



# Ecosystem partnerships: Research summary

Advisory Insights

December 2024



# 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 assesses:

- 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”
- Fielded a **quantitative survey to 258 respondents** using a double-blind methodology in partnership with GLG
- Respondent criteria for participation included:



**Geography:**  
US-based



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



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



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



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



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

# Our research provides insight as to how organizations are strategizing and architecting partner ecosystems as a future value generator

## Key Takeaways



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

- Firms' ecosystems are dominated by technology partners, emphasizing the importance of collaborating for technological expertise; yet strategic partnerships are almost as commonplace
- **Nearly half** of the respondents are aiming to explore new types of partners to grow their ecosystem in the next 1-3 years



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

- **75%** of respondents agreed and acknowledged the advantages of ecosystem partnerships in expediting their growth strategies
- Increased revenue and profitability was ranked first in priorities for ecosystems, followed by innovation and tech advancements and then market expansion opportunities



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

- Gen AI has had a significant impact on the ecosystem strategy and planning, with **48%** stating a somewhat influential effect
- In the next 1-3 years, there will be increased focus on expanding digital collaboration and virtual ecosystems, as well as increasing the utilization of AI and automation capabilities



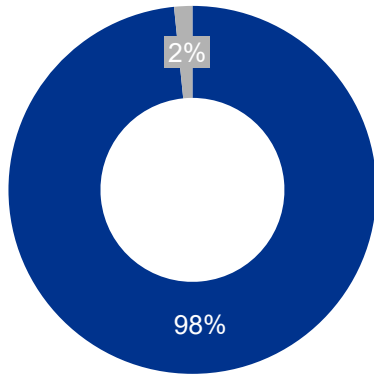
### A top challenge organizations' face is aligning goals and expectations among partners

- **71%** of organizations are challenged with aligning goals and expectations among partners
- **Only 36%** of respondents consistently measure ecosystem performance

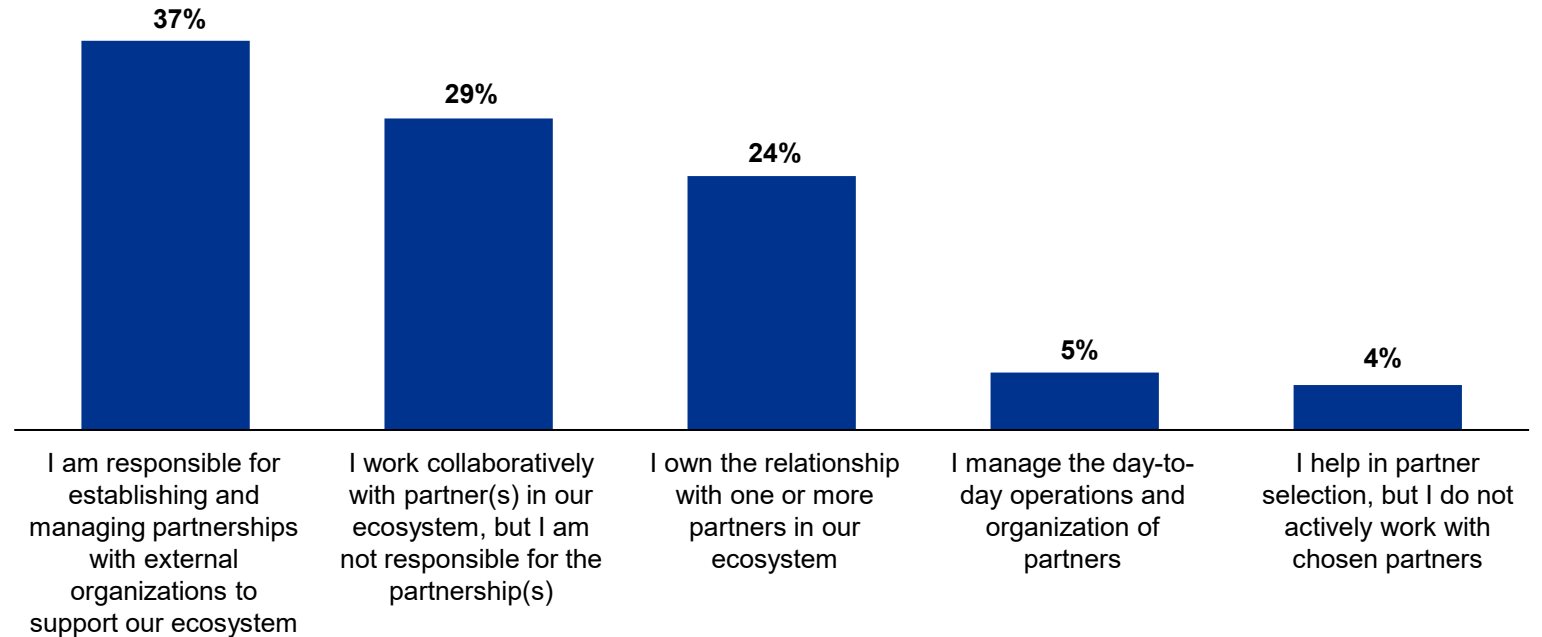
# Almost all respondents currently have an ecosystem in place

Does your organization currently have an ecosystem of partnerships in place?<sup>(a)</sup>

■ Yes  
■ No



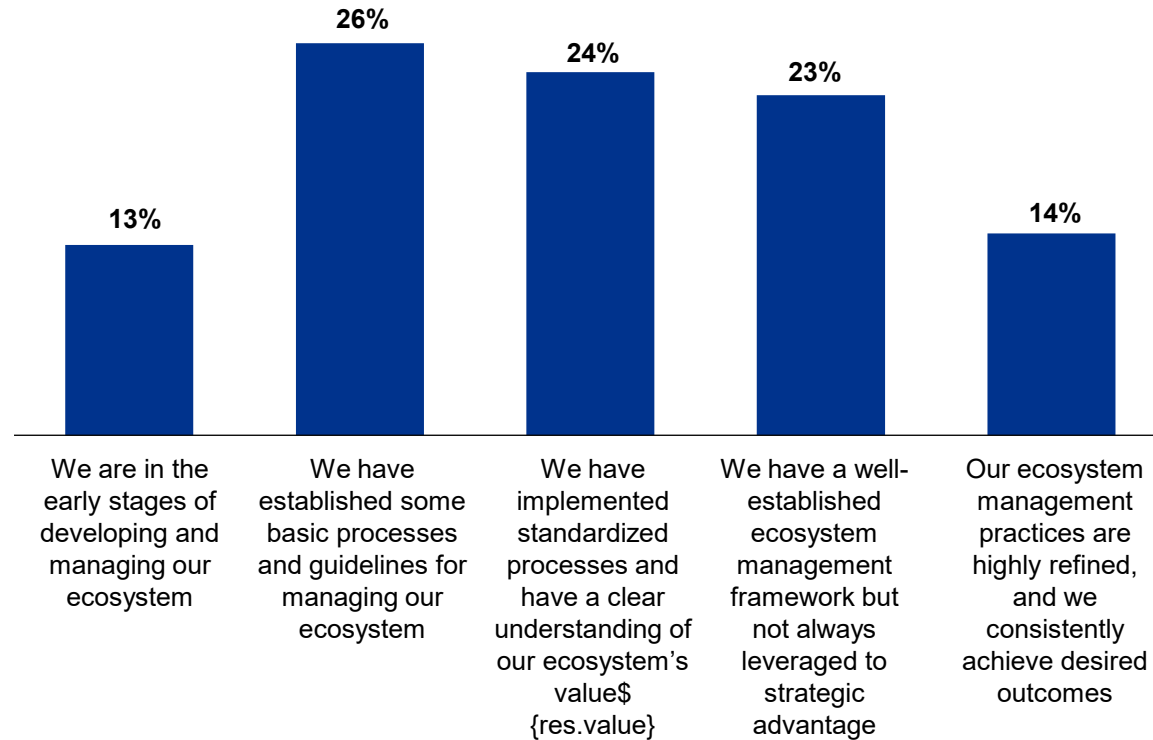
How would you describe your role in the ecosystem partnerships within your organization?<sup>(a)</sup>



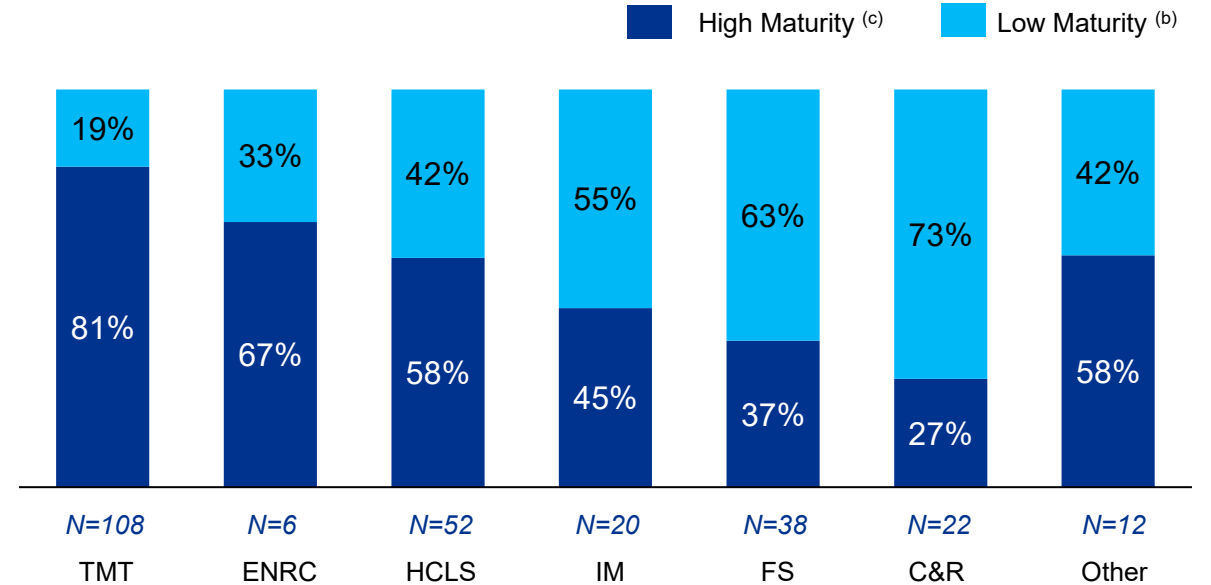
Note(s): (a) Sum of percentages may not add up to 100% due to rounding off  
Source(s): Partner ecosystem survey, Sep 24

# Most respondents are somewhat mature in managing their partner ecosystems

How mature is your organization in managing your ecosystem?<sup>(a)</sup>



Sectors' maturity view (Crosscut of QS1 and QS7 in screeners)

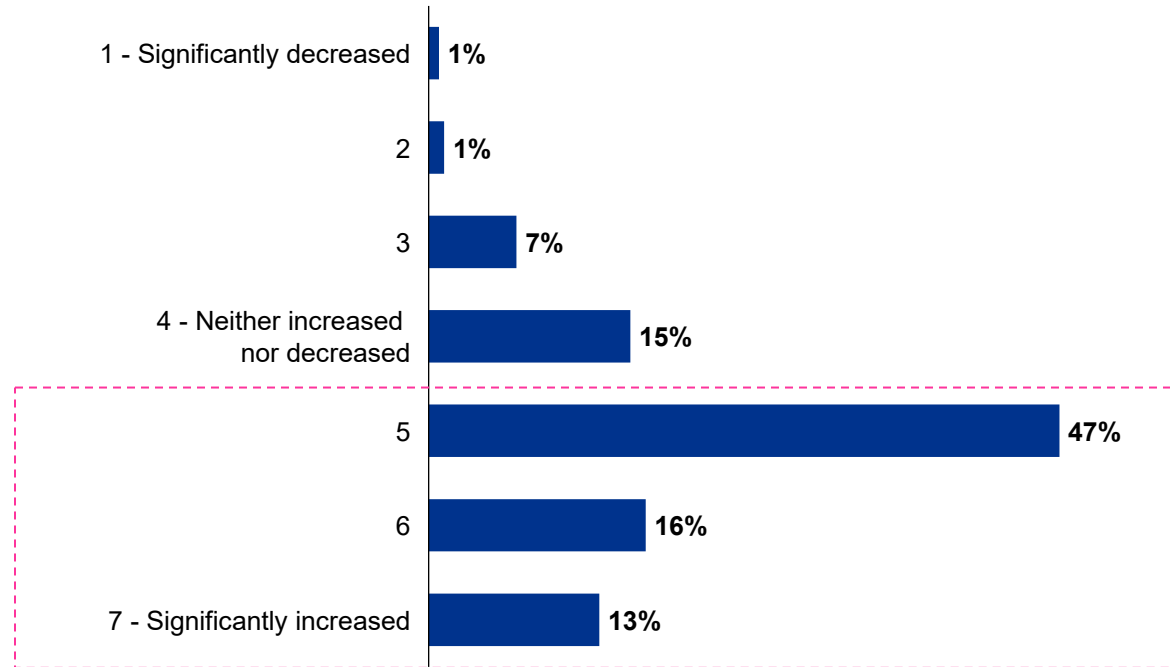


Note(s): (a) Sum of percentages may not add up to 100% due to rounding off; (b) Low maturity includes respondents who selected "We have not thought about formalizing our ecosystem + We are in the early stages of developing and managing our ecosystem + We have established some basic processes and guidelines for managing our ecosystem"; in S7 screener question; (c) High Maturity includes respondents who selected " We have implemented standardized processes and have a clear understanding of our ecosystem's value + We have a well-established ecosystem management framework but not always leveraged to strategic advantage + Our ecosystem management practices are highly refined, and we consistently achieve desired outcomes" in S7 screener question

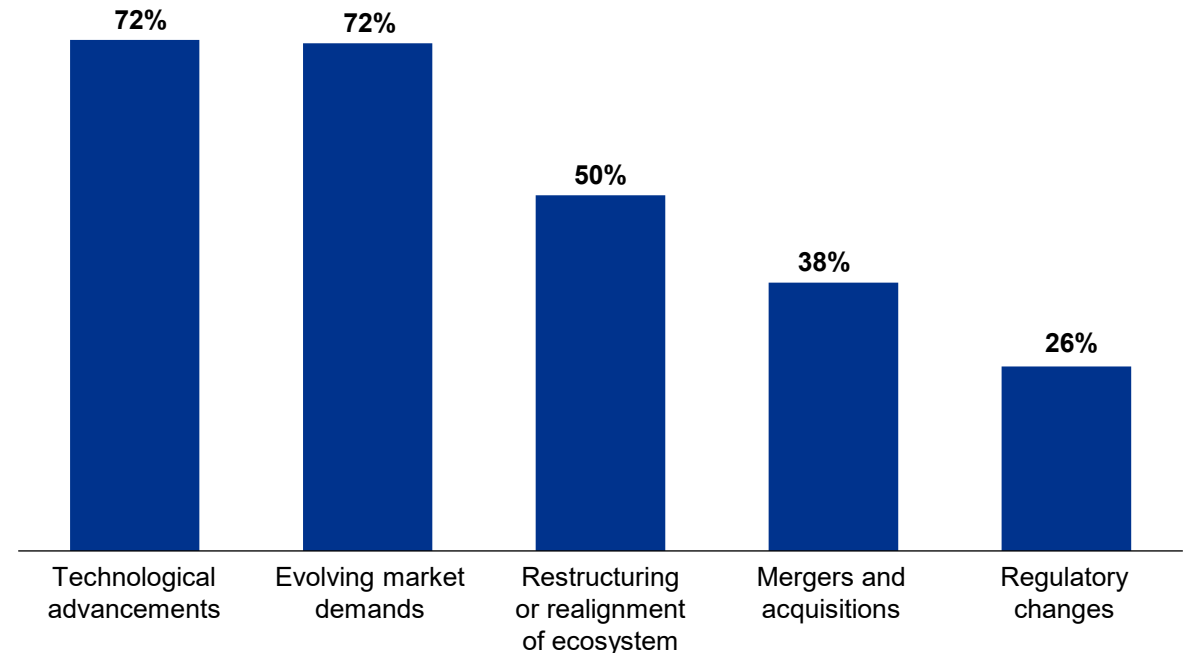
Source(s): Partner ecosystem survey, Sep 24

# Partnerships have surged in the last 3 years, 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>



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



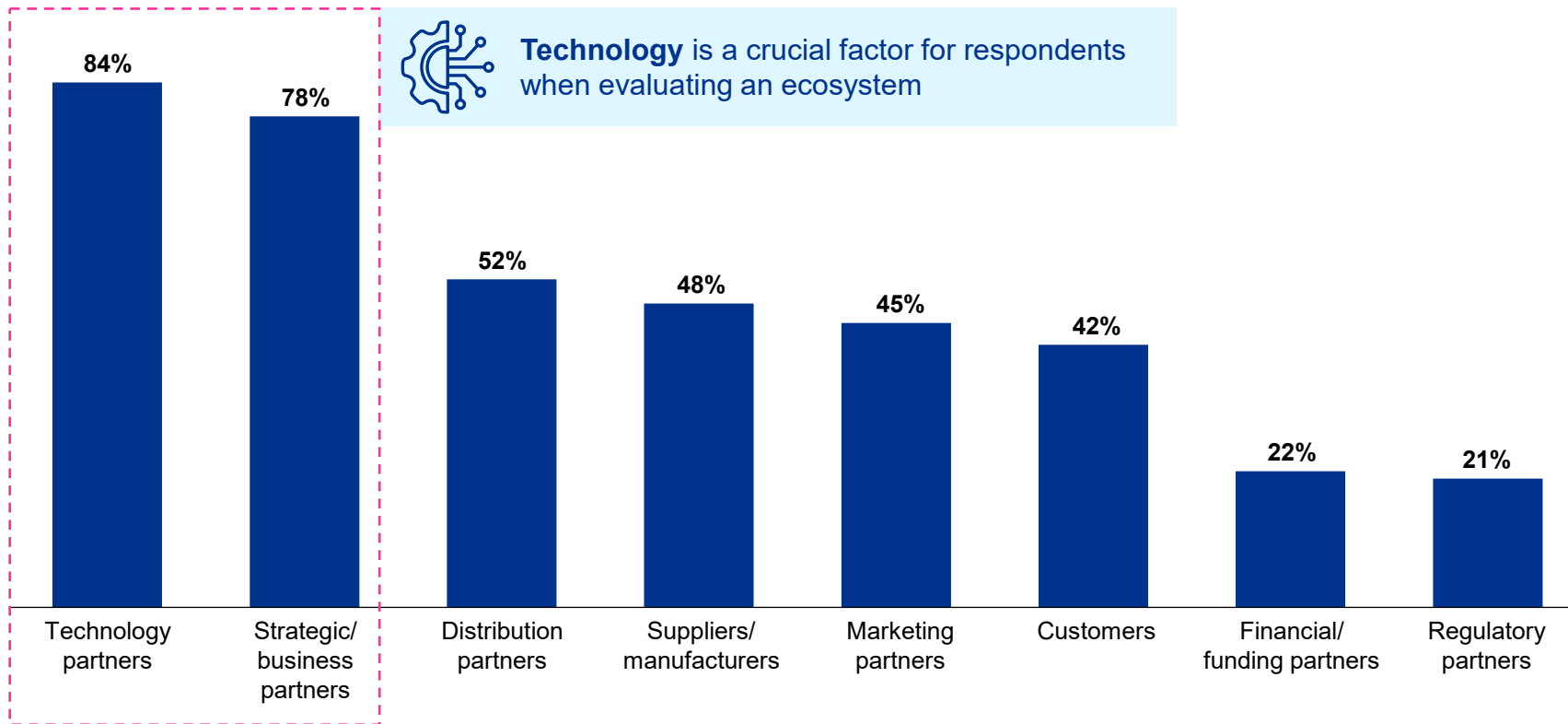
Respondents have witnessed a surge in partnerships in the last 3 years, with roughly **3/4th** experiencing an increase **driven by evolving market demands/disruptions and technological advancements**

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>



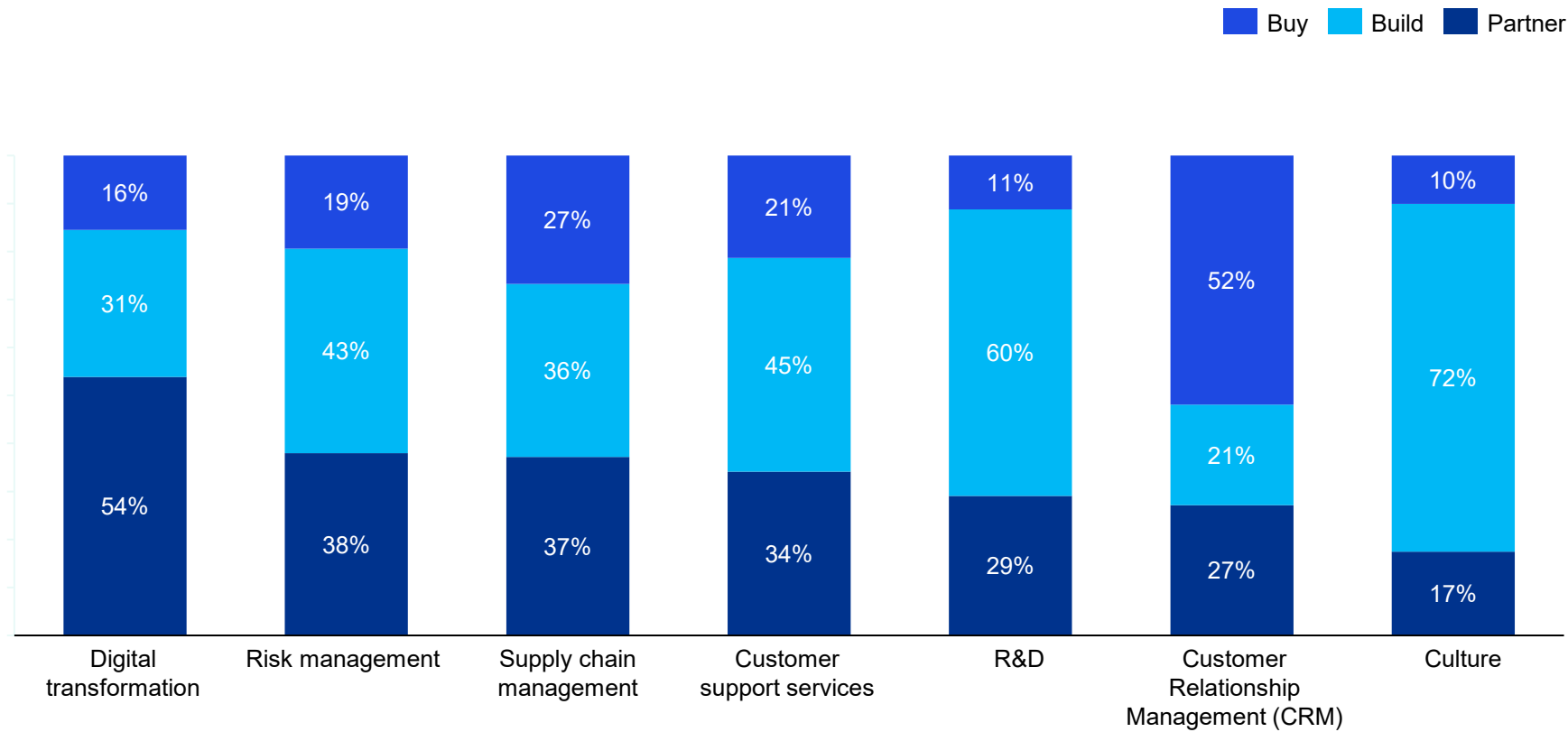
## Key observations:

- Currently, firms' ecosystems are dominated by **technology partners**, emphasizing the importance of collaborating for technological expertise, with **strategic/business partners** also playing a significant role
- Partnerships with **regulatory bodies** and **financial/funding partners** are less common at **21%** and **22%** respectively

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>



**Key observations:**

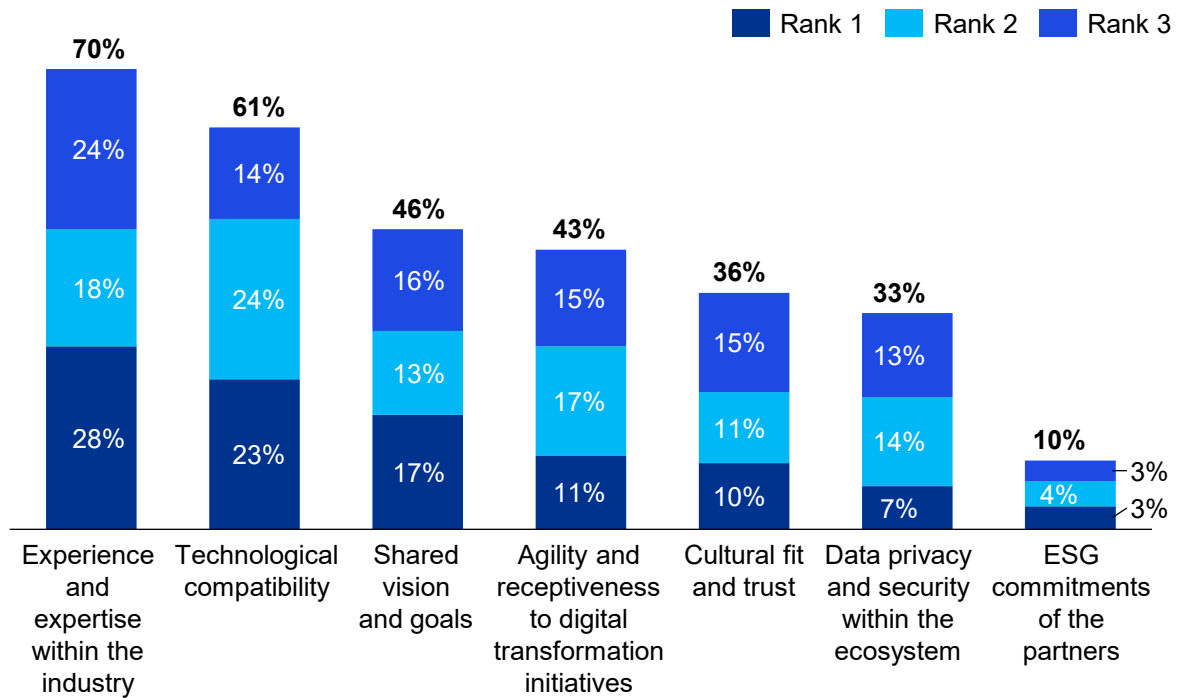
“Digital transformation” (54%), emerged as the top capability that organizations intend to partner on, while “Culture” (72%) and R&D (60%) were the top capabilities that firms intend to build themselves to achieve objectives for the future

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 Source(s): Partner ecosystem survey, Sep 24

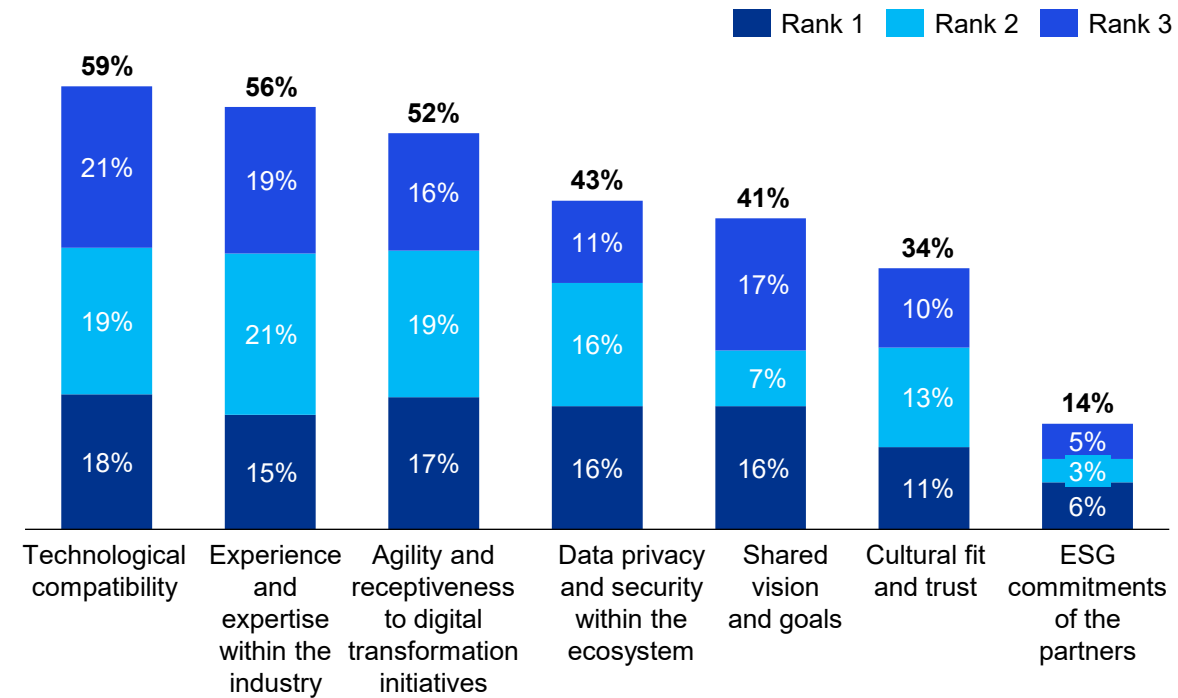


# Current priorities in ecosystem building focus on experience and expertise, but the next 1-3 years will emphasize technological compatibility

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



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



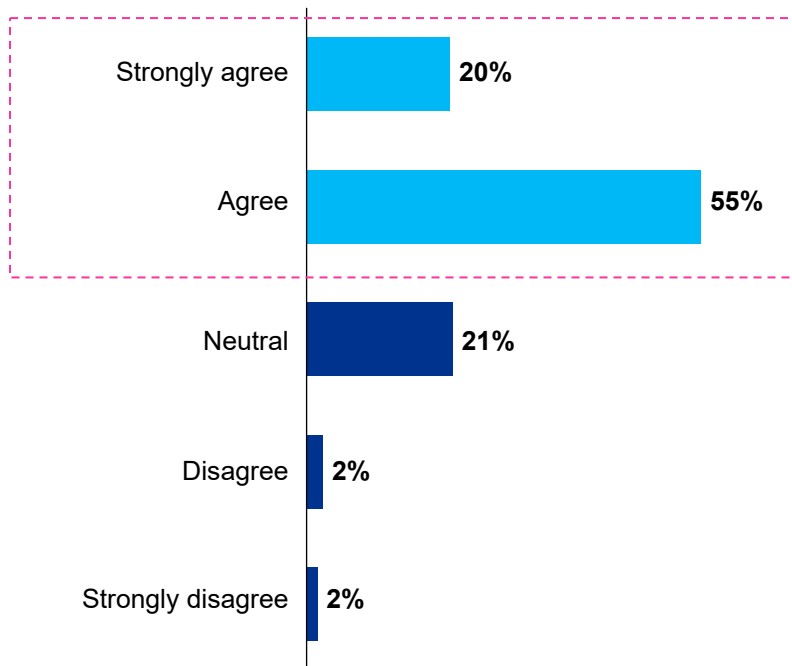
Currently, **experience, industry expertise, and technological compatibility** are prioritized by respondents when building their ecosystem

- 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  
 Source(s): Partner ecosystem survey, Sep 24

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

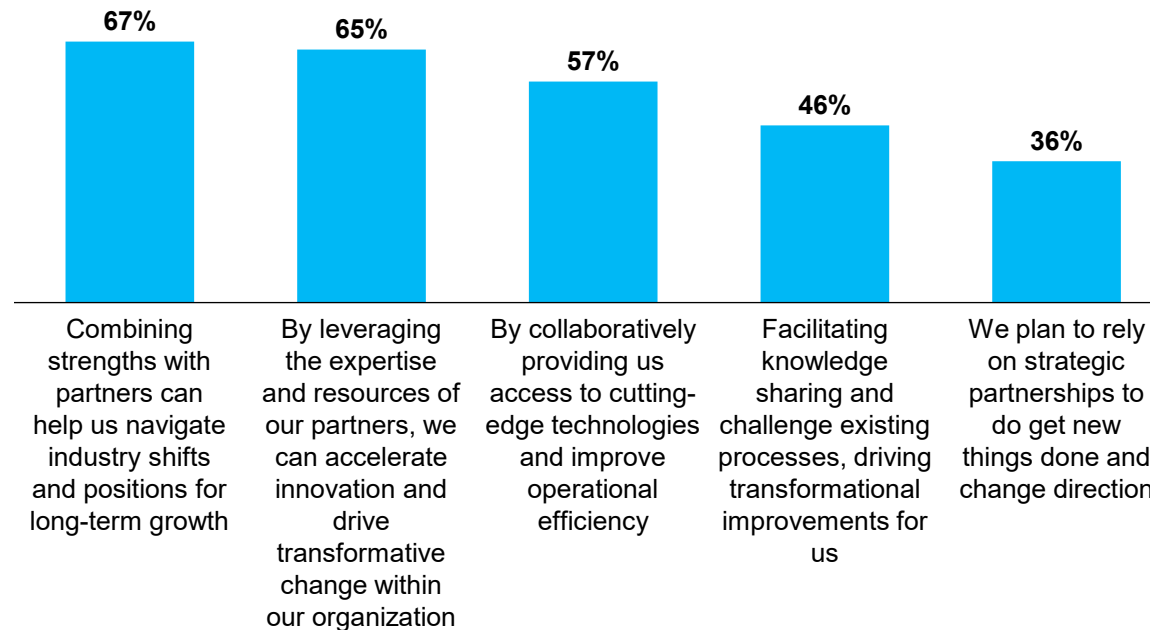
Please rate your level of agreement with the following statement “Ecosystem partnerships help organizations accelerate their growth strategy”<sup>(c)</sup>



Among “Agree” & “Strongly agree”



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



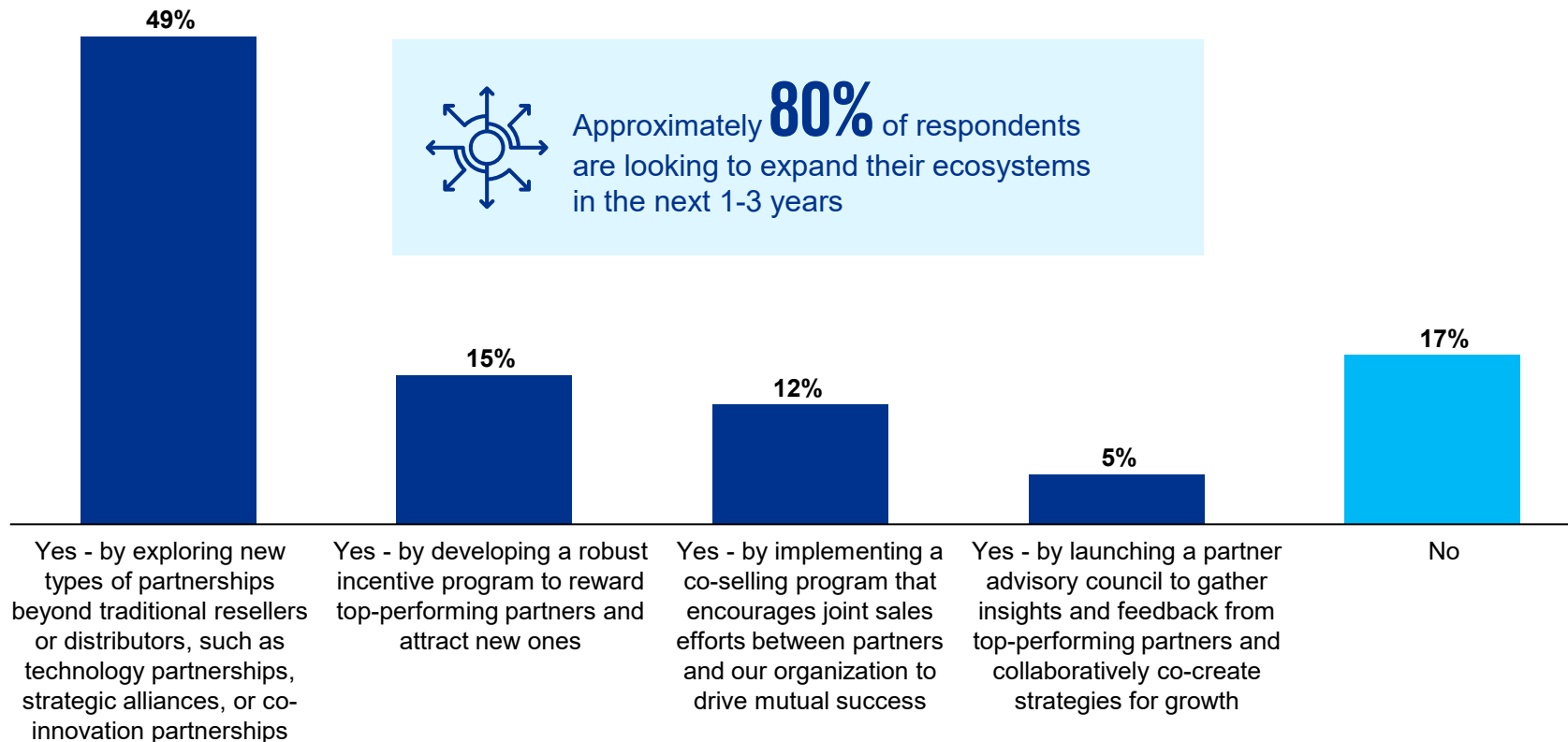
**3/4th** respondents (**75%**) agree and recognize the benefits of ecosystem partnerships in accelerating their growth strategies

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

Are you intending to expand your partner ecosystem in the next 1-3 years? If yes, how?<sup>(a)(b)</sup>



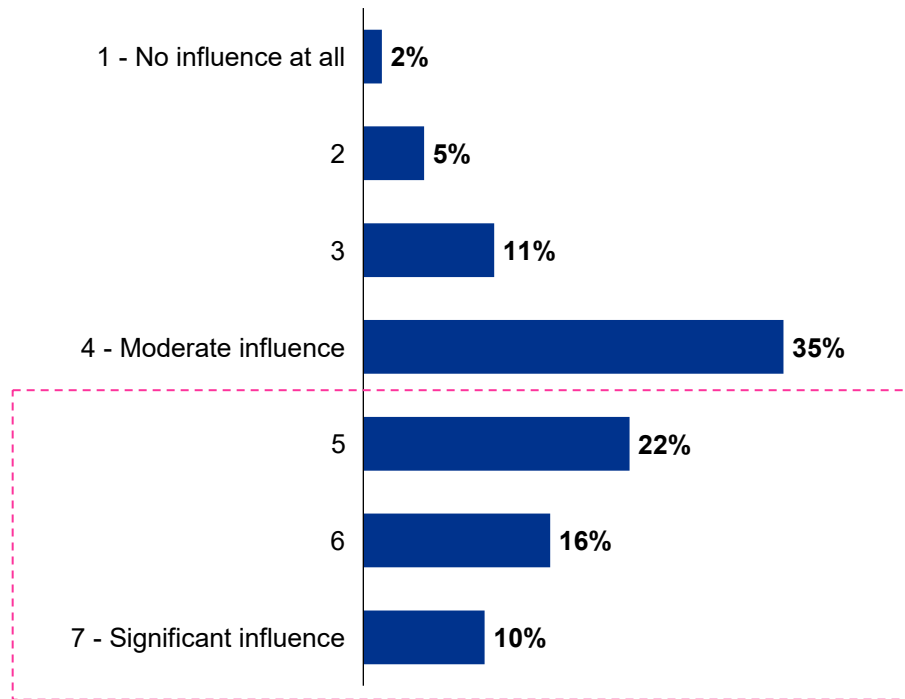
## Key observations:

Overall, 49% respondents are exploring new types of partnerships beyond traditional resellers or distributors, such as technology partnerships, strategic alliances, or co-innovation partnership

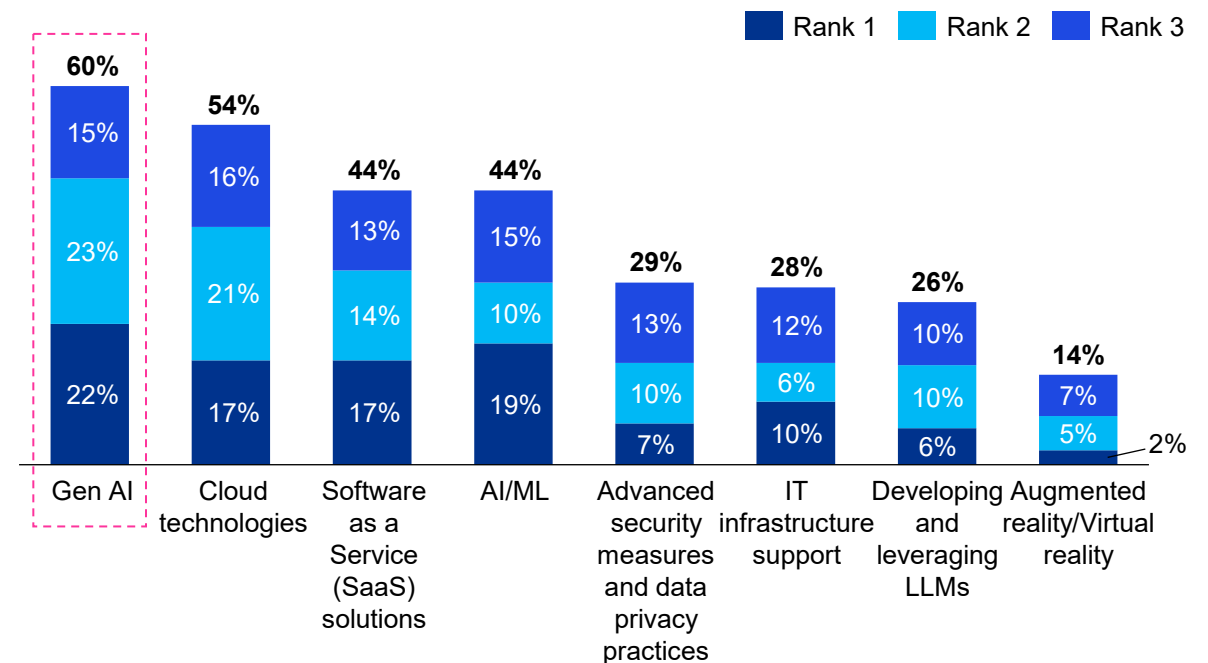
Note(s): (a) Sum of percentages may not add up to 100% due to rounding off; (b) "Yes - if other, please specify" option is not included in the graphical representation, due to low number of respondents  
 Source(s): Partner ecosystem survey, Sep 24

# 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)</sup>



**Gen AI has had a significant impact** on the ecosystem strategy and planning of respondents, with **48%** stating a **somewhat influential effect**

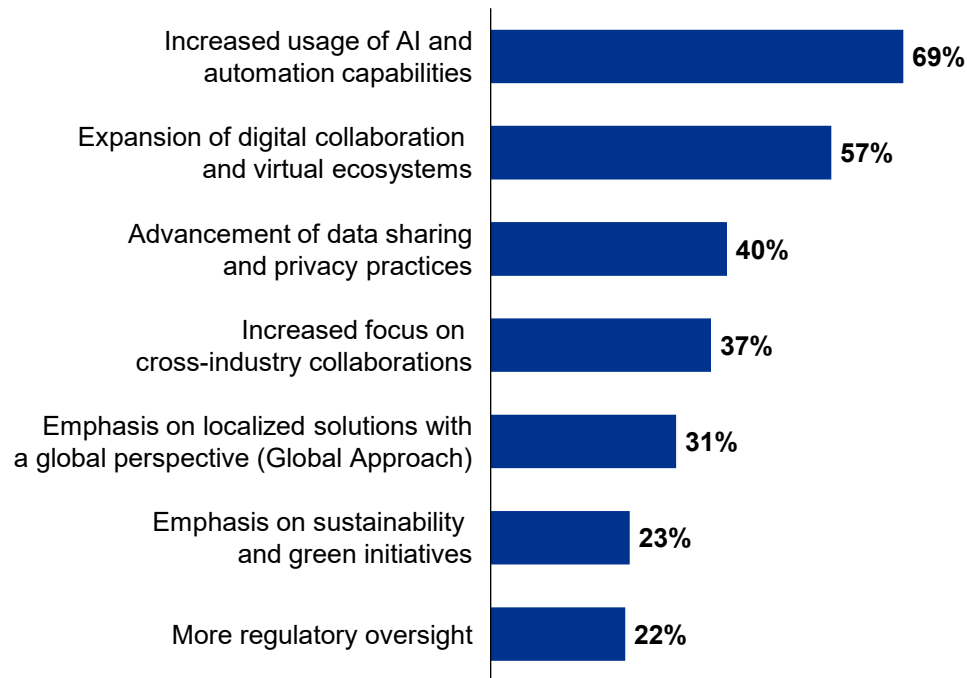
- Hence, in the future, organizations are expected to rely more on partners for **technological aspects like Gen AI, Cloud technologies, SaaS solutions and AI/ML**

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



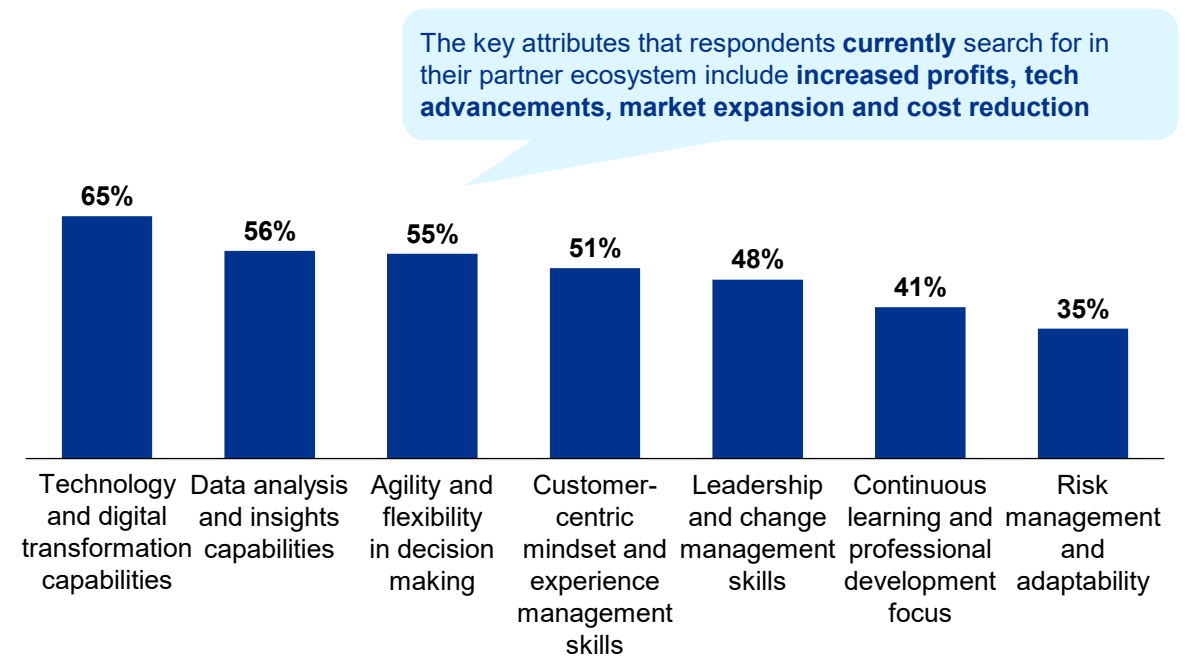
# Organizations foresee a shift to digital collaboration, AI, and automation in ecosystems, stressing the need for technology, data analysis, and agile decision-making

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



Respondents expect their ecosystem partnerships to evolve in the next 1-3 years, with increased **usage of AI and automation capabilities and a growing focus on expanding digital collaboration and virtual ecosystems**

What are the capabilities that the business needs to develop in the future, specifically for the trajectory of a transformation?<sup>(a)(b)</sup>

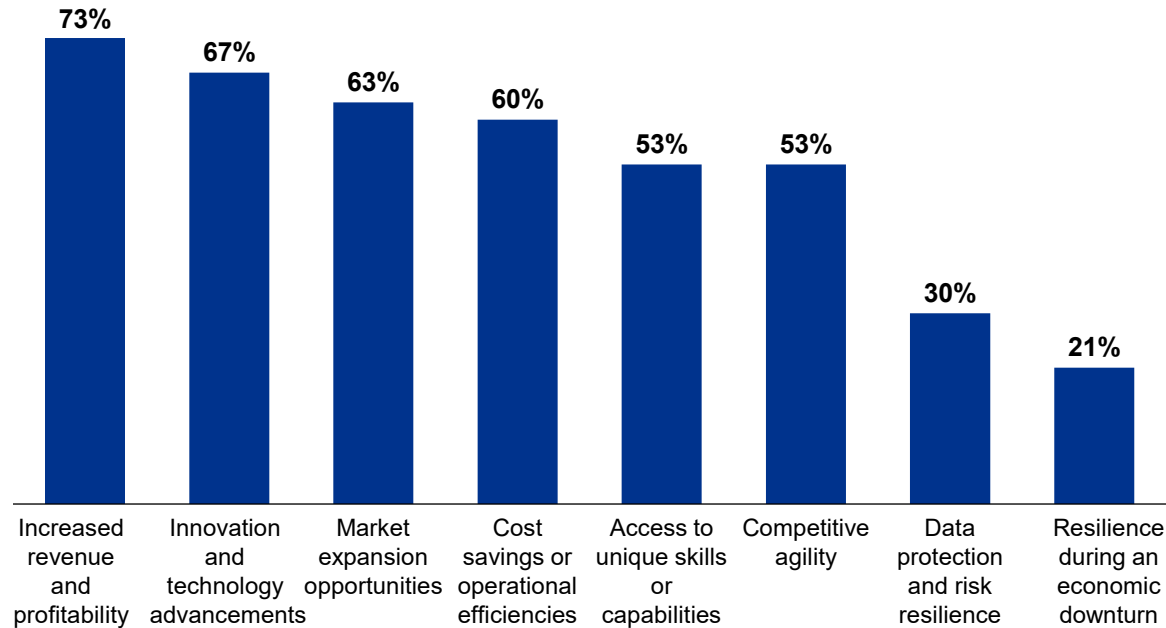


In order to thrive in future business transformations, respondents emphasize the importance of **developing capabilities in technology and digital transformation, data analysis and insights, and agile and flexible decision-making**

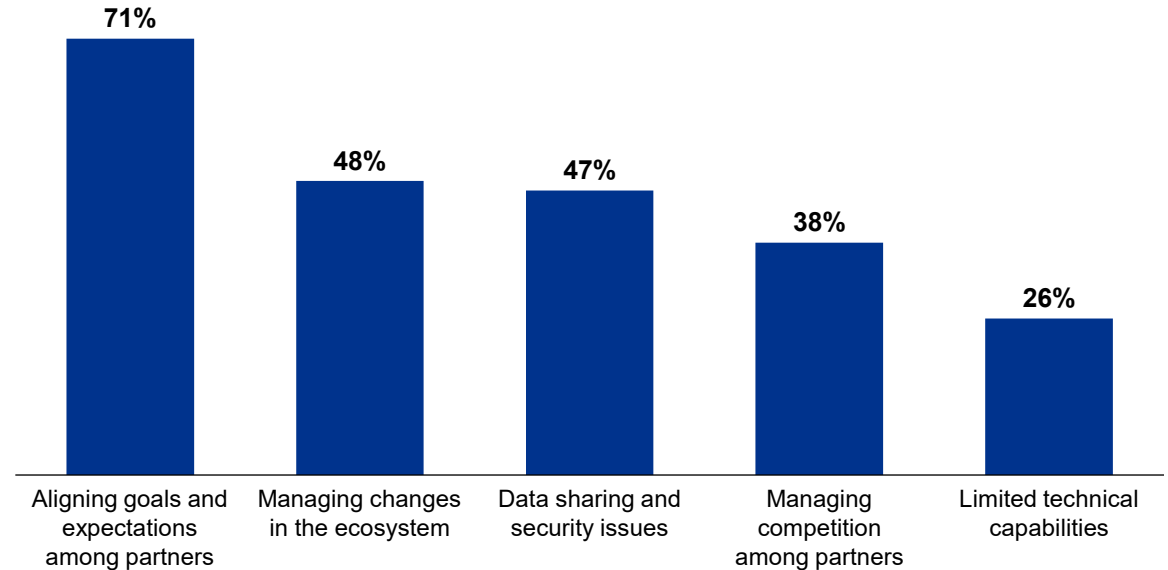
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 Source(s): Partner ecosystem survey, Sep 24

# Top ecosystem challenges include goal alignment and change management, with partners prioritizing profit, technology progress, and market expansion

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



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

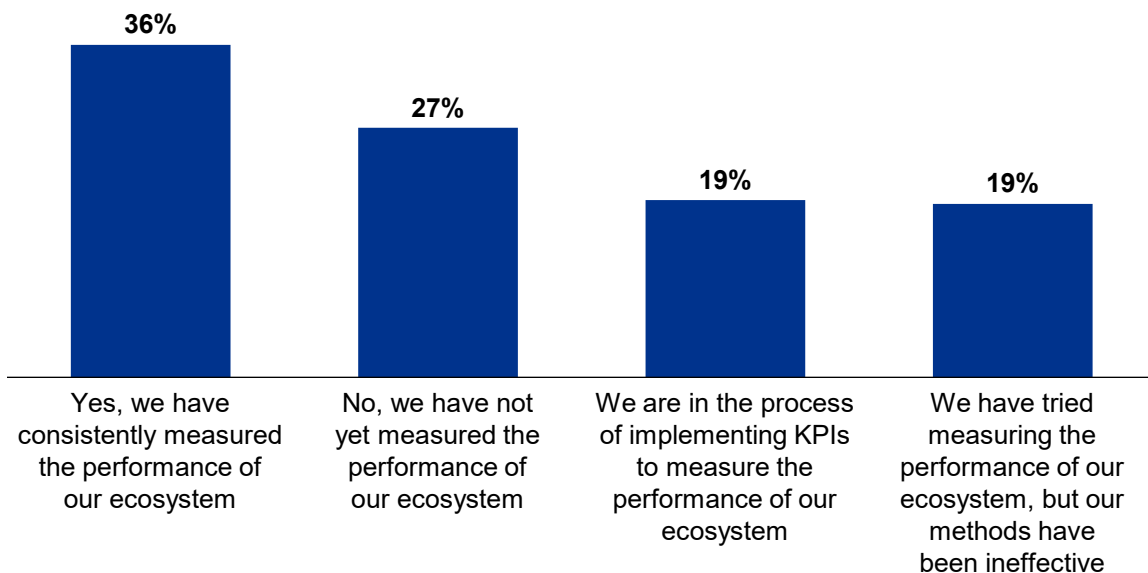


The key challenge faced within the partner ecosystem is **aligning goals and expectations among partners (71%)**, while the key attributes that respondents search for in their partner ecosystem include **increased profits, tech advancements, market expansion** and **cost reduction**

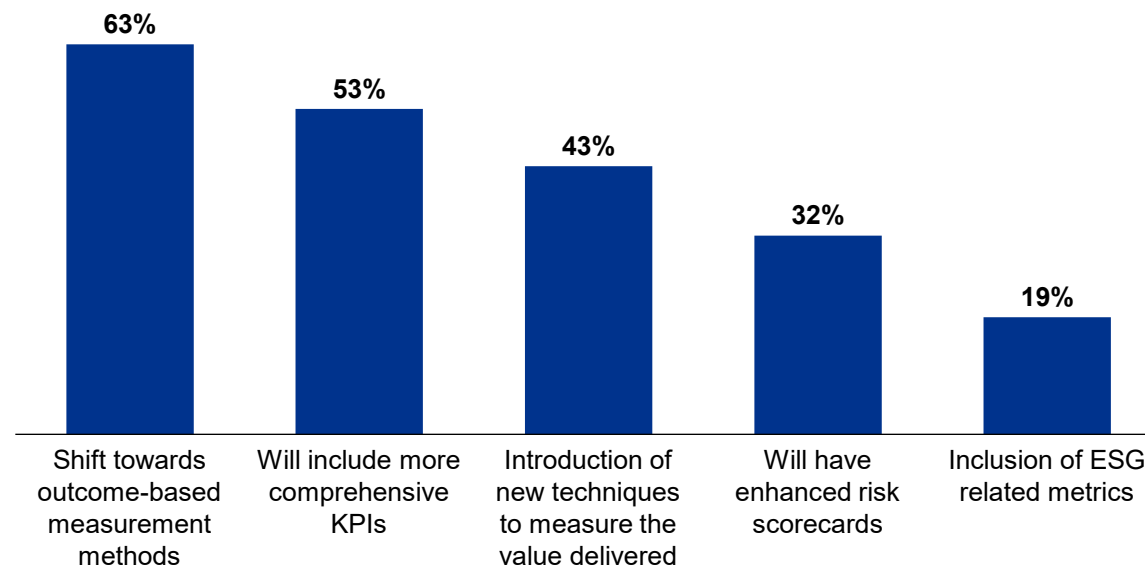
Note(s): (a) Sum of percentages may not add up to 100% as it is a multi-select question; (b) Other, please specify" option is not included in the graphical representation, due to low number of respondents  
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# Only a third of respondents currently measure their ecosystems effectively, highlighting the need for evolved, outcome-based metrics and KPIs for growth tracking

Have you been effectively measuring the performance of your ecosystem?



How do you think measurement methods will evolve to better track the growth and value delivered in partner ecosystems?<sup>(a)(b)</sup>



- There is a need for enhanced measurement of ecosystem performance, as only **36%** of the respondents currently do so consistently
- To track growth better, companies estimate measurement methods to evolve into **outcome-based metrics and comprehensive KPIs**

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