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THE COOPETITION STRATEGY: A COMPREHENSIVE ANALYSIS OF REAL CASES AND EMPIRICAL STUDIES

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Coopetition strategy (cooperation with competitors) has become a popular approach for firms seeking to simultaneously cooperate and compete with their rivals. This study aims to analyze the effectiveness of coopetition strategy by conducting a comprehensive analysis of real cases and empirical studies. The authors examine the possible benefits and drawbacks of coopetition strategy, and compare the main recent findings in the field. The research methodology involves literature reviews, content analysis, historical method, comparative analysis, and synthesis. The generalization and analysis of real cases of coopetition are based on content analysis of news, newsletters, reviews in the press, reports, and papers published in Scopus database. The most cited papers in the field of empirical research devoted to coopetition are analyzed through content analysis to shed light on the effectiveness of coopetition strategy and provide insights for firms considering implementing this approach. The current study united the analysis of several strategic alliances in the period 2001-2023, and the recent publications in the Scopus database in 2013-2023 years. The variety of findings allows concluding that there are some ideas the scholars and practitioners agreed upon, and some are still in the process of development. Scholars and practitioners have debated several topics, such as the role of power, the relationship between coopetition and innovation, the sustainability of coopetition, and how to manage conflict in coopetition. These topics are important to consider when implementing coopetition strategies in practice. The analysis of real cases and empirical studies offers a comprehensive understanding of the benefits and drawbacks of coopetition, and highlights the factors that contribute to successful coopetition.

Keywords: coopetition, benefits, drawbacks, strategic alliance, managing coopetition, cooperative tension.

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Introduction and formulation of the problem

Organizational development is a rapidly changing sphere of academic and practical activities, each decade may contribute disruptive ideas to the field of strategic thinking, management models, and organizational performance assessment. Coopetition as a phenomenon appeared centuries ago, and was articulated and formulated by Branderburger and Nalebuff [11] in 1996.

Organizations that engage in coopetition, which

is the strategic collaboration between competitors, face several challenges in terms of organizational development. One major challenge is managing the tensions between cooperation and competition. While coopetition can lead to mutual benefits, it can also create conflict and distrust among the collaborating firms [6, 19]. Another challenge is establishing a balance between cooperation and protection of intellectual property. In a cooperative environment, organizations may need to share valuable knowledge

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and resources with their competitors, which can put their intellectual property at risk [8, 12]. Finally, organizations must also navigate the complexities of inter-organizational relationships, including managing power imbalances and resolving conflicts, in order to build successful cooperative partnerships [16, 41].

Based on the statement of problems above, one major challenge that organizations face when engaging in cooperation is managing the tensions between cooperation and competition. While cooperation has the potential to generate mutual benefits, it can also create conflict and distrust among competing firms, and cooperation may affect diversity and innovative thinking in a team. Therefore, the challenge of managing this tension between opposite drivers, cooperation and competition, has significant implications for leadership and management in organizations that achieve the cooperative stage. Leaders and managers must be skilled in navigating complex inter-organizational relationships, resolving conflicts, and building trust. They must also be able to balance the need for cooperation with protecting the organization's intellectual property. Effective leadership and management in a cooperative environment can help organizations maximize the potential benefits of collaboration while minimizing the risks of conflict and intellectual property loss.

Analysis and research of publications

The term “cooperation” was first introduced by Ray Noorda, the founder of Novell Inc., in the late 1980s [11]. Noorda used the term to describe the relationship between Novell and Microsoft, which was a mix of cooperation and competition. However, it wasn't until the early 1990s that the term gained widespread attention, when the authors Adam Brandenburger and Barry Nalebuff published their book “Co-Operation: A Revolution Mindset That Combines Competition and Cooperation” in 1996 [11]. This book has changed the way of thinking for many strategists, marketers, and entrepreneurs. Investigating the success cases and incredible changes in market dynamics, Brandenburger and Nalebuff noted that competitors sometimes may follow the logic of a positive-sum game, and in this case, creating cooperation has a greater potential for value creation than the same efforts of companies if they act independently towards innovative development [11]. They suggested that organizations could achieve greater success by combining elements of both competition and cooperation in what they called a “cooperative” strategy.

Since then, the concept of cooperation has become increasingly popular in management and

strategy research, as organizations seek to find new ways to collaborate and compete in a rapidly changing business environment.

The cooperation as a model of interactions was used by enterprises in IT-industries in the first place and aircraft manufacturing, and later they became widely used by car manufacturers, the pharmaceutical industry, tourist units, etc. [32]. The strategic alliances such as Samsung Electronics and Sony; Sharp and Toshiba; Boeing, and Airbus performed positive outcomes of cooperation with competitors and negative ones. Cooperation boosts innovations [19], and this unique strategy uses the advantages of cooperation and competition [11], and requires a unique approach to manage it.

One central theme in recent studies has been the tension between cooperation and competition and how organizations can manage this tension to build successful cooperative partnerships [20]. This tension can be exacerbated by power imbalances between collaborating firms, cultural differences, and the risk of information leakage. To address these challenges, researchers have emphasized the importance of effective leadership and management in a cooperative environment, focusing on building trust, resolving conflicts, and establishing clear goals and objectives for the partnership [41].

Another key theme in recent cooperation research has been the impact of intellectual property protection on innovation and knowledge sharing within cooperative partnerships. Researchers have explored the relationship between cooperation, intellectual property protection, and firm innovation and have identified a need for organizations to strike a balance between sharing knowledge and protecting their intellectual property [12].

Finally, researchers have also explored the potential benefits and drawbacks of cooperation in different contexts, including strategic emerging industries in China, small and medium-sized enterprises, and the healthcare industry [9, 41]. Overall, recent research highlights the importance of careful management and planning in cooperative partnerships, focusing on building trust, resolving conflicts, and establishing clear goals and objectives for the partnership.

The cooperation, in our opinion, is the next phase of the evolutionary development of organizations that at a certain stage begin interaction with competitors who may become complementors for the company. We also believe that cooperative strategy is the next step in the development of strategic management, as the perception of competitive behavior and its advantages, competitive

advantages, and key competencies is changing. Coopetition is multifaceted phenomenon, it is an interaction, a paradox, a process, a multi-level concept, and a mindset, and it is only at the door of its prime [32]. Hence, the more insights coopetition provides, the more need for new types of leaders equipped with a solid background and an up-to-date toolbox increases too. Top leaders and management of global corporations are keen to find new ways of unleashing the hidden development potential of the organization, and new powerful drivers to motivate higher labor productivity, and therefore, the coopetition paradigm may offer new opportunities to grow innovatively. The implementation of innovative projects is complicated and requires a whole new set of soft skills managers should have to communicate effectively in competitive, cooperative, and coopetitive frameworks, to mitigate possible conflicts, and to facilitate added value creation.

The purpose of the paper

The paper is aimed at analyzing the previous findings devoted to the real cases of coopetition and empirical studies to reveal and compare the main recent findings in the field, possible benefits, and drawbacks of coopetition.

Materials and methods

The research is designed as an overview that is structured as follows: 1) the generalization and analysis of real cases of coopetition based on news, newsletter, reviews in the press, and reports; 2) the content analysis of the most cited papers in the field of empiric research devoted to coopetition, and finally (using Scopus database); 3) analysis of the relevant empirical research selected by authors using simple keywords search. The main methods of the research are literature reviews, content analysis, historical method, comparative analysis, and synthesis.

The results of the research

Considering many great organizational transformations due to coopetition strategy implementation, we would claim that in addition to its possible effect on innovations, coopetition may be a potential phase of organizational evolution. Even in conditions where a competitor does not see the need for joint efforts, another enterprise can reach a phase where coopetition is the only next prospect for further development and purposefully changes the "rules of the game" in the field of coopetition relationships.

The enterprise may make a leap to coopetition development only if it uses a proactive approach to strategy design. Coopetition should not be confused with collusion or a cartel, when the participants, in

response to the actions of competitors, unite for temporary inventive strategic ploys to set the most favorable prices or overcome the dominance of other players in the market. Coopetition is aimed at obtaining benefits by increasing the economy of scale by offering a new generation of innovative product within a shorter production cycle. Researchers have repeatedly argued that coopetition is a more attractive option for further actions if partners have already been involved in joint activities or have a common history of interaction and positive experiences [6, 20, 32]. On the other hand, negative experiences can become a barrier to partnership, according to Eriksson [18]. Such a statement strongly narrows the possibilities for the manufacturer, which located in a developing country, or emerging institutional environment (such as in Ukraine). Thus, we state that coopetition relationships can be established not only as a result of long-term competition, but also as a conscious choice of subjects who, due to a proactive position and managerial maturity, are ready to design a joint coopetition strategy. Coopetition is a phenomenon, the causes of which cannot be reduced to an attempt to protect the enterprise from future risks, an attempt to retain market share, or to go beyond the borders of industries. We consider coopetition as an element of an innovation strategy that combines the organizational efforts and/or investment resources of competitors to create new capabilities, competencies, innovative products, etc.

The coopetition definition was introduced by Brandenburger and Nalebuf [2] as combination of partnership and competition based on game theory. This definition was discussed by many researchers and scholars from all around the world, as well as practitioners in strategic management.

According to Bengtsson, the paradoxical character of coopetition lies in the dual relationship between firms that simultaneously cooperate and compete [6]. Other research stated that the two-dimensional nature of coopetition forms the effective balance between the processes in the organizations, and it is an important element of the strategic development of a company [37]. This dualism creates favorable conditions for the high performance of participants (companies, branches), and some organizational units may receive positive outcomes such as knowledge sharing, interunit social interactions, and as a result possible synergy [37]; however, these processes need proper coordination directed by managers. In our opinion, there might be a confusion for the participants at the individual level (units, projects). The employees who are involved in that type of project have to deal with the

two-dimensional concept when they are partners and competitors at the same time and do not have a comprehensive framework for the interactions. Coopetition is a symbiotic relationship, based on continuous, progressive, and sustainable solutions agreed upon between partners, where cooperative interactions replace competitive ones and vice versa. This replacement creates the preconditions for the performance increase at the organizational and interunit level, and further development of relationships between the departments and participants of coopetitive projects should embrace this process and mechanism of replacement.

The combination of all the above-listed features allowed us to interpret the coopetition as a system of paradoxical (simultaneously competitive and cooperative) multi-level multi-causal relationships between proactive economic subjects who consciously choose a partner for the joint creation of a new value in the external environment, and new competencies – within the organization.

There is no clear consensus in the academic literature on whether coopetition between main competitors leads to more positive or negative outcomes. Some studies suggest that coopetition can lead to benefits such as increased innovation, cost savings, and access to new markets (e.g., [6]). To reveal the features of effective management in coopetitive projects, this study embraces several cases of coopetition and strategic alliances between competitors in different countries and different industries. Firstly, we generalized the outcomes of the most well-known strategic alliances since 2000 in chronological order (see Table 1), with an indication of the main milestones and outcomes of the alliances.

This overgoing dispute among scholars and practitioners about the beneficial or counterproductive nature of competitive, cooperative, and coopetitive drivers led us to systematic overview of the most cited empirical studies in the sphere of coopetition for the recent ten years. To reveal them,

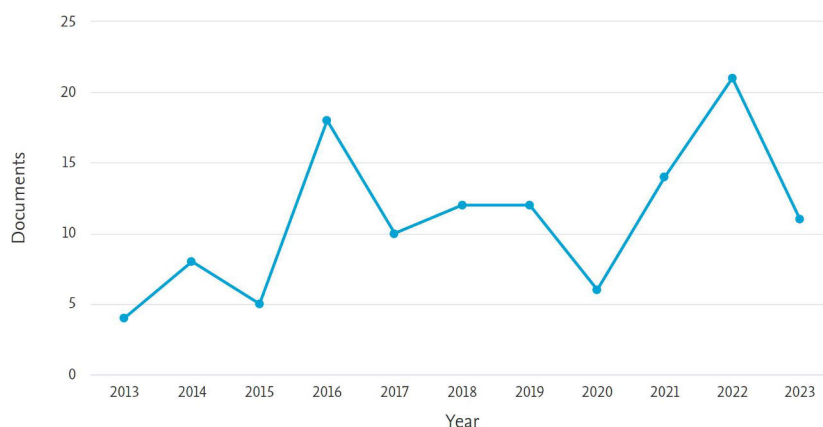
Table 1

The most discussed strategic alliances between competitors since 2000

Year of start-year of termination*	Name of companies/corporations	Description	The state of the alliance
2001–2012	Sony and Ericsson	In 2001, Sony and Ericsson formed a joint venture to develop and market mobile phones [22] The partnership lasted until 2012, when Sony bought out Ericsson's share of the venture [5]	Terminated
2005–2008	Microsoft and Yahoo!	In 2005, Microsoft and Yahoo! announced a 10-year partnership to combine their search engine technologies and advertising platforms in an effort to compete with Google [24]. However, the partnership was terminated early in 2008 due to regulatory concerns [3]	Terminated
2007–2009	Renault-Nissan and Bajaj Auto	In 2007, Renault-Nissan and Bajaj Auto announced a partnership to develop a low-cost car for the Indian market [2]. However, the partnership was dissolved in 2009 due to disagreements over branding and pricing [28]	Dissolved
2010–2014	Nokia and Microsoft	In 2010, Nokia and Microsoft formed a strategic alliance to develop smartphones using Microsoft's Windows Phone operating system [4]. The partnership ended in 2014 when Microsoft acquired Nokia's mobile phone business [6]	Terminated
2014–*	Apple and IBM	In 2014, Apple and IBM announced a partnership to develop enterprise apps for iOS devices and provide cloud services to businesses [19]. The partnership was aimed at competing with Microsoft in the enterprise market.	In a process
2016–2018	General Motors and Lyft	In 2016, General Motors and Lyft announced a partnership to develop self-driving cars and provide ride-sharing services [23]. However, the partnership was dissolved in 2018 when General Motors sold its stake in Lyft [9]	Dissolved
2020–*	Volkswagen and Ford	In 2020, Volkswagen and Ford announced a strategic alliance to collaborate on electric and autonomous vehicles, with Ford licensing Volkswagen's electric vehicle platform for use in its own vehicles [33]	In a process

* is a note if there is no year of termination, and the partnership goes on.

Source: compiled by authors based on the sources [1,2,3,4,5,7,18,22,23,24,34,40].



The results of a search in Scopus database using keywords “coopetition” and “empirical”, time period 2013–2023 years (121 documents in total)

Source: compiled by authors

we used Scopus database and simple keyword search (Figure).

The TOP-10 most cited papers in the field were analyzed and presented in order of citations, and the further content analysis allowed us to emphasize some distinguished features as it showed in Table 2. The papers that mentioned other empirical studies (i.e., overviews) and are not based on original empirical studies were excluded from the search.

The content analysis of selected papers allowed us to generalize very briefly the main outcomes and findings of each research.

The article by Ritala and Hurmelinna-Laukkanen [28] focuses on the role of absorptive capacity and appropriability in facilitating incremental and radical innovation in coopetition. Based on a survey of Finnish technology firms, the authors found that firms with higher levels of absorptive capacity were more likely to engage in both incremental and radical innovation in coopetition. Appropriability, on the other hand, was found to have a negative impact on incremental innovation but a positive impact on radical innovation. The study also suggests that coopetition partners may differ in their preferences for incremental vs. radical innovation, which can pose challenges for managing the coopetition relationship. The authors conclude that firms engaging in coopetition need to carefully manage their absorptive capacity and appropriability in order to balance the potential benefits of innovation with the risks of knowledge spillovers and loss of control over intellectual property.

The study by Park, Srivastava, and Gnyawali [26] examines the impact of competition and cooperation on innovation performance in firms

engaged in coopetition. The authors argue that coopetition involves a delicate balance between cooperation and competition, and that the intensity of each can influence innovation performance. The study identifies three ways in which coopetition can influence innovation performance: value co-creation, value creation through knowledge application, and value creation through competition with partners. The study also shows that the intensity of competition matters in coopetition, and there is an inverted-U relationship between market competition and innovation. The positive effects of learning potential may diminish and the negative effects of competitive tension on innovation performance become dominant as the intensity of competition increases beyond a certain point. The study also shows that high intensity of cooperation is likely to be beneficial for innovation due to increased possibility of knowledge sharing, mutual commitment, and pursuit of common goals. The role of tension is critical for understanding the relationship between coopetition and innovation, and managing tension in coopetition is through the balance between competition and cooperation. Lastly, the study is the first to empirically examine the phenomenon of coopetition using a large sample of firms over a period of ten years in a highly nuanced manner. The authors provide insights for managers on how to navigate the tightrope of coopetition and optimize their innovation performance.

The paper by Tidström [35] discusses the concept of coopetition, where the author argues that coopetition involves managing tensions between cooperation and competition, which can be a challenging task for firms. The study mainly concentrated on two cases, both of which demonstrated domain-related tension, and the

Table 2

The most cited papers in the coopetition field in 2013-2023 years (empirical studies)

Rank/No of citations*	Authors	Year of publication	Methodology/ approach	Sample size	Country of research/sector	Main outcomes & takeaways
1/377	Ritala, P., Hurmelinna-Laukkanen, P.	2013	Cross-industry survey	213 companies	Finland/different sectors	Conceptual framework of interdependence of firm's absorptive capacity and types of innovations in coopetition
2/231	Park, B.J.R., Srivastava, M.K., & Gnyawali, D.R.	2014	Econometric research based on using panel data (1990– 2003)	1930 observations	Global/Semiconductor industry	Conceptual model of Coopetition-based Innovation
3/194	Tidström, A.	2014	Case-study	4 firms & 10 companies	Finland/Steel Industry Finland/Natural Products Industry	Types of tensions revealed (domain-related tension; tension related to forced cooperation, and tension related to sharing vs protecting information)
4/136	Ritala, P., Sainio, L.-M.	2014	Structured survey questionnaire	209 firms	Finland/Manufacturing, Machinery & vehicles, Information & Communications Technology (ICT) & Electronics, Wholesale, Retail & Logistics, Construction & infrastructure; Services	The coopetition is not beneficial to technological radicalness, but is the background for creating network value
5/120	Ho, H.D., Ganesan, S.	2013	Study 1 Between-subjects scenario experiment Study 2 Surveys	Study 1 – 121 participants; Study 2 – 610 firms	1. The USA/MBA students 2. Manufactures in the private sector	The role of a customer in cooperative supplier partnerships. The importance of managing competition relationships
6/114	Ritala, P., & Tidström, A.	2014	Longitudinal in-depth case study	4 companies	Finland/steel industry	Three types of value-creation and value-appropriation approaches identified: ‘collaborate first to compete later’, collaboration intensification, and a conflict-driven approach
7/84	Bouncken, R.B., Laudien, S.M., Friedrich, V., Görmar, L.	2018	Multiple-case study with a purposeful sampling approach	12 coworking places	Germany	4 types of coworking spaces were identified. The role of community managers specified
8/55	Sanou, F.H., Le Roy, F., Gnyawali, D.R.	2016	Content-analysis of reports, interviews, journals, sectoral data, and newsletters	193 firms	70 countries/global mobile telephone operator industry	A theory of cooperative networks developed. Empirical demonstration of how a central position in a cooperative network enhances competitive aggressiveness and market performance
9/51	Tidström, A., Rajala, A.	2016	Qualitative case study	1 case, 9 interviews	Tredoc & Sentrec Alliance	Insights in competition strategy development, shaped by interrelated activity on multiple levels. Praxis and practice as activities of cooperation, and their inter-influence
10/44	Crick, J.M., Crick, D.	2019	Semi-structured interviews & survey	151 participants	New Zealand/sporting clubs, martial arts	Coopetition increases management performance. Validation of COOP scale

* The number of citations is valid on the 10th of April 2023. Source of data: Scopus Database
 Source: compiled by authors based on the sources [10,14,21,26,28,29,30,31,35,36]

findings contributed to the field of coopetition study. Other types of tensions were tension related to forced cooperation, which could lead to some conflicts related to delivery, to advertising; and tension related to seeking balance between sharing and protecting the information.

The findings of the research published by Ritala and Sainio [29] are useful for business practitioners, indicating that coopetition does not necessarily lead to technological radicalness. However, it can be beneficial for overall innovativeness if competitors work together on the incremental development of common platforms and standards for technologies. This approach can lead to potential benefits such as interoperability and interworking, and the development of a common technology base, which is essential for network industries. In terms of business-model radicalness, firms can achieve differentiation in the market by engaging in innovation-related coopetition activities. This can enhance their competitiveness in product design, marketing, and delivery channels. Therefore, actively seeking such differentiation can result in radical changes in business models and improve a firm's competitiveness.

The study by Ho and Ganesan [21] investigates the effect of knowledge base compatibility on knowledge sharing between suppliers in coopetition, and the role of customer participation in mediating this relationship. The authors collected data in two different ways – from a scenario-based experiment and through a survey study. The results suggest that knowledge base compatibility has a positive effect on knowledge sharing between suppliers in coopetition, and that customer participation moderates this effect. Specifically, customer participation enhances the positive effect of knowledge base compatibility on knowledge sharing. The authors also find that customer participation positively affects the relationship between knowledge sharing and innovation performance, indicating that customer involvement in coopetition activities can lead to improved innovation outcomes. Overall, the study highlights the importance of considering the role of customer participation in coopetition activities and suggests that knowledge base compatibility can facilitate knowledge sharing between suppliers, which in turn can lead to improved innovation performance.

The exploratory case study that examined the elements of value creation and appropriation of a coopetition strategy [30] found that relational and firm-level strategies are notably different in terms of their value-creation and appropriation objectives, and that there is observable heterogeneity in this regard

among the firms involved. The study also found that the strategies evolved over time, affecting the emphasis on the two types of objectives in different firms. The study emphasizes the importance of temporal dynamics in the coopetition strategy, where heterogeneity and changes in the nature of interactions between the firms were observed over time. The paper distinguishes three types of value-creation approaches and identified several patterns that shifted over time, and two types of value-appropriation approaches (positive-sum and zero-sum) were observed in all companies (four companies in the steel industry in Finland) at different points in time during the period in question.

The multiple-case study with a purposeful sampling approach offered by Bouncken and her co-authors [10] to gain an in-depth understanding of the coworking phenomenon by ensuring richness of information. The cases were selected based on the following criteria: (1) key informants such as founders, co-founders, coworking-space managers, and users, and (2) coworking spaces located in Germany to eliminate cultural influences. The sample consists of 12 coworking spaces, which exceeds the number of cases suggested by case study literature. The researchers developed a semi-structured interview guideline based on prior literature and adapted it as they conducted more interviews. The researchers evaluated the interviews using the Gioia methodology and analyzed a vast amount of archival data, such as from firm websites, press publications, and material provided by the informants, to improve data quality. As a result, the study identifies four types of coworking spaces, including corporate coworking spaces that benefit from the creative and flexible collaboration of their employees, consultancy coworking spaces that are just emerging and rely on project structures, independent coworking spaces that promote interaction, collaboration, and co-creation, and open organizations that create value by enhancing innovation and creativity-related capabilities.

The study shows that community managers play a crucial role in coworking spaces as they create atmosphere, set up rules, and channel conflicts. Coworking spaces are social proto-institutions that can establish internal organizational institutions that emphasize the positive value-creation tensions and reduce problematic value-creation-appropriation tensions. The concept of ecosystems refers to a group of localized actors and institutions that create an environment for innovation, and coworking spaces can build the core of such innovation ecosystems by using the positive tensions of collaboration and competition [10].

The study [31] focuses on the concept of "coopetitive networks" and their competitive implications in global mobile telephone operator industry. Data was collected through interviews, journals, sectoral data, annual reports, and newsletters. The authors analysed 6300 pages of articles and identified 193 mobile operators from 70 countries. Competitive actions during a six-year period were examined using structured content analysis of news reports. As a result of content analysis, the authors make three contributions to the literature: (1) developing a theory of coopetitive networks, (2) empirically demonstrating how a central position in a coopetitive network enhances competitive aggressiveness and market performance, and (3) emphasizing the need for integrating competitive dynamics research and coopetition research. The study shows that being a strong cooperator (highly central) in a coopetitive network has a clear impact on competitiveness and firm performance. The findings suggest that centrality matters in coopetitive networks, and the formation of ties with competitors is a valuable means of achieving future competitiveness [31].

The study conducted by Tidström and Rajala [36] focuses on vertical coopetition and includes the perspective of time and dynamics in relation to strategic activities on multiple levels. The findings show that there can be both deliberate and emergent coopetitive activities on the same level at the same time, and coopetitive activities may simultaneously be influenced by practices and activities on several levels, indicating a more complex interrelationship than presented in previous studies. The study also reveals the importance of recognizing both praxis and practice as activities of coopetition strategy, as these are related on (and between) different levels of analysis and influence the nature of a coopetitive business relationship. The findings indicate a certain pattern of development of coopetitive strategy over time, which evolves from lower-level praxis influenced by higher-level practice to higher-level praxis influenced by lower-level praxis and practice. The study offers a new perspective on the activity of individuals in coopetition, showing that coopetition from a practice perspective can be deliberate from the individual-level perspective and emergent from the relational perspective.

The study conducted in New Zealand in a sphere of sport management [14] shows that coopetition activities can lead to improved performance for management teams. Coopetition activities can provide benefits that cannot be achieved through individualistic efforts. However, the measures

of the coopetition construct used by marketing scholars have certain limitations, which can restrict the recommendations that can be made to practitioners. The COOP scale can help academics test the antecedents and consequences of different forms of coopetition activities. This can lead to well-rounded managerial recommendations about the benefits and potential drawbacks of collaborating with competitors to target different product markets. The study highlights certain limitations and avenues for future research that need to be addressed. Overall, the research suggests that coopetition can be a valuable strategy for management teams, but it needs to be managed appropriately, and the benefits and drawbacks need to be carefully weighed.

As we see from Table 1, coopetition can lead to negative outcomes such as loss of strategic control, ownership change in favor of one of the partners, conflicts of interest, or even loss of market share. Table 2, on the contrary, presents studies aimed at revealing both the negative and positive consequences of coopetition, and there are many findings that proved that coopetition can be beneficial.

However, some of the remarkable research in coopetition field worth of attention haven't got in TOP-10, and therefore we selected more papers additionally using the simple search by keywords in Google Scholar and analysis of abstracts and full texts of papers. We arranged them in similar way (Table 3).

Among those, we should mention a recently published study by Park and Kim [27], devoted to coopetition dynamics in the smartphone industry, specifically in the new convergent segment, which is characterized by the integration of various technologies such as smartphones, TVs, and wearable devices. The main case authors have chosen to focus on symbiotic relationship between Apple Inc. and Samsung Electronics. The analysis of the case is mainly based on secondary data obtained from various sources such as articles, annual reports, COMPUSTAT financial data, USPTO patent data, news reports, and press releases that have been published online. As a result of analysis, the coopetition that took place between Apple, a large new player, and Samsung, the incumbent, had a significant impact on both companies, as well as their complementor, Google. Both firms' revenues and net incomes showed a continuous increase during the early and middle stages of this competition. Moreover, when the rivalry between the two companies intensified in 2010, their financial performance significantly improved. Not only did this study provide evidence of the benefits of

Table 3

Empirical studies in a sphere of coopetition (additionally selected)

Year	Authors	Methodology/approach	Sample size	Country of research/sector	Main outcomes & takeaways
2013	Urgal et al.	Survey	9432 firms	Spain/different sectors	Working with competing partner technologies improves their innovative efficiency
2016	Strese et al.	Survey	234 managers	Germany/different sectors	The impact of cross-functional coopetition on enhanced innovation, improved product development, and increased firm performance is confirmed
2015	Le Roy & Fernandez	In-depth study, semistructured interviews	Case-study (Yahsat), 40 interviewees	UAE/telecommunications	Coopetition tension should be managed properly. Co-management principle.
2020	Crick & Crick	Survey & semistructured interviews	101 firms & 20 interviewees	New Zealand/Wine Producers	Non-linear effects of coopetition. "Optimal level" of collaboration.
2021	Park & Kim	Case-study	Apple & Samsung	Global/electronics	Evidences of the benefits of coopetition in various stages of partnership

Source: compiled by authors based on [13,25,27,33,38].

coopetition in various stages of partnership, but it also enriched the coopetition literature with new insights. Furthermore, this study made a contribution to managerial practice and strategic literature.

Earlier publication by Strese and co-authors [33] investigates the organizational factors that influence cross-functional coopetition, specifically the impact of leadership and organizational structure on this type of collaboration. As the outcomes, the study finds that a flat organizational structure and transformational leadership style are positively associated with cross-functional coopetition, while a hierarchical structure and transactional leadership style have a negative impact on this type of collaboration. Additionally, the study suggests that cross-functional coopetition can result in positive outcomes such as enhanced innovation, improved product development, and increased firm performance. Overall, the study highlights the importance of leadership and organizational structure in facilitating cross-functional coopetition and provides insights for managers seeking to implement this type of collaboration in their organizations.

The publication by Urgal and his co-authors [38] explores the relationship between knowledge resources, innovation capability, management commitment, and innovation performance. The study finds that knowledge resources positively impact innovation capability, which in turn positively influences innovation performance. Additionally, the

study suggests that management commitment moderates the relationship between innovation capability and innovation performance, such that the positive impact of innovation capability on innovation performance is stronger when management is committed to innovation. The study concludes that the effective management of knowledge resources, innovation capability, and management commitment are critical factors in enhancing innovation performance. Overall, the study provides insights into the role of knowledge resources and management commitment in improving innovation performance and offers practical implications for managers seeking to improve their firm's innovation capabilities.

The publication by Crick and Crick [13] investigates the yin and yang nature of coopetition activities, highlighting the non-linear effects and the moderating role of competitive intensity for internationalized firms. The study finds that while coopetition can lead to positive outcomes, such as innovation and knowledge sharing, the relationship between coopetition and performance is non-linear, meaning that there is an optimal level of coopetition beyond which the positive effects diminish. The study also suggests that the level of competitive intensity in the industry moderates the relationship between coopetition and performance. Specifically, firms in highly competitive intensity industries can benefit from higher levels of coopetition, whereas those in

low competitive intensity industries may not. The study provides insights into the complex nature of coopetition and highlights the importance of considering the moderating effects of industry competition when evaluating the outcomes of coopetition activities. Overall, the study offers practical implications for managers seeking to engage in coopetition strategies and suggests that a balanced approach to coopetition is crucial for achieving positive outcomes.

The publication by Le Roy and Fernandez [25] focuses on managing coopetitive tensions at the working-group level, specifically through the rise of the coopetitive project team. The study highlights the growing importance of coopetition in project-based industries and the need for effective management of coopetitive tensions to achieve successful outcomes. The authors propose a conceptual framework that identifies three key dimensions of coopetitive tensions: strategic, organizational, and cultural, and suggest that effective management of these tensions requires a balance between cooperation and competition. The study presents case studies of Yhsat program jointly developed by TAS and Astrium to illustrate the framework and demonstrate how the coopetitive project team can effectively manage tensions and achieve positive outcomes. The authors argue that the coopetitive project team can serve as a powerful tool for managing coopetitive tensions and can facilitate collaboration and innovation across firms. The study offers practical implications for managers seeking to engage in coopetition at the project level and provides insights into the potential benefits of the coopetitive project team approach. Overall, the study highlights the importance of effective management of coopetitive tensions and suggests that the coopetitive project team can serve as an effective mechanism for achieving successful outcomes in project-based industries.

Conclusion

Current study is designed as overview of the empirical research and evidences in open access (news, newsletter, and reports) to reveal possible benefits and drawback of coopetition which may be a reason for the firms initiate or avoid of such a strategy. Many studies, including those analyzed in this paper, bring evidence that by collaborating with competitors, firms can achieve mutual benefits that may not be achieved individually. This idea has been widely accepted in practice, as many firms have realized that they can achieve better outcomes by collaborating with their rivals than by competing against them. However, the idea of cooperation with

competitors emphasizes the importance of trust between firms, which is crucial for successful coopetition. Many firms have worked to build trust with their rivals to facilitate coopetition and achieve better outcomes. One more idea, widely accepted is that coopetition is not limited to individual firms but can also occur between entire ecosystems. At the same time, there are several disputable topics and questions that scholars and practitioners have debated regarding coopetition. One such topic is the role of power in coopetition. Some scholars and practitioners argue that power imbalances can lead to exploitation and undermine trust, while others believe that power asymmetries can facilitate coopetition by providing incentives for cooperation. Another topic of debate is the relationship between coopetition and innovation. While some argue that coopetition can facilitate innovation by bringing together complementary resources and expertise, others believe that competition is necessary for innovation to occur. Additionally, scholars and practitioners have debated the sustainability of coopetition and how to manage conflict in coopetition. These topics are important to consider when implementing coopetition strategies in practice, as new findings in leadership studies may bring new light to the phenomenon.

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СТРАТЕГІЯ КООПЕТИЦІЇ: КОМПЛЕКСНИЙ АНАЛІЗ РЕАЛЬНИХ ВИПАДКІВ ТА ЕМПІРИЧНИХ ДОСЛІДЖЕНЬ

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Стратегія коопетиції (співпраця з конкурентами) стала популярним підходом для компаній, які одночасно бажають співпрацювати та конкурувати зі своїми конкурентами. Це дослідження має на меті проаналізувати ефективність стратегії коопетиції, провівши комплексний аналіз реальних випадків та емпіричних досліджень. Автори досліджують переваги і недоліки стратегії коопетиції та порівнюють основні винаходи і відмінні результати в сфері дослідження. Методологія дослідження включає огляд літератури, контент-аналіз, історичний метод, порівняльний аналіз і синтез. Узагальнення та аналіз реальних випадків коопетиції базується на контент-аналізі новин, інформаційних бюлетенів, оглядів у пресі, звітів і статей, опублікованих у базі даних Scopus. Найбільш цитовані статті в галузі емпіричних досліджень, присвячених коопетиції, аналізуються через контент-аналіз, щоб розкрити ефективність стратегії коопетиції та надати інсайти для компаній, які розглядають можливість реалізації цього підходу. Поточне дослідження об’єднало аналіз декількох стратегічних альянсів в період 2001–2023 рр. та недавні публікації у базі даних Scopus у 2013–2023 рр. Різноманітність результатів дозволяє зробити висновок, що є ідеї, з якими вчені та практики погоджуються між собою, та є ті, що перебувають у процесі розробки. Насамперед, слід виокремити такі дискусійні моменти, як роль влади, взаємозв’язок між коопетицією та інноваціями, стійкість коопетиції та управління конфліктами у коопетиції. Ці теми важливо враховувати при реалізації стратегії коопетиції на практиці. Аналіз реальних випадків та емпіричних досліджень надає всебічного розуміння переваг і недоліків коопетиції, і виокремлює фактори, які сприяють успішній коопетиції.

Ключові слова: коопетиція, переваги, недоліки, стратегічний альянс, управління коопетицією, коопетитивна напруга.

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THE COOPETITION STRATEGY: A COMPREHENSIVE ANALYSIS OF REAL CASES AND EMPIRICAL STUDIESShvindina Hanna^{a,c*}, Balahurovska Inna^{b,c}^a American University Kyiv, Kyiv, Ukraine^b Joint Doctoral School, Silesian University of Technology, Gliwice, Poland^c Sumy State University, Sumy, Ukraine

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Coopetition strategy (cooperation with competitors) has become a popular approach for firms seeking to simultaneously cooperate and compete with their rivals. This study aims to analyze the effectiveness of coopetition strategy by conducting a comprehensive analysis of real cases and empirical studies. The authors examine the possible benefits and drawbacks of coopetition strategy, and compare the main recent findings in the field. The research methodology involves literature reviews, content analysis, historical method, comparative analysis, and synthesis. The generalization and analysis of real cases of coopetition are based on content analysis of news, newsletters, reviews in the press, reports, and papers published in Scopus database. The most cited papers in the field of empirical research devoted to coopetition are analyzed through content analysis to shed light on the effectiveness of coopetition strategy and provide insights for firms considering implementing this approach. The current study united the analysis of several strategic alliances in the period 2001-2023, and the recent publications in the Scopus database in 2013-2023 years. The variety of findings allows concluding that there are some ideas the scholars and practitioners agreed upon, and some are still in the process of development. Scholars and practitioners have debated several topics, such as the role of power, the relationship between coopetition and innovation, the sustainability of coopetition, and how to manage conflict in coopetition. These topics are important to consider when implementing coopetition strategies in practice. The analysis of real cases and empirical studies offers a comprehensive understanding of the benefits and drawbacks of coopetition, and highlights the factors that contribute to successful coopetition.

Keywords: coopetition, benefits, drawbacks, strategic alliance, managing coopetition, cooperative tension.

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