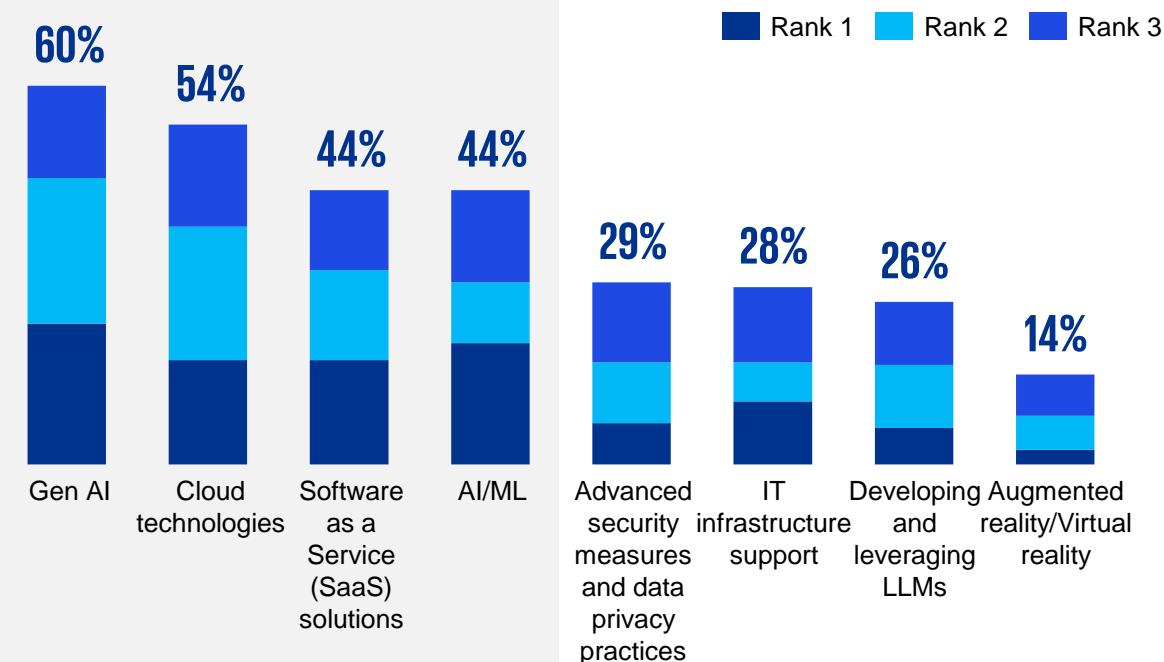
Note(s): (a) Sum of percentages may not add up to 100% due to rounding off; (b) "Yes - if other, please specify" option is not included in the graphical representation, due to low number of respondents  
Source(s): Partner ecosystem survey, Sep 24

# Gen AI has significantly impacted ecosystem strategy and planning, prompting organizations to increasingly depend on partners for Gen AI solutions in the future

To what extent has Generative AI influenced your ecosystem strategy/planning in any manner?<sup>(a)</sup>



In the future, for which technological aspects do you anticipate your organization will increasingly rely on partners?<sup>(b, c)</sup>



48% consider Gen AI to have had an important influence on their ecosystem strategy and planning



Organizations expect to rely more on partners for technological aspects like Gen AI, Cloud technologies, SaaS solutions and AI/ML

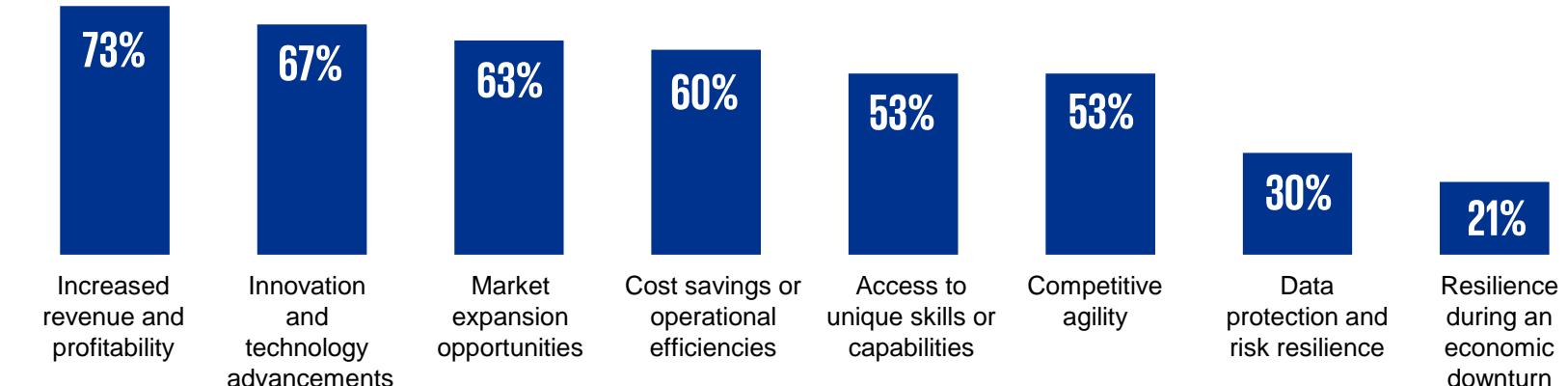
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**Organizations foresee a shift to digital collaboration, AI, and automation in ecosystems, stressing the need for technology, data analysis, and agile decision-making**

**How do you expect your ecosystem partnership will evolve in the next 1-3 years? <sup>(a)(b)</sup>**



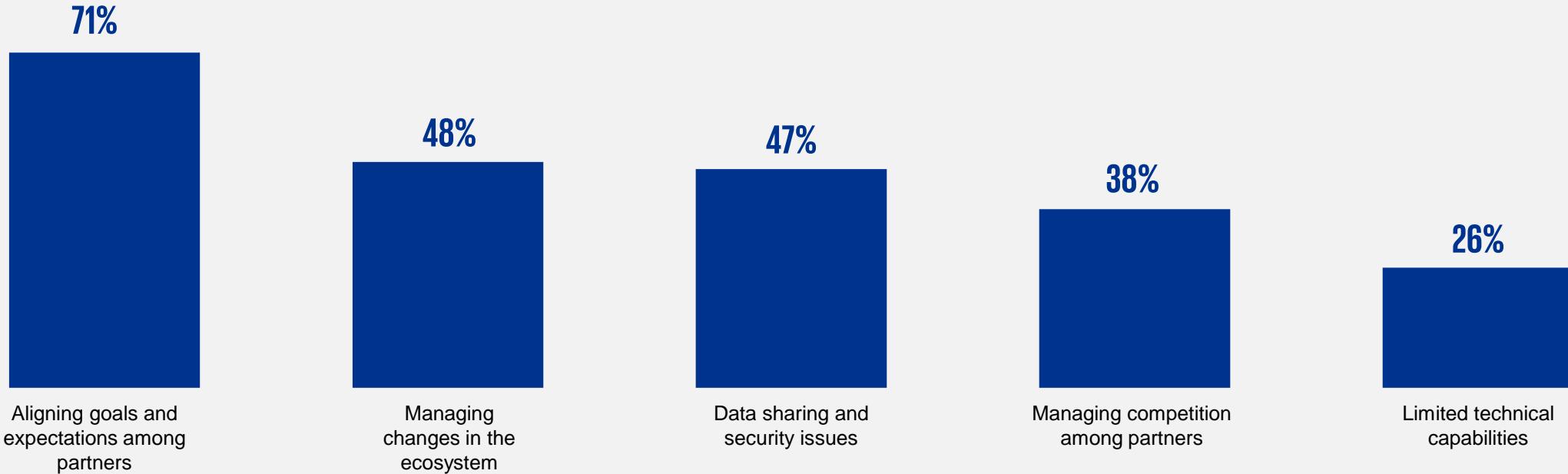
**What are you looking for most from your ecosystem? <sup>(a)(b)</sup>**



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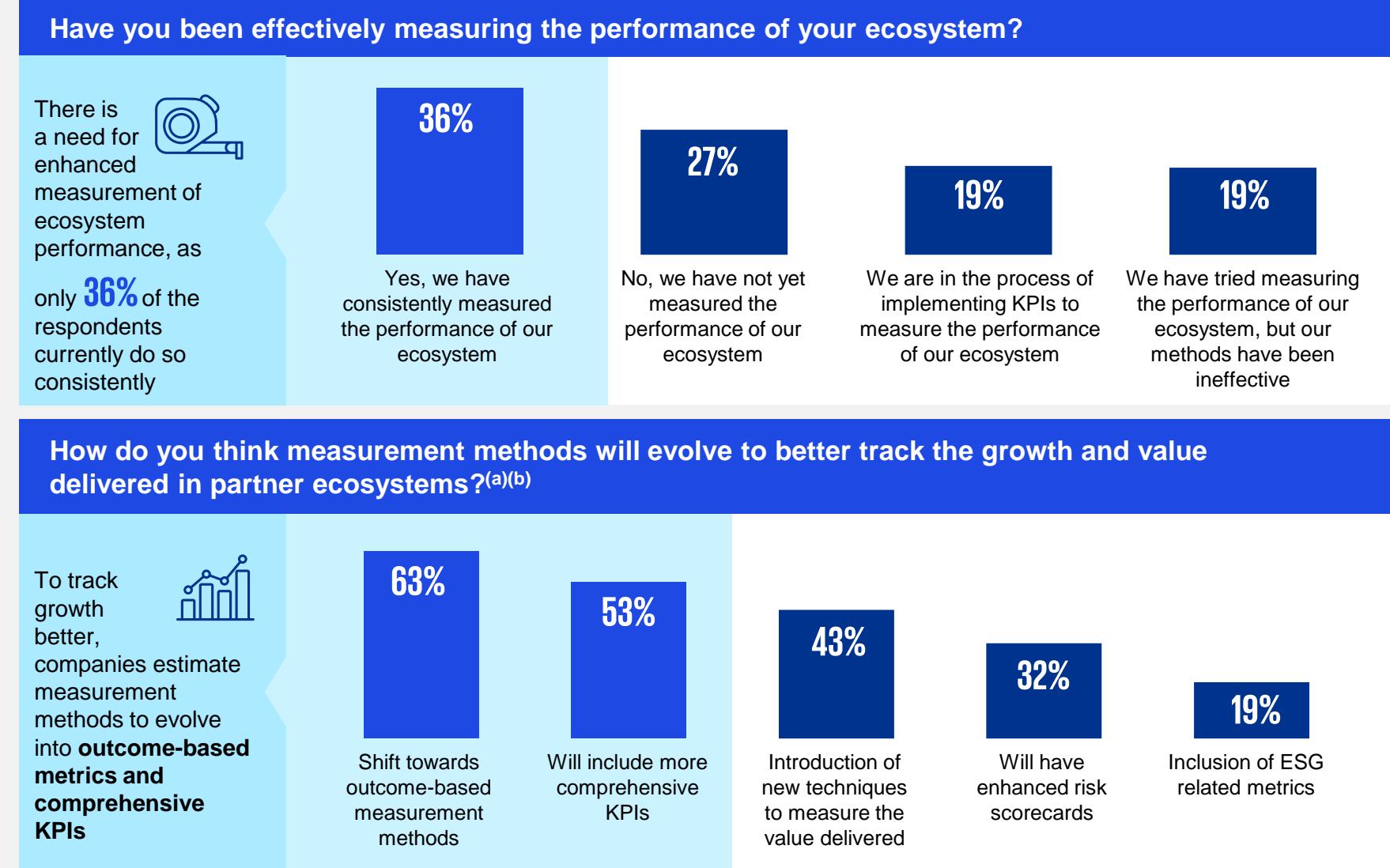
# Organizations are challenged with aligning goals and expectations within their ecosystem partnerships

## What challenges do you face with your partner ecosystem?<sup>(a)</sup>



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Source(s): Partner ecosystem survey, Sep 24

**Only a third of respondents currently measure their ecosystems effectively, highlighting the need for evolved, outcome-based metrics and KPIs for growth tracking**



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