1. The rise of digital ecosystems and the battle for the end-customer relationship
2. Could we strengthen our end-customer relationship by working together?
The rise of digital ecosystems and the battle for the end-customer relationship
Disruption is challenging traditional business models and end-customer relationships for the telecom industry.
Megatrends – the rise of digital ecosystems, both global and local
The master of ecosystems, everybody’s looking to WeChat

- 1.1 billion signed up users
- 980 Million MonthlyActiveUsers
- 902 Million DailyActiveUsers
- 38 B messages every day
- 2 – 4 hours per day
- 200+K WeChat developers
Amazon is targeting multiple new end-user relationships.
And tying it all together with the Amazon Prime ecosystem
- Amazon customers should be paying $785 for Prime membership instead of $119 annually; what do you get?

<table>
<thead>
<tr>
<th>Free and fast shipping</th>
<th>TV and Movie content</th>
<th>Prime VOD content</th>
<th>Amazon music</th>
<th>Amazon Prime reading</th>
<th>Amazon photo</th>
<th>Whole foods</th>
</tr>
</thead>
<tbody>
<tr>
<td>• FREE Same-Day Delivery and One-Day Shipping</td>
<td>• Watch your favorite shows and movies from HBO, SHOWTIME and STARZ channels $4.99–$14.99/month for Prime members.</td>
<td>• Unlimited streaming of movies and TV episodes</td>
<td>• Featuring a growing selection of 2 million songs, always ad-free and on-demand</td>
<td>• You can borrow books, magazines</td>
<td>• Unlimited photo storage, 5 GB of for videos, document, and other files for themselves. They can also invite up to five friends or family members to receive unlimited photo storage</td>
<td>• 10% discount on sale items</td>
</tr>
<tr>
<td>• FREE Release-Date Delivery</td>
<td></td>
<td></td>
<td>• Curated playlists and personalized stations</td>
<td>• Amazon First Reads</td>
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<tr>
<td>• Earn shopping rewards with a little patience</td>
<td></td>
<td></td>
<td>• Stream music on their Amazon Echo, Echo Plus, or Echo Dot</td>
<td>• Audible Channels for Prime</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Receive deliveries inside your home with Amazon Key</td>
<td></td>
<td></td>
<td></td>
<td>• Washington Post Free Trial</td>
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</tr>
</tbody>
</table>

Amazon financial loyalty programs with Prime benefits

**Amazon rewards Visa Card (benefits for Prime only)**
- 5% back at amazon.com and Wholefoods
- 2% back at restaurants, gas stations and Drugstore
- 1% back on all other purchases

**Amazon.com Store Card (benefits or Prime only)**
- 5% back at amazon.com
- Access to special financing on Amazon.com>149$
- Access to 0% interest 12% month on Amazon.com
The introduction of smart speakers /bots will strengthen the global ecosystem players end-user positions even further:

### Hardware

<table>
<thead>
<tr>
<th>Device</th>
<th>Launch Date</th>
<th>Focus</th>
<th>Models &amp; Price</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Amazon Echo</strong></td>
<td>June 2015</td>
<td>Focus on utility</td>
<td>4 models starting at 49 USD</td>
</tr>
<tr>
<td><strong>Google Home</strong></td>
<td>Nov 2016</td>
<td>Focus on assistant and music</td>
<td>3 models starting at 49 USD</td>
</tr>
</tbody>
</table>

### AI/Smartbots

#### Amazon Alexa
- "Alexa, turn on Welcome Home"
- "Alexa, turn off my Bedroom Sonos"
- "Alexa, turn on my Chill Tunes"
- "Alexa, turn on the TV"

#### Google Assistant
- "Google, play my favorite song"
- "Google, set an alarm for 7 AM"
- "Google, send a message to John"
- "Google, check the weather for tomorrow"
the all new echo dot
Could we strengthen our end-customer relationship by working together?
An ecosystem is the network of cross-industry players who work together to define, build and execute market-creating customer and consumer solutions. An ecosystem is defined by the depth and breadth of potential collaboration among a set of players: each can deliver a piece of the consumer solution, or contribute a necessary capability.

The power of the ecosystem is that no single player need own or operate all components of the solution, and that the value the ecosystem generates is larger than the combined value each of the players could contribute individually.

Customer needs first, not businesses!!
We have to solve real customer need/problems
Assumptions for making an digital ecosystem to keep customer relationships, you have to cater for:

<table>
<thead>
<tr>
<th></th>
<th>FRICTIONLESS USAGE</th>
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<tr>
<td>4.</td>
<td>- a smartbot making interactions to the ecosystem as easy as possible</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>SOLVE CUSTOMER NEEDS</th>
</tr>
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<tbody>
<tr>
<td>3.</td>
<td>– services that cater for high user engagement and activity.</td>
</tr>
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</table>

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<th></th>
<th>EASY ACCES:</th>
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<tr>
<td>2.</td>
<td>- a common ID that give you access to all services</td>
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<tr>
<th></th>
<th>CONNECTIVITY</th>
</tr>
</thead>
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<tr>
<td>1.</td>
<td>– allways on, regardless of acces</td>
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</table>
We are now building assets to solve these user needs, and we would like to invite others building them with us.

1. Connectivity

2. Common ID with SSO / Data

3. MinFamilie

4. TIA (SmartBot)
Telenor launched the foundation for an ecosystem on Jan 23rd 2018, a common ID with full SSO

Simplicity for the end customer is key: 
- **Customer**
- **Common ID**
- **Partners**
- **Services**

Partner X,Y,Z  Service X,YZ
3. MinFamilie We have made an app that have high user engagement and solve users daily tasks one place:

- Skole/barnehage info
- Oppskrifter
- Personlig økonomi
- Post tjenester
- Kommune tjenester

- Fritidsaktivitet info
- Kjøpe mat
- Sparing
- Flytte prosessen
- Info fra myndigheter
3. MinFamilie

Aggregating local content in the calendar will be critical to compete, on making it easy
4. Voicebot/TIA 📡 A joint local ecosystem between local Norwegian players would first and most benefit the end-customer but also all players in the ecosystem.
Solving more family needs “end to end” have to be done through partnerships, we have to think the whole value chain.

**User Need:** Get food/groceries to home

**Possible steps in a fully integrated system:**

1. User makes a grocery list and orders through voice device connected to Tia.
2. These actions are updated in Min Familie.
3. A grocery store gets the food order.
4. Delivery company delivers the order.
5. User unlocks smart door using Min Familie, so delivery company can deliver inside home.
6. User gets groceries at home!!
Thank you