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This is a Author's accepted manuscript (AAM) version of a publication
published by De Gruyter
in Crick, J.M. (Ed.) De Gruyter Handbook of Coopetition.

DOI: 10.1515/9783111288987-015

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Please cite the publication as follows:

Ritala, P. (2025) Coopetition – A meta-theoretical lens and a research program. In Crick, J.M. (Ed.) De Gruyter Handbook of Coopetition. De Gruyter: Berlin. DOI: 10.1515/9783111288987-015

**This is a parallel published version of an original publication.
This version can differ from the original published article.**

COOPETITION – A META-THEORETICAL LENS AND A RESEARCH PROGRAM

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Full citation info:

Ritala, P. (2025) Coopetition – A meta-theoretical lens and a research program. In Crick. J.M. (Ed.) De Gruyter Handbook of Coopetition. De Gruyter: Berlin.

Weblink: <http://doi.org/10.1515/9783111288987-015>

Abstract: Coopetition – simultaneous collaboration and competition between organizations – has been a powerful concept that has sparked the imagination of both researchers and practitioners. The power of coopetition is in its universal applicability to foundational dynamics in the firm’s business environment, in its competitive strategy, and around its inter-organizational relationships. In this chapter, I document – using a self-reflective approach – how coopetition started as a novel managerial thinking framework, included a promise of becoming a meta-theoretical construct, and eventually grew into a cumulative research program. I also draw parallels to several other constructs that imply metaphorical or metatheoretical utility – such as the paradox or the ecosystem – to demonstrate how and why concepts such as coopetition become adopted, why they gain popularity, and why they sometimes struggle to gain traction.

Introduction: the multiple origins of the research program of coopetition

This chapter documents my interpretation of the research program of coopetition – i.e. simultaneous competition and collaboration between organizations – how it came to fruition, how I see its progress, and what can we expect from it in the future. I have witnessed how the coopetition research program initially ignited from several different and parallel origins and later consolidated into a mainstream strategy construct. For most of this time, there have been questions and debates including its conceptualization, the community, and the role of the research theme within the broader management literature. In many ways, the arc of coopetition research has resembled many other research programs around a powerful conceptualization, including that of ambidexterity, paradox, or ecosystem.

My journey with cooptition started in the 2000s. This was a time when the concept was gaining traction across multiple fronts. First, cooptition was already out in the field as a managerial idea and a philosophy, initiated by Ray Noorda, the CEO of Novell. This philosophy was first fully documented in a book by Brandenburger and Nalebuff (1996) based on their ideas of game theory, helping to explain a firm's competitive and collaborative strategies (Brandenburger & Nalebuff, 1995). The managerial-philosophical aspect of cooptition was interestingly noted in passing by Lado et al. (1997) in a theory paper on syncretic rent-seeking behaviour in the *Academy of Management Review*. Second, cooptition was explicitly identified and conceptualized by industrial marketing and business-to-business scholars. Interestingly, the phenomenon was identified by Bengtsson and Kock already in their 1999 article, but without an explicit use of the term (1999). In their pioneering study one year later (Bengtsson & Kock, 2000), they combined those findings with the conceptualization of Brandenburger & Nalebuff (1996), thus closing the loop between the emerging managerial construct that was based on game theory and the theoretical ideas from the management and industrial marketing literature. Third, there was an emerging European research movement around cooptition from a strategy angle. These early insights were captured by Dagnino and Padula (2002) in a conference paper. They were extended with a stream of EIASM seminars explicitly around "cooptition strategy", involving a lot of community development, research, and momentum (for discussion and reflections of this research stream, see also Dagnino & Rocco, 2009; Yami et al., 2010; Czakon et al., 2020; Dagnino & Ritala, 2025). A bit later several scholars, including myself, started to build a parallel discussion around cooptition and innovation, which combined insights from innovation management, strategic management, and alliance and network literature (Ritala & Hurmelinna-Laukkanen, 2009, 2013; Gnyawali & Park, 2011; Park et al., 2014; Bouncken et al., 2018; Corbo et al., 2023).

All the above developments have now converged into a diverse, generative, and consolidating research program (for reviews, see e.g. Bouncken et al., 2015; Bengtsson & Raza-Ullah, 2016; Gernsheimer et al., 2021). Yet, despite its relative maturity, cooptition remains to me a fascinating concept. On one hand, cooptition represents a similar overarching and metatheoretical understanding of a business environment that, for instance, is currently attributed to the concept of ecosystem. On the other hand, cooptition seems to have consolidated into a mainstream concept that carries with it the reference value that links together a research program with several different lenses, findings, and perspectives. The potential of cooptition as the "theory to rule them all" is linked to the first perspective, while the more mundane "research theme" or "research topic" represents the latter view.

In the remainder of this chapter, I reflect coopetition first as a metatheoretical lens, followed by a discussion of coopetition as a research program. Finally, I conclude by reflecting on how I see the future of coopetition research program.

Coopetition as a metatheoretical lens

Coopetition was initially introduced by Brandenburger and Nalebuff (1996) – two economics scholars who used the term to characterize game theoretic strategizing in the context of the firm’s complex business environments. The idea of coopetition was embedded in an overarching lens labelled as “value net” which they presented already in 1995 in a Harvard Business Review article (Brandenburger & Nalebuff, 1995). Value net included the vertical relationships of a firm – the customers and suppliers – and the horizontal relationships divided between substitutors (i.e. competitors) and complementors. A player is a *substitutor* to the focal firm if focal firm’s customers value its offering less when they can access the other players' offerings. Similarly, a player can also be a substitutor toward suppliers when suppliers find it less attractive to supply to the focal firm if they are also supplying to the other player. On the contrary, a player can be a *complementor* to the focal firm when there is synergy in the value created to the focal firm’s customers when the other player’s offering is also available to that customer, or from the perspective of suppliers who can find synergies when they supply to multiple firms. From coopetition perspective, the first revelatory notion was that a firm’s competitors can take complementary roles as well, or that complementors can become competitors. Business environments are thus dynamic, rather than static, and the competitive-collaborative roles overlap and evolve. The second notion was the much-referred insight that firms often collaborate to create value for the customers while they compete to divide it up, which represents a temporal dimension of many game-theoretic considerations. These insights were followed by many scholars, in describing the dynamics that arise from the simultaneity of competition and collaboration (Bengtsson & Kock, 2000; Dagnino & Padula, 2002) and the dual nature of value creation and capture (Ritala & Hurmelinna-Laukkanen, 2009, 2018; Ritala & Tidström, 2014; Bouncken et al., 2020).

The aforementioned insights characterize something fundamental about strategy and management, and therefore coopetition scholars had early on the idea that coopetition could present a sort of a “big picture of strategy”, or at least an overarching lens to inter-organizational strategy. Therefore, there is an interesting question to ask whether coopetition is (or could be) a metatheory, similarly as paradox theory is argued to be (Schad et al., 2016). Or is coopetition at least a universal theoretical lens to the

duality of competition and collaboration? Many early-stage coopetition theorists clearly had such pursuits in mind. For instance, Lado et al. (1997) theorized “syncretic rent-seeking behavior” as a firm’s tendency to both compete and collaborate intensively. Similarly, Brandenburger & Nalebuff (1996) value net pursued to be an overarching strategy framework.

Yet, in my view, coopetition never fully accomplished the status of such metatheoretical construct as the concepts of paradox and ambidexterity enjoy, for instance. In a way, coopetition resembles a lot the initial coining of the term ecosystem (Moore, 1993), and the eventual development of it, and does not fall far from the substance matter either. Both constructs – coopetition and ecosystem – represent a view to the firm’s competitive and collaborative environment, both involve an idea about (co-)evolution, and both allow for firm-centric and more overarching analyses of inter-organizational relationships. To this end, the value net by Brandenburger & Nalebuff (1995, 1996) and the initial idea of a business ecosystem by Moore (1993) represented a holistic analysis for strategy practitioners and scholars about the core business environment where strategic considerations are embedded in. Later on, these two streams of literature differentiated themselves from each other quite a bit, with coopetition remaining and zeroing in its focus on collaboration and competition (see e.g., Chiambaretto et al., 2025), while ecosystem scholarship has mainly focused on firms’ complementary relationships and their orchestration (see e.g., Adner, 2017; Aarikka-Stenroos & Ritala, 2017). Interestingly, however, the way Brandenburger & Nalebuff (1995, 1996) conceptualized complementors as increasing the value of the focal firm’s product towards the customers represents almost exactly how complementarities and complementors in ecosystem literature have later been conceptualized (Adner, 2017; Shipilov & Gawer, 2020).

In the end, considering the above discussion, the relatively minor momentum of coopetition as a metatheory remains a missed opportunity. It is difficult to reason why such progression has not happened, but a comparison to other research programs might help here. For instance, paradox literature builds around a rather solid ontology including duality, contradiction, tension, and interdependence (Smith & Lewis, 2011; Schad et al., 2016). Coopetition literature, however, involves a variety of interpretations and perspectives on the topic, and there are debates around what constitutes “coopetition”, what are the boundary conditions, and which levels of units of analysis should or could be considered (Chiambaretto et al., 2025). At the same time, much of the coopetition research draws from other (meta)theories, and indeed, also from paradox (Raza-Ullah et al., 2014; Bengtsson et al., 2016; Wilhelm & Sydow, 2018) and ambidexterity (Fernandez et al., 2014; Hoffmann et al., 2018) literature. In this sense, coopetition literature resembles ecosystem literature,

where there is a variety of viewpoints, debates, and conceptualizations into what ecosystem represents conceptually and empirically (see e.g., Aarikka-Stenroos & Ritala, 2017; Ritala & Almpantopoulou, 2017; Scaringella & Radziwon, 2018). Overall, it seems that the flexibility of the coopetition concept serves several types of analyses of competitive and collaborative relationships and dynamics. Yet, this flexibility might come with the cost of not having a unified ontology or metatheoretical foundations.

Coopetition as a research program

While coopetition does not necessarily appear as one unified metatheory, for previously discussed reasons, there is a generative and a relatively clear research program around coopetition. As documented by Chiambaretto and colleagues (2025), there is increasing consensus around the “hardcore” tenets of coopetition, in that the phenomenon should involve: (1) simultaneous competition and cooperation; (2) an intense competition between partnering firms in critical markets, and (3) an intense cooperation between competing firms in critical activities or markets. At the same time, there are occasional extensions to coopetition including venturing into different levels of analysis beyond inter-organizational, including intra-organizational (e.g., Chiambaretto et al., 2019) and network (Czakon & Czernek, 2016) levels of analysis.

Interestingly, many articles published about coopetition fail to qualify fully with all three of the above-mentioned tenets. For instance, many studies on collaboration between competitors use the phrase coopetition rather casually, without necessarily focusing on the simultaneity of competition and collaboration, nor the intensity of either. We could argue on one hand that this weakens the research program – it is difficult to achieve cumulative evidence on something where scholars use the concept ambiguously or metaphorically. On the other hand, we could and should also appreciate the diversity of competitive and collaborative inter-organizational dynamics – in the empirical world, not all instances of coopetition appears similar to the theoretical conceptualizations, nor is it intensively present at all given moments. Then, it remains an empirical question to which extent competition affects collaboration, and vice versa, and how it matters. Indeed, a parallel stream of research has discussed the interplay of competition and collaboration (Hoffman et al., 2018) in which there is broader interest in competitive and collaborative dynamics that sometimes resemble the strict definition of coopetition, while sometimes not (see also Kostis et al., 2024).

Early on in my coopetition journey, I tried to figure out the boundaries of coopetition phenomena as opposed “just alliances” or “just competition”. I published – together with colleagues – a stream of

studies where I compared coopetition to non-competitive relationships (Ritala, 2009), distinguished the implications of coopetition on value creation and capture (Ritala & Hurmelinna-Laukkanen, 2009; Ritala & Tidström, 2014; Ritala et al., 2014), and examined how firm's orientation towards coopetition matters for its performance (Ritala, 2012). I came to understand that both collaboration and competition play a key role in each other, resulting in distinctive benefits and challenges that cannot be explained by more traditional analyses of competitive or collaborative dynamics separately. Many other scholars have also discussed these unique dynamics of coopetition from different points of view, including the early contributions by Lado et al. (1997) and Dagnino & Padula (2002), but also many others later on, such as Gnyawali and Ryan-Charleton (2018), and Kostis and colleagues (2024).

To me, it is obvious that coopetition will carry on as a cumulative research program. We are starting to see consolidation in a variety of aspects, including coopetition and its outcomes for a firm (Ritala, 2018; Crick & Crick, 2021), coopetition and innovation (Ritala et al., 2016; Corbo et al., 2023), the feasibility and performance of coopetition under different contingencies (Crick et al., 2024), and competition tension (Raza-Ullah et al., 2014). On the other hand, new openings are being introduced all the time, following the developments in business and society. For instance, several studies are focusing on the role of coopetition in achieving environmental or social sustainability (Volschenk et al., 2016; Christ et al., 2017; Crick & Crick, 2020; Manzhynski & Figge, 2020; Harala et al., 2023). Another stream of studies has started to figure out how coopetition plays out in digital platforms and ecosystems (Ritala et al., 2014; Cozzolino et al., 2021; Bahar et al., 2022; Yoo et al., 2022).

Coopetition research program will keep expanding in different directions both empirically and theoretically. With new empirical contributions, there will be cumulative progress with the nuances of coopetition in a variety of contexts and with different phenomena. At the same time, scholars will keep expanding and integrating ideas from coopetition literature into other literature streams – either by explaining coopetition with a theoretical lens from elsewhere (such as in the case of coopetition paradox research) or by bringing in insights from coopetition literature to inform other discussions.

Conclusion

I recall the early discussions in EIASM Coopetition Workshops in the 2000s and early 2010s. There was worry that coopetition research would not “catch on” or would not “become mainstream” – as in being accepted broadly in management literature and by management scholars. It is safe to say that this is no longer a worry – we have seen coopetition become a mainstream management concept, a

body of literature on its own, and a research program. I consider this a success. We have learned a lot as academics, and a lot of practitioner-relevant insight has also been created. I am happy to have contributed to this field with my research which formed a substantial part of my initial academic career. I continue to be fascinated with coopetition, and look forward to seeing the field grow, consolidate, and diversify together with the changes in business and society.

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