



# Levels, phases and themes of coopetition: A systematic literature review and research agenda



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## ABSTRACT

There is increasing interest among management scholars in “coopetition”, which is simultaneous cooperation and competition between at least two actors. The research interest in coopetition has grown remarkably in the past few years on a variety of levels of analysis, including the intra-firm level, the inter-firm level, and the network level. However, this research has emerged along tracks that are often disconnected, and involves different terminologies, theoretical lenses, and topics. Accordingly, scholars have called for consolidation and synthesis that makes it possible to develop a coherent understanding of the coopetition concept and that reconciles its inherent heterogeneity. In this study, the authors address this issue by means of a systematic literature review that gathers, analyzes, and synthesizes coopetition research. Current knowledge on coopetition is consolidated and presented across multiple levels of analysis along a phase model of coopetition. On the basis of this in-depth review, the authors synthesize a conceptual map that highlights five multilevel research areas: (1) the nature of the relationship, (2) governance and management, (3) the output of the relationship, (4) actor characteristics, and (5) environmental characteristics. The major research themes are identified for each of these areas, enabling the authors to suggest future research avenues.

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## 1. Introduction

The management literature increasingly refers to the phenomenon of simultaneous cooperation and competition as “coopetition” (Bengtsson & Kock, 1999, 2000; Bonel & Rocco, 2007; Brandenburger & Nalebuff, 1996; Eriksson, 2008a; Ghobadi & D'Ambra, 2012; Gnyawali, He, & Madhavan, 2006; Lado, Boyd, & Hanlon, 1997). The rise of coopetition reflects an increasing awareness of the complexity of relations between economic agents. The combination of the seemingly contradictory “operating modes” of competitive and cooperative relations (Bunge, 1979) has inspired its analysis at the inter-firm level (e.g., Gnyawali & Park, 2009; Kylänen & Rusko, 2011), the intra-firm level (e.g., Luo, Slotegraaf, & Pan, 2006; Luo, 2005), and the network level (e.g., Gnyawali et al., 2006; Peng & Bourne, 2009).

Coopetition scholars have focused on developing its ontological

foundations (e.g., Chen, 2008; Luo, 2004; Yami, Castaldo, Dagnino, Le Roy, & Czakon, 2010), the conditions for its formation (e.g., Brandes, Brege, Brehmer, & Lilliecreutz, 2007; Mariani, 2007), its underlying processes (e.g., Bengtsson & Kock, 1999; de Rond & Bouchikhi, 2004), and its outcomes (e.g., Luo, Rindfleisch, & Tse, 2007; Luo et al., 2006). They have done so by using a variety of research methodologies. On the one hand, many studies have been conceptual or exploratory in nature and have often examined single cases in order to provide an initial conceptual basis (e.g., Cassiman, DiGuardo, & Valentini, 2009; Mariani, 2007). On the other hand, quantitative studies have begun to investigate correlations between distinct coopetitive relationship variables, including, for example, the effects of partner characteristics on efficiency (Li, Liu, & Liu, 2011), the effects of cross-functionality on firm performance (Luo et al., 2006), the influence of tensions on outcomes (Bello, Katsikeas, & Robson, 2010), and value creation (Kumar, 2010).

However, while extant contributions offer valuable accounts and facets of coopetition, they are characterized by a high degree of terminological, conceptual, and explanatory heterogeneity, which hinders research progress. Scholars have already called for a coherent, synthesizing conceptualization of this multidimensional

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construct (e.g., Bengtsson, Eriksson, & Wincent, 2010; Gnyawali et al., 2006; Gnyawali & Park, 2011; Ketchen, Snow, & Hoover, 2004; Zeng, 2003).

Only few efforts have been undertaken to answer this call (Bengtsson & Kock, 2014; Chin, Chan, & Lam, 2008; Stein, 2010; Walley, 2007). While these studies offer valuable overviews and research suggestions, they also leave substantial opportunities to further consolidate and extend our knowledge and understanding of cooperation and its research potentials. On the one hand, this is due to their publication date a few years back as cooperation research has been burgeoning and is remarkably productive. On the other hand, these reviews are not (and do not claim to be) comprehensive as they follow a traditional review approach which is often described as less transparent (i.e. risk of being biased) since the article selection is strongly dependent on the perspective of the author(s) (Davies, 2000; Torgerson, 2003; Tranfield, Denyer, & Smart, 2003). This approach can pose challenges for future research efforts, especially in such fields where a widely acknowledged theory base and terminology is still not settled. We therefore suggest that a systematic review approach is valuable for cooperation research as it is more transparent in literature selection, allows accommodating the field's inherent heterogeneity and is conducive for deriving a well-grounded research agenda for the cooperation field.

The aim of this review is therefore to systematically gather, analyze, and synthesize cooperation contributions in the management literature in a way that facilitates further research and supports management practice. We build a phase model of the existing literature that will enable us to structure cooperation research in terms of its antecedents, and the following three cooperation phases: initiation, managing and shaping, and evaluation phase. On the basis of this in-depth review we develop a comprehensive synthesis (Petticrew & Roberts, 2006; Torgerson, 2003) in the form of a conceptual map that highlights five multilevel research areas: (1) nature of the relationship, (2) governance and management, (3) output of the relationship, (4) actor characteristics, and (5) environmental characteristics. For each of these areas the major research themes are identified, allowing the authors to suggest future research avenues.

## 2. Cooperation – definition and scope

The concept of cooperation attained popularity in game theory and was subsequently championed in strategic management by Brandenburger and Nalebuff (1996). Their book “Co-opetition” suggested that managers overcome traditional competitive thinking by cooperating with competitors in order to create value.

Cooperation is intriguing as it combines two ways of interaction that usually involve strongly opposing logics. Scientific philosopher Mario Bunge, for example, pinpointed the conceptual similarity but fundamental difference of cooperation and competition based on a definition that contains the three elements: actors, activity, and mode. Whereas cooperation is the performance of an activity in a way that the actions undertaken by one actor deliberately facilitate the actions undertaken by the other (that is, Cooperation= $\langle$ Actors, Activity, Mode $\rangle$ , with Mode = “facilitating”), competition operates when the actions undertaken by one partner hinder the actions by the other (that is, Competition= $\langle$ Actors, Activity, Mode $\rangle$ , with Mode = “hindering”) (Bunge, 1989, p. 344). In this sense, it is “only” the mode (or the logic) that differentiates cooperation from competition, but does so in a very profound way.

The risks inherent in applying cooperation and competition simultaneously have been widely acknowledged. For instance, in the alliance literature cooperation and competition were traditionally seen as “opposing forces” within cooperative arrangements

(Das & Teng, 2000b, p. 85) so that competitive facets in a cooperative business relationship are often regarded as potentially harmful and need to be reduced (Child, Faulkner, & Tallman, 2005; Das & Teng, 1997, 2000b; Dyer & Singh, 1998; Hennart, 2006; Pearce, 2001). By contrast, the emerging cooperation perspective tries to integrate the two paradoxical logics into a common construct (e.g. Bengtsson et al., 2010; Chen, 2008). The emerging perspective is to depict cooperation and competition on two separate continua allowing to distinguish between different forms of cooperation with varying combinations of low to high cooperation and competition respectively (Lado et al., 1997; Luo, 2007; Park, Srivastava, & Gnyawali, 2014a; Raza-Ullah, Bengtsson, & Kock, 2014). This understanding is also reflected in one of the most popular definitions of cooperation, offered by Bengtsson and Kock, who described it as, “a relationship simultaneously containing elements of both cooperation and competition” (1999, p. 178).

Concrete, distinct cooperation forms that go beyond such foundational accounts are reflected in the strategic management literature. The concept found substantial resonance on all levels of analysis (individual, intra-firm, inter-firm and network) within organizational and management research. Simultaneous cooperation and competition on the *individual level* can facilitate innovation and creativity within teams as several studies show (e.g., Baruch & Lin, 2012; Hutter, Hautz, Füller, Mueller, & Matzler, 2011). Most of these studies address complex psychological processes or mechanisms which are starting when individuals are expected to cooperate with their team members while simultaneously each member is incentivized to increase individual performance (e.g., Lin, Wang, Tsai, & Hsu, 2010; Mooradian, Renzl, & Matzler, 2006). At the *intra-firm level*, scholars have studied, for example, the effect of competition for “parent resources, corporate support, power delegation, market expansion, and global position” (Luo, 2005, p. 73) and the simultaneous need for cooperation between the subunits (e.g., Ritala, Välimäki, Blomqvist, & Henttonen, 2009; Rossi & Warglien, 2009). At the *inter-firm level*, some contributions have dealt with firms that cooperate despite being on the same value chain level and in the same industry (i.e. direct competitors) (e.g., Bengtsson & Kock, 1999, 2000; Burgers, Cromartie, & Ronnie, 1998; Daidj & Jung, 2011; Krajewska, Kopfer, Laporte, Ropke, & Zaccour, 2008; Kumar, 2010; Luo et al., 2007; Lydeka & Adomavičius, 2007), while others have studied partners within a supply chain (Bakshi & Kleindorfer, 2009; Eriksson, 2008a; Lacoste, 2012; Pellegrin-Boucher, Le Roy, & Gurà, 2013; Zerbini & Castaldo, 2007). *Network-level* studies have tried to explain competitive behavior within a cooperative network structure (intra-network) (Gnyawali et al., 2006) as well as competition and cooperation between networks (inter-network) (Peng & Bourne, 2009).

Overall, cooperation is broad enough a concept to carry meaning across the salient organizational and strategy levels of analysis and therefore is a highly popular and prominent research topic. However, despite the similarity in the underlying phenomenon, terminology, definitions and findings from studies on one level of analysis have rarely found their way into cooperation studies on another level of analysis hindering to develop, or build upon a coherent understanding, or even theory. Also, for those interested in the current knowledge on cooperation, a search that focuses merely on studies that use the term cooperation would underestimate the current state of knowledge due to the substantial heterogeneity in terminologies employed. A literature review across multiple levels with a broad terminological approach is conducive to create an integrated picture of cooperation research.

## 3. Review approach

We conducted a systematic literature review on cooperation

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