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The Complexity of Owning the Customer Within Ecosystems

A study of owning the customer within ecosystems

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Executive Summary

This thesis explores the phenomenon of owning the customer within business ecosystems. Business ecosystems are complex entities where dissimilar organisations jointly deliver value to the customer by balancing cooperation and competition. While businesses need to collaborate to deliver value, they instinctively compete, creating friction between actors within an ecosystem. This situation may then raise the question of who has access to, and can gain, customer ownership. To date, limited research on owning the customer in an ecosystem setting has been conducted. The main aim of this thesis is therefore to understand what it means to own the customer in an ecosystem and discover how an ecosystem actor can obtain ownership.

This paper is conducted as an exploratory multi-case study, analysing secondary data from 15 semi-structured interviews mainly from the retail industry. The empirical findings are assessed with existing literature on owning the customer and business ecosystems in general, to better understand customer ownership in an ecosystem setting.

The findings of this study suggest that owning the customer can be defined as *having direct and/or indirect ties with the customer in ways that optimise firms' individual value capture within an ecosystem and maximise joint value creation potential for the customer.* Ties in this setting relate to a firm communicating with customers and/or obtaining the needed customer data from the ecosystem's customer journey. Moreover, the findings of this study also suggest that the roles actors adopt within ecosystems are decisive in the allocation of who gets to own the customer. The orchestrators of ecosystems seem more likely to obtain ownership as they have more power in the ecosystem structure. Nevertheless, the findings highlight that orchestrators' desire for sole ownership increases friction between them and their complementors. This friction seems to complicate the ecosystem's function of jointly creating more value as it hinders cooperation. Therefore, the findings argue that creating a sound relation between actors would be necessary to share ownership of the customer and thus ensure stronger value creation.

Finally, as this thesis mainly aims to define owning the customer and to understand who owns the customer in an ecosystem, future research should be conducted on how power imbalance between actors might negatively influence the overall value proposition of an ecosystem.

Preface

This master's thesis is written as part of the Master of Science in Economics and Business Administration at the Norwegian School of Economics (NHH), where we are both pursuing a specialization in Strategy and Management.

This thesis is written as part of the Norwegian research centre Digital Innovation for Growth (DIG). DIG is a leading operating research centre with a focus on digital transformation and innovation for sustainable growth. Being part of the DIG research program has not only enabled us to work with exciting projects but also given us the opportunity to exchange our insights with a group of fellow peers working on dissimilar projects within the research program.

We would like to thank our supervisors, Bram Timmermans and Vidya Oruganti for their invaluable guidance and continuous support throughout the course of this project. Their guidance and encouragement were instrumental in helping us best achieve our goals for this master thesis.

Lastly, we would also like to thank the informants for sharing their opinions with us.

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1. Introduction

1.1 Background

Most customers shopping on Amazon's website believe that they are merely purchasing from Amazon. In reality, a purchase from platforms such as Amazon involves dozens of actors (Jacobides, 2019). A customer might begin their journey with a simple search on Google's search engine. From there, they find a relevant link with the product they are seeking and get directed to Amazon's website. The customer then decides to add a number of items to their shopping cart. Unaware, the customer is adding products from numerous merchants, with different sale locations to their cart. The order is then fulfilled by paying a single time often using the customer's Mastercard. From the customer's perspective, the journey was simple to complete, however, given the number of actors involved, the purchase is indeed much more fragmented and complex than what is presumed.

Business practices have evolved in lockstep with the rest of the world. It is no secret that technology has revolutionised the way we do business. Among the many benefits that technology has provided, the most essential is the ability to interact and share information (Belk, 2014). While managers in the past were reliant on working tools and information that could only be obtained in person, managers today can access and share data with their departments and even entire organisations. The interchange of communication does not end there: modern firms are also exchanging information with third parties, including competitors, in order to deliver greater value to their customers. Amazon is an excellent example. When the customer described earlier completed their purchase, they encountered more actors than one might expect. This is what is referred to as an ecosystem. An ecosystem is composed by a diverse range of actors which complement each other. While some actors deliver their part and receive payment without ever interacting with the end customers, others require more direct contact. Amazon is just one of many successful ecosystems that exist today, and these types of systems are becoming increasingly popular as customers are expecting more value and the business world is becoming more complex.

It is evident that in order to deliver more value to customers, one must fully grasp their own customer. In an ecosystem however, this may become a challenge as the exposure to customers differentiates from one ecosystem actor to another. When entering an ecosystem, actors with various roles will have varying degrees of contact with their customers. Moreover, from a

customer's perspective, having an abundance of organisations wanting to form direct ties might diminish their perceived value of an ecosystem.

1.2 Research Question

As the world is becoming more fragmented, it is important for businesses to understand what boundaries they may encounter when entering or creating an ecosystem. Although existing literature depicts improved customer understanding as vital, little empirical research investigates the latter in an ecosystem setting. For instance, several definitions of owning a customer exist within a general business setting, however there is little to no research on owning the customer in an ecosystem setting. As previously mentioned, ecosystems are complex entities with complex borders in terms of who benefits the most from customers. This study seeks to comprehend owning the customer within business ecosystems, as well as how the ownership influences value for the alternate actors. Thus, this thesis seeks to contribute to the existing literature by investigating customer ownership within ecosystems and answering the research question:

"How does owning the customer influence value capture in ecosystems?"

The thesis looks into several sub-themes, such as understanding ecosystem roles, defining owning the customer, and understanding who owns the customer. As customers, businesses, and ecosystems alike aim to increase value, value is assessed within all sub-themes. Value capture is thus the common nominator. Combined, the three themes seek to illuminate and answer the main research question. This thesis adopts an explorative and qualitative approach, relying on interview data from actors within retail, and thus focuses on the customer journey. As such, the term customer is portrayed as the end-user, both in a business-to-customer setting (B2C) and a business-to-business-to-customer setting (B2B2C).

All in all, the thesis provides the reader with relevant insights into recurring issues met by businesses that operate in ecosystems. This thesis is therefore considered to be of high relevance for the retail industry. However, as retail ecosystem structures are transferable to other industries, this thesis is also relevant for anyone interested in ecosystems and the concept of owning the customer within an ecosystem.

1.3 Outline

This thesis includes a total of six chapters. Followed by this introduction, Chapter 2 digs into the existing literature on ecosystems and the phenomenon of owning the customer. The first chapter also presents a provisional model which presents an ideal balance of owning a customer between different actors of an ecosystem. In Chapter 3, we explain the chosen methodological approaches, as well as the ethical issues faced, and which measures were in place to diminish the latter. Chapter 4 presents the empirical findings and includes quotations from the informants. Shortly following, the next chapter evaluates the findings by both comparing and analysing the findings in general and with the existing literature. Finally, Chapter 6 concludes the findings of our thesis, proposes future research, states which implications should be kept in mind while considering the findings, and suggests several recommendations for the industry.

2. Literature Review

This section presents an overview of existing literature relating to the research question. Hence, the section describes topics within ecosystems and digs deeper into the phenomenon of owning a customer.

2.1 The Origin of Ecosystems

To understand how the term ecosystem was inaugurated in business and economics journals, it is noteworthy to understand the terms' origins. The term ecosystem originally derives from biology and delineates a collection of random elements which together composes a structured community (Moore, 1993). A biological ecosystem is complex, and while some elements are seen as enemies, they all play a role in the given setting. In a similar manner, Moore (1993) depicts a business ecosystem. The business strategist states that business ecosystems are complex entities may differentiate from one field to another, however Moore (1993) describes that the one thing all business ecosystems have in common, no matter the field, is the process of co-evolution, which he describes as "the complex interplay between competitive and cooperative business strategies".

Ever since Moore (1993) first introduced the term business ecosystems in the early 90s, the ecosystem phenomenon has seen an upsurge of attention from management scholars. The popularity of the term has subsequently conceptualised it into new branches (Cobben et al., 2022). Researchers have come up with many branches of the original concept with conceptual boundaries that match different sectors. For instance, while marketing and strategy-oriented literature use the term business ecosystems, information and technological-oriented papers use the term digital ecosystems. Moreover, a combination of strategic and technological papers has also brought the term platform ecosystems (Hein et al., 2020). Cobben et al. (2022) also indicate that the terms innovation ecosystems, knowledge ecosystems, and entrepreneurial ecosystems evolved from Moore's (1993) original idea. Thus, there exists an abundance of branches from the natural phenomenon. Aiming to add to strategic literature on ecosystems, this thesis primarily looks into understanding customer ownership within business ecosystems. With that said, alternate concepts indeed derive from Moore's (1993) original term and are therefore often used interchangeably. Thus, even though this thesis investigates strategic

concepts and therefore uses the term business ecosystems, the findings could perhaps also seem attractive for other fields.

2.2 Business Ecosystems

The term business ecosystem has seen a sudden surge in popularity among scholars during the last decade. In fact, a quick search of "business ecosystem" on Google Scholar results in 366,000 articles written prior to 2013 - This number increases to 819,000 when refining the results merely to the last decade. The number of articles written on business ecosystems has thus more than doubled over the last 10 years. There exists a dozen of definitions of the term business ecosystem. Some of the more commonly used definitions include Moore's (1993), Adner's (2017) and Jacobides et al.'s (2018). Moore's (1993) definition takes its roots in the biological stem of the term, and thus defines business ecosystems as "an economic community supported by a foundation of interacting organizations and individuals – the organisms of the business world". Similarly, Jacobides et al.'s (2018) definition of the term proposes a cooperative relationship among partners that create value: "a group of interacting firms that depend on each other's activities". Adner (2017) however, views ecosystems as a structure. Contrary to the traditional definition proposed by most scholars, including Moore (1993) and Jacobides et al. (2018), an ecosystem as structure highlights that the value proposition towards the customer sets the scene and thus creates the boundaries of an ecosystem. That is, contrarily to businesses partnering to provide an innovative value proposition, they are rather partnering as they see the potential in collaboration. Thus, Adner (2017) defines ecosystems as "the alignment structure of the multilateral set of partners that need to interact in order for a focal value proposition to materialize". While the three definitions of ecosystems are in a similar vein, we will focus on the latter, as Adner's (2017) definition sets a clearer understanding of the emergence of business ecosystems in terms of customers' gain.

By dissecting the definition into three parts, it is possible to fully grasp the main mechanisms of business ecosystems. Adner's (2017) definition is composed of three main parts: a set of partners, an alignment structure, and a value proposition. Adner (2017) describes an ecosystem's set of partners as a defined membership. According to the researcher, different actors within the ecosystem may have different plans regarding the arrangement of the set and their end goals. However, Adner (2017) states that the participating actors have one joint and general goal which is to create value. Yet, Adner (2017) also states that an ecosystem is only

successful when the set of partners reaches alignment through structure. Alignment structure occurs when business partners mutually agree on the incentives and motives of the system. It is thus a case or equilibrium where the partners involved must be satisfied with their position within the ecosystem and agree on the system's activities. Lastly, the definition states that the set of partners must reach an agreement to ensure that the value proposition occurs. Adner (2017) states that the focus lies on the value proposition, thus it lies on benefitting the customer rather than the delivering firm. The researcher also emphasizes that by focusing on delivering value, there is a requirement that ecosystem actors reach a level of coordination with each other. All in all, the definition places the customer as a core of ecosystems.

2.2.1 Business Ecosystems from a Customer's Point of View

As customers are at the core of ecosystems, it is beneficial to better comprehend the ecosystem phenomenon from a customer's point of view. For instance, it is advantageous to better understand what value a business ecosystem provides to customers, and how the different actors within a single system interact with customers and end-users.

In line with Adner's (2017) definition, successful business ecosystems should bring businesses together to provide more value to customers, and not act merely as a spree to find more business opportunities with complementors and competitors. A successful business ecosystem will have customers that are satisfied with the partnering of businesses as they see the value they provide. From the customers' point of view, a business ecosystem provides value by simplifying their lives, understanding their needs, and revolutionising their customer journey (Chung et al., 2020). For instance, Amazon simplifies its customers' lives by providing customers with anything they may need on the same website, from entertainment to personalised shopping experiences, and ordering items.

Adding to the complexity of business ecosystems is the businesses' interaction with and presence toward customers and end-users. As established, business ecosystems are complex mechanisms that usually include an abundance of actors, such as partners, suppliers, distributors, competitors, government agencies, and so on. For instance, Boeing partnered with more than 50 different actors to create the Boeing 777 aeroplane, including several competing airline companies, many engineers, and the customers themselves (Condit, 1994). Moreover, many of the interacting actors in a business ecosystem are often unexpected, from diverse industries and integrated into more than a single ecosystem (Panetta, 2017). The interacting

firms of a single business ecosystem may therefore seem profusely confusing from a customer's point of view. To add to the complexity, many actors of business ecosystems will not be visible to the customer as different actors have dissimilar needs to engage and interact with the end-users (Story et al., 2020). For example, when purchasing the second generation AirPods Pro from Apple, some actors are visible to the end-users, such as the owner of the product, in this case, Apple, logistics companies, such as the packaging supplier, and payment systems needed to fulfil the order, such as American Express and Visa. On the other hand, some actors will never have any contact with the end-user as it is not necessary for them (Story et al., 2020). For instance, suppliers of the AirPods' parts will simply have direct contact with Apple, such as Nordic Semiconductor which supplies Apple with semiconductor chips. Even though customers and end-users never directly communicate with companies like Nordic Semiconductor, no electronic devices would exist without them. The Apple AirPods example illustrates how a single product often involves several actors within a system, many of whom never directly engage, or engage at all with the customers.

2.2.2 Actors' Roles in an Ecosystem

As mentioned, customers often find themselves unaware of the many entities within an ecosystem as some actors are more prominent than others. Moreover, Adner's (2017) definition emphasizes the importance of ecosystem actors reaching alignment. To understand the structure and thus the relationship with customers, it is essential to understand actors' roles within the ecosystem.

Being a complex system with dozens of interacting players it is noteworthy to comprehend which players if any, have more authority. Moreover, considering the challenges encountered by firms in ecosystems, and the importance of providing value to customers, it is essential to understand how alternate ecosystem roles impact a firm's power and thus the possibility to own their customer. A handful of recent literature has looked into the different functions the actors play in an ecosystem (Dedehayir et al., 2018; Yaghmaie et al., 2019; Marty & Warin, 2020; Lingens et al., 2021). Dedehayir et al. (2018) define an ecosystem role as "a characteristic set of behaviours or activities undertaken by ecosystem actors". As research on ecosystem roles is undeniably in an embryonic phase, there is no set terminology on the roles actors have. In Moore's (1993) early literature on ecosystems, he did however mention that ecosystems often include an actor that takes the role of a leader. Similarly, Adner (2017) states that ecosystems need a leader which ensures that the participating actors share a vision and

align their investments in a successful matter. In more recent literature, new terminology has been presented to explain other roles ecosystem actors may have. For instance, Yaghmaie et al. (2019) divide ecosystem roles into four main categories:

(1) Leadership roles: Like Moore (1993) and Adner (2017), Yaghmaie et al. (2019) states that ecosystems have at least one actor with a leading role. These include dominators which ensure that the ecosystem finds place.
(2) Direct value creation roles: These actors include suppliers, assemblers, complementors, and users.
(3) Value creation support roles: including experts and champions
(4) and entrepreneurial ecosystem roles: including entrepreneurs, sponsors, and regulators.

The common thread between earlier (Moore, 1993) and more recent literature (Adner, 2017; Yaghmaie, et al., 2019) is that ecosystems need a least one actor with a leading role. Dissecting ecosystems into leader-follower roles has become more common, with literature often referring to the former as the orchestrator of an ecosystem (Dedehayir et al., 2018; Lingens et al., 2021), and the latter as complementors. Moore (1993) states that the companies that hold the leadership role are highly valued by the complementors as they enable members to align their visions. Likewise, Adner (2017) states that while the leader takes accountability for leading the ecosystem to alignment, the complementors follow the leader's management and must accept a non-leadership role. Orchestrators can therefore be seen as authoritarian players with responsibility for the success of the ecosystem.

Existing literature often portrays the orchestrator as the main decision maker and as a large, established company with much power (Kapoor & Lee, 2013; Clarysse et al., 2014). Moreover, Marty and Warin (2020) mention that the complementors of an ecosystem are smaller participants that provide complementing activities. Thus, it is evident that ecosystems have a so-called authorial level between complementors and orchestrators, with the latter being larger companies with more power and authority than the first. On the other hand, some literature opposes this view and reveals that the orchestrating role is not necessarily obtained by the largest player of an ecosystem (Lingens et al, 2021; Williamson & De Meyer, 2012). For instance, Lingens et al. (2021) found that start-ups often become successful orchestrators.

As this thesis is investigating how actors within ecosystems can own the customer, it will adopt the terminology of orchestrator and complementors. The term orchestrator refers to

Moore's (1993), Adner's (2017), and Yaghmaie's (2019) leading role. The latter, complementors, is used as an umbrella term for any other participating actors.

2.2.3 Friction Between Firms

As established, businesses within the same ecosystem are considered complementors to one another as they allow access to and exchange of resources and benefits. Among the resources and benefits shared, is businesses' knowledge (Arya & Zhiang, 2007). Knowledge is often considered the most vital resource enabling firms to create innovative capabilities and strategies (Lorenzoni & Baden-Fuller, 1995; Grant, 1996; Grant & Baden-Fuller, 2004). Thus, knowledge sharing may be considered among the most vital resources shared in a business ecosystem. It is no secret that knowing your customer is key to a successful business. Davenport et al. (2011) state that a business should strive to know what their customers want before they do and should thus systematically gather information about its customers, their purchase context, and more. By being a part of an ecosystem, a business may gain a competitive advantage by acquiring more information on their customers from collaborating partners. However, Wulf and Butel (2017) state that knowledge sharing in business ecosystems does not follow guidelines and is not as open as knowledge sharing within an organisation.

As mentioned, business ecosystems are complex entities, where companies play different roles. By partnering, companies may experience friction as they meet several challenges throughout their relationship. For instance, Smith (2013) found that the main general risks associated with operating within business ecosystems are related to complexity of relationship management (between actors), control (which can be centralized or decentralized), and co-opetition (businesses that cooperate while competing). The complexity further increases as businesses are becoming increasingly digitalized. A digital business ecosystem is similar to a business ecosystem, however in a digital ecosystem, the businesses are operating with technology, such as a similar platform. With the rise of digital ecosystems, several novel challenges emerge. For instance, Lenkenhoff et al. (2018) state that challenges met by digital ecosystems are mainly related to two distinctive areas: interoperability challenges and actor-related challenges. Marty and Warin (2020) state that in a digital ecosystem, orchestrators encourage the implementation of non-cooperative strategies to capture the innovative products by its own complementors, and thus hinder the complementors' possibility to evolve and gain more market power. This occurs in digital ecosystems as the orchestrators control the

infrastructure and enjoy a decisive informational advantage over the complementors (Marty & Warin, 2020). Going back to the example of Amazon, the platform giant has received critique from The European Commission for their use of third-party sellers' data to benefit the platform's own retail business (The European Commission, 2020). The challenge of knowledge sharing may thus become further aggravated as business ecosystems digitalize, leading us to the question of who obtains what information in a digital business ecosystem, and more precisely, who obtains most information and data on the customers within a business ecosystem.

Having discussed what business ecosystems are, which frictions occur between partnering firms, and lastly, the value and interaction of actors within ecosystems have with customers, bring us to what this thesis will explore. The main problem this dissertation is aiming to explore is how information regarding the customers and the ownership of customers shifts as businesses participate in different roles within digital business ecosystems.

2.3 Owning the Customer

When our grandparents went shopping, merchants obtained all available information about their customer journey: from the moment they entered the store, to the completion of their purchase. A few decades later, the process has become much more fragmented, and with several companies involved in most purchases, the ownership of information on the customer's journey is no longer as straightforward as it once was.

While the concept of "owning the customer" is discussed in previous literature, its meaning alternates from field to field. Marketing-related articles often discuss the term in accordance with customer relationships and define the term as being the customers' first choice when shopping. On the other hand, law and informational technology concentrated articles mostly discuss the ownership of customer data.

2.3.1 Owning the Customer Relationship

Vandermerwe (1996) states that a business owns a customer when they are the customer's first choice and are willingly sharing their information, problems, and plans with you. Moreover, Vandermerwe (1996) states that the concept of owning customers emerged as traditional businesses went from defining their customers as next in line to end-users. End-users will not

necessarily have the same needs or thoughts as retailers, and businesses should thus strive to understand their end-consumers to thrive.

Yang (2017) defines customer ownership as "establishing direct contact between the company and the customer", and states that owning the customers is all about "knowing how to track users by their purchases, friends, and actions before and after purchasing a product or service". Thus, Yang (2017) argues that owning the customer is about having a direct relationship with the latter to map their customer journey. Yang (2017) also emphasizes that a successful business must be able to use the information to meet customers' needs. Hence, a business must be able to both map a customer's journey as well as use it to enhance the customer experience. Similarly, Halvorsrud et al. (2016) emphasise the importance of not only understanding a customer journey as a storyline of users' engagement with a service but also including an analysis of it, consequently increasing customers' value proposition.

The findings in some scholarly articles display a distinction between the concept of owning the customer and the more abundant term customer ownership. The term owning the customer discusses whether a business understands and provides its end-users with products or services fulfilling their needs. On the other hand, customer ownership more often revolves around the idea of customers owning a part of a business, whether it is through co-operatives or stock ownership. For instance, Talonen et al. (2018) suggest that customer ownership is closely linked to customer value which refers to understanding the potential value dimensions of the cooperative's contexts. Talonen et al. (2018) further state that creating customer value is represented by mechanisms available for customer-owners of cooperatives, which render this value potential along the relevant dimensions. To clarify, this thesis will use Vandermerwe's (1996) and Yang's (2017) definitions and look away from customer ownership in terms of the partial or complete ownership of a business by its customers and end-users.

It is no secret that the digitalisation of retailing has fragmented the customer journey, and thus made it more difficult for businesses to obtain valued information about their customers. Weill and Woerner (2015) emphasize that the digital disruption has caused an abundance of turmoil for businesses wishing to own their customers, especially with the emergence of digital ecosystems. For instance, as streaming platforms such as Netflix and HBO are becoming increasingly popular, movie producers like Disney and Warner Brothers are no longer in control of information that enables them to better understand their end-users. These cases have in fact become so critical that movie producers have removed their products from third parties

and now provide their own streaming services. For example, Disney has stopped licensing new content to Netflix and now offers its own streaming service, Disney+. In this way, not only has the firm gained a new source of revenue, but more importantly, Disney has also enabled itself to keep a direct relationship with its customers, hence enabling the giant to collect information and improve its products (Santos, 2017).

2.3.2 Owning the Customer Data

While discussing whether businesses own their customers or not, it is inevitable to discuss ownership of customer data. Owning data on consumers is seen as a major competitive advantage (Krafft et al., 2021), yet as many businesses scale, their data collection is often owned by larger companies, such as Google, Facebook, and Apple (Esteve, 2017). The data is then often resold to the initial companies by the latter tech giants. In fact, Tucker and Neumann (2020) state that the business of collecting and selling customer data is worth around 200 billion dollars. Naturally, customers and digital users alike have become more concerned about how their data is being collected and used (Chakravorti, 2020).

Businesses within ecosystems cooperate, and as stated earlier, business ecosystems enable companies to share resources and knowledge to create value for customers. Data sharing within ecosystems thus seems like a strategic opportunity. According to Birkinshaw (2019), business ecosystems are mostly built around intangible assets, such as the sharing of informational systems and data, however, as the resources are non-palpable, challenging discussions find root in the ownership of the latter. Moreover, as some businesses within an ecosystem also compete, the sharing of customers' data information seems counterintuitive and sets a question mark regarding its legality. The sharing of data poses challenges for both businesses and customers. As General Data Protection Regulation (GDPR) made a heavy impact in 2018, especially in the European market, businesses are now obliged to provide customers with the possibility to access their data and the right to erasure without questioning (Downes, 2018). This legality presents several challenges to the ecosystem model, both businesses and customers, as data sharing is a vital part of the ecosystem's functioning.

All in all, there are several scholarly articles defining the concept of owning the customer. Nevertheless, the recurring point seems to be that owning customers, both relationship and data-wise, is about obtaining first-hand information on customers which benefits strategic business making in businesses.

2.4 Owning the Customer in an Ecosystem

As businesses are modernising their operations with technology that enables simpler methods of collaborating with other actors, business singularities such as ecosystems emerge. An ecosystem is a complex phenomenon that enables several actors to work together by sharing both assets and knowledge. In the 21st century, the knowledge of customers has become more critical than ever with data tracking and an abundance of other technological tools. Taking part in an ecosystem thus seems like an evident business opportunity. However, as discovered, these systems are often led by a single or a few leaders, also known as orchestrators. These actors often have more authority and are further involved in strategic decision-making processes. Literature on roles in an ecosystem finds that complementors actors may therefore not have as much authority on which knowledge is shared to whom and on what they receive. It is therefore interesting to understand how the roles actors have in an ecosystem play an importance in the ownership of their customers and their success. Moreover, the literature review has revealed that understanding one's customers is becoming more critical than ever to succeed. Terminology such as customer ownership and owning the customer is sometimes used to describe how a firm manages to fully understand and provide their customers with their needs. In an ecosystem however, the line of ownership appears blurred, and the ownership of customers goes beyond a business' borders.

To summarise, this thesis explores what it means to own a customer, how firms manage customers in an ecosystem, and how one can obtain the information they want when there are several actors involved.

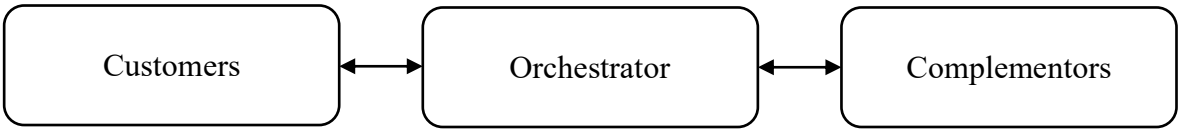

Figure 1: Allotment of authority in accordance with owning customers in an ecosystem, as discovered in existing literature.

Figure 1 illustrates how the findings from existing literature describe the allotment of customers and their information within ecosystems: The orchestrator of the ecosystem is the only actor that communicates with both customers and complementary actors. Figure 1 is composed of customers, orchestrators, and complementors. The customers include the end target within an ecosystem. The orchestrator portrays the leader of the ecosystem. Although

some ecosystems have several orchestrators, this thesis limits itself to ecosystems with one orchestrator due to time constraints and the nature of the methodology. It is nonetheless noteworthy to distinguish that the figure may be composed differently in an ecosystem with several orchestrators involved. Lastly, the complementing actors include all non-leader roles involved within the ecosystem.

3. Methodology

Chapter 3 explains the methodology we followed for our chosen research question, which is widely affected by our cooperation with an ongoing research project on Digital Ecosystems: BEST in Retail. The chapter initiates by explaining the chosen research design, before explaining the data collection process, including sampling, what data was collected, how it was managed, and what limitations these signify. The last section of this chapter depicts the data analysis, which describes how we approached coding and abstracting concepts from the data.

3.1 Formal Association

This study is a part of the Digital Innovation for Growth (DIG) research centre in Norway. DIG is a leading operating research centre with a focus on digital transformation and innovation for sustainable growth. As a part of DIG, we have focused on gaining more knowledge on ecosystems and have therefore had the opportunity to support an ongoing research project at the Norwegian School of Economics: Business Model Innovation & Ecosystems for Seamless Transactions in Retail, also called BEST in Retail. The BEST in Retail project has partnered with several stakeholders in the retail industry as well as the Norwegian School of Economics to generate more knowledge, methods and roadmaps that will benefit the retail sector. While we are supporting the ongoing project with our thesis, we chose not to focus on the retail sector explicitly, but rather investigate the ownership of customers within business ecosystems as it is a frequently emerging theme in the ongoing project. By focusing on ownership of customers in a more general setting, the thesis may benefit both the retail industry, but also other industries looking to get a broader understanding of their presence within an ecosystem.

3.2 Research Design

The research design is a general plan of how the initial research question will be answered (Saunders et al., 2020). The following section will focus on presenting reasoned justifications for the coherence between the research question and methodological choices. It is worthwhile to highlight that by being a part of the BEST in Retail project the research design was somewhat predetermined, as the data collection had been previously conducted.

As identified in the literature section, there is little prior existing theory on the concept of owning a customer within an ecosystem, making the topic complex to grasp. An exploratory research design is considered appropriate to facilitate a broader understanding of an issue or phenomenon (Saunders et al., 2020), it was therefore a suitable approach to gain insights into this study. Moreover, the chosen design allowed asking an open-ended research question which is needed to gain an overall understanding. Lastly, an exploratory approach also enabled flexibility and adaptability, making it possible to accommodate changes to the research process as needed when new information or data appeared.

The aim of this thesis is to benefit future studies, and thereof contribute to expanding the concept of owning a customer in an ecosystem. In addition to the study being of an exploratory nature, the data collection happened through semi-structured interviews. To develop a successful conceptual framework and theoretical contribution, it is evident that this thesis followed a qualitative research design (Saunders et al., 2020). A qualitative approach allowed us to confront the research process with a more in-depth understanding compared to a quantitative approach (Saunders et al., 2020). As the accessible data for the thesis consisted of previously conducted interviews, the research strategy was set to case studies. Case studies are suitable in the sense that they allowed us to recognize patterns within and across cases and their underlying logical arguments (Eisenhardt & Graebner, 2007). Case studies also enabled us to conceptualize and explore similarities and differences between the cases and concepts.

3.2.1 Research Approach

The research approach is the plan the research project follows when developing theory (Saunders et al., 2020). The literature often portrays two contrasting approaches, either an inductive or deductive approach (Klag & Langley, 2013). However, an alternative approach commonly used within business and management research is an abductive approach. An abductive approach allows researchers to move back and forth between data and literature, during the research process, and in effect combine induction and deduction (Suddaby, 2006). The main purpose of choosing an approach is to be able to make more informed decisions about the research design. Consequently, it is important to find an approach that matches the research philosophy, nature, and topic. This thesis followed an abductive approach, which is further elaborated in the section below. The purpose of this study is dual as it aims to add to the empirical understanding of the concept of owning the customer within an ecosystem and contribute to further develop theory in the area. Considering this, adopting an abductive and

iterative approach best matched this thesis, as we needed to be able to combine induction and deduction.

More specifically, when initially observing the data from the semi-structured interviews, an inductive approach was used to diminish theoretical preconceptions. From there on, a deductive approach was used to compare the existing literature with the data and hence allowed an adjustment and re-work of the literature review. While we relied on the data to identify new findings, we were also guided by literature to identify specific patterns. This method is considered to provide the research with both theoretical and empirical contributions (Saunders et al., 2020), and the abductive approach increased the overall flexibility and allowed us to be open to the diverse phenomenon encountered as we analysed the data.

3.2.2 Purpose and Strategy

The purpose of this study was to gain insight and investigate a relatively unexplored area within the field of business ecosystems. In order to reach the main goal, this thesis sought to fulfil two objectives. Firstly, the aim was to provide an overall understanding of the concept of owning a customer and what factors might influence businesses' ownership of the latter. Secondly, the thesis investigated how being part of an ecosystem affects the ownership of a customer. As a result, the thesis aimed to decrease the current gap in the existing literature.

Given the nature of the research design being case studies, the research question and objectives are developed in an exploratory and qualitative matter. The purpose of this thesis is to cover a wider range of concepts in order to gain an in-depth understanding of the qualitative areas that might be covered in the interviews; hence the research question is set in a "what" and "how" matter. A qualitative and exploratory mindset is vital in this thesis, as we depended upon flexibility throughout the research process. This especially concerned the ability to properly analyse and understand the concepts and the possible patterns through the reflections of the informants.

3.3 Data Collection

The data used for this study was secondary data collected from the ongoing study mentioned previously: BEST in Retail. Our supervisors initially linked us with researchers on the ongoing project. From there on we contacted the researchers to access more data as needed during the

analysis. In this section, we will specify our data source and explain its form before describing the sampling technique used.

3.3.1 Secondary Data

This study fully relied on secondary data from previously conducted interviews and the nature classified them as compiled document data (Saunders et al., 2020). We were provided with a total of 15 transcriptions from semi-structured interviews. While unstructured interviews refer to interview settings with no previously set format and thus allows an interviewer to ask whichever questions are on their mind, semi-structured and structured interviews follow a predetermined set of questions, usually in the format of an interview guide (Bell & Waters, 2018). As established, the interviews we were provided with followed a semi-structured interview guide, which held the interviews' formats similar but also enabled the interviewer to ask certain adjacent questions. Prior to receiving the secondary data, we received the interview guide used by the researchers for the interviews (see Appendix A). In this manner, we were able to see which questions were more relevant to our chosen theme and thus searched for relevant existing literature accordingly.

In general, secondary data is less time-consuming than other types of sources and hence allowed us to allocate our resources toward the theoretical aims and issues as well as the analysing and interpretation of the data (Saunders et al., 2020). However, the use of secondary data also presented some limitations. For instance, secondary data limited the possibility to reach out to the interviewees to clarify any comments or ask further questions. Moreover, the limited number of interviews also implies that there could be low levels of saturation in the answers and there is a need to conduct more.

3.3.2 Sampling Technique

The main sampling technique used for the secondary data was theoretical sampling. Theoretical sampling is used when researchers select participants that are particularly suitable for the case study (Eisenhardt & Graebner, 2007). They are thus chosen on the basis that they will offer theoretical insights on a chosen phenomenon due to their own experiences. Eisenhardt and Graebner (2007) state that while many believe that a sample population should be randomized to be representative, theoretical sampling is indeed appropriate in case studies as the main purpose of a qualitative study is to develop theory and not to test it. Moreover, the researchers of the primary data also used snowball sampling as a subsidiary technique, as they

received contact information from some of the informants. Similar to theoretical sampling, snowball sampling is also a non-randomised technique. D O'Gorman and MacIntosh (2015) define snowball sampling as a technique where existing informants recruit future informants from their personal networks.

The 15 interviews we received for this thesis consisted of an average of 30 pages each and were transcribed from interviews lasting around 50-60 minutes. The interviews were conducted digitally and recorded before being transcribed. All the informants were on a top managerial level in various industries operating in Norway (See Table 1). While the ongoing project had conducted a total of 50 interviews, we were merely provided with 15. The 15 assigned interviews were provided as they were more relevant to our chosen thesis theme. Thus, purposeful sampling was used when filtering among the many interviews conducted in the BEST in Retail project. The table below provides a brief profile of the informants utilized in this thesis.

Table 1: List of Informants

Informant	Role	Industry / Area
i1	Chief Innovation Officer & Head of Strategic Partnerships	Digital Identity Solutions Provider
i2	Head of Strategic Partnerships and Ecosystem Activities	Insurance Company A
i3	Senior Vice President of Digital Innovation	Postal Services Company
i4	Head of Media and Digitalization	Municipality
i5	Innovation and Strategy Advisor	Energy Company
i6	Chief Information Officer	Insurance Company B
i7	Chief Operating Officer	Innovation / Startup Collective
i8	Chief Executive Officer	Trade and Service Company
i9	Director of Customer Innovation	Insurance Company C
i10	Head of Products	Insurance Company A
i11	Head of Business Development	Supermarket Company
i12	Head of Sales and Development	Financial Services Company
i13	Competition Lawyer	Consulting Company A
i14	Senior Business Developer	Financial Services Company
i15	Partner and Head of Product Development	Consulting Company B

3.4 Data Analysis

The main purpose of data analysis is to create meaning of the collected data (Ngulube, 2015). The data analysis of qualitative research is often portrayed as a complex and labour-intensive process as it is less evident than in quantitative settings (Miles, 1979). The analysis of this research project followed a thematic approach. A thematic analysis has several phases (see Appendix B), and the following section describes the six steps used during the analysis, starting with familiarisation with data (Braun & Clarke, 2006).

3.4.1 Familiarisation with Data

To fulfil the data analysis process as efficiently as possible, and in line with a thematic analysis (Saunders et al., 2020), we started the process by familiarising ourselves with each interview as a stand-alone case and writing down some preliminary ideas. Eisenhardt (1989) states that an initial familiarisation with the data enables researchers to see the unique patterns in each interview before pushing to generalize patterns with coding and cross analysation. Furthermore, we initiated the analysis of the data by familiarising ourselves with the data on an individual level. Similar to two interviewers having dissimilar roles in an interview setting to obtain diverse perspectives, this allowed us to view the case in divergent ways before communicating together (Eisenhardt, 1989). The initial familiarisation of the data on an individual level was especially useful as we had not been present at the time the interviews were conducted and were offered the secondary data in a fully transcribed version.

3.4.2 Coding

After familiarisation with the data, it was necessary to code the data to simplify the analysis and translate it to central findings (Boeije, 2010). The second step of a thematic analysis involves organising the notes taken from the familiarisation and turning them into initial codes (Braun & Clarke, 2006). This stage was inductive and flexible, aiming to generate as many relevant codes as possible based on the broader extracts we had previously noted as interesting. The third step involves combining relevant or aligned codes into broader patterns and potential themes. Some of the codes identified were of such abundance that they became main themes, whereas others which were more specific became subthemes. Figure 2 portrays an example of how codes inductively emerged from text extracts and were thereafter narrowed down into more specific codes, using Corley and Gioia's (2004) data structure methodology. This

process is also defined as axial coding, as it involves reconsidering, comparing, and merging numerous codes into a respected few (Corbin & Strauss, 2015). The next two steps in a thematic analysis include reviewing the themes and identifying them in a cross-analysis. D O'Gorman and MacIntosh (2015) state that these steps aim to analyse the data in a manner that reveal its hidden relationships by exposing variances between similar elements and common points across dissimilar elements. The sixth, and last step, includes writing the discussion itself. The discussion chapter compares identified themes with existing literature.

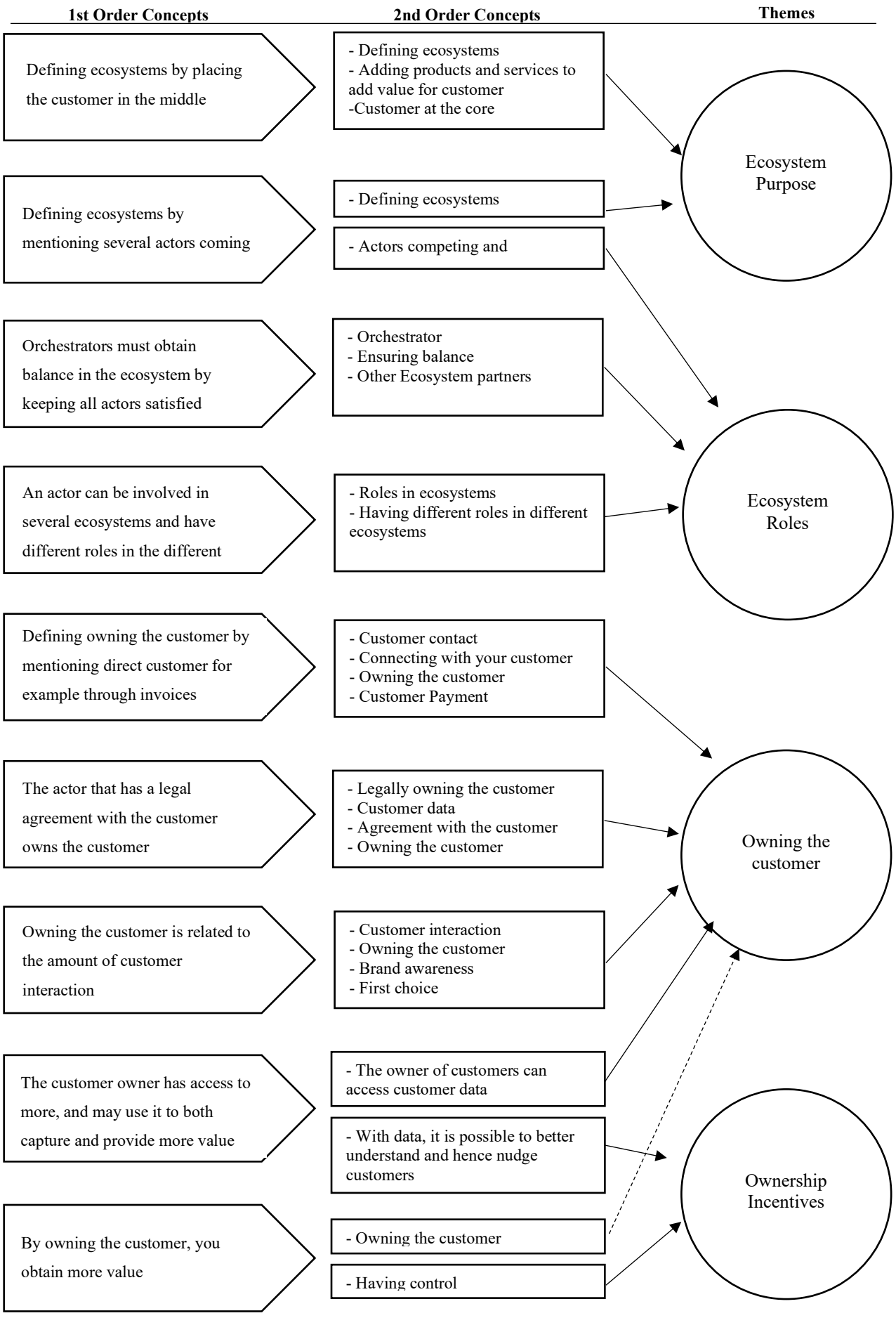

Figure 2: Sample of coding the secondary data using Corley and Gioia (2004)

3.5 Research Quality and Methodology Limitations

This section presents the quality of the research, evaluating the strengths and weaknesses of the methodological choices. It is generally more difficult for qualitative researchers to demonstrate that their research is of high quality (Saunders et al., 2020). Recognising the nature of this research as qualitative, this thesis will apply Lincoln and Guba's (1985) four criteria of trustworthiness when evaluating the quality of the research. The perspective consists of credibility, transferability, dependability, and confirmability.

3.5.1 Credibility

The credibility of research is to which extent the representation of the research participants' socially constructed realities matches what the participants intended (Saunders et al., 2020). In other words, credibility concerns whether the researcher managed to capture the truth of the research findings. There are several strategies researchers can apply to establish credibility in their research.

A researcher can increase trust and hence credibility by getting to know their informants and trying to guide their expectations of the research (Anney, 2014). To increase the informants' understanding of the study, the interviewer initiated the interviews by enlightening the informants about their ethical rights and explaining how the interviews were to be conducted. Moreover, the interviewer ensured that the purpose of the study was emphasized throughout the study and also provided the informants with several opportunities to ask questions they might have. This strategy was used to increase trust between the interviewer and interviewees, in hope of making the interview setting more comfortable.

Furthermore, the nature of the in-depth and semi-structured interview format allowed for an informal dialogue. To ensure credibility in this type of research setting, member checks are a commonly used strategy. Guba (1981) describes member checks as continuously testing the data with members of the data population, making sure that the information is factually verified. In this research, preliminary data analysis was presented to some of the interviewees as part of this process. Member check strategies are crucial in qualitative research because it makes it easier to ask follow-up questions and collect sufficient data (Lincoln & Guba, 1985). On one side, one can argue that the use of secondary data might remove the possibility of testing the informants' answers through member checks and thus lower the credibility as the

control and quality of the interviews are harder to ensure. On the other side, communicating with the interviewer helped us analyse and understand the data correctly to ensure that they represent the informants' interpretations.

Another way we improved the credibility of the research was by using peer debriefing. Peer debriefing provides the researchers with the opportunity to test their insights and thoughts continuously. (Guba, 1981). As this thesis is a part of the BEST in Retail project, we actively requested feedback and guidance from resourceful project members. This helped us gain valuable insight into the ideas and findings from peers' points of view, and from there adjust as new data, questions or patterns emerged. This technique is considered to strengthen the credibility and thereof the research quality.

Guba (1981) suggests that qualitative research should include some triangulation techniques as a part of strengthening credibility. Triangulation involves combining multiple data sources, methods, and theories to obtain corroborating evidence (Guba, 1981). The technique helps researchers reduce systematic biases by cross-examining the integrity of the informants' responses (Anney, 2014). Even though this research collected data from multiple sources, using secondary data can be a limitation towards the credibility of this specific thesis. However, the use of previously conducted interviews allowed us to further reduce biases, as multiple researchers bring different perceptions (Anney, 2014). In addition, the combination of existing literature and in-depth interviews from several informants indicates persistent observations of the concepts and possible coherences. Incorporating the triangulation techniques above is considered to strengthen the overall credibility.

Lastly, to improve the credibility, the research has considered negative case analysis by refining the analysis to be able to produce the best possible explanation of the phenomenon being studied (Saunders et al., 2020). A thorough analysis helped us delve into the research question and explore themes across the informants, strengthening credibility.

3.5.2 Transferability

The second criterion of trustworthiness is transferability and is parallel to generalisability (Saunders et al., 2020). The concept refers to which degree the results of qualitative research can be transferred to other contexts or settings (Anney, 2014). A qualitative study with a limited number of informants can often be hard to translate into other settings or contexts (Saunders et al., 2020). The data retrieved in this thesis was merely sampled from the retail

sector. Having that said, one may argue that ecosystems are structured similarly in other settings, and the results may hence be transferable. Nevertheless, some industries such as the health sector experience stricter regulations in terms of sharing between ecosystem actors, and the results may hence be challenging to transfer. Moreover, due to time constraints, this thesis analysed 15 interviews which may be considered a limited number. However, quantification is not necessarily the goal of qualitative research. The goal of this study is to provide a clear description so that the reader can evaluate the findings of the study to be relevant in a similar context. Therefore, we provided a thorough description of the research question, design, data collection, context, findings, and interpretations. We believe that an elucidating description of the research process is valuable for the reader when the research nature is exploratory, and the aim is to gain an overall deeper understanding of the concepts. In this way, the reader can judge the transferability of the study to another setting in which the reader might be interested to research. In this specific study, we consider the transferability to be especially important for the members of the BEST in Retail project, as this study intends to be extended in the future.

3.5.3 Dependability

The third criterion of trustworthiness is dependability. Dependability is defined as the stability of findings over time (Bitsch, 2005). Making sure that the research is understandable is critical to increasing dependability as it ensures that the research can be replicated (Saunders et al., 2020). Therefore, this thesis aimed to provide a detailed and transparent description of the research process, methods and the changes done as the research progressed. As all the phases of the research are presented, the thesis sought to create an openness and increase the possibility of replicating the findings of the study.

The thesis mainly sought to ensure dependability in two ways. Firstly, using a stepwise replication technique (Anney, 2014). As this research held multiple researchers, we were able to analyse the data from the interviews separately and compare the results. Stepwise replication enabled us to achieve a thorough analysis and reduce biases, hence increasing consistency and improving dependability. Secondly, to gain a deeper understanding, we coded the data from the interviews twice, making sure that some time had passed between the two coding processes. This technique is called the code-recode strategy (Anney, 2014). For this project, we first received and analysed 10 interviews before receiving five more, six weeks later. This allowed us to compare the results and discover if our findings were the same several weeks later. Both stepwise replication and code-recode strategies were applied to improve the

research dependability. Lastly, it is worth mentioning that dependability may not be established without some level of credibility or transferability (Guba, 1981). Therefore, this thesis aimed to utilise both triangulation and peer-debriefing techniques to improve dependability throughout the research process.

3.5.4 Confirmability

The last criterion of trustworthiness is confirmability and refers to which degree the research can be confirmed by other researchers (Guba, 1981). Confirmability in this thesis was mainly established by objectivity, ensuring that the findings clearly derived from the data and not from individual opinions. Therefore, cross-checking the information from the interview transcriptions in the analysis and findings has been an important part of reducing personal reflections and maintaining objectivity. Furthermore, merely being aware of the concept when applying several quality techniques helped maintain an objective and neutral mindset and is hence considered to strengthen the confirmability of the research.

The most influential part of this thesis confirmability is the nature of the previously conducted interviews as a part of the BEST in Retail project. On one hand, interviews conducted by other participants within the project increased the chance to reduce biases and maintain an objective mindset when assessing the interview data. On the other hand, this also created distance between the data collection and the interpretation of the findings presented in the results. To avoid misunderstandings and strengthen the research confirmability, we involved the project's members closely to confirm that objectivity was present throughout the research process. Furthermore, the findings in the research are supported by direct quotes from the informants providing the research with authenticity and generating awareness (Saunders et al., 2020). To summarize, the use of multiple quality criteria techniques and a clear description of the methodological choices and research process are considered to strengthen the concept of confirmability.

3.6 Ethical Considerations

In order to promote the main aims of a research project with scientific integrity and dignity while also being truthful and correct, researchers need to adhere to several ethical norms. Moreover, Saunders et al. (2020) state that failing to follow ethical norms in research settings impacts the quality of the findings. Thus, considering that a research project may be referenced

in the future and that readers may follow any suggested advice, ethical considerations are critical to keep in mind. For the duration of this thesis, the researchers have followed several guidelines to ensure that minimal ethical issues took place.

Firstly, it is important to note that at the time the secondary data was given from the ongoing project BEST in Retail to the researchers of this study, several ethical considerations were already in place. For instance, all informants of the BEST in Retail project were provided with a description of the research topic prior to interviews. They were also provided with information regarding the procedures for participating. The informants that agreed to participate also gave oral consent at the start of each interview and were reminded of their full rights to withdraw from the study at any point. Moreover, The BEST in Retail project has been ethically approved by the Norwegian Centre for Research Data (NSD Number 281940).

Secondly, several measures were put in place prior to obtaining the data specifically for this thesis. For instance, both researchers of this project signed a non-disclosure agreement. The agreement is in place to secure the privacy of individuals' personal and business matters and entails that the researchers comply with the guidelines of the research data owners. The secondary data received had also been fairly anonymized prior to its handover. The interview participants' names were fully removed from all the obtained data. However, for quality purposes of this thesis, participants' positions and company names were not removed, the data was therefore not fully anonymized.

Thirdly, considering that the data handled was not fully anonymized, the researchers of this thesis applied for ethical approval through the Norwegian Centre for Research Data (NSD Number 850395). Moreover, informants referenced in the thesis were further anonymized as exact company names were replaced with a corresponding industry the participants work in. Even though Gibbs (2007) states that the level of detail behind the data and the context from where it was collected strengthens a qualitative study, it was necessary to further anonymize informants in this study as knowing both the position and company easily enables one to find who was involved.

Lastly, to secure the informants and ensure that no unauthorized individuals were able to access the collected data, the data was stored and encrypted in secure work servers with limited access at all times. As soon as the thesis is completed and handed in, the data used for the project will be deleted from these locations to ensure no leakage of sensitive information.

4. Findings

This chapter presents in-depth the concepts that emerged from the data analysis and thus provides the basis for the discussion in Chapter 5. Quotes from interviews are presented to substantiate our findings.

Firstly, the chapter illuminates the diverse responsibilities within an ecosystem. This lays the foundation for understanding the authority of alternative roles. Thereafter the chapter looks into the concept of owning a customer within an ecosystem and presents why it is crucial for some players. Finally, the findings chapter presents which ecosystem players essentially own the customer. The figure below illustrates the three main parts the findings chapter presents.

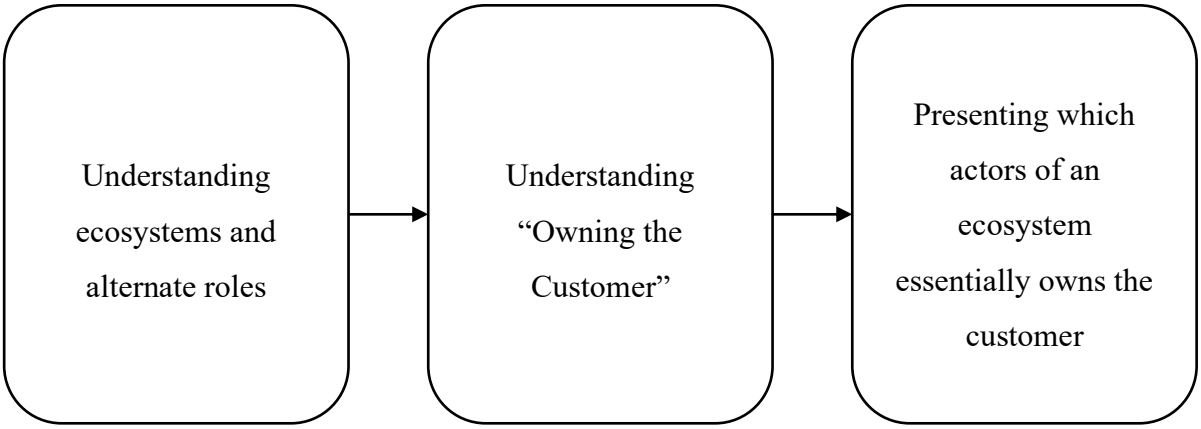

Figure 3: The main parts the findings chapter presents.

4.1 Diverse Roles with a Unified End Purpose

Business ecosystems bring together several players with indistinctive roles. Moreover, even though these players are part of a unified system, they have diverse responsibilities and authority. Roles identified include the ecosystem the orchestrator, and complementors.

4.1.1 What is an Ecosystem?

Among the many topics covered in the interview guide, one question concerned how the informants define ecosystems. The findings present several angles on how the informants perceive what an ecosystem is. It is essential to grasp informants' opinions of the term to fully understand the findings presented in this chapter.

Business ecosystems emerge as businesses come together to provide customers with an improved value proposition in terms of a simplified customer experience. There is a unified understanding that the definition or perception of ecosystems includes several participants combining their products, knowledge, and services with the main purpose of improving customers' experiences. Out of the 12 informants that were asked to define an ecosystem, more than half described a system that included a set of partners that aimed to provide more value to customers.

> *"An ecosystem is where you can add up products, services with other partners and attach to other products […] so that the customer can get products or services from more than one company. […] for ecosystems, you see it from the customer side" (i2).*

> *"For me, an ecosystem is a collection of different providers, either a physical products or services that are put together and offered to the customer as one value proposition." (i10).*

Some also described the phenomenon in a comparable manner, however this time by placing the customer in the middle.

> *"[…] in the end it's adding value to the customer experience. And of course it could be business customers as well, not necessarily consumer" (i9).*

Informants also emphasize that ecosystems bring value to the customer when the customer journey is simplified. For instance, two informants within insurance mentioned that the industry is devoted to simplifying the customer journey.

> *"[…] the insurance companies are investing, including trigger or investing a lot in items to make the customer journeys easier" (i2)*

> *"I think making it easy for the customer is key. And then obviously, and then having one invoice to the customer is, I think that from a customer perspective, that's very convenient." (i10)*

The remainder of the informants had dissimilar views on the phenomenon. When asked about ecosystems, the informants mentioned that these kinds of systems emerge as businesses look to obtain value from other firms, for example to expand their current customer base or even expand their competence.

> *"[…] the whole thing about ecosystem is that [the] partners are able to create, add value to each other, to be able to bring services closer to the user and to be able to extend their services in a way that they will not be able to do if they were doing it alone […]" (i14)*

> *"[…] the motivation for being part of an ecosystem is that by being part of that ecosystem, we get some kind of leverage, or we get access to a much bigger universe or potential customers." (i1).*

> *"[…] that's why we also enter into some of these kinds of partnerships just to be able to build up the competence and knowledge on how to do this" (i9).*

Lastly, while previous informants mentioned firms partnering to form an ecosystem, one informant mentioned that ecosystems also include competing parties that cooperate.

> *"I think that to have a complete ecosystem, […] you need a good combination of companies that are competing and are aware of each other and at the same time as they are competing, they're also cooperating when it's necessary." (i8)*

4.1.2 Orchestrator

To understand which ecosystem players had more authority in customer situations, it is natural to discuss the distinctive roles within the system. When discussing ecosystems, informants found it natural to dismember the system's roles, and divided these into two categories, the lead role, which was also referred to as the orchestrator, and the complementors. This section portrays informants' beliefs about the orchestrator role and is shortly followed by a section regarding informants' beliefs about the complementary actors.

In an ecosystem, there are several participants. Among these, one grasps a leader role, often referred to as the orchestrator. The role of the orchestrator is to administrate the ecosystem in a manner that ensures balance and functionality of the system.

> *"[…] you will have an orchestrator ensuring that there is a balance and if that is not there, the partners will not be happy and ecosystem will not be fruitful, I suppose" (i5).*

According to the informants, orchestrators have more authority as they administer the players within the ecosystem. The threat of being replaced will thus diminish for a business with the orchestrator role.

> *"I would say it's a diplomat. I would say it's a person or a firm understanding balance. So, they have to ensure that people are happy in the partnership, at least those they want in, and they have to be cut from those who should actually go out." (i5).*

> *"The threat is that, I mean, if you're the orchestrator is not a threat in that sense, but the other players in the ecosystem could easily be replaced. So, if we don't deliver as an insurance provider in a car subscription business model, then we will just be replaced" (i10).*

> *"[…] Apple owns the whole ecosystem and the rest [of the players within the ecosystem [are] just delivering a small service and it's easy to replace [them]" (i2)*

There are however some imperatives as to who gets to take on the orchestrator role and thus administrate the ecosystem. For instance, informants of this project stated that the orchestrator must have an abundance of experience, large networks, and great financials. Hence, the orchestrator is often synonymous with the largest player in the system.

> *"The orchestrator must have some experience on partnerships and ecosystems so I don't think we, I would say, as of now […] are there, I would say it's a maturity, some maturity to be experienced, and I don't think we're there yet" (i5).*

> *"We're not big enough and you know, building that platform itself would be a huge investment. Building the algorithm, the connectivity, and the stability, and 24/7 operations, it would, it really requires a joint » (i6).*

Another informant also mentioned that the actor that operates the platform where participants associate becomes the orchestrator.

> *"[…] if you think of an ecosystem and to be an orchestrated in an ecosystem, […] we don't have enough muscles and I think the willingness to do what it takes to actually be one of those players […]. We don't have the platform to be the orchestrator!" (i9)*

In addition, what is needed to lead an ecosystem depends on to which extent the customer views their relationship with the orchestrator as relevant.

> *"[…] You need to be relevant towards the end user and to the customer […] And then if we add on services, you will still feel that relationship between yourself and the insurance company. So, I think being relevant to the customer is key." (i10)*

From a customer's point of view, the orchestrator must be able to grasp their attention. Several informants mention that well-known brands are more likely to become orchestrators.

> *"Well, I think brand name is a huge thing because if you look into […] platforms today, you have the few, you know, you have Facebook, Apple, Amazon, Microsoft […]. It's very hard to build a relationship I think, with customers and other value providers" (i6)*

> *"I would say that the only company in the world that is able to or could be, that is kind of like Apple or Google. […] you need to have the kind of data and knowledge that companies like Google or Amazon or Apple" (i2).*

Moreover, informant i10 mentioned that customers have established considerable amounts of trust towards well-known brands and are therefore more prone to allowing larger brands to withhold the role of orchestrator.

> *"Obviously I trust Apple to be the orchestrator around everything that goes within my devices because it worked. I don't need anything outside of that ecosystem, and I trust them" (i10)*

Interestingly, informants also mention that an orchestrator should be able to grasp customers' attention with appealing products. Thus, less appealing businesses will be less likely to become the orchestrator of an ecosystem.

> *"Of course, you [as the orchestrator] have to have the attention of the customer [some] way, either business to business or consumer, whatever. So, what is your offering? […]. I know where you would perhaps look too thin. […] And I think insurance is such a boring product for most people, so you would rather think getting insurance embedded where you can because you don't want to take a stand on it and then you can say, it's*

the same with the banks because it should only work, so if you could do it digitally, the job you want do for yourself"(i9).

Some informants stated that the founding business of the ecosystem sometimes inherits the orchestrator role even if they are not the major players.

"[…] the startup could be the orchestrator. So, it was not the major firm" (i5).

"I mean, obviously the company or the person creating the product will have like a head start [to become orchestrator]" (i10).

On the other hand, informants also mentioned that looking back at it, large orchestrators were once nothing. They emerged their businesses from nothing and founded the ecosystem themselves. The informants underlined that it may even be easier for small firms to start an ecosystem than for large firms to change their business models.

"Amazon, they appeared from nowhere. And you can see different kinds of companies like that, and I think it's harder to kind of, if you take for example, a large company. Think of it as like a big boat. And when we are changing the direction 5%, it's a lot of work, compared to a small company doing the same change. It's so much easier" (i11).

"Like Facebook when they started out, they wouldn't have a network. But when they build their network and they get a lot of data, then you have a great opportunity for creating an ecosystem" (i13).

Relatedly, another informant illustrates an example where a large firm in the salmon industry fails to build its own ecosystem due to their size and thus loses the orchestrator role.

"But on the other hand, if you are a big company, for example, I have an example from the salmon industry […] And the problem for this company was that they realized very early, but they didn't manage to have enough resources to develop that part of services at the same time as they should earn the money." (i8)

4.1.3 Complementors

An ecosystem is made up of several actors, many of whom will not obtain an orchestrator role. This section presents findings regarding roles non-related to being the orchestrator, thus being a part of an ecosystem with a complementary role. As mentioned in the literature review, the

term complementors is used as an umbrella term for any other participating actors. Informants stated that these supplementary roles are often more valuable for some businesses than playing an orchestrating role considering the amount of time and financials needed for the latter but also their business purpose.

> *"[…] we should be part of the system and not necessarily the one orchestrating it, because that takes a lot of time and money at least. […] And I think for us it's more to find those important, and so to say, necessarily systems that we can be a part of" (i9).*

The orchestrating role is not always compatible with some businesses as they have different business goals. For instance, informant i5 differentiates themselves from profit-maximising firms, and thus believes that a complementary role is more suitable for their needs within an ecosystem.

> *"We have another mindset, so we're not after the last dollar or krone, we are there for the society to function. So, we are more an enabler than we are a profit maximiser. So, I can clearly see the difference between like [large profit maximizing companies]. They have very different roles so they're very different companies from us" (i5)*

One informant explained that even though many want to be an orchestrator, most businesses will have a complementary role and contribute to the ecosystem with other aspects.

> *"[…] everybody wants to be the main player. And from the ecosystem perspective then I think that only a few will be the main player and then your products and services will be more like commodities" (i12).*

These roles are more customary and even though they may come with fewer demands, they also come with less authority. It is therefore vital to be an important player in an ecosystem so that one's business does not become undesirable. For instance, one informant used Amazon as an example of how orchestrators can use their authority to make other actors less involved.

> *"[…] there's a lot of fear, right? So, if I […] make a product […] and sell it on Amazon. Amazon is well known for making markups, making their own Amazon Basic version. […] They will start selling it to compete with you and also, they will usually list that higher than your listing. And sometimes [companies involved in the ecosystem] go bankrupt because Amazon copies them" (i3).*

On another note, another informant also mentioned that a business is not restrained to a single role or a single business ecosystem.

> *"We can be in different kind of ecosystems. We don't have to be in one and only one and I think our role can be different in different setups" (i9).*

4.2 Customer Ownership

The interviews revealed that even though ecosystems are made up of firms with a shared goal of providing value to customers, there is still a large competition for keeping customers' attention and acquiring their data. Depending on firms' roles within the business ecosystem, they obtain more or less power towards the customer. This section includes a part on what the informants believe it means to own the customers, as well as a part on why a business should be worried about owning the customer.

4.2.1 Owning the Customer in an Ecosystem

Informants were asked what they believed owning a customer means within an ecosystem. Many of the informants replied that owning the customer is equivalent to owning the relationship with the customer, especially online and through mobile phone applications, others believed that ownership could be linked towards owning data regarding the customer. One participant also mentioned that ecosystem actors may own the customer in a legal matter.

When it comes to owning the customer relationship, informant i3 mentioned that a business that owns the customer is whichever business the customer interacts with when looking for a product or service.

> *"By owning the customers is who did the customer interact with? What's the brand name? Because mixing so, what's the URL they put into their browser? What app do they open?" (i3).*

Similarly, informant i10 mentioned the customer relationship in terms of communication and dialogue with the customers.

> *"[…] who takes the lead in the customer dialogue. Who is sending you emails or giving you a lot of calls or what have been in a normal customer relationship?" (i10).*

In terms of customer dialogue, an informant stated that in order to own the customer, a firm must keep them satisfied.

> *"[…] I think the companies that will win the customers' heart are those that do what the customers want and need." (i15)*

Moreover, from the customer's point of view, informant i15 also states that ecosystems are complex to understand especially regarding the many businesses and roles involved. The informant emphasises that when unsatisfied with a purchase from an ecosystem, customers tend to blame the actor with whom they had the last interaction. The informant thus means that in a situation that does not go as planned, it might damage the whole value chain within the ecosystem and not merely the brand at fault.

> *"I think our attention span as customers are getting shorter. We have so many things disturbing our attention so I think we will often react on taken out our frustration out on the last part which we were in touch with. So, say that was delivered food like at my door, I don't necessarily blame the restaurant. I might blame the one during delivery" (i15)*

Another informant stated that owning the customer meant that you could keep the customers if the ecosystem dissolves.

> *"Owning the customer means that if one piece of the ecosystem is going away, you will not lose the opportunity to connect with your customer, either through sending the invoice to them" (i2).*

In a similar manner, informants i10 and i2 also mentioned that invoicing is relevant when considering who owns the customer.

> *"I think one basic thing is where the cash flow is, so who is invoicing the customer?" (i10)*

The belief that owning the customer had something to do with owning the customer relationship was the most abundant reply. On the other hand, several informants also alleged that a business owns the customer when they own a customer's data.

"But data is the key I think, so if you have the correct data and you can use the correct data. I think you are in a position to own a relation with the customer." (i8).

"I think the one that owns the data owns the customer" (i12).

One of the informants stated that businesses that own the interface or platform also own the customers' data.

"The interface where you are meeting the customer. It could be the online page, it could be in the store, in your store, so that's the interface with the customer. […] You're opening the interface; you're owning the data." (i11)

Lastly, two informants also mentioned that owning the customers entails that a firm owns the customer through legal agreements, thus owning the customer in a legal matter.

"Regarding to the questions of who owns the customers, simply put that's the one who got an agreement with the customers I suppose. And that would be the legal owner of the customer and they would have obligations according to GDPR […] the one who's got an agreement with the customer owns the customer, as a starting point" (i13).

4.2.2 Ownership Incentives

There are several reasons why businesses feel the incentive to own the customers within an ecosystem. The interviews unveil that several ecosystem actors fear the consequences of not owning the customer, as it is the latter that may be your anchor within the system. For instance, informant i3, who believed that a business owns customers when they are in control of the customer relationship within an ecosystem, states that it is easy for whoever owns the customer to terminate other ecosystem partners. The informant is a top-management employee in a postal services company and has witnessed first-hand how postal services companies can easily be removed from ecosystems nowadays.

"So, you know, 49 krs with us, 49 krs with our competitor and it will have our logo. And then, if that item is delivered to your mailbox, you will never actually interact with an employee from [our company]. And you don't really care maybe if it was [another company that] put it in your mailbox or some other company put it in your mailbox. I mean I don't care. So, it could be very easy for [a] retailer in Norway to just remove

our logo and [say], you know, don't worry about who's delivering, it will show up, don't worry" (i3).

In simpler words, the actor that owns the customers has more authority and control than other ecosystem actors.

"[…] the thing is, when you own the customer, you have control" (i3).

Moreover, as mentioned earlier, informant i2 states that it is vital to own the customer in case another actor of the ecosystem vanishes to ensure that one does not lose any business. In an equivalent manner, informant i3 states that by not owning the customer, a business loses power over its customers.

"And also, we lose a lot of our power to influence the customers, to choose us, and that's super scary scenario" (i3).

Finally, several informants also mentioned that by owning the customer, a business may access more of the available customer data than other actors within the same ecosystem. Informant i14 states that the owner would be able to access more data and use it proactively to nudge their customers.

"[the] owner is able to see different data, to see the different point[s] around the customer journey, use data to be proactive, to nudge customers in a way towards the whole customer journey in a way" (i14).

Similarly, informant i8 also mentioned that owning the customer through data allows a business to provide the customer with better solutions.

"If you know the customer through data and how you act like a customer, the part in the value chain that really understand the customer and can do the analysis and can adapt to it, in a way own the customer or are in a position to provide the customer with more and better solutions." (i8)

One informant also emphasized that much of the acquired customer data is secure and can merely be used for what the customers have agreed to, thus making it better to collect customers' data directly.

> *"[...] some of the data, in the data like [is] not open data. [It is] secured and [is] only used for what [it was] expected to." (i4)*

Overall, the incentives of owning the customer in an ecosystem are linked to greater security, increased profits, and access to more data.

4.3 Obtaining Ownership

This section discusses the informants' opinions on which actors and roles in an ecosystem are more prone to own the customers. The section also portrays how actors can get information and establish a relationship with their customers without being the orchestrator of an ecosystem. The informants had several ideas of which actors manage to obtain the information they require.

4.3.1 Being the Orchestrator

Most of the informants stated that some specific roles within an ecosystem, such as the orchestrators, are more prone to own the customer.

> *"Depending on the role we have in the ecosystem, is obviously that you will have a stronger relationship with the customer, so that kind of customer locking will be stronger." (i10)*

Likewise, informant i7 also believed that in order to own the customer in an ecosystem, a business must establish its own platform and thus have the authority of an orchestrator to access the customers.

> *"I guess it's something about you know, who provides the platform, because if it's a bundle services, I guess the platform players [keep the customers]. It doesn't necessarily just have to be software, or you know, on that kind of system. […] the platform players […] provide a place to customers who want to go and spend time" (i7).*

Moreover, several informants emphasize insecurity regarding the allocation of owning the customer within ecosystems, as the orchestrator takes control. Hence, if unsatisfied with the allocation, complementors feel a need to break out of larger ecosystems to ensure their own survival.

> *"Then you don't need to break out of the ecosystem, but if something very important for you is missing in that ecosystem, you will not be satisfied to be within the apple walls" (i10)*

For instance, informant i3 states that out of fear of not owning the customer, the company the informant works at has started its own ecosystem. The informant states that not only has the establishment of its own ecosystem enabled them to acquire a larger share of profits, but it has also increased the security of being cut out.

> *"But we also have a bigger share of the profits, and we see a lot of competitions now just being subcontractors. Very low paid, very easily removed and exchanged subcontractors. And that's not a position that our company wants to be now [...] So in our case for instance, a lot of our businesses, e-commerce, [is] B2C" (i3).*

4.3.2 Communicating Directly with the Customer

Another suggestion proposed by an informant contradicts the ecosystem's fundamental goal. While most informants agreed that the major objective of an ecosystem is to simplify a customer journey, one informant indicated that maintaining simplicity is not always viable to continue owning the client. For example, the informant indicated that their insurance invoices would not be sent through the orchestrator, allowing them to maintain the client relationship.

> *"I'm not saying that it's the best customer journeys solution, but [...], you get the invoice on the insurance part from your insurance company, and you get the monthly invoice for renting the equipment from another part and you have agreed that they can share the data between them" (i2).*

Moreover, informants also stated that ecosystems allow sharing of resources and data. However, informants also stated that obtaining customer data can be challenging if you do not own the customer. In this case, informant i15 stated that businesses must acquire that data directly from the customers.

> *"[...] in competitive environment, when you can't get the data from the earlier steps in a process, you need to kind of, I guess go up there and then talk through customers and get the data you need and that is open" (i15).*

Interestingly, the informant also underlined that data is going to become more accessible in the future, and it is thus becoming more central to acquire the necessary skills to use the data one obtains.

> *"I think that going forward, everyone can buy the same data. Then that is not going to be a competitive edge anymore. It has been for some years that you buy your journalistic and learned how to use them such, but then the value of your own data that nobody else has will increase if you learn how to use it" (i15).*

4.3.3 Diminishing Legal Hurdles and Increasing Trust

It was also mentioned that there are legal issues as to which data one can obtain. Informant i8 stated that in some countries it is more difficult than others to share customer information on customers, and the orchestrator would therefore own the customer. However, the informant stated that luckily in Norway there are fewer restrictions and a greater amount of trust among actors, and it is therefore simpler to cooperate within the ecosystem.

> *"If you are in an American context, for example, everything is by the laws, [there is] a lot of paper before you can talk to each other, it's difficult to have the speed. But if you go for example, to Norway or the Nordic approach where we trust each other […]. I think that we'll be even more competitive if we still can have the trust and treat each other good, because then you [have] cooperation. And at the same time [have] competition. So, trust is also a key, I think in the future." (i8).*

Similarly, other informants also mentioned that trust between competitors is essential in an ecosystem setting. The informants emphasize that trust is especially vital as actors within ecosystems often compete while cooperating.

> *"In addition, I think there's a challenge when it comes to trust because if you don't have trust, then the cooperation is very hard. And if you're basically competitors then you normally wouldn't tell that much trust among the partners as there should be, maybe in cooperation" (i13).*

> *"[..] there's some natural fear of abuse when it comes to ecosystems, right? So you need to trust the party in the middle" (i3)*

All in all, the top management informants portrayed various insights into whom owns the customer in an ecosystem. The majority alleged that a business owns the customer by being the orchestrator, communicating directly with customers whether it is through direct invoices or data collection, or lastly by increasing trust among ecosystem players to simplify resource sharing.

5. Discussion

This chapter discusses our empirical findings in relation to the existing literature which was reviewed in Chapter 2. The chapter is divided into three sections that combined situate the findings in terms of the initial research question of this thesis: ***How does owning the customer influence value capture in ecosystems?***

The findings suggest that owning the customer could relate to the possession of customer data and/or customer relationship. In that sense, it appears that a firm's role in an ecosystem is likely to disclose whether it owns a customer or not. To clarify, while the complementors of ecosystems indeed desire some form of ownership, it is mainly the orchestrator that obtains ownership over customers. However, the findings also suggest that by bypassing the orchestrator and obtaining some form of direct contact with the ecosystem's customers, complementors are able to own the customer. The figure below illustrates how a firm's role in the ecosystem influences the likeliness of them owning the customer.

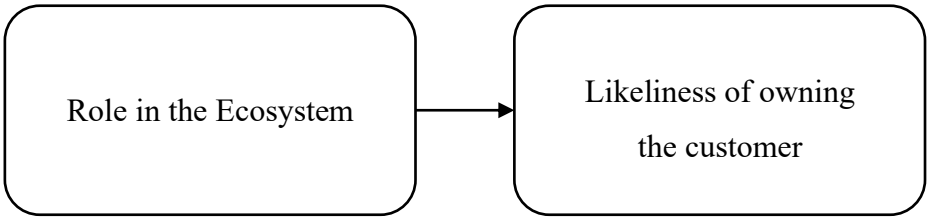

Figure 4: Role influences likeliness of owning the customer.

5.1 Understanding Ecosystems and Ecosystem Roles

In line with the literature review (Moore, 1993; Adner, 2017; Jacobides et al., 2019), the findings show that there are many ways to understand the term ecosystem. With that said, similar to Adner's (2017) beliefs, our findings reveal that most informants believe that increasing value to customers by placing them as the core provides the fundamentals of an ecosystem. On the other hand, contrary to Adner's (2017) definition, our findings also suggest that some firms are mainly incentivised of acquiring broader competencies. The findings may find roots in the fact that the informants of the project represent firms in various industries, both from for-profit and from non-profit companies. As the former may be further incentivised

to add value to their own organisations, it is likely that they look at ecosystems as a self-adding value phenomenon.

The findings acknowledge Moore's (1993) and Adner's (2017) belief that ecosystems must have at least one participating actor that takes an orchestrating role while the remaining participants act as complementors. In line with Adner (2017), the findings explain that the role of orchestrators is to ensure a balance between partners in the ecosystem. It seems however that while Moore (1993) and Adner (2017) state that an ecosystem sometimes has more than one orchestrator, our findings suggest that ecosystem actors perceive there to be merely one participant with the orchestrator role in all ecosystems. The informants may have this perception as they often believe that the orchestrator is a large firm with more authority than all other participating actors. Moreover, as the data merely classifies roles into orchestrators and complementors, the findings oppose Yaghmaie et al.'s, (2019) in-depth dissection of ecosystem roles. The findings' classification of orchestrator-complementor roles may find its roots in informants' belief that the orchestrator role is of such importance that the classification of remaindering roles is not as relevant. In fact, in line with Clarysse et al., (2014) and Kapoor and Lee (2013), the findings portray that orchestrators are large firms with decision-making power, large networks, and greater financials than the ecosystem's complementors. According to the informants, orchestrators have more power as they administer the players within the ecosystem. Thus, there is a leader-follower hierarchy. Considering Adner's (2017) statement of an orchestrator ensuring balance within the ecosystem by ensuring that all actors align their roles, one can argue that it may be challenging to achieve as informants mainly used the terms orchestrator and complementor. Hence, the informants seemed hesitant about a more specific classification of complementing roles, diverging from the many depicted in existing literature (Yaghmaie et al., 2019). As it seems that the informants display a lack of knowledge of ecosystem roles, it is noteworthy to question whether they fully understand their specific position in an ecosystem. Nevertheless, there are limitations to our findings on the diverse types of roles as some interview questions were more inclined toward an ecosystem leader.

Contrary to Marty and Warin's (2020) description of complementors being smaller firms, the findings also suggest that being small is not the only reason for adopting a complementor role. While the findings imply that orchestrators are large and powerful firms, they also portray that firms decide to adopt a complementor role as it is better suited with their business' goals. For instance, while some firms adopt a complementing role due to time management, others, such as non-governmental organizations, adopt the role as profit maximization is not in line with

their business goal. Furthermore, despite the fact that the findings and theory demonstrate that the majority of orchestrators nowadays are large and established firms (Kapoor & Lee, 2013; Clarysse et al., 2014), one can debate if these are better equipped for the orchestrator role. According to the findings, large orchestrators such as Amazon once began as small businesses, and the pace of change in small businesses is often faster than in larger businesses. As a result, we cannot rule out the possibility of small businesses taking on the job of orchestrator, and one may also argue that they may be better suited as orchestrators. This also supports Lingens et al. (2021) findings that small firms and start-ups are able to lead an ecosystem despite their size.

Moreover, even though the findings depict some firms willingly adopting a complementing role, they also portray the aspiration of being the orchestrator. This may be due to the fear of being replaced in the ecosystem. The findings describe the power obtained by orchestrators as vital in terms of securing a firm's position, as the orchestrator coordinates the players within the ecosystem. As Moore (1993) described, ecosystems are complex entities as they balance competition and strategy. There is therefore a fine line between competition and cooperation, and as orchestrators seem to have a clear advantage, the informants seemed desirous of the role.

5.2 Customer ownership in an Ecosystem and why it is Important

5.2.1 What Does it Mean to own the Customer?

As the literature review revealed, ecosystems are complex entities where businesses that usually compete come together to provide more value for customers. Moreover, as Davenport et al. (2011) explain that knowing what your customer wants is key to business success, it is ideal for ecosystem participants to understand what it means to own the customer in an ecosystem setting.

In line with the literature review (Vandermerwe, 1996; Yang, 2017), the findings demonstrate that owning the customer in an ecosystem primarily entails owning the relationship between firms and customers. In terms of the customer relationship, our findings suggest that in order to own the customer, an ecosystem player must have direct contact with the customer. The findings thus acknowledge Yang's (2017) definition of owning the customer. For example,

the findings imply that a firm owns the customer when communicating with him or her directly through mobile applications, websites, phone conversations, and email. Furthermore, the findings also emphasize that there is a difference in the nature of customer interaction between firms that own and those that do not own the customer within an ecosystem. Meaning, the firms that own the customer have a higher degree of direct contact with the customer. Hence, it is possible to suggest that the ecosystem actors with the most customer interaction are the ones that are likely to acquire ownership of the customers. Adding to Yang's (2017) definition of customer ownership, our findings imply numerous ways to establish direct contact between ecosystem firms and customers. For instance, as well as acquiring customer interaction through traditional communication methods, the findings propose that a firm owns the customer when it can retain the customer relationship even if the orchestrator departs the ecosystem. To illustrate, if a complementor invoices the customer directly rather than through an ecosystem's orchestrator, the complementor will still be able to invoice the customer if the ecosystem dissolves. In this way, the complementor maintains a direct interaction with the customer through invoicing, and thus maintains ownership of the customer. The latter somewhat differentiates from Yang's (2017) definition as the findings of this thesis are related to an ecosystem context, whereas Yang (2017) examines owning the customer on its own. Finally, in addition to acquiring some form of direct customer interaction, the findings also emphasize that it is vital for a firm to ensure that its customers are satisfied when interacting with other firms within the ecosystem. In other words, the findings showed that customers that are unsatisfied with a product tend to blame the last company they interacted with even if the problem is due to another participant's mistake. Thus, it is vital that firms ensure that their ecosystem partner's relationship with customers is of superior quality.

As well as defining owning the customer through customer relationships, the findings also underline that one of the ways an ecosystem actor may own the customer is by owning their data. It is arguable that being able to receive necessary customer information or data is among the main reasons for owning the customer relationship. Similarly, both Vandermerwe (1996) and Yang (2017) discuss that it is necessary to own the customer relationship to be able to access customer information and thus track customers' purchases, wants, and needs. Moreover, as mentioned in the literature review, new legislations also directly hinder ecosystem actors to gain access to the customer data they require (Downes, 2018). Our findings suggest that with the emerging GDPR laws, owning the customers may be interpreted as owning the customers in a legal matter. When evaluating the impact of data, it is thus worth

considering how the legal aspect of GDPR forces both customers and businesses to increasingly consider data. This also presents some justifications for why data is a key factor that cannot be avoided when understanding who owns the customer. In contrast to Vandermerwe's (1996) and Yang's (2017) views of acquiring customer data by having a relationship with the customer, and Downes' (2018) opinion that information sharing is becoming more difficult due to GDPR, the findings also suggest that customer data is somehow becoming more accessible. For instance, data is becoming accessible through third parties such as Google and Facebook. As mentioned in the literature review, the collection and selling of customer data have become a 200-billion-dollar industry (Esteve, 2017). Similarly, an informant also suggests that going forward ecosystem actors may be able to acquire the necessary customer data without directly forming a relationship with the customers as they are able to access it through data-selling companies. Nevertheless, in line with industry- and digitalisation trends, the findings consider the acquisition of customer data to be of significant importance when discussing how to own the customer in an ecosystem.

Considering the thesis' findings, it is however also important to note that when asked to define owning the customer, one can clearly differentiate the informants that draw a direct line between customer data and owning the customer compared with the informants that are more concerned about the customer relationship. To illustrate, the analysis suggests that the informants with positions associated with law, competition, sales, digitalisation, and developing (IT) to a higher extent define owning a customer by centralising owning the customer data than informants in innovation roles. This contrast could be explained as a natural division, as different job positions often impact their area of competence, interests, and focus.

To summarise, while some argue that owning the customer depends on which relationship a business has to its customer, ecosystem actors are not able to withhold a successful relationship without the existence of data, particularly of the businesses wanting to survive in today's digital world. This point of view supports previous literature that customer data can be seen as a major competitive advantage and therefore the core of a successful ecosystem (Krafft et al., 2021).

5.2.2 Why is it Important to Own the Customer in an Ecosystem?

Building on the previous section that discusses what owning the customer in an ecosystem means, this section clarifies why it is significant to own the customer.

The primary reason for a firm wanting to own the customer is to gain the customer information they require. However, Yang (2017) states that owning the customer is only successful when a firm is able to use the information they acquire. The findings support the latter, revealing that only firms that can properly grasp and analyse customer information would be able to meet customers' needs. Moreover, as businesses are increasingly operating digitally more data is being produced. As a result, businesses operating in today's market may require superior knowledge of analysing customer journeys to create more value for their customers (Halvorsrud et al., 2016).

Furthermore, in line with Birkinshaw (2019), the findings suggest that ecosystems are built around intangible assets which lead to disagreements among participants. The findings however also provide a solution to the problem: By owning the customer, a firm can receive the information it seeks directly from the customer, avoiding conflict between actors over the allocation of intangible assets. The conflicts revealed in the findings find their roots in the nature of the ecosystem phenomenon, that is, having a complex interplay between competitive and cooperative business strategies (Moore, 1993). Acknowledging Moore's (1993) description of an ecosystem, the findings of this thesis revealed that firms must obtain balance between competing and cooperating to ensure an effective ecosystem. For instance, equivalent to the literature review (Marty & Warin, 2020; The European Commission, 2020), the findings portray firms' insecurities regarding their existence within an ecosystem due to larger players having a decisive informational advantage over customer information. The findings emphasise that a firm that owns the customer in an ecosystem, obtains a form of control that may hinder other participants to flourish. Moreover, the findings reveal that several informants fear being replaced as they do not have power over their own position in the ecosystem. Thus, by owning the customer, a firm obtains the specific information it requires to ensure its own success.

5.3 Understanding who Owns the Customer in an Ecosystem

Having discussed the fundamentals of owning a customer in an ecosystem, the following section describes the thesis' findings concerning how to obtain ownership. The most recurring findings portray that a firm is able to own the customer in an ecosystem by being the orchestrator, forming direct relationships with the customer, or by ensuring enough trust between the ecosystem actors.

5.3.1 Control the Ecosystem to Own the Customer

An important discussion about how to own the customer in an ecosystem is intricately linked to who owns the customers. As stated in the sections above, the findings suggest that ecosystem actors appear as either orchestrators or complementors. While arguing who owns the customer, most of the informants describe the orchestrator's role as in control. Similarly, Marty and Warin (2020) acknowledge that orchestrators have more authority and therefore have a decisive advantage over complementors. For this reason, it seems that the level of control the orchestrator naturally holds, is the primary criterion for orchestrators owning the customer. Thus, one can reason that the power structure between the orchestrator and complementor role is somewhat pre-decided and hence influences which actors are in charge of the customer relationship, supporting Figure 4. As established the orchestrator tends to be in control (Krafft et al., 2021), and as actors in ecosystems often compete, the orchestrators might use their power to gain competitive advantage.

When addressing the power arrangement between orchestrators and complementors, it is worth mentioning that the findings and literature (Downes, 2018) recognize several legal requirements that might obstruct the ability to obtain balance. For instance, GDPR sets higher expectations for businesses when processing customer information, and it may be particularly challenging to share customer information between ecosystem actors. In fact, sharing certain customer information without customers' consent outside of the business is illegal (Downes, 2018). Moreover, orchestrators might struggle to meet the legal requirements considering that the law obliges businesses to inform customers about how their data is processed. In an ecosystem setting it may be further challenging as there is an abundance of actors involved, resulting in blurred lines regarding which actors oversee the customer data. A single purchase today often involves dozens of businesses: from manufacturers to postage companies, making the list of actors involved complicated for orchestrators to handle and thus diminishing their willingness to share customer information with other actors.

Even though the literature and findings debate that the orchestrator owns the customer by merely being in control, Adner (2017) states that the actors must also be satisfied with their position to reach structural alignment and thus ecosystem success. While the majority of the informants state that they are not the orchestrator nor need to be, some express that they are unsatisfied with the fact that the orchestrator holds control over the customer. Supporting Adner's (2017) resonance, the findings reveal that if informants are unable to reach their

desired amount of control, they are tempted to either exit the ecosystem, or when possible, create their own ecosystem. In some cases, it may therefore appear that the only option for a complementor to own the customer, is to break free from their current ecosystem. However, if complementors start leaving the ecosystem, it opposes its core purpose and eventually decreases the value derived by customers from that ecosystem.

To summarise, it seems that orchestrators try to gain competitive advantage by complicating complementors information gathering, hence hindering the latter to own the customer. This creates friction between actors as complementors find themselves in a dilemma between leaving the ecosystem for their own good or staying to ensure higher value for customers. For instance, leaving the ecosystem to form direct ties with the customer disrupts the customer journey, and creating one's own ecosystem is not necessarily a simple task. Hence, some complementors find themselves obliged to stay in the ecosystem and must thus find other solutions to owning the customer, such as forming direct ties with the latter.

5.3.2 Form a Direct Relationship with Customers to Obtain Ownership

The findings suggest that participants that are not the orchestrators of an ecosystem, tend to form direct relationships with the customers to be able to own the customers. As stated by Wulf and Butel (2017) and Marty and Warin (2020) the sharing of intangible assets is not straightforward in ecosystems as there is a fine line between competition and collaboration. Similarly, the findings of this study highlight that sharing customer ownership is a challenging task. Moreover, due to the complex nature of ecosystems, the customer journey is fragmented and raises the question of whether any actor other than the orchestrator is able to fully own the customer. Hence, as complementors may be unable to own the customer, they find it necessary to communicate directly with the customer and establish ties with them, as they have an underlying fear of being replaced. The findings thus contrast Figure 1, which was proposed in the literature review as the findings reveal how the complementors of an ecosystem must bypass the orchestrator in order to own the customer.

The forming of direct ties between complementors and customers with an aim to gain ownership of the customer also acknowledges Yang's (2017) definition of owning the customer; "establishing direct contact between the company and the customer". The findings suggest alternative examples of how a complementor can manage to own the customer without overtaking an orchestrating role. For instance, a complementor can create a direct relationship

with the customer and thus own the customer by sending invoices directly. This allows the complementors to keep ties with the customer, lowering the chances of being substituted within an ecosystem. Another method proposed in the findings, is for firms to collect data directly from the customer. The findings argue that as the orchestrators of a firm may be unwilling to share all information with the complementors, the latter must acquire the needed data directly from the customer. In this manner, the complementors can continue to satisfy customers with their needs and thus have an advantage over alternative substitutes. Alternatively, to strengthen the customer relationship between an ecosystem actor and the customer, an omnichannel model may be adopted. By adopting an omnichannel model, complementors may be able to own the customer and hence better understand customers' purchasing journey (Weill and Woerner, 2015).

However, it is arguable that these direct customer links contradict the initial nature of the ecosystem phenomena which Adner (2017) described as enhancing the value proposition for customers. The reason for conflict between the existing literature and the thesis' findings may find its roots in the fact that not all ecosystems are impeccable, including the case studies of this thesis. For instance, while Moore (1993) asserts that the orchestrator is highly regarded by other participating actors, his statement contradicts the findings of this study. This study found that many orchestrators are unwilling to share ownership of the customer with complementors, thus decreasing complementors' opinions of their so-called leader. Having that said, while the findings reveal several informants having the need to tie direct relationships with the customers, it was especially the informants employed within insurance who fear being substituted. The informants within insurance describe their own product as less appealing to customers and thus found it more difficult to form a relationship with end users. Hence, all informants within insurance mentioned the need to form direct ties with their customers to ensure their position within an ecosystem, either through direct invoicing or by forcing their logo on orchestrators' platforms and websites. In total, four of the informants worked within insurance, it is thus arguable that the findings are somewhat tinted by the industry's specific views.

Overall, the findings reveal that complementors choose to bypass the orchestrator and form direct relationships with customers in order to gain ownership, even if it decreases the value proposition to customers.

5.3.3 Ensuring a Balanced Ownership

To reduce friction between actors, the findings reveal that establishing trust within an ecosystem is critical. In line with the literature review (Moore, 1993; Wulf & Butel, 2017; Marty & Warin, 2020), the findings reveal that the lines between an ecosystem's competitiveness and strategic cooperation are blurred. As the findings revealed that the orchestrators acquire ownership of the customers, it also reveals that for an ecosystem to function, the actors must cooperate. For instance, the findings disclose that complementors who have enough trust in the orchestrators are more certain to receive the customer data they would like to access, and thus obtain some form of customer ownership. The findings also disclose that orchestrators who allow complementors to keep some form of interaction with customers increase complementors trust towards orchestrators of not replacing them. For example, by having a complementor's logo on the orchestrator's platform or website, customers' brand awareness of the complementor increases and thus lowers the complementor's fear of being substituted. By increasing customers' awareness of alternate participants, one may also argue that customers gain trust towards the different actors. The findings underline that customers are a vital part of any ecosystem, and that obtaining their trust is therefore necessary for the functionality of an ecosystem. Considering that complementors may try to bypass the orchestrator, we propose the following figure to ensure value creation in ecosystems.

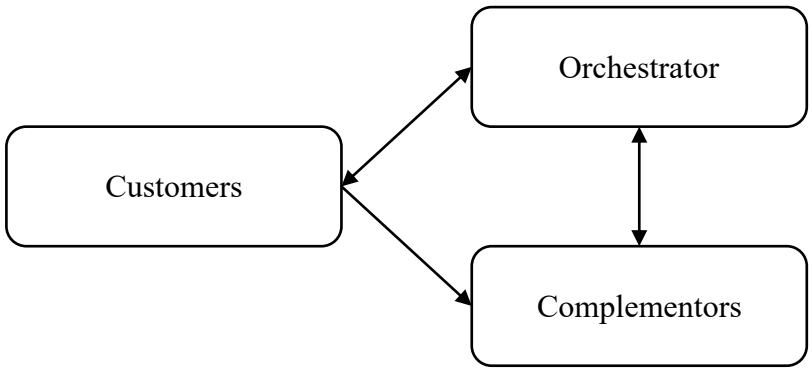

Figure 5: An ideal allotment of customer ownership within an ecosystem

Figure 5 illustrates how complementors may form direct ties with the customer, ensuring that they obtain the information they require. In this illustration, customers' information is provided to both the orchestrator and complementors, the two also share their knowledge in

between themselves. However, merely the orchestrators of ecosystems are able to communicate directly with customers. In this manner, it is possible to maintain the simplicity customers expect from an ecosystem. Figure 5 withholds the same composition as the Figure 1 illustrated in the literature review, with customers, the orchestrator, and complementors. However, compared to Figure 1 in the literature review, Figure 5 has now obtained an arrow linking customers and complementors. The arrow illustrates a one-sided relationship where complementors are able to get the information they require directly from the customer. The arrow is however one-sided as it is still merely the orchestrator that communicates directly back to the customers. This ensures the simplicity of the system, and thus keeps the ecosystem's purpose of providing value for the customers. The allotment proposed in Figure 5 may increase the value proposition as the findings reveal that complementors sometimes find it necessary to collect resources from and have direct contact with the customer.

All in all, by creating a mutual sense of trust between ecosystem actors and allowing complementors to form ties with the customer, the barriers to owning the customer are lowered. Thus, friction is reduced, and the ecosystem's arrangement is strengthened.

6. Concluding Remarks

The sixth and final chapter summarises the findings of the study in parallel with the existing literature. Thereafter, suggestions for future research are proposed, as well as limitations encountered throughout this study. Lastly, recommendations for the industry are presented based on the study's findings.

6.1 Summary

The purpose of this study was to explore the research question: ***How does owning the customer influence value capture in ecosystems?*** To best answer the question, previously conducted interviews provided by the ongoing BEST in Retail research project, were analysed through multiple case studies. In total, 15 semi-structured interviews were analysed. All the informants of the case studies had top managerial positions, and the findings thus reflect their personal insights. The angles of their opinions visibly derive from their industry and area of expertise. A large amount of secondary data was analysed to gain a thorough understanding of the research topic. Existing literature on owning the customer in a general business setting, and literature on ecosystems were utilised, providing a theoretical context for the analysis. This proved valuable to define owning the customer in an ecosystem setting, and to understand how an ecosystem actor can obtain ownership.

The findings suggest that owning a customer in an ecosystem can be defined as *having direct and/or indirect ties with the customer in ways that optimise firms' individual value capture within an ecosystem and maximise joint value creation potential for the customer.* The findings reveal that the main requirements of owning the customer include customer contact to diminish the threat of being substituted. Hence, the research suggests that owning a customer does not merely consist of a singular meaning, but rather multiple mutually dependent concepts influencing all the actors and customers within the ecosystem. A vital part of understanding owning the customer in an ecosystem as owning the customer relationship is linked to actors' roles. The findings reveal that the role a business has within an ecosystem influences its likeliness of ownership. It is thus inevitable to discuss owning the customer without looking into roles.

This thesis concludes that it is the orchestrators who have the power over who owns the customers, depriving the complementors of owning the customer. The significance of owning

the customer creates an insecure relationship between orchestrators and complementors, and thus deviates from existing literature. Overall, the need of owning the customer and maintaining a direct customer relationship is of such importance that complementors either decide to leave the ecosystem to create their own or choose to bypass the orchestrator. Hence, the imbalance within ecosystems may result in self-destruction, removing the initial value capture for all actors involved. It is the orchestrator's responsibility to ensure balance between actors. Yet, as orchestrators fully own the customer, they hinder alignment between actors. Orchestrators should acknowledge how the value of sharing customer ownership allows greater amounts of value capture. Having that said, one may not completely remove businesses' competition instinct. Nevertheless, ecosystems' function may improve by encouraging orchestrators to cooperate. All in all, obtaining balance seems to be the ultimate goal of successfully owning the customer in an ecosystem setting. Striving to reach alignment between ecosystem actors increases both customers' and businesses' satisfaction, ultimately allowing the ecosystem to capture more value.

6.2 Implications for the Industry

Our findings have certain implications for all industries and businesses participating in ecosystems. Even though the data used in our findings was sampled from the retail sector, the implications are transferable to alternate industries as ecosystems are structured similarly in other settings.

The findings have certain implications for all actors involved in an ecosystem. Firstly, as information sharing is key for creating value in an ecosystem setting, actors are recommended to explore innovative ways of simplifying the sharing process. The findings suggest that the information flow is outdated as the orchestrator often possesses all the information, hence leaving the complementor in an uncertain position. It is therefore vital for both orchestrators and complementors to agree on guidelines that could reduce frictions. Secondly, all firms within an ecosystem should ensure that their partners' relationship with customers is of superior quality. As the findings revealed that customers tend to blame the last company they interacted with when unsatisfied, the partners need to be aware of how other firms may impact their business' reputation.

Additionally, the findings also have certain implications for the orchestrators of ecosystems. The findings imply that orchestrators should improve their governing abilities that may allow

shared ownership of customers between partners, thereby, ensuring balance in ecosystems. Because of the importance of owning the customer and the power differences between roles creating friction, our findings reveal that complementors may seek alternative measures to gain ownership within the ecosystem. Nevertheless, as the orchestrators often exploit their authority, it is arguable that the orchestrators should be the actor adjusting their actions. Moreover, the findings imply that orchestrators must understand that lowering the barrier of customer ownership for complementors will enable more value creation for all actors involved. Thus, orchestrators must acknowledge that their role as a leader is to ensure synergy within the ecosystem.

Lastly, our research underlines the need for policies that foster information sharing within ecosystems. As the findings revealed that orchestrators hinder complementors access to valuable information, there is a need for specific governance rules and agreements which enable more collaborative information sharing between ecosystem actors.

In sum, the main recommendation for the industry is that ecosystem actors must understand their role while acknowledging that value creation and capture through cooperation is the primary reason for the creation of ecosystems. In addition, all actors within the ecosystem must ensure that they understand and align their roles within the ecosystem towards common value creation.

6.3 Limitations

Along with the research project we encountered several limitations which may have influenced the results of our study. First and foremost, the data utilised in this thesis was secondary data in the form of semi-structured interviews obtained from a larger ongoing project. By using secondary data, we as researchers were not able to form the questions informants were asked. This may limit our results as we did not have control over the direction of the questions. Nevertheless, while pursuing the research we had continuous conversations with the interviewer, allowing us to clarify any misunderstandings we had regarding the interviews.

Secondly, some limitations derived from the sample population. While the project seeks to understand what it means to own the customer and which actors within an ecosystem own the customer, the findings may be somewhat biased as nearly all informants were employed in a company that identified themselves as complementors. Thus, the credibility of the findings

would be strengthened if more of the informants worked in orchestrating businesses. However, the informants interviewed are industry experts, and their opinions can thus be considered highly relevant to the theme in general. Moreover, while the sample population desires to depict firms in alternative industries, 33% of the informants worked within the insurance industry, and some of the informants were employed in the same firm. Additionally, the study focuses merely on Norwegian businesses. These factors may limit the results as they create an uneven balance of the results.

Lastly, the thesis investigates a rather unexplored area. There is therefore little existing literature on a similar study topic which hinders the credibility and scope of our own research. The limitations of the study are also reviewed in the methodology chapter.

6.4 Future Research

While some literature exists on owning the customer, this study deviates from the latter as it defines owning the customer in an ecosystem setting. The deviations may stem from a rather unexplored topic. We therefore suggest conducting the research both in larger settings and within other industries to see if the results are coherent in alternative research settings.

Moreover, considering that one of the main findings of this study was how power and competition may negatively influence an ecosystem, it would be interesting to conduct research on the topic. For instance, how power imbalance may negatively influence ecosystem value and survival.

Lastly, based on the findings of this study, it would also be interesting to conduct comparing research in order to discover different opinions. For instance, comparing the opinions of owning the customer between alternative industries or opinions between an ecosystem and a non-ecosystem setting.

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8. Appendix

8.1 Appendix A – Interview Guide

Experts' Interview guide, NHH, November 2021

Ecosystem Business Models in Retail

Main aim: To understand the Top Management perceptions on "Ecosystems" and their readiness for it.

Planned: 45mins-1 hour.

*Introduction by the Interviewer

*Consent (verbal) to record the conversation

Business Model Questions

1. Could you introduce yourself?

2. How would you describe the current Business Model of your company?

3. What is the role of Digitalization in your Business Model?

Ecosystem-based BM:

4. How would you describe an Ecosystem?

-Is it different to regular partnerships?

5. What is the importance of Ecosystems in Retail businesses?

6. Do you envisage an Ecosystem Business Model for your organization?

-How is/would it be different to your current Business Model?

7. In your view, what is the role of digital technologies in building an ecosystem-based approach to business?

Ecosystem Readiness:

8. Do you feel your organization is ready to accommodate a digitally driven ecosystem way of doing business?

-If so, in what ways?

9. In your opinion, what kind of competencies are needed to build an ecosystem way of operating business?

10. In your opinion, this ecosystem readiness emerges from within one (your) organization or is it drive from outside, say the partners around you?

11. In terms of partner firms/stakeholders for ecosystems, how can they be identified?

- And persuaded to be part of your ecosystem?

12. Do you anticipate that some of your existing partners could serve the same purpose in an ecosystem model of operating?

-(yes/no) Why is that?

13. What are your views on ecosystem emergence because there is a new technology/digitalization that works better in an ecosystem setting vs ecosystem way of organizing because that is the way in which the market is headed (tech push vs market pull)?

Following part, maybe for Interview 2/Follow-Up Interview:

Consumer journey:

14. How would you describe the customer journey in your product (organization)?

15. Do you think it would differ when you adopt/operate in a digital ecosystem with other partners?

-If so, how?

16. Would it be possible to distinguish your consumers' journey between your and partner organizations'?

Digital, Physical divide/interaction:

17. Most retail experiences have a digital and a physical component, and so the customer experiences are split between the two.

-How can companies better integrate the interaction between these two components?

Thank you very much for your time, and I may come back to you if I have more questions!

8.2 Appendix B – Stages of Thematic Analysis

Table 2: From D O'Gorman and MacIntosh (2015)

Phase	**Description of the process**
1. Familiarisation with the data	Data transcription (if necessary). "Active" reading and writing down initial ideas.
2. Generating initial codes	Coding data (posteriori) in a systematic fashion across the entire data set.
3. Searching for themes	Re-focusing the analysis at the broader level. Forming codes into initial themes.
4. Reviewing themes	Checking themes against the coded extracts and in relation with each other. Forming a thematic "map" of the analysis.
5. Defining the report	Further refinement of identified themes. Locating the overall story of the analysis.
6. Producing the report	Writing-up the analysis results with vivid extracts examples and comprehensive commentary.