Winning in Open-Source Ecosystems

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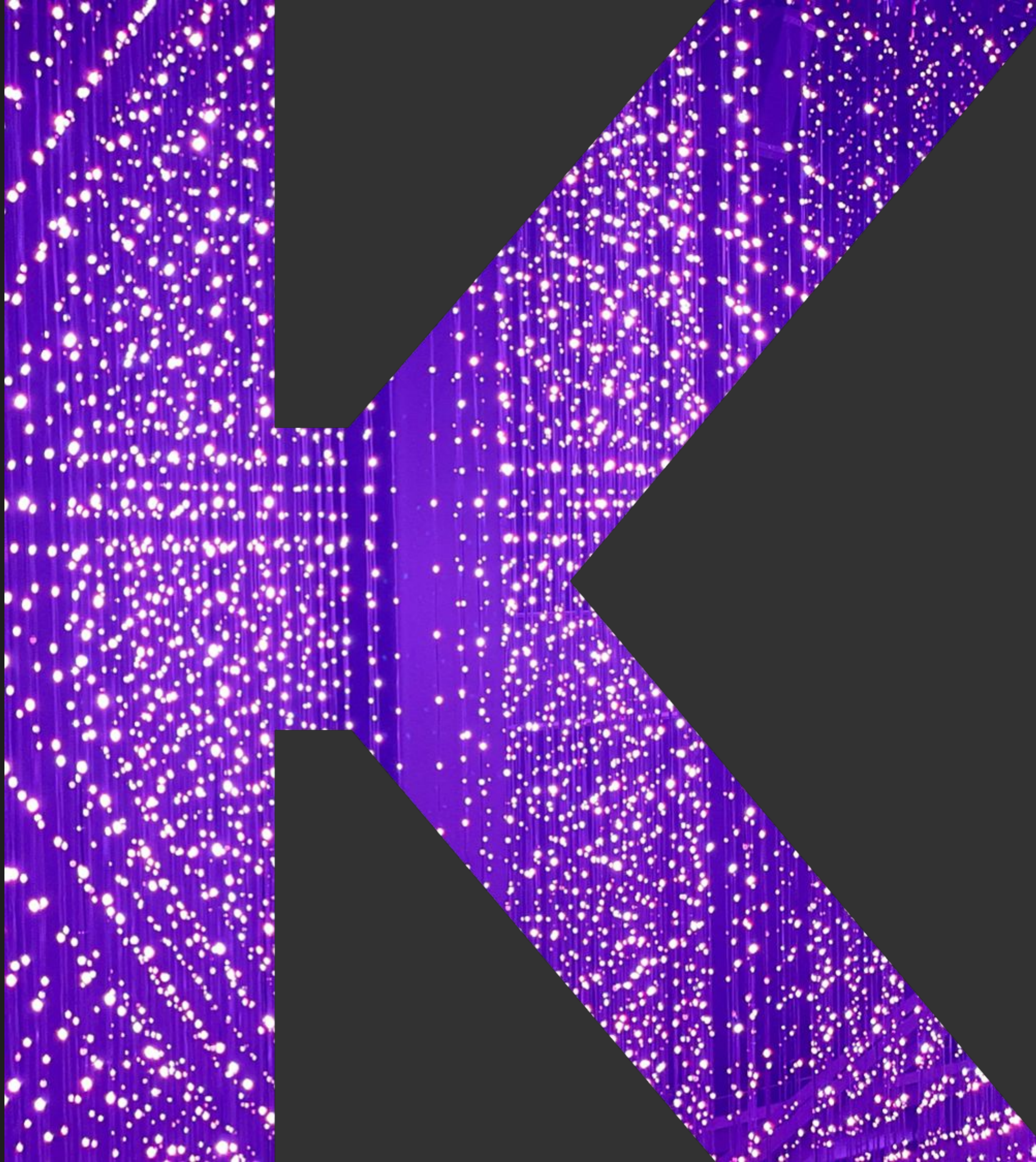
30.06.26, AOSS Starnberg



KEARNEY

How many open-source projects are estimated to exist?

~5 million

~10 million

~15 million

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But most fail to deliver **business impact**

because companies misunderstand **how value is created** and **captured**

Open-source creates value when influence & capture are designed

Value creation

Typical rationale

Reduce development effort

Avoid duplication

Accelerate innovation

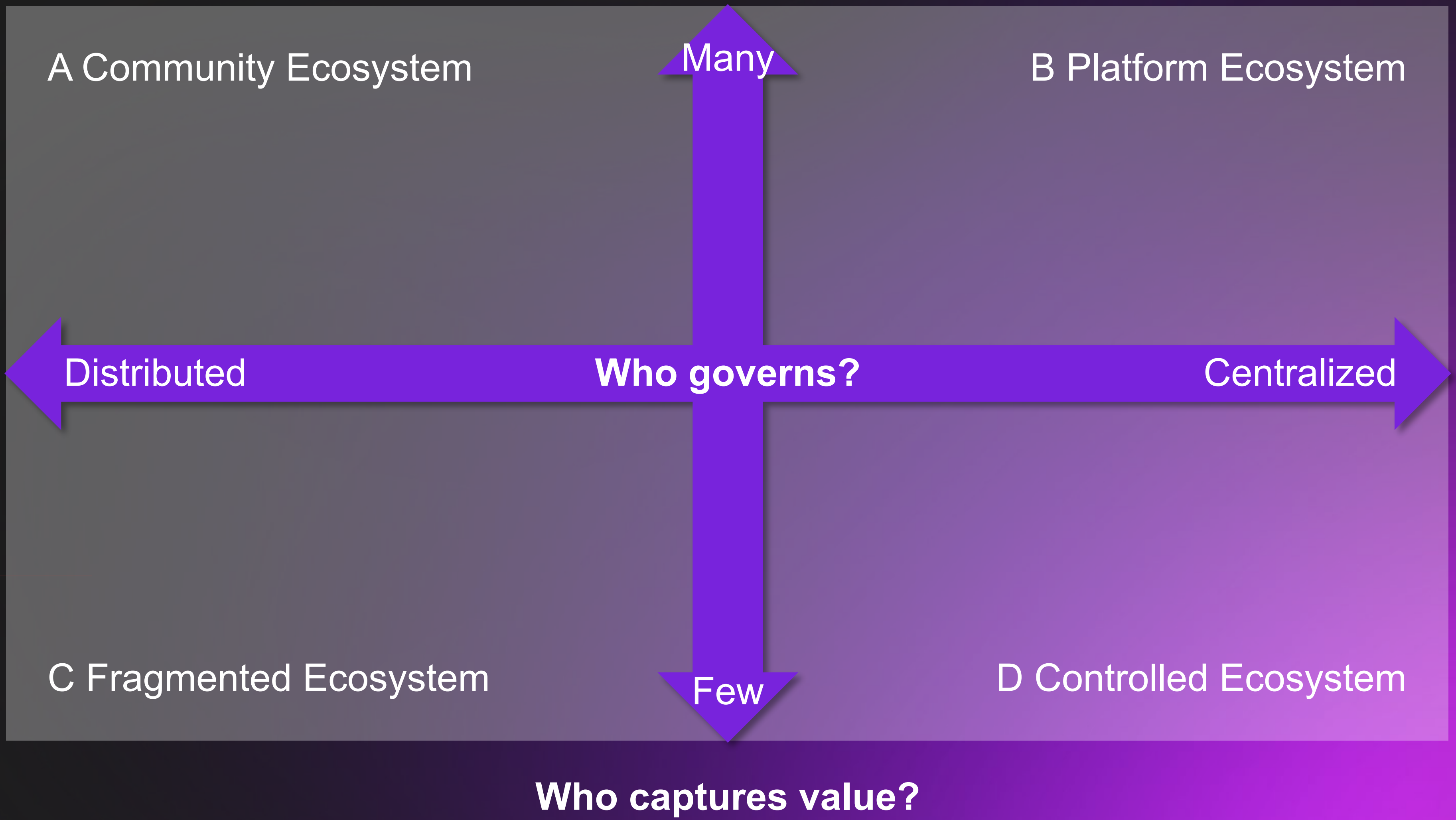
The real game is about

Influence

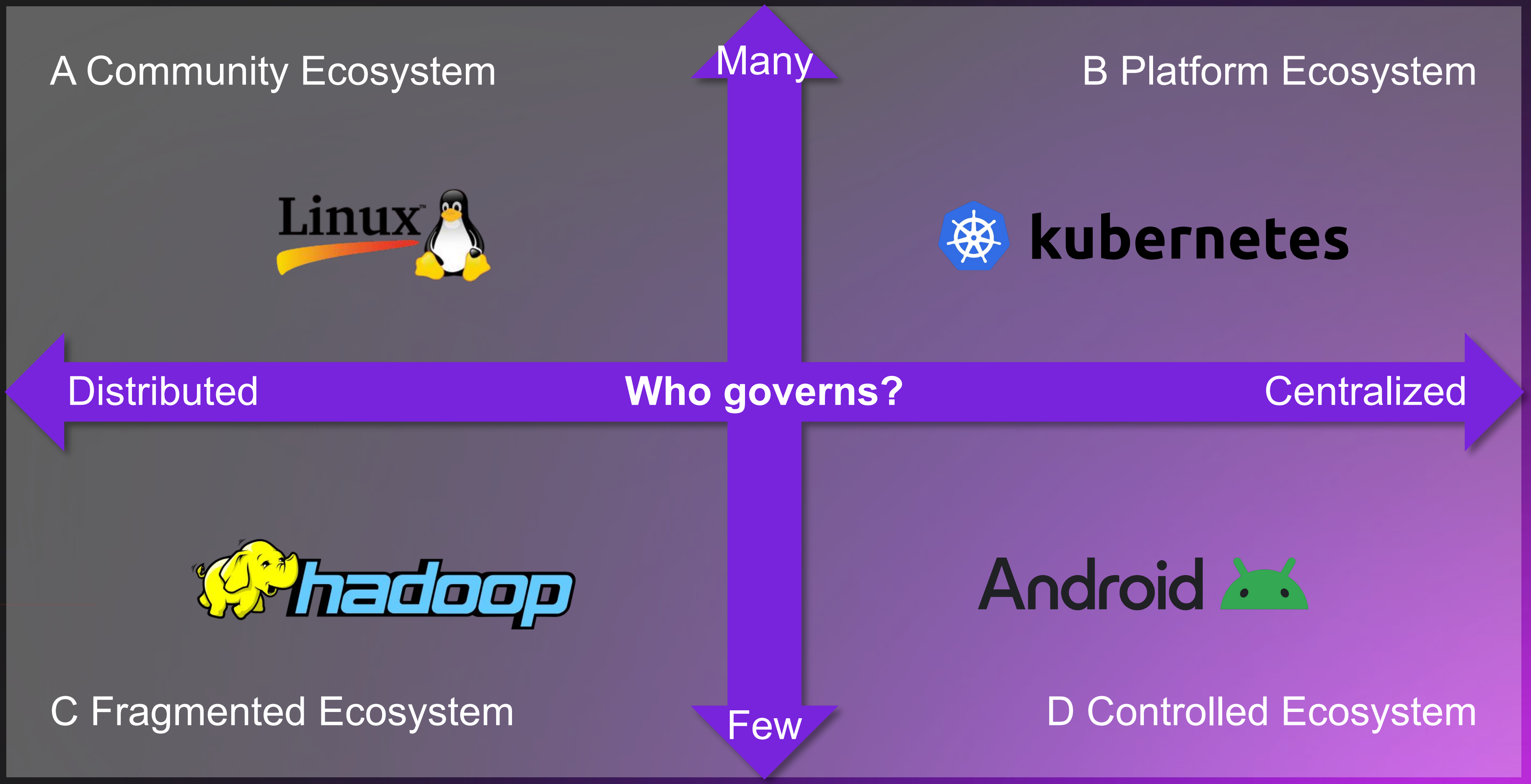
Ecosystem position

Value capture

Every ecosystem must solve two questions



Each archetype evolved powerful solutions



Who captures value?

A Community: Linux

The power of collective stewardship

– foundation-based governance
– broad contributor base
– long-term stability

Shared infrastructure became industry critical

Lessons Learned

Trust sustains ecosystems

– neutrality attracts contributors
– transparency creates resilience
– long-term stewardship matters

Shared ownership can create durable industry infrastructure

~96%

of the top 1 million web servers run Linux

B Platform: Kubernetes

The power of neutral governance

- common infrastructure layer
- CNCF governance
- broad participation

Companies competed above the platform

Not on the platform

Lessons Learned

Shared foundations accelerate everyone

- neutral governance builds trust
- clear boundaries prevent conflict
- differentiation belongs above the platform

Standardize the foundation and compete on value-added layers

200+

certified distributions & platforms

C Fragmented: Hadoop

Innovation without alignment

– multiple competing vendors
– overlapping offerings
– weak ecosystem coordination

Value creation outpaced value capture

Lessons Learned

Innovation alone is not enough

– incentives must be aligned
– governance reduces fragmentation
– commercialization must be sustainable

Without a clear economic model,
ecosystems eventually consolidate

$1B+

market merged by Cloudera & Hortonworks

D Controlled: Android

Open-source by dominant orchestrator

- Open-source core
- centralized strategic control
- large partner ecosystem

Massive adoption with concentrated value capture

Lessons Learned

Participation does not equal influence

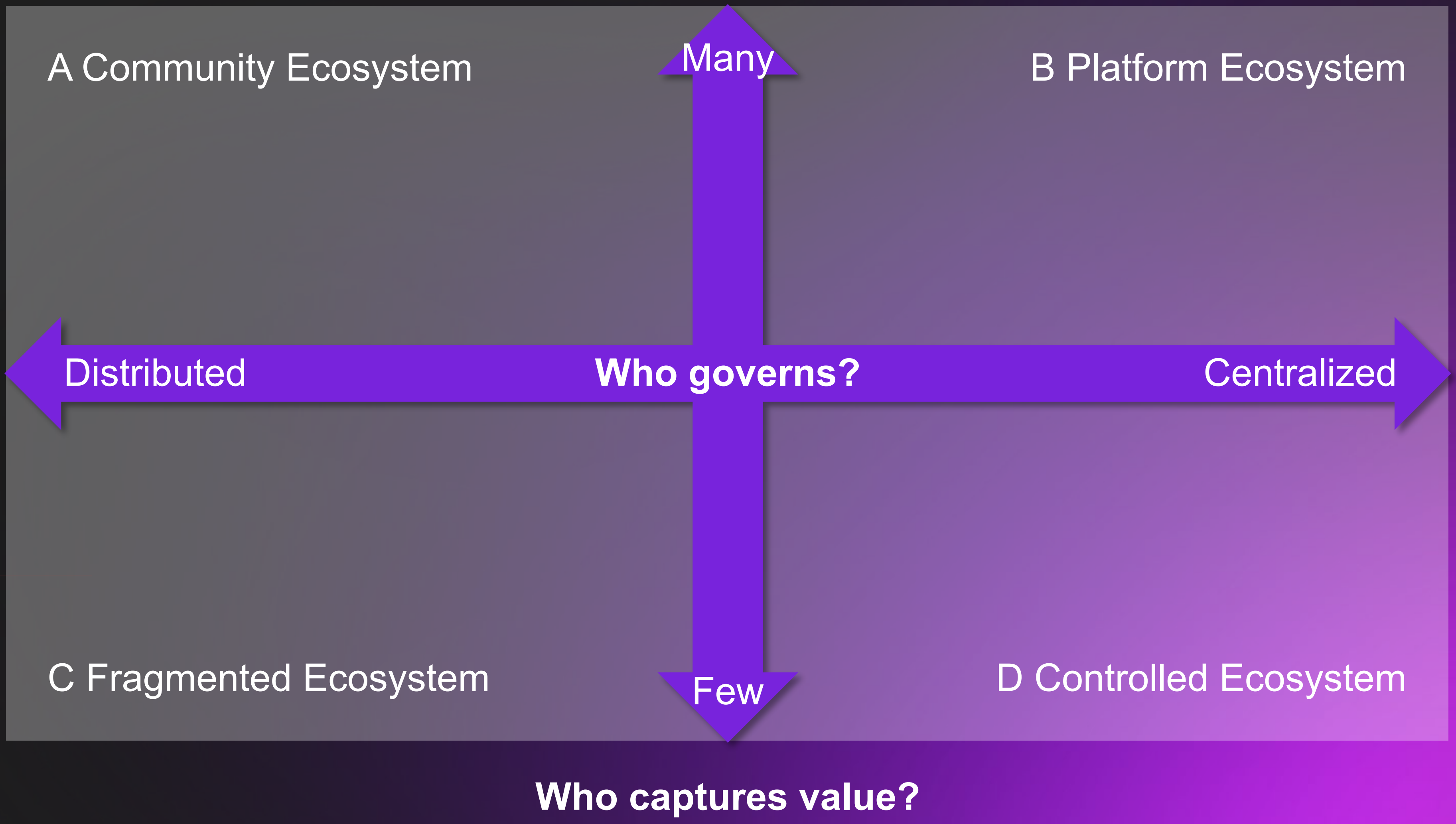
- governance determines strategic power
- ecosystem scale can coexist with control
- value capture follows platform ownership

Open source can create broad participation while concentrating economic value

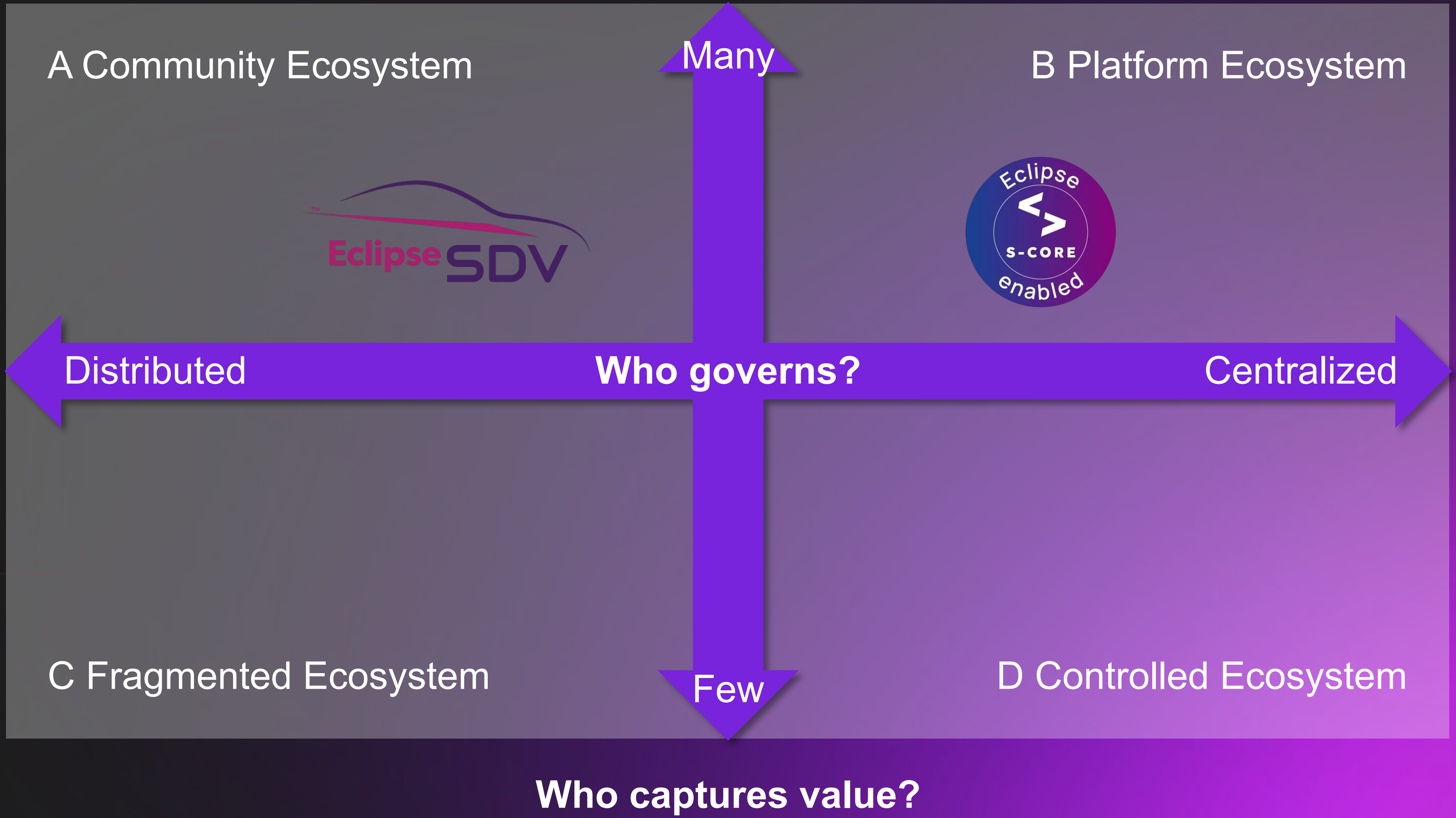
3 billion +

active devices running on Android

Where do you see Eclipse SDV and S-Core as archetypes?



Outside-in it indicates a Community to Platform spread



Align what to share, who governs, and where value flows

Dimension	A: Linux	B: Kubernetes	C: Hadoop	D: Android	Automotive question
Governance	Foundation / Community	Neutral	Fragmented	Centralized	Who decides the roadmap?
Incentives	Broad contributor base	Broadly aligned	Misaligned	Orchestrated	Why should competitors contribute?
Boundary	Shared infrastructure	Clear infrastructure layer	Blurred	Open base + controlled complements	What is shared vs differentiated?
Value capture	Distributed around the base	Distributed around the platform	Difficult / fragmented	Concentrated around control points	Where will profit flow?
Strategic risk	Slow collective decisions	Commoditization of the base	Ecosystem confusion	Dependency on orchestration	Which risk are we accepting?

Auto FOSS wins if collaboration is designed not just encouraged

Dimension	Automotive question	Design choices
Governance	Who decides the roadmap?	Neutral & transparent governance □ Build trust with OEMs, Suppliers and tech players
Incentives	Why should competitors contribute?	Lower cost, faster standards, certification, influence and reusable assets □ Clear reason to contribute
Boundary	What is shared vs differentiated?	Compete on integration, UX, data, services and vehicle-specific performance □ Share commodity software foundation
Value capture	Where will profit flow?	Tools, integration, validation, lifecycle services, cloud and customer-facing features □ Operations on shared base and customization above
Strategic risk	Which risk are we accepting?	Aim for Linux/Kubernetes-style durable infrastructure □ Avoid Hadoop-style fragmentation and Android-style dependency

Thank you

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