

# Harnessing the Carnival

A New System of Markets  
Positioned on the 'Production of  
Cardiometabolic Health'

Ecosystem Value: \$440 Billion in Annual Revenue

Blue Spoon Consulting®

The Global Leader in Positioning Strategy at a System Level



Blue Spoon Consulting Group, LLC

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Which is the opportunity....

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# The ‘Health Market Stack’

“Ecosystems” are economic systems with the gravitational pull to reset how a market works, or they become channels themselves, with the power to enable new categories of products and services that are native to the new system.

The process knowledge to construct industry ecosystems from scratch – to intentionally combine market fragments in an organized and persistent way – is the foundation to the ‘next \$100 billion in growth’ from what Andreessen Horowitz calls the “mother of all markets.”

The **health market stack** positioned here can spark a new economic system whose annual revenue is roughly \$440 billion. It centers on the concept of **market interoperability** to enable new health and economic value. The potential payoff for this kind of structural shift is significant: it can open entirely new growth trajectories for the ‘pieces and parts’ cohering on outcomes as shared marketspace, while at the same time changing the impact, and government burden, of diabetes worldwide.

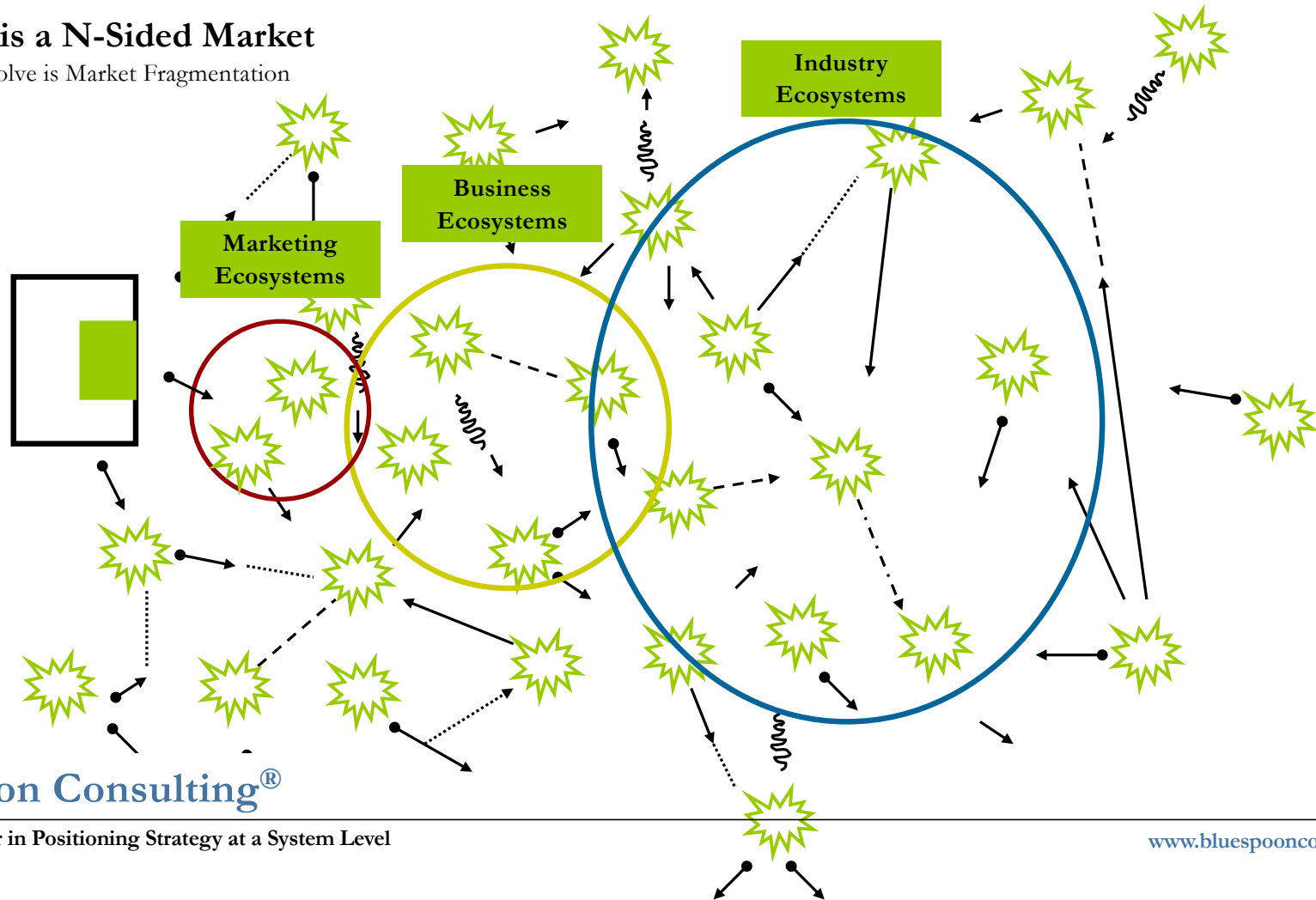
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# Healthcare is a N-Sided Market

The Problem to Solve is Market Fragmentation



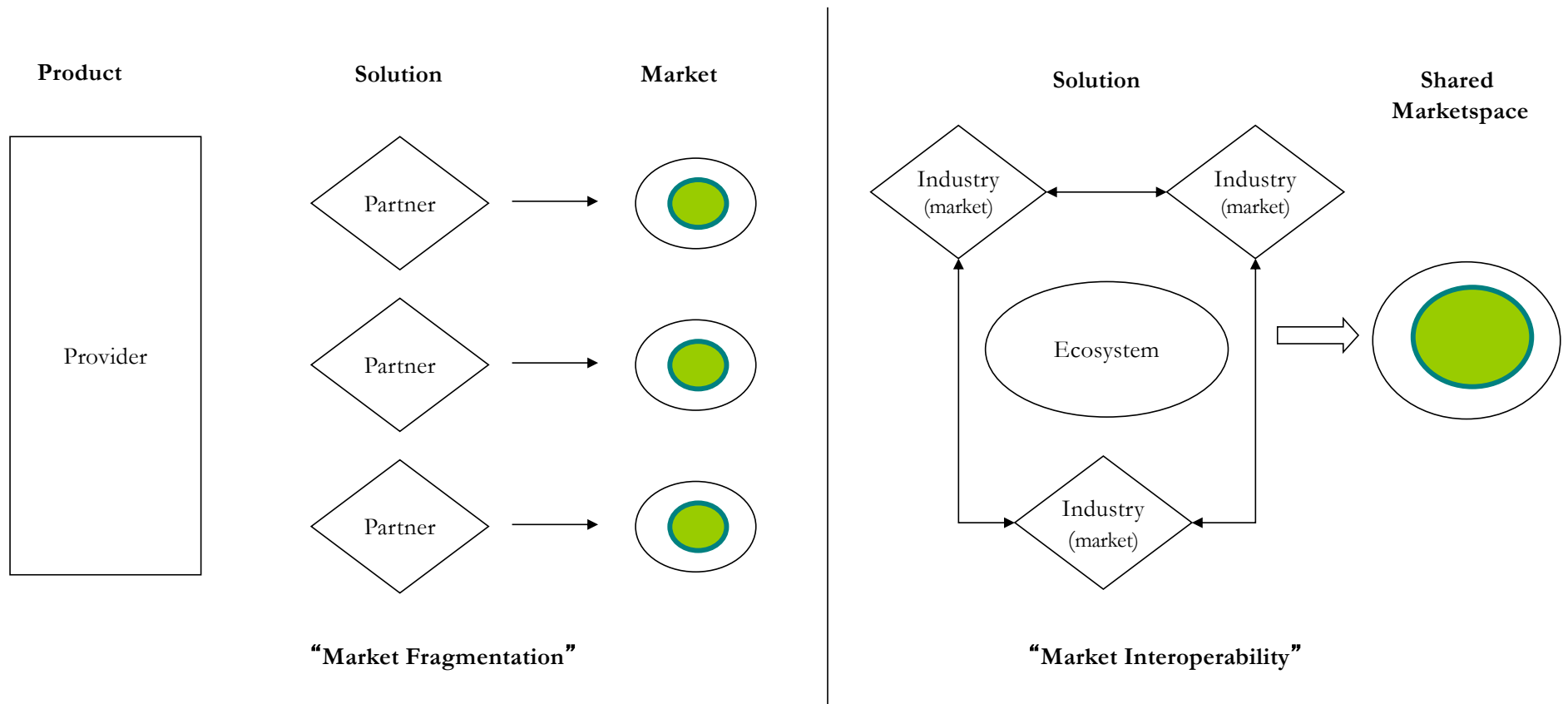
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# ecosystem-centered market strategy

DESIGN A NEW 'SYSTEM OF MARKETS' TO OPERATE AS A SINGLE ORGANISM



# ecosystem design matrix: “diabetes/obesity” rough mix

AN ECONOMIC SYSTEM WITH ANNUAL REVENUE OF AROUND \$440 BILLION

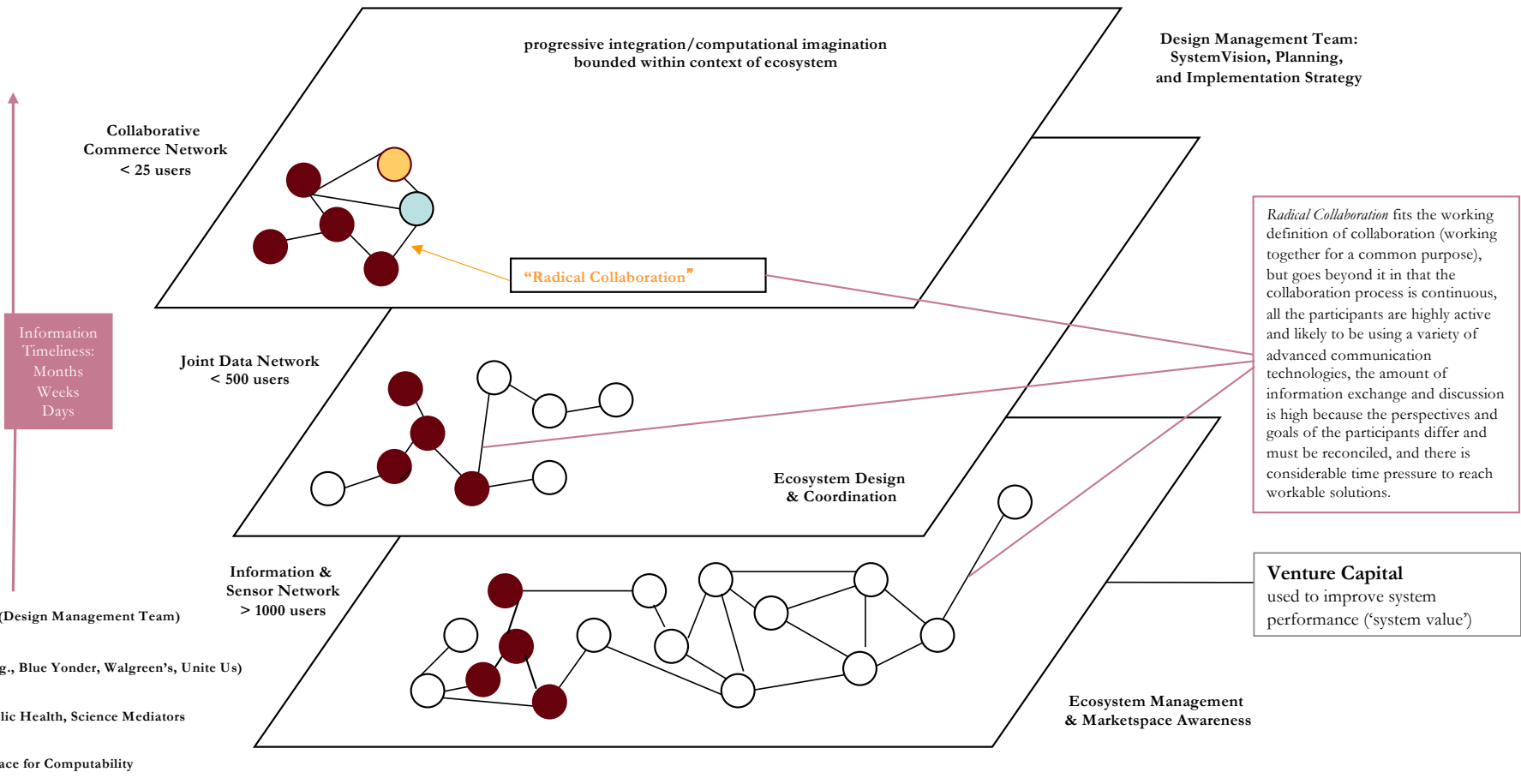
MARKET SET	CONTINUOUS GLUCOSE MONITORING MARKET (\$17 Billion)	TECHNOLOGY SERVICES MARKET – BPaaS (\$300 Billion)	DRUG MARKET - GLP-1 (\$100 Billion)	PERSONALIZED NUTRITION MARKET (\$23 Billion)
Market Option 1	FreeStyle 	wipro 	Lilly 	 - <b>BASF</b>
Market Option 2	<b>dexcom</b>	Infosys® Navigate your next 	 novo nordisk®	digbi health 
Keystone Partner Option				
Keystone Partner Option				



# A New Care and Service Infrastructure

An Economic System Positioned on the 'Production of Cardiometabolic Health'

- Dexcom
- Lilly
- ExxonMobil
- Microsoft



- Keystone Players (Design Management Team)
- Niche Players (E.g., Blue Yonder, Walgreen's, Unite Us)
- Government, Public Health, Science Mediators
- New Markets, Space for Computability

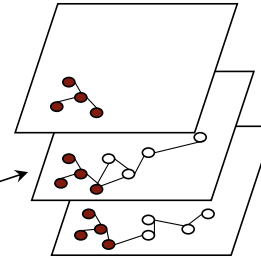


# Strategic Vision for a Global Market Scope

Manage a Portfolio of New Health Ecosystems Worldwide

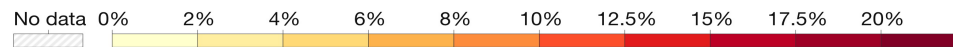
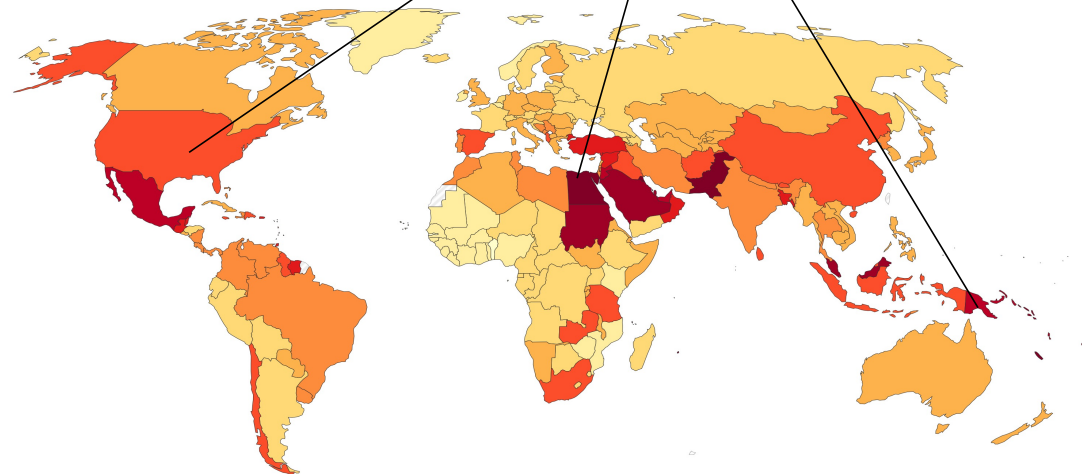
## System-Level Performance Measures<sup>1</sup>

- Health outcomes (population level)
- Resource utilization (direct and indirect)
- Economic performance (state and country)
- Market dynamics (ecosystem components)
- Emergence (innovation and ideas)



## Diabetes prevalence, 2021

The share of people aged 20-79 who have diabetes<sup>1</sup>.



<sup>1</sup>See also:

**China's Tech Hub Shenzhen Moves Ahead with GDP Alternative that Measures Value of Ecosystem Goods and Services**

Gross ecosystem product (GEP) system is the total value of final ecosystem goods and services supplied to human well-being in a region annually.

He Huifeng, *South China Morning Post* March 24, 2021

Source: International Diabetes Federation (via World Bank)

OurWorldInData.org/burden-of-disease • CC BY