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A systematic review of research on coopetition: Toward a multilevel understanding

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ABSTRACT

While research on the phenomenon of coopetition has dramatically increased during the last years, this line of inquiry often embodies a loosely connected body of work with fragmented themes, underdeveloped concepts, and little work explaining coopetition at multiple levels. In this paper, we conduct a systematic literature review of the field, and based on a final set of 142 contributions, synthesize the disparate research into a coherent whole by developing an overarching and dynamic multilevel model. We first systematize diverse conceptualizations of coopetition with respect to different levels into The Actor and The Activity Schools of Thought. Then we integrate major critical themes into a Driver, Process, Outcomes (DPO) framework, and offer a Blended School of Thought to show how different levels are intertwined and affect each other. Next, we develop a multilevel conceptual model of coopetition by integrating the Blended School into the DPO framework. This model helps future research better understand how the phenomena of coopetition at one level of analysis are distinct, yet interlinked, from coopetition at other levels, and in so doing, provides a richer and more complete perspective of the phenomenon of coopetition. Finally, we identify promising research avenues and suggest how future research can strengthen this line of inquiry.

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1. Introduction

Strategy and management scholars are increasingly using the term coopetition, coined by the founder of Novell, Ray Noorda in 1980s, to describe the simultaneous pursuit of cooperation and competition by firms (Afuah, 2000; Ketchen, Snow, & Hoover, 2004; Luo, 2007; Zhang & Frazier, 2011). In the wake of best-selling book (Brandenburger & Nalebuff, 1996), and seminal work done on the subject (e.g. Bengtsson & Kock, 1999, 2000; Dowling, Roering, Carlin, & Wisniewski, 1996; Lado, Boyd, & Hanlon, 1997), interest in coopetition research has been on rise. While the academic literature on coopetition has been extensive as evidenced by growing number of tracks and workshops, several special issue calls in well-reputed journals such as *Industrial Marketing Management* and *Strategic Management Journal* (forthcoming), edited books, and substantial increase in article publications, it often embodies a loosely connected body of work with fragmented themes, underdeveloped concepts, and little work explaining coopetition at multiple levels. In this paper, we systematically review the field and synthesize the disparate research into a coherent whole by developing an overarching and dynamic multilevel model that explains coopetition.

Coopetition has been conceptualized in multiple ways such as value-net (Brandenburger & Nalebuff, 1996), dyadic relationship (Bengtsson & Kock, 2000), paradox (Raza-Ullah, Bengtsson, & Kock, 2014), business model (Ritala, Golnam, & Wegmann, 2014), and ecosystem (Daidj & Jung, 2011), and studied on multiple levels like network, dyadic, triadic, and intra-firm levels. The phenomenon at one level is distinct from that at another level, as understandably coopetition's nature and dynamics, for instance at a network level tend to differ from the ones at a dyadic level. Thus the definition and conceptualization of coopetition, despite sharing certain commonalities, ought to be different at different levels. Yet, the extant literature inclines to conceptualize and treat the phenomenon at different levels alike without demarcating boundaries between them. Further, even though the literature acknowledges coopetition as a dynamic multilevel phenomenon, it lacks integrative models spanning multiple levels of analysis. Prior research has thus far not produced an overarching theory to explain what drives coopetition, what happens during coopetition at and across multiple levels of analysis, and what are the consequences. Together, these issues highlight the need for doing a comprehensive literature review of the field to further specify the construct of coopetition with respect to different levels, integrate the diverse major themes of coopetition into a coherent whole, and develop an overarching and dynamic multi-level model of coopetition.

Following Watson (2015), we conducted a systematic literature review that is both efficient and effective. While efficiency is

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achieved by using a prescribed protocol to identify, select, and assess articles without being biased and subjective, effectiveness results by synthesizing the literature, communicating the depth of knowledge on key major themes and concepts, and building important relationships among them (e.g., [Watson, 2015](#)). Previous reviews on coopetition either lack an established system that supports efficient detection and searching of articles (e.g., [Bengtsson & Kock, 2014](#); [Bengtsson, Eriksson, & Wincent, 2010](#); [Walley, 2007](#)), or limit their scope to address only specific dimensions of coopetition ([Ilvonen & Vuori, 2013](#); [Rai, 2013](#); [Petter, Resende, Andrade Júnior, & Horst, 2014](#)).

Based on a final set of 142 articles selected from two databases (ISI and EBSCO), we first scrutinize the concept of coopetition by classifying numerous disparate definitions and conceptualizations in relation to multiple levels into two dominant schools of thought, which we name as The Actor and The Activity Schools. After that, we integrate the major critical disperse themes in a driver-process-outcome framework, and explicate how the process in each school is different but drivers and outcomes appear to be the same. We then offer an overarching and a dynamic multilevel model of coopetition that simultaneously synthesizes the two schools with the mentioned framework and determines a new Blended School of Thought that gives novel insights on how coopetition is, in the broad sense, at least a two level phenomenon that involves one-to-one relationships (sub levels include dyadic & triadic levels) and the broader context (network and inter-network levels) in which such relationships may be embedded in. This model specifies the interactive linkages among drivers, processes, levels, and outcomes, and further demonstrates that a deeper investigation of such linkages may be critical in providing a fuller understanding of where coopetition comes from, how cooperative processes are dynamic, complex, and managerially challenging in both schools but in different ways, and how it matters to performance. Finally, we discuss several weaknesses of current literature, which in turn provide opportunities for future research, followed by our suggestions to strengthen this line of inquiry.

2. Research methodology

Following [Watson \(2015\)](#) and [Crossan and Apaydin \(2010\)](#), the methodology used in this article is that of a systematic literature review (SLR). [Boell and Cecez-Kecmanovic \(2015\)](#) argue that rigor in SLRs is commonly conceived as efficiency that results from following a prescribed protocol and a particular search process. However, [Watson \(2015\)](#) states that although efficiency is important, effectiveness is necessary and argues that effectiveness is obtained by “synthesizing the literature and revealing the depth of knowledge on an area's critical key concepts and the relationships between these concepts” ([Watson, 2015](#) p. 185).

Our literature review is both efficient and effective. In order to be efficient, we initiated a review process that uses a protocol-based, i.e. a systematic approach to identify, select, and assess the relevant literature ([Tranfield, Denyer, & Smart, 2003](#)). Such a systematic process is argued to be reproducible, objective, transparent, unbiased, and rigorous (e.g. [Boell & Cecez-Kecmanovic, 2015](#); [Crossan & Apaydin, 2010](#)). We attempted to achieve this by doing an exhaustive literature search that uses two accredited databases, ISI Web of Knowledge's Social Sciences Citation Index (SSCI) and EBSCO host web's Business Source Premier, and provide an audit trail of our article selection and review procedures (c.f., [Cook, Mulrow, & Haynes, 1997](#)). We selected 1996 as the base year for our search because the first contribution on coopetition appeared in 1996 in the shape of a book by Brandenburger and Nalebuff. Thus we used the time span from 1996 to 2014. As the phenomenon is also explained by simultaneous cooperation and competition, we, in addition to having coopetition as the search keyword, used ‘cooperation and

competition’ in both the title and the topic fields of ISI and the title and the abstract fields of EBSCO.¹ This was done to ensure that we do not miss any relevant article that has not used the term coopetition per se. The initial sample resulted in 215 and 598 articles from ISI and EBSCO, respectively. After excluding 171 duplicates, and 51 non-English papers, a total of 593 articles were left to review as shown in [Fig. 1](#).

Next, we independently reviewed the abstracts (and body when required) of these articles for relevance based on three criteria, and suggested which articles should be included and excluded. First, we included only those articles that addressed both cooperation and competition explicitly as the main concepts. Thus, articles mainly focusing on either cooperation or competition, or how cooperation makes firms more competitive for instance, were excluded. This resulted in 215 exclusions. Second we looked for real research papers published in peer-reviewed journals and not, for example, commentaries, essays or notes, which resulted in 57 more exclusions.

Third, we considered articles as off-topic if coopetition was only used as a catchword, and if the articles did not relate coopetition to business or management. Using this criterion, we further excluded 179 articles, even if they used the term coopetition. Among these, we excluded 41 articles that focused on an individual's psychological motives and the brain's structures in explaining why people cooperate or compete with other individuals and those that examined their personal well-being without relating it to business or management. A further 38 articles on economics, discussing different industrial structures and financial markets, and 24 articles on anti-trust law were excluded. Moreover, 35 articles that focused on trade, coopetition among countries, and other macro phenomenon were also excluded. Furthermore, 14 articles addressed political science and 11 articles studied regional developments without discussing the role of coopetition. Five articles were about computing but were not related to business and management and were therefore excluded. Four articles were about education, for example how children learn, and five articles only mentioned coopetition but focused on other aspects, like the atomization of sales forces, and these were also excluded. Using the mentioned criteria, we removed 451 articles, as illustrated in the figure above. Finally, we arrived at a set of 142 articles addressing coopetition, six of which were literature reviews of coopetition. The next step was to read and code all the remaining articles.

Each article was read by both authors. Through the initial coding, we identified different definitions and conceptualizations of coopetition, level of analysis and the method used in the study. Furthermore, we codified the purpose or research question, and the main conclusions and findings into three different dimensions – drivers, processes and outcome – with a number of sub-codes for each dimension.

Next, we conducted a preliminary analysis to determine the growth in the field, the journal outlets that have published coopetition research at least twice, and the methodologies used to study this phenomenon. The analysis shows that from 1996 to 2014, the number of articles published on coopetition has consistently increased, as shown in [Fig. 2](#).

¹ ISI: Title = (cooperat*) AND Title = (compet*) OR Title = (collaborat*) AND Title = (compet*) OR Title = (coopet*) OR Title = (co-opet*) OR Topic = (coopet*) OR Topic = (co-opet*) Refined by: Web of Science Categories = (MANAGEMENT OR BUSINESS) AND Document Types = (ARTICLE OR REVIEW) AND Languages = (ENGLISH) Timespan = 1996–2014. Databases = SSCI. Lemmatization = On Results: 215. EBSCO: Search Terms TI cooperat* AND TI compet* OR TI collaborat* AND TI compet* OR TI coopet* OR TI co-opet* OR AB cooperat* OR AB co-opet* Limiters – Peer Reviewed; Published Date from: 1996–2014; Publication Type: Academic Journal; Document Type: Article Expanders – Apply related words Search modes – Find all my search terms Last Run Via Interface – EBSCOhost Search Screen – Advanced Search Database – Business Source Premier. Results: 598.

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