



PwC Viewpoint:  
**The Platform Play**

Why high-performing organisations are shifting gears and evolving their digital & IT units from product to platform orientation



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1. **Rationale** for Platform Operating Models
  2. Platform Operating Model **Strategy**
  3. Platform Operating Model **Setup**
  4. **Outlook** and Lessons Learned

# Responding to external & internal pressures companies must shift from product to platform orientation, emphasising scalability & efficiency

## External forces

### Macroeconomic volatility

68% of executives feel pressure from economic uncertainty and global market fluctuations

### Technological disruption

Over 70% of investors emphasize tech change as crucial for companies to rethink value models

### Innovation need

74% of investors seek clear and actionable strategies for innovation in current market contexts



Digital & IT units

## Internal pressures

### Cost pressure

63% of CEOs view cost reduction as a key strategic priority for their organisations moving forward

### Slow reinvention pace

42% of executives see business model reinvention as vital for survival in the coming decade

### Operational silos

Over 50% of CEOs view fragmented infrastructure as a key barrier to successful digital transformation

The platform operating model tackles these challenges and enables digital & IT units to ...



### Boost efficiency

Streamlined operations and reduced redundancy for lower costs and better resource use



### Accelerate innovation

Breaks down silos, enabling faster collaboration and quicker time-to-market



### Enhance scalability

Adaptable design enables easy scaling up or down based on market demands

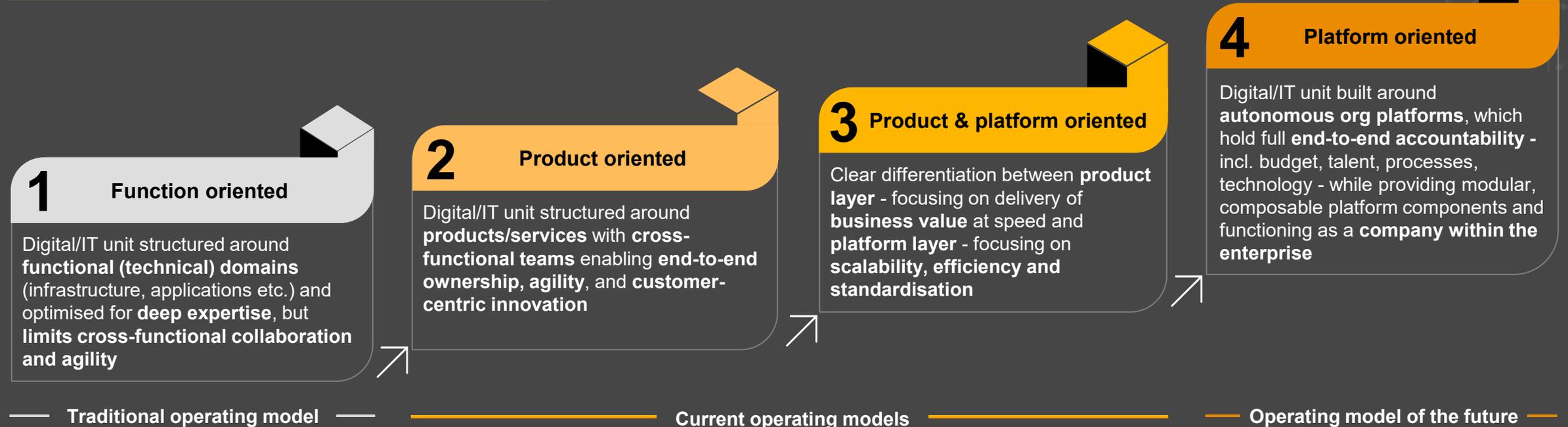


### Drive competitive advantage

Better resource allocation and streamlined processes for a stronger market position

# Shifting from siloed structures to platform-based units drives greater scalability, faster delivery and improved cost-efficiency

## Evolution of operating models in digital & IT context



## Our understanding of platforms as key organisational elements

- Platforms are **autonomous organisational units** composed of technology assets, roles, processes, and governance structures to **provide scalable, reusable, and self-service components** for internal and external stakeholders
- They operate with **end-to-end ownership**, ensuring seamless alignment between business and technology aspects

# Our clients' experience shows a well-designed platform-based operating model boosts efficiency, reduces complexity & accelerates innovation



## 25%

**reduction of the overall technology portfolio** through a dedicated governance unit that drives and enforces the tech roadmap, standards, and optimises cost management



## 40%

**reduction in organisational complexity** by consolidating layers into differentiated platforms with a clear mandate, technological convergence, and scalability



## 15%

**boost in delivery efficiency and productivity** by decentralising decision-making, empowering development teams with greater autonomy for faster execution

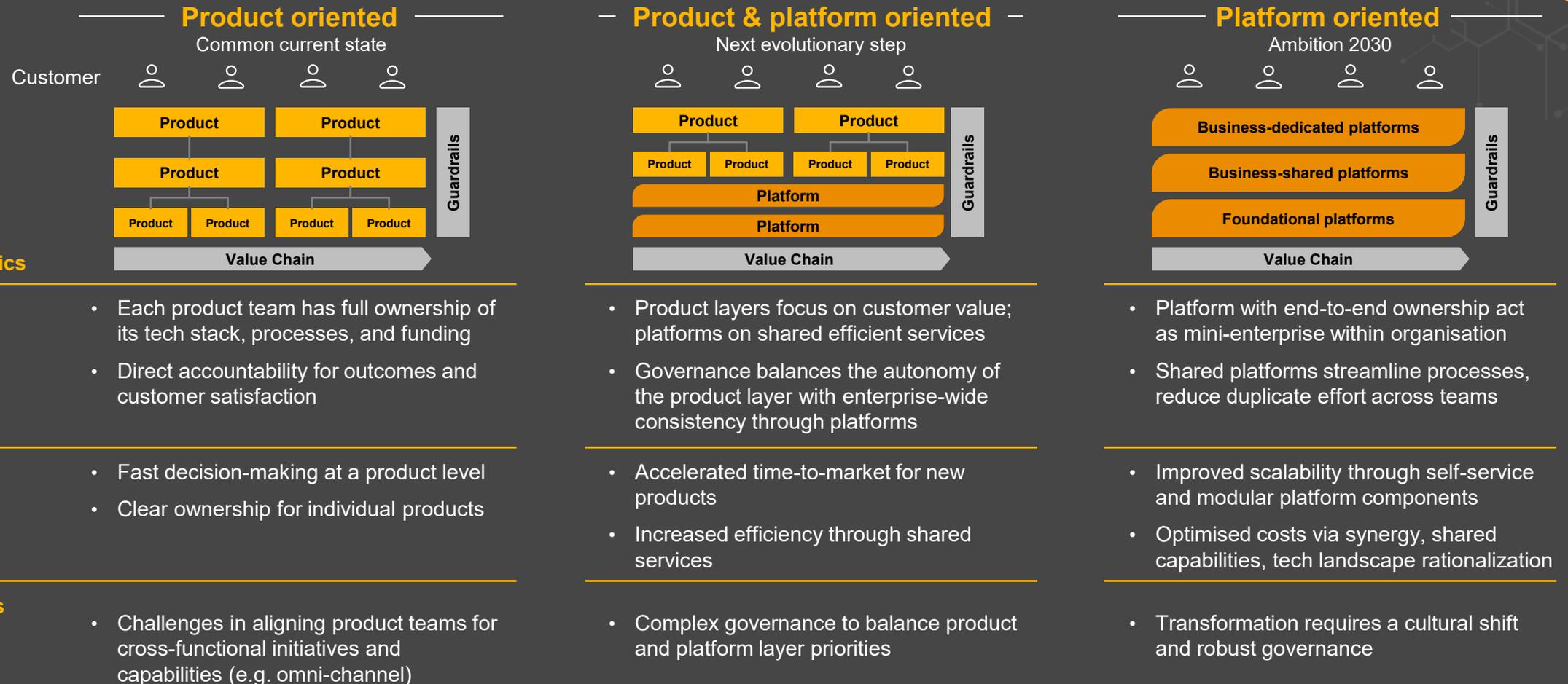


## 3-5x

**accelerated market launch of digital/IT products** by empowering platforms to operate as businesses within the enterprise while maintaining a clear strategic focus

Note: Figures are based on PwC case studies focused on platform operating models

# We recognise the platform-based operating model as the next evolutionary leap beyond the pure product-based model



## Key characteristics

- Each product team has full ownership of its tech stack, processes, and funding
- Direct accountability for outcomes and customer satisfaction

## Benefits

- Fast decision-making at a product level
- Clear ownership for individual products

## Major challenges

- Challenges in aligning product teams for cross-functional initiatives and capabilities (e.g. omni-channel)

## PwC case study global retailer

(see details)



## PwC case study global pharma firm

(see details)



# A successful journey towards platform orientation begins with the positioning of the digital & IT unit and clear strategic objectives

Excerpt

## Positioning of digital & IT unit within organisation



### Innovation Accelerator

focus on driving digital & IT innovation and emerging technology initiatives



### Governance Spine

focus on providing a robust governance structure to steer and advise product teams



### Technology Catalyst

focus on providing product units with self-service products and platform components to accelerate development speed



### Delivery Hub

focus on maximum customer-centricity with fully customised solutions according to their specific needs

## Strategic objectives of digital & IT unit

### Optimised tech investments

enhance TCO and ROI of tech products and platforms to enhance financial performance

### Streamlined tech landscape

rationalize tech stack to enable technology convergence & scalability

### Enhanced capability consolidation

centralise similar capabilities distributed across organisation to avoid duplication of efforts

### Enhanced system resilience

strengthen stability to minimise operational disruptions

### Autonomous consumption

enable self-service and automation to accelerate service delivery

# The platform operating model setup includes the three scaling levels platforms, tribes and squads as well as chapters as functional layer



**Platform** is an autonomous organisational unit composed of technology assets, roles, processes, governance structures. It delivers scalable, reusable, and self-service platform components for both internal and external stakeholders

*Example: AI & data platform, engineering enablement platform*

*Size: 100-400 members*



**Tribe** is a group of multiple squads unified by a shared purpose, vision, outcomes, or capabilities. This optional scaling level is optional - primarily used in large enterprises

*Example: machine learning and AI, UX/UI enablement*

*Size: 30-100 members*



**Squad** is self-managed, cross-functional team accountable for delivering defined outcomes with autonomy and end-to-end ownership

*Example: model training squad, user research and testing squad*

*Size: 6-12 members*



## Chapter/community

is a group of professionals with shared expertise, skills, or areas of interest, aimed at fostering learning, standardisation, and professional development.

Participation in chapter - mandatory; in community - optional

*Example: UX/UI chapter, data scientist chapter*

*Size: 15-25 members (community: up to 50)*

Note: The optimal size of org scaling level may vary depending on the organisation's specific context, structure, and operational needs

# Unified design principles guide a seamless shift to the platform operating model, ensuring alignment with the future positioning

## TOM dimension



**Platform & product strategy**

## Design principles

Establish two distinct platform roles and manage platforms based on their maturity:  
**emerging platforms** – driving **value through innovation**  
**mature platforms** – focus on **efficiency, scalability and TCO** optimisation



**Tech landscape & portfolio**

Continuously **streamline, optimise, and standardise** the **technology portfolio** to drive tech convergence



**Delivery model**

Foster cross-functional collaboration and enable **agile ways of working**, allowing teams to **choose their delivery model** (Scrum, Kanban, etc.) while **adhering to standards and tools**



**People & skills**

**Empower autonomous org elements** (platforms, tribes, squads) to drive fast, outcome-focused decisions by **shifting accountability** to them



**organisation & governance**

Conduct platform/product organisational split to **maximize synergies** between related capabilities and enforce **centralised standards** for consistent delivery



**Performance & cost management**

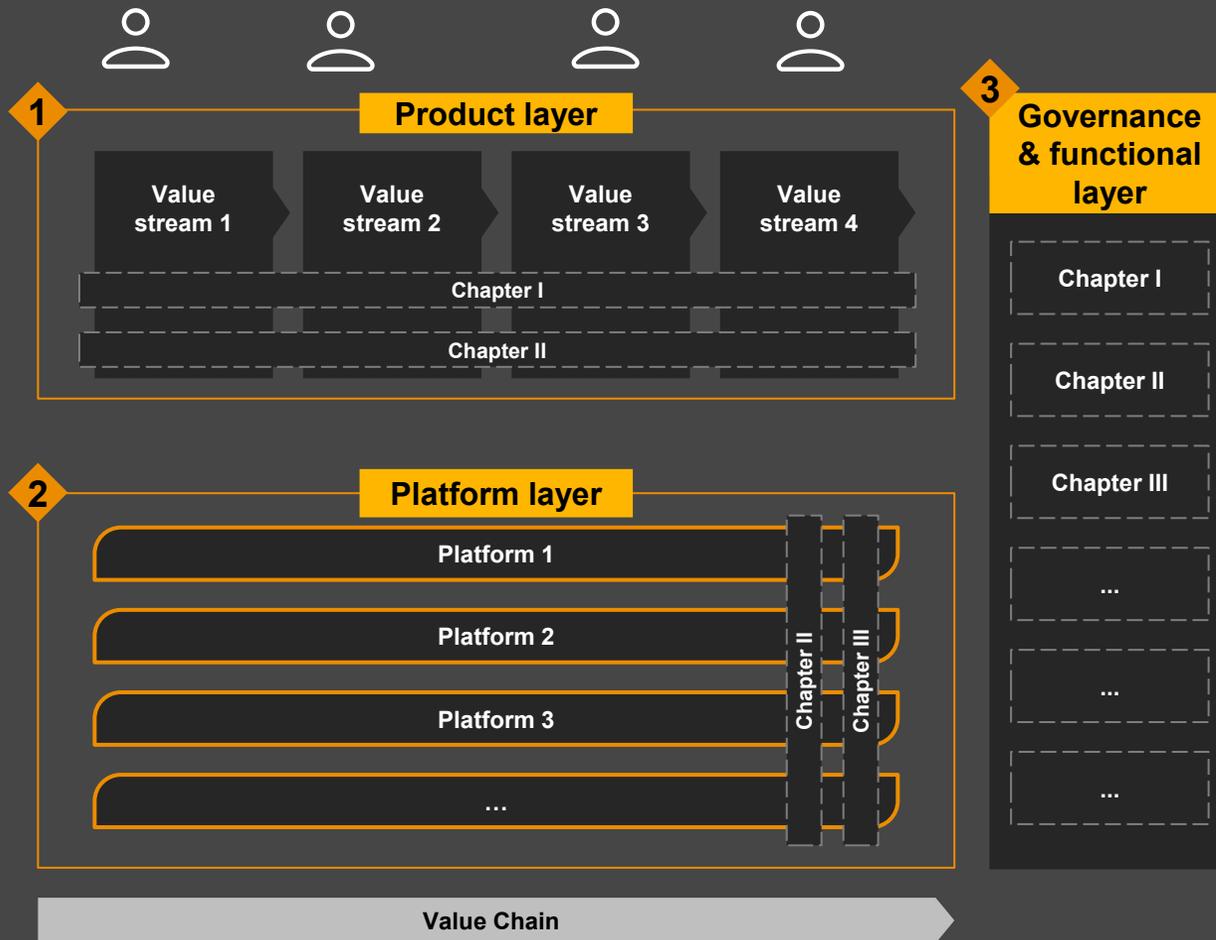
Establish **transparent cost structures** for products and platforms to continually improve TCO and ROI

## Design principles

Establish guidance for the organisational design, ensuring alignment with strategic intent and the positioning of platform unit within the company

# A global retailer leveraged the product & platform-based model to accelerate innovation and drive organisational efficiency

PwC case study global retailer



## Major considerations

- 1 Purpose:** Build and iterate on digital products for rapid business value and user satisfaction

**Outcome:** Tech products that directly address customer needs

**Customers:** External end users or other internal product teams
- 2 Purpose:** Provide reusable, scalable platform components offered self-service to accelerate product teams' delivery

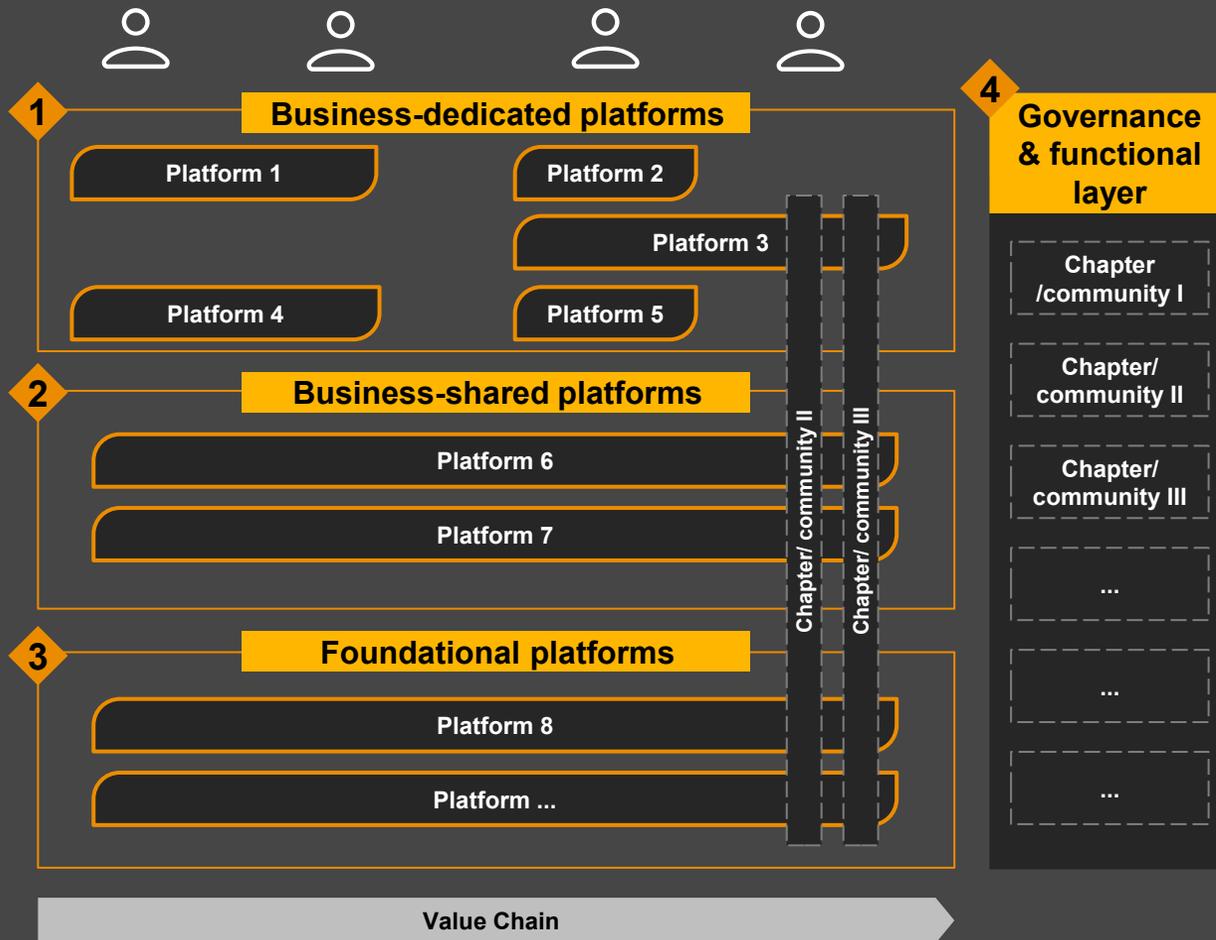
**Outcome:** Shared platform components to reduce duplication of efforts

**Customers:** Primarily other internal product/platform teams
- 3 Purpose:** Define and maintain standards, best practices, guardrails and ensure alignment with overarching business objectives

**Outcome:** Clear tech roadmap, minimised duplication of efforts, enhanced transparency into platform/product TCO and ROI

# A global pharma firm adopted platforms to meet customer needs, improving decision-making and rapid market responsiveness

PwC case study global pharma firm



## Major considerations

- 1 Purpose:** Serves one customer segment exclusively, emphasizing customisation, autonomy, and strategic differentiation

**Outcome:** Tailored solutions directly supporting divisional needs

**Customers:** external (end users) or internal (platforms, tribes, squads)
- 2 Purpose:** Supports multiple customer segments through scalable, standardised capabilities emphasizing efficiency, interoperability, and resource optimisation

**Outcome:** Optimised resource utilization and process harmonisation

**Customers:** external (end users) or internal (platforms, tribes, squads)
- 3 Purpose:** Enable enterprise-wide technology foundations for operational stability, standardisation, and scalability

**Outcome:** Robust backbone enabling secure, consistent, and cost-effective services that support business continuity

**Customers:** internal (platforms, tribes, squads)
- 4 Purpose:** Ensure digital & IT quality, security, and compliance while supporting platform autonomy and governance

**Outcome:** Stronger regulatory compliance, reduced IT risks

# Clearly dividing responsibilities between platforms & governance layer ensures accountability, accelerates decisions, & streamlines operations



# Implementing a platform operating model in digital & IT units faces common challenges that must be addressed proactively

1.

## Objectives

Unclear or missing early objectives of the operating model transformation case strategic drift, misalignment with business needs, and failure to prioritise critical outcomes

2.

## Positioning

Undefined platform layers in terms of purpose and capabilities leads to inefficiencies, confusion over roles and scope, and lack of strategic focus

3.

## Key elements

Missing shared understanding of key elements results in misalignment and friction between stakeholders, and slowed project progress due to recurring internal debates

4.

## Gravitation

Platform gravitation must be aligned with business goals to avoid ambiguity, overlapping responsibilities, and internal conflicts that hinder efficiency and accountability.

5.

## Pilots

Lack of an iterative pilot phase prevents early validation of the platform blueprint, increasing the risk of design flaws and resistance during broader rollout

6.

## Communication

Unclear communication creates uncertainty and rumours, triggering resistance and slowing adoption by undermining trust and alignment on transformation goals

## Costs of typical project hurdles

Ignoring hurdles in a platform operating model transformation comes at a price; case examples illustrate the impact:

- **A shift in objectives:** One client shifted focus mid-transformation — from innovation to cost reduction. This triggered a redesign of the platform architecture, delaying delivery and weakening strategic clarity.
- **Lack of platform gravitation:** Misalignment between platform structures and business goals at a client led to bloated, fragmented platforms. Ambiguous ownership created inefficiencies and governance breakdowns.
- **Poor communication:** No proper communication sparked layoff rumours at a client. The eroded trust, fuelled resistance and significantly slowed adoption across the organisation.

# Through extensive engagements, we have tackled executives' pressing questions and offered strategic solutions for the platform evolution

## What defines a platform, and how should it be built?

- Beyond technology, what **organisational elements** are **essential** for a platform to succeed?
- What **core design principles** ensure sustainable platform growth and evolution?
- How do we **differentiate platforms from products**, and where should we set the boundaries?

## How should teams and responsibilities be structured?

- What are the key criteria for defining **platform ownership** and accountability?
- How can **autonomous teams operate effectively** across multiple organisational units?
- How does platform evolution **impact my target operating model** and long-term scalability?

## Where and when should we invest for maximum impact?

- How do we **balance investments** between platforms and products?
- What resources and capabilities are critical for **scaling platforms** effectively?
- How do we determine which **business capabilities** should be **platform-driven**?

## How do we measure success and ensure alignment?

- What **governance model** aligns platforms with business goals while ensuring agility?
- What **KPIs** best measure platform success (e.g., adoption, efficiency, time-to-market)?
- How do platforms **support** modernisation while managing **legacy IT** complexity?

# Successful platform adoption follows a structured, four-phase approach: analysis, blueprinting, validation, scaling



## Analysis

- **Analyse the current operating model** through a structured gap analysis (e.g. business needs, capabilities, skills)
- Identify key challenges and **define the digital & IT operating model mandate** incl. design principles



## Blueprint

- Design **future platform operating model and create key design elements** (e.g. platform template, collaboration and governance model)
- Ensure feasibility by incorporating **stakeholder feedback** early on



## Validate

- **Implement and validate the platform operating model** incl. elements with **1-2 selected platforms / teams** (pilots)
- **Refine the governance and collaboration model**



## Scale

- Develop a transformation roadmap and iteratively **roll out the validated blueprint to new platforms** in order to scale the platform operating model

## Change Management & Communication

*Drive continuous engagement, transparency, and proactive change management to ensure alignment and user adoption throughout the transformation journey*

# Case studies show platform models reduce complexity, lower costs, and speed time-to-market, fuelling competitiveness

Excerpt

## Platform Strategy

## Platform Operating Model

### Global energy network operator



### Global retailer



### Global pharma firm



Description

The energy network operator adopted a platform-centric IT strategy to achieve holistic transformation. By modernising its IT architecture and redefining the operating model, the operator aimed to deliver enhanced business value through integrated capabilities across its product clusters

Our client sought to transform its IT from traditional service delivery to an autonomous, platform-oriented model to improve agility and responsiveness. Achieving this strategic vision required clearly defining objectives and optimising the operating model accordingly

Burdened by rigid structures, slow decision-making, high IT costs, and poor system quality, a multinational pharmaceutical company restructured its IT with a platform operating model to regain agility, efficiency, and customer focus

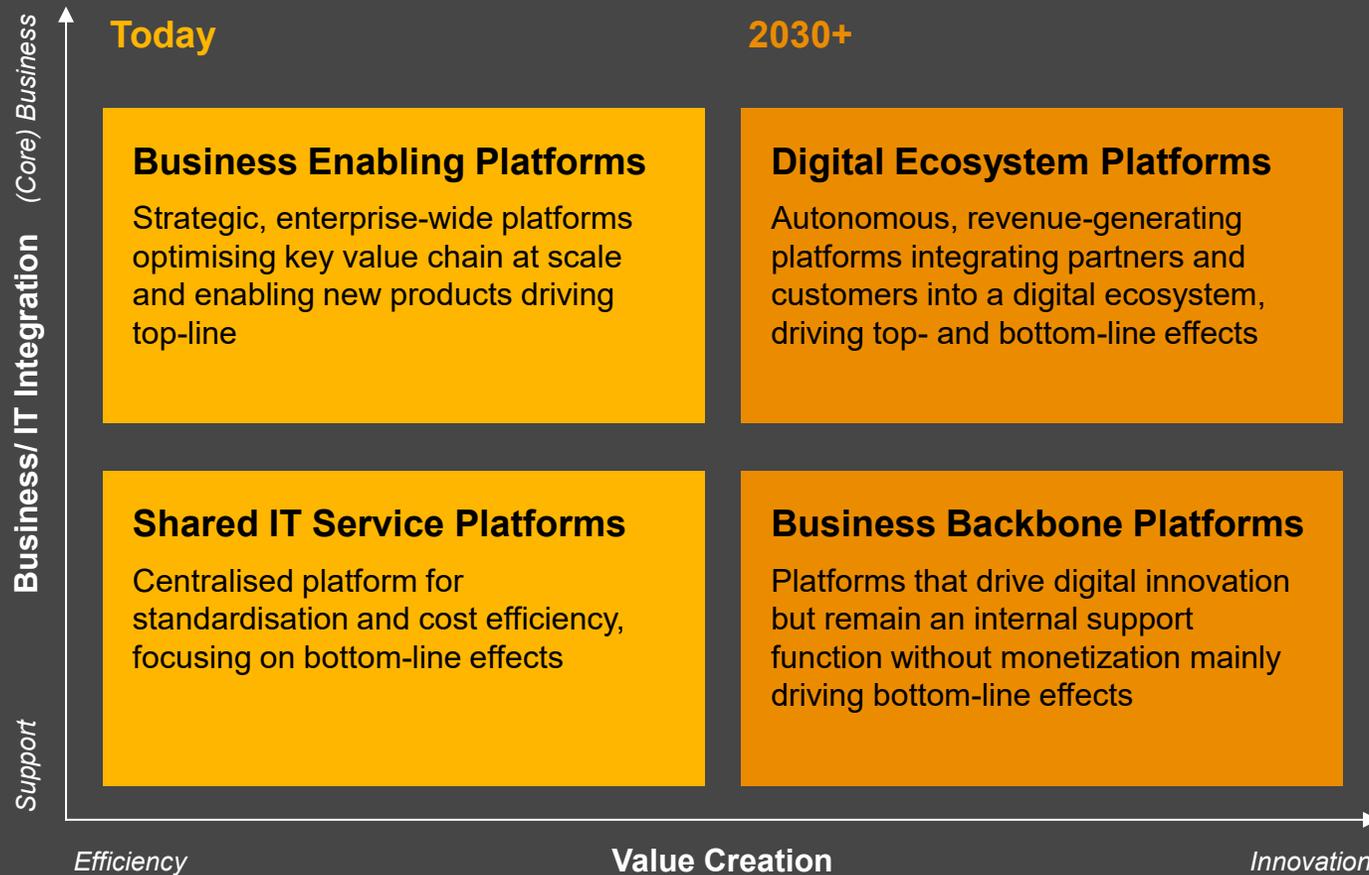
Outcomes

- Improved alignment of IT and business goals
- Streamlined operations via platform unification
- Strong architecture designed for future needs

- Clear alignment on digital unit positioning
- Org. layers down 40%, lean platforms up
- Synergy created through unified capabilities

- Increased agility through autonomous platforms
- Simplified governance with fewer hierarchies
- Consolidated capabilities into 33 platforms

# Platforms as a lever for efficiency are just the beginning; digital ecosystem platforms act as strategic partners for growth



## Future of platform positioning

Several trends are catalysing the development of shared IT service platforms into digital ecosystem platforms:

- **From silos to platform ownership:** IT and business merges into platform structures with E2E value ownership
- **From ridged to adaptive governance:** Successful platforms balance centralised control with agile, value-driven decision making
- **From efficiency to value creation:** Platforms shift from cost-saving tools to strategic business growth drivers
- **From closed systems to ecosystems:** Platforms expand beyond internal use, integrating partners and customers for new value streams

# Your experts for platform operating model design



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By embracing **platforms as mini-enterprises**, high-performing organisations boost **efficiency**, accelerate **innovation** and **scalability** but simultaneously drive **resilience** and manifest corporate **competitive advantage**

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