



E-NOVATION
WEEK

What's new? The association, the organogram GENERAL ASSEMBLY

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NetComm Suisse**

www.e-nnovationweek.com

2018 Members General Assembly

Baden, 21 November 2018



Antonio Besana – Strategic Planning Advisor

ROLE: “Strategic Planning Advisor” SUISSE KNOWLEDGE

PHASE 1 - TO ELABORATING ON NETCOMM SUISSE KNOWLEDGE

- Understanding and identifying myself with the Association, the Team, the organization
- Understanding how it works

PHASE 2 – MEMBERS’ NEEDS UNDERSTANDING KNOWLEDGE

- Market research: e-Commerce status assessment and expected development
- Benchmark analysis vs. with other e-commerce associations on members provided services
- Customer satisfaction (true-blue/regular, gain/new, lost)
- Stakeholder identity and needs (internal/external)
 - Partnership support
 - Solution innovation sharing and development
 - Being the e-commerce voice toward institutions

PHASE 3 - RECOMMENDATION TO THE MANAGEMENT (ACTION PLAN) KNOWLEDGE

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Netcomm Suisse: What I learned

History and achievements

Netcomm Suisse homepage



The first and only Swiss Association of e-Commerce

The main goal of NetComm Suisse is to support the interests of all companies operating in e-Commerce, supplying services and promoting networking activities for operators and merchants.

Better e-Commerce together

NetComm Suisse Associates gain fast access to the latest research, training programs and a wealth of support and networking opportunities within the e-Commerce community.

Associated e-Commerce leaders

Whether you are an established e-Commerce business or still planning your journey, joining NetComm Suisse opens the door to greater knowledge, visibility and success.

Netcomm Suisse main events 2016-2019

2016-17

- e-Commerce meet tourism - CREA Geneva, Oct 2016,
- SEC 2016 – Baden Trafo Center, Nov 2016
- Regulatory framework for operating in CH - Bern, Feb.2017
- e-Commerce meet luxury – Geneva, Mar 2017,
- e-Commerce meet fashion –LAC Lugano, Mar 2017
- SOM – Swiss on-line marketing –Zurich, Apr 2017
- e-Comm Geneva – Palaexpo Geneva, Jun 2017
- Ladies in e-commerce – Zurich, July 2017
- e-Commerce meet tourism – Zurich, Oct.2017
- SEC 2017 – Baden Trafo Center, Nov 2017

2018

- Innovation in food – Nestlé Vevey, March 2018
- Fashion Innovation Week – LAC Lugano, March 2018
- e-Comm Geneva – Palaexpo Geneva, Apr 2017
- Ladies in e-commerce – Ginetta HQ's, Zurich, July 2017
- Fashion Chat Boat – Lugano, July 2018
- Commerce meets B2B – Geneva, Sept 2018
- E-Luxury Summit – The Ritz Geneva, Oct 2018
- Digital Day – World Web Forum, Lugano, Oct 2018
- SEC 2018 – From e-comm to innovation – Baden, Nov 2018



netcomm
suisse
ecommerce association

More than 200 Associates in 2018

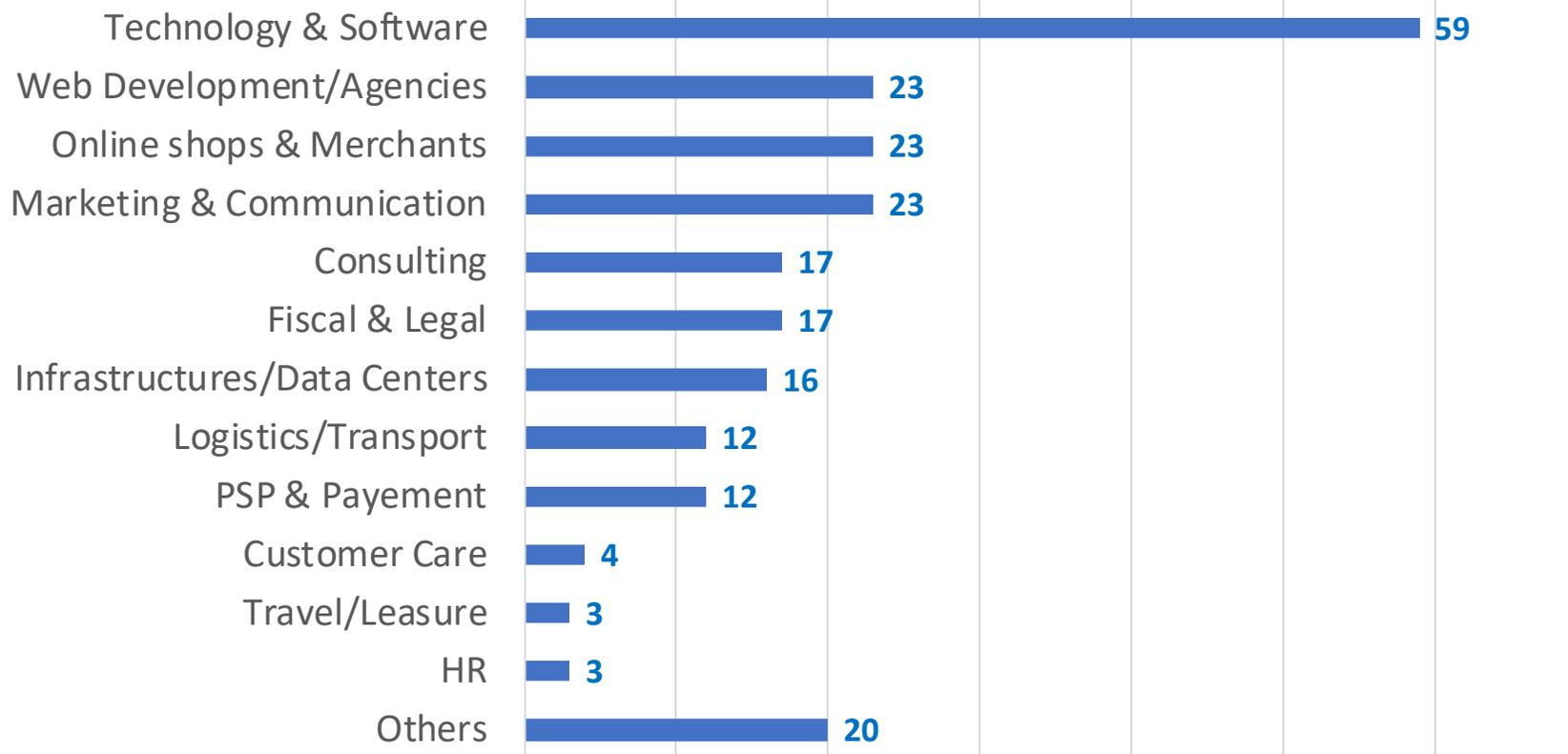
Who are Netcomm Suisse Members

232 members

Country

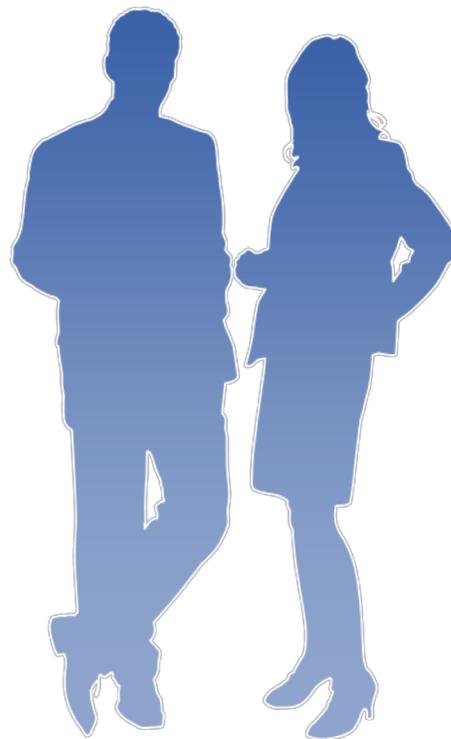
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Members by industry sector



People

A Team of e-commerce enthusiast professionals supporting e-business and developing the e-innovation networking community in Switzerland



Values

- Competence
- Passion
- Commitment
- Enthusiasm
- Transparency
- Trust
- Reliability
- Credibility
- Efficiency and effectiveness
- Compliance
- Courage in change challenges
- Caring for people

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Outlook (environment analysis)

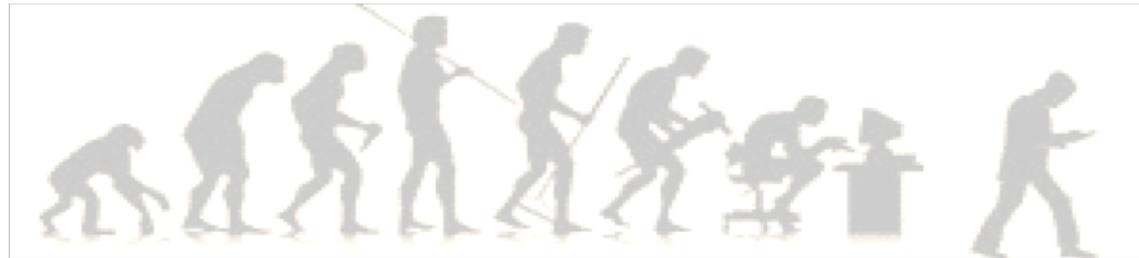
Adaptation in a game with changing rules

Surviving in a changing environment

In the evolution of the species the said nothing vanishes as success is probably always valid.

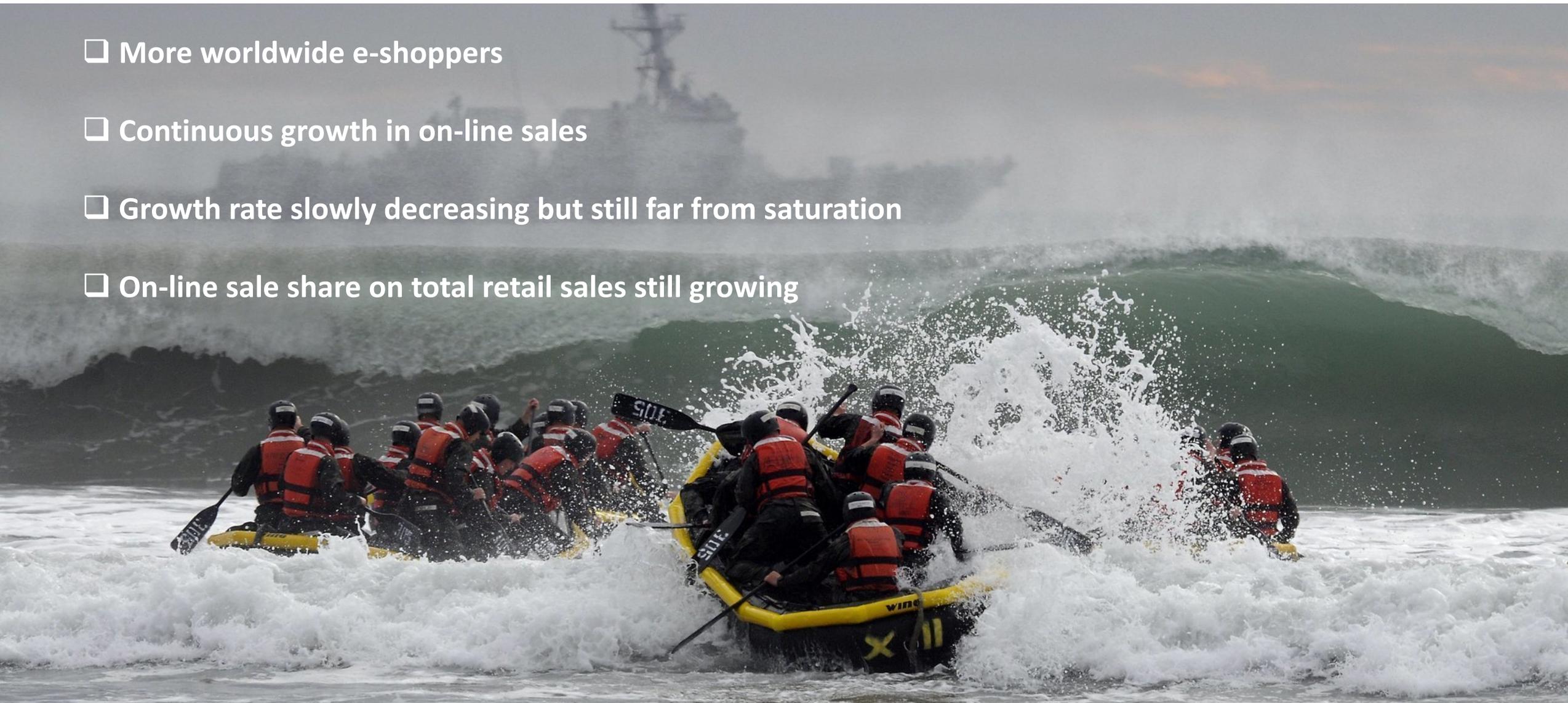
A creature that has adapted perfectly to its environment, and whose capacity and vital force are concentrated and expressed in its immediate survival purposes, no longer has any means to respond to any radical change. With the passage of time all its resources would adapt in even a more perfect way to its usual and current needs. Eventually this creature can do everything necessary to survive without conscious effort or unnecessary movements. He can beat all his competitors in that particular environment. However, if the environment were to change, that creature should become extinct.

(Arnold Toynbee)



Arnold Joseph Toynbee (1889–1975) was a British historian, philosopher of history, research professor of international history at the London School of Economics and the University of London and author of numerous books. Toynbee in the 1918–1950 period was a leading specialist on international affairs. He is best known for his 12-volume *A Study of History* (1934–1961). With the civilizations as units identified, he presented the history of each in terms of challenge-and-response, sometimes referred to as theory about the law of challenge and response. Civilizations arose in response to some set of challenges of extreme difficulty, when "creative minorities" devised solutions that reoriented their entire society. Challenges and responses were physical, as when the Sumerians exploited the intractable swamps of southern Iraq by organizing the Neolithic inhabitants into a society capable of carrying out large-scale irrigation projects; or social, as when the Catholic Church resolved the chaos of post-Roman Europe by enrolling the new Germanic kingdoms in a single religious community. When a civilization responded to challenges, it grew. Civilizations disintegrate when their leaders stopped responding creatively. Toynbee believed that societies always die from suicide or murder rather than from natural causes, and nearly always from suicide. He sees the growth and decline of civilizations as a spiritual process, writing that "Man achieves civilization, not as a result of superior biological endowment or geographical environment, but as a response to a challenge in a situation of special difficulty which rouses him to make a hitherto unprecedented effort.

- More worldwide e-shoppers
- Continuous growth in on-line sales
- Growth rate slowly decreasing but still far from saturation
- On-line sale share on total retail sales still growing



The Global e-Commerce challenge drivers



OMNICHANNEL RETAIL

No border anymore between On-line and off-line. Customer journey is just one



TECHNOLOGY

AI, Blockchain, Chatbot, digital assisted commerce, ... are rebuilding customer relations and business partnership



LOGISTICS

One day delivery as a must. New scenarios for merchant and delivery services

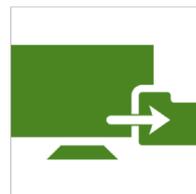


MARKETING

User Experience, marketing automation, ADV
Technology is changing branding and customer engagement

PAYMENT

Need to adapt to the Mobile payment revolution



BORDERLESS MARKET

Digital commerce open to internationalization and new strategies



SOCIAL ENGAGEMENT

Linked to the product, before, during and after the purchase

ANALYTICS

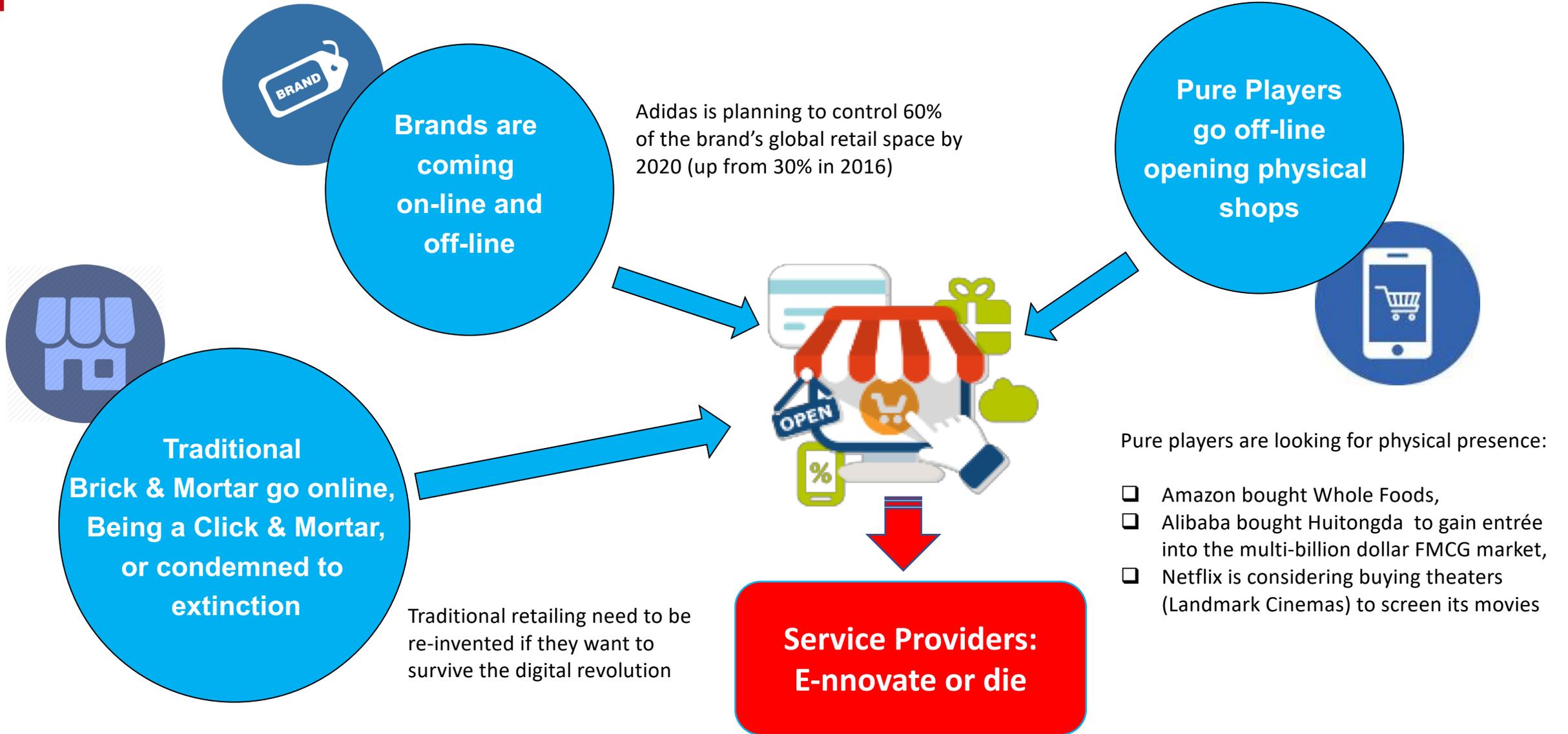
Data driven economy



COMPLIANCE

New legal and fiscal rules not always aligned with e-commerce environment (GDPR, PSD2, Geoblocking,...)

No more borders between on-line and off-line push for innovation for service providers too



Switzerland: the perfect HQ's location for global e-commerce retailers (*)

- Large purchasing power
- Mobile, multilingual and technological consumer
- Available income far beyond European average
- Habits of people to look behind domestic borders for product and services
- Stable economy and a safe haven for investments
- Predictable legal framework
- High communication quality
- Highly skilled workforce

Netcomm Suisse Target

**National (Swiss) companies with local
and international focus**

**Global companies with local/international focus
targeting Switzerland as HQ's location
(Aldo Shoes, Lastminute.com, Christies,...)**

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Vision 2019-2023

Association role and stakeholders: Recommendations

- e-Commerce stable continuous growth
- Increased competition between big players
- New opportunities for Retailers and Brands
- Irreversible changes

- more players on the marketplace**
- more prospect members (?)**
- more growth opportunities**
- New challenges for improvement**



old ways won't open new doors

Mandatory changes for all players: e-innovate or die

Retailers /Distributors Manufacturers / Services	E-Commerce services suppliers	Government, institution, association	Netcomm Suisse
			
<ul style="list-style-type: none"> <input type="checkbox"/> New competitors <input type="checkbox"/> No more borders between on-line and off-line <input type="checkbox"/> From e-commerce to a-commerce 	<ul style="list-style-type: none"> <input type="checkbox"/> New customers <input type="checkbox"/> Different integration <input type="checkbox"/> New solutions needed 	<ul style="list-style-type: none"> <input type="checkbox"/> Regulation update for barrier reduction (local, cantonal, national, international) <input type="checkbox"/> e-Commerce Network (E-Commerce Europe, VSV, Others) 	<ul style="list-style-type: none"> <input type="checkbox"/> Members needs <input type="checkbox"/> Organization <input type="checkbox"/> People Investment <input type="checkbox"/> Technology investment

Suppliers



Distribution
& Delivery



Media &
Social Media



Consumers



Government
& Institutions



Education



Finance



Other
Associations



Brands &
Manufacturers



Click & Mortar
Retailers



eTailers
Pure Players

No more borders
for the Association?

No more borders
between
B2B and B2C

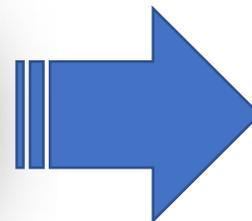
No more borders
between on-line
and off-line



Aim

Being and the driving force behind the e-commerce development in Switzerland

Connecting and give voice to the e-commerce sector, being the community aggregator, promoting experience sharing, cooperation and networking between the members and the whole on-line business sector



From Aim to Action
(action plan roll-out)

Action plan roll-out (2019)

Association role enforcement (Value for Membership)

- Knowledge and partnership sharing
- Support service providers offering e-innovation
- Increasing relationship/lobbying with institutions
- Serious evaluation about possible enlargement to new prospect members (Retailers, Brands,...)
- Increasing external partnership with other local and global associations (VSV, e-Commerce Europe, Retail Institute, ...)

Organization enhancement

- Re-definition of Mission, Vision, Values
- KPI identification
- People assessment
- Organization update
- Roles clarification and job descriptions
- People performance appraisal implementation
- Premium system KPI/appraisal based
- Getting on board additional needed professionals
- Team training
- Infrastructure and technology update (processes, software, location, ...)



**netcomm
suisse**
ecommerce association

... Our future starts now



Thank you for your time!



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