Industrial Marketing Management 105 (2022) 532–547

Contents lists available at ScienceDirect

Industrial Marketing Management

journal homepage: www.elsevier.com/locate/indmarman

Tensions in multilateral coopetition: Findings from the disrupted music industry

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ARTICLE INFO

Keywords:
Coopetition
Coopetitive tension
Tension management
Digital platform
Disruptive innovation
Multilateral coopetition
Music industry

ABSTRACT

Coopetition may help firms to respond collectively to technological change, and compete against disruptive innovation. Yet, coopetition often creates tensions, as coopetitors need to engage in persistently contradictory activities. While existing research focuses on dyadic coopetition, we know much less about multilateral coopetition; specifically, how tensions in multilateral coopetition arise and how they are managed in response to disruptive innovation. We use an in-depth case study of nine Dutch firms, who respond to digital disruption by introducing a new digital music platform, to analyse how tensions evolve in a multilateral coopetition entity. Our findings reveal two coopetitive tensions: a novel multilateral generalist–specialist contribution tension, and the well-known value creation–capture tension. The generalist–specialist contribution is an actor-activity-based tension that originates from the variable contributions of different vertical and horizontal coopetitors over time. Coopetitors try to resolve or balance this tension constantly via commensuration and orchestration of individual coopetitors' contributions, but the tension remains dormant and therefore re-appears. The second tension appears to stabilize over time as the coopetitive entity manages to balance the value creation–capture tension through an iteration of cooperation-inducing, competition-inducing and attendance to redirecting external events. The tensions are interlinked: the generalist–specialist contribution tension triggers subgroup coalition formation, which spurs the value creation–capture tension. We contribute to the coopetition literature by explaining how tensions emerge and are managed in multilateral coopetition, pointing to a new tension inherent in multilateral coopetition. Furthermore, we show how disruptive innovation uniquely shapes multilateral coopetition by inducing cooperative behaviour.

1. Introduction

Technological change disrupts existing market structures, which creates new opportunities and challenges (Christensen, 1997, 2006; Tushman & Anderson, 1986). Disruptors introduce new business models that challenge the status quo and devalue incumbents' existing technological and/or market-based competencies (Charitou & Markides, 2003; Christensen & Overdorf, 2000; Christensen, Raynor, & McDonald, 2015). Alone, incumbents lack certain capabilities to effectively imitate or counter the disruptors' offerings.

Coopetition – the simultaneous pursuit of cooperation and competition with the intent to create joint value (Bengtsson & Kock, 2000, 2014; Brandenburger & Nalebuff, 1996; Gnyawali & Charleton, 2018) – may help firms address these challenges. Coopetition has already been touted as a viable strategy to deal with the challenges posed by radical technological innovations (Bouncken, Fredrich, Ritala, & Kraus, 2018): the voluntary exchange of diverse and complementary resources improves firms' innovativeness (Bouncken, Gast, Kraus, & Bogers, 2015; Padula & Dagnino, 2007; Tsai, 2002), while expanded market access and jointly facilitated market or business model development improves firms' value appropriation (Gnyawali & Park, 2009; Ritala, Golnam, & Wegmann, 2014). Coopetition thus enables firms (or *coopetitors*) to pursue difficult yet highly rewarding opportunities that cannot be attained individually (Gnyawali & Park, 2009, 2011). This simultaneous pursuit of contradictory goals, however, creates coopetitive tensions (Schad, Lewis, Raisch, & Smith, 2016) that determine the dynamics and outcomes of

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https://doi.org/10.1016/j.indmarman.2022.06.020
Received 19 May 2021; Received in revised form 23 April 2022; Accepted 30 June 2022
Available online 28 July 2022

coopetition (Gnyawali, Madhavan, He, & Bengtsson, 2016; Gnyawali & Park, 2011: Raza-Ullah, Bengtsson, & Kock, 2014), making their management an issue of great importance.

Our reading of the literature presents two gaps that we intend to fill. First, coopetition studies tend to focus on dyadic or triadic settings. This is problematic, because insights on governance structures (Fernandez & Chiambaretto, 2016) or knowledge sharing (Fernandez, Le Roy, & Gnyawali, 2014; Le Roy & Czakon, 2016) may not be generalizable to multilateral coopetition. Multilateral coopetition, that is coopetition between multiple horizontal and vertical competitors (Bengtsson & Kock, 2014), involves a greater number and variety of actors, which introduces greater complexity to manage the coopetition entity[1] (Estrada, 2019; Li, Eden, Hitt, Ireland, & Garrett, 2012; Raza-Ullah et al., 2014). This setting may exacerbate tensions (Chiambaretto, Maurice, & Willinger, 2020; Rouyre & Fernandez, 2019) and introduce new ones compared with dyadic coopetition. While such multilateral coopetition is by no means an uncommon phenomenon, there is nevertheless a dearth of research on the emergence and management of multilateral tensions (Yami & Nemeh, 2014). Recent research has highlighted the importance of managing coopetition (Le Roy & Czakon, 2016; Le Roy, Fernandez, & Chiambaretto, 2018), so the question of how to manage multilateral coopetition warrants further research (Bengtsson & Kock, 2014; Raza-Ullah et al., 2014; Yami & Nemeh, 2014).

Second, despite the potentially rewarding opportunities of attending to disruptive innovation through a coopetition lens, few attempts have been made to connect the two literature streams (for notable exceptions, see Ansari, Garud, & Kumaraswamy, 2016; Cozzolino & Rothaermel, 2018). This is surprising as disruptive innovations challenge existing value networks and firms' business models, and provide favourable conditions for coopetition (Cozzolino & Rothaermel, 2018) in general and for multilateral coopetition in particular. Yet, multilateral coopetition in response to disruptive innovation is also extremely difficult and risky as it (a) implies permanent changes to incumbents' value networks and business models (Christensen et al., 2015), (b) involves high uncertainty during the development and commercialization stage of the disruptive innovation (Cubero, Gbadegeshin, & Consolación, 2021) and (c) presents a much greater risk of freeriding than dyadic coopetition (Rouyre & Fernandez, 2019). Additional research is therefore warranted to understand how the disruptive innovation context may influence multilateral coopetition.

In this study, we therefore pose the following research question: *How do tensions in multilateral coopetition arise and are managed in a disruptive innovation context?* To answer this question, we conducted an in-depth single case study (Yin, 1994) of technological disruption (i.e. file-sharing, downloading, streaming) in the Dutch music industry from the 1990s to 2016. We analyse the emergence and management of coopetitive tensions in one multilateral coopetition entity established by nine music companies that chose to develop a new digital platform: *MusicNL*. Our findings make two contributions.

First, we reveal how tensions arise and are managed in multilateral coopetition. We identify two interlinked coopetitive tensions. We find that a new, inherently multilateral tension emerges between generalists (actors who contribute a range of resources through dispersed efforts over time) and specialists (actors who contribute few resources in a concentrated effort, often at one point in time). This actor-activity-based tension results from the complexity of securing cooperation from a diverse set of coopetitors, as it becomes hard to identify individual coopetitors' role in and contribution to value creation and related value capture. The well-known coopetitive tension between value creation and value capture (as identified in dyadic coopetition) plays out in multilateral coopetition through a combination of cooperation-inducing and competition-inducing mechanisms as well as attendance to external redirecting events. While either tension may lie dormant at any given time, one tension resurfaces when the coopetition entity attempts to manage the other: the less manageable and more unpredictable generalist–specialist contribution tension triggers informal coalition building. That is, dissatisfied with the progress and contribution of other members of the entity, coopetitors engage in 'rebalancing acts' through informal coalition formation. Such informal coalitions magnify actor differences, driving competition and a unilateral focus on value capture. To manage competition-dominant behaviour, coopetitors openly address their interests through formal coalition building to refocus on cooperation and value creation.

Second, we show how the disruptive innovation context uniquely shapes multilateral coopetition, as compared to incremental and radical innovation contexts. Despite its high uncertainty, the disruptive context may help overcome coopetitive tensions by inducing a strong collaborative environment via external 'redirecting events'. That is, with increased market success of the disruptive innovation, coopetitors realize the obsolescence of their traditional activities and business model and redirect their attention towards cooperation to effectively counteract a high level of competition within the coopetition entity.

2. Literature review

2.1. Disruptive innovation

Disruptive innovations are new products, processes or business models that utilize disruptive technologies (Christensen, 1997, 2006). Such innovations introduce a different performance package, which is initially inferior to existing mainstream technologies and dominant product attributes that mainstream customers value (Ansari & Krop, 2012). Over time, technological advancements and improvements to the disruptive innovation increase the attractiveness of performance packages to mainstream customers. As a result, disruptive innovation alters existing market positions and value networks and displaces established market leaders and their products (Christensen, 1997, 2006; Tushman & Anderson, 1986, 1990). This poses a challenge for incumbent firms who are often reluctant to relinquish the basis of their existing competitive advantage (Christensen & Rosenbloom, 1982) but need to access and (re-)configure their resources to adapt to the disruption (Ansari et al., 2016; Christensen & Raynor, 2003).

A central theme in the disruptive innovation literature relates to how firms respond to disruptive innovations (Charitou & Markides, 2003; Christensen & Overdorf, 2000). Firms' inability or unwillingness to respond to disruptive innovations *individually* (Charitou & Markides, 2003; Macher & Richman, 2004) has led to research indicating that firms could also acquire or access the required resources and knowledge via inter-firm relationships (Madhavan, Koka, & Prescott, 1998; Rothaermel & Boeker, 2008). The strategic alliance literature also proposes inter-firm relationships as a viable response to disruptive innovations as these enable firms to acquire or access the required resources and knowledge (Madhavan et al., 1998; Rothaermel & Boeker, 2008). When considering strategic alliances in response to disruptive technological change, prior literature has focused on alliances between incumbents and new entrants that compete in the same industry (Baum, Calabrese, & Silverma, 2000; Rothaermel, 2001) but not on alliances between incumbents and new entrants that introduce a disruptive innovation (i.e. disruptors).

2.2. Coopetition and tensions

Coopetition – the simultaneous pursuit of cooperation and competition with the intent to create joint value (Bengtsson & Kock, 2000, 2014; Brandenburger & Nalebuff, 1996; Gnyawali & Charleton, 2018) – can be distinguished from other inter-organizational interactions because of the

[1] A coopetition entity is a formal or informal collaboration between coopetitors, who remain legally independent but develop a common strategy and shared identity to create joint value (Ingram & Qingyuan Yue, 2008; Mathias, Huyghe, Frid, & Galloway, 2017).

paradoxical nature of coopetition resulting from the simultaneity of cooperation and competition (Bengtsson & Kock, 2014; Gnyawali et al., 2016; Gnyawali & Charleton, 2018). On the one hand, *cooperation* drives value creation because it enables firms to overcome knowledge and resource asymmetries (Bouncken et al., 2015; Padula & Dagnino, 2007; Tsai, 2002) and instils a commitment to joint action that stimulates resource sharing and complementarity (Le Roy & Czakon, 2016; Quintana-Garcia & Benavides-Velasco, 2004; Ritala & Hurmelinna-Laukkanen, 2009). *Competition*, on the other hand – firms' desire to enhance or redefine strategic positions and earn above-normal returns at the expense of competitors (Gnyawali et al., 2016; Gnyawali, He, & Madhavan, 2008; Padula & Dagnino, 2007; Porter, 1980) – may improve value appropriation by expanding firms' current markets or facilitating the development of new markets and business models (Ritala et al., 2014). Competition can further enhance value creation and appropriation as it motivates firms to innovate at a faster rate than competitors, removing potential complacency from coopetitive relationships (Gnyawali & Charleton, 2018). Although coopetition thus enables competitors to pursue difficult and potentially highly rewarding opportunities that cannot be attained individually (Bouncken & Kraus, 2013; Gnyawali & Park, 2009, 2011), it has also been framed as a double-edged sword that provides incentives to behave opportunistically (Bouncken & Kraus, 2013).

Coopetition creates tensions because coopetitors pursue goals and activities that are persistently contradictory (Schad et al., 2016). These *coopetitive tensions*, that is contradictory pressures that exist in dyadic coopetition relationships due to the simultaneous presence of persistently competing demands of competition and cooperation (Ansari et al., 2016; Le Roy & Fernandez, 2015), materialize on the intra-organizational level (i.e. between business units) and inter-individual level (i.e. between team members from different business units). Extant literature has conceptualized coopetitive tensions as stemming from the contradictory pressures between (a) common value creation and private value appropriation of benefits (Ritala & Tidström, 2014; Tidström, 2014) and (b) knowledge sharing while being vulnerable to technological imitation (Fernandez et al., 2014; Fernandez & Chiambaretto, 2016; Le Roy & Czakon, 2016; Raza-Ullah et al., 2014; Rouyre & Fernandez, 2019). These coopetitive tensions may create feelings of emotional ambivalence (Raza-Ullah et al., 2014) that can influence coopetition processes and lead to cross-coopetitor conflicts that endanger coopetition success (Dorn, Schweiger, & Albers, 2016; Fernandez et al., 2014; Tidström, 2014). Although such coopetitive tensions may explain why alliances between competitors are less stable than alliances between non-competitors (Das & Teng, 2002; Park & Russo, 1996), research also indicates that such tensions can be positive and a necessary by-product of the simultaneous pursuit of cooperation and competition (Clarke-Hill, Li, & Davies, 2003; Fernandez et al., 2014). Hence, the management of such tensions ultimately determines the degree to which coopetitors realize innovative outcomes (Fernandez & Chiambaretto, 2016; Le Roy & Fernandez, 2015; Seran, Pellegrin-Boucher, & Gurau, 2016) and coopetition success (Gnyawali et al., 2016; Gnyawali & Park, 2011; Raza-Ullah et al., 2014).

While coopetitive tensions have received much attention in the dyadic coopetition literature (Le Roy & Fernandez, 2015; Tidström, 2014), our understanding of coopetitive tensions in multilateral coopetition remains limited. Coopetition studies often examine the dyadic level, creating a need for future studies to go beyond the dyadic relationship (Bengtsson & Kock, 2014; Yami & Nemeh, 2014) and capture the coopetitive interplay in multilateral coopetition. Multilateral coopetition involves a greater number of both vertical (i.e. firms at different stages within the value chain, Wilhelm (2011)) and horizontal (i.e. rival firms) coopetitors. This plurality makes it more likely that coopetitors differ in their contributions, competencies, needs and roles, which can lead to disagreements (Fernandez et al., 2014; Seran et al., 2016) and complicate evaluation of individual coopetitors' role in value creation and capture (Chiambaretto et al., 2020). This greater number of coopetitors allows for fundamentally different interactions between coopetitors and may even aggravate tensions (Estrada, 2019). Multiparty coopetition also requires new formal mechanisms to manage issues concerning information sharing and protection (Rouyre & Fernandez, 2019).

Drawing largely upon the multiparty alliance literature, we know that firms are more likely to pursue opportunistic, potentially harmful benefits in multiparty alliances as the harm caused by an opportunistic partner is diffused over a greater number of partners (Doz, 2019; Lazzarini, 2007). Additionally, this research suggests that non-cooperative behaviour is more difficult to detect and penalize in a multiparty alliance where partners more often rely on generalized rather than direct exchanges. As a result, partners must rely on one another's reciprocity without being able to observe all partner behaviours (Das and Teng, 2002). This may incentivize coopetitors to shirk their (albeit implicit) responsibilities or purposefully withhold resources when they feel governance mechanisms will not detect such freeriding (Doz, 2019; Rouyre & Fernandez, 2019). Larger multilateral coopetition entities are particularly vulnerable, as the greater number of partners reduces coopetitors' motivation for cooperative actions and invites opportunistic, competitive behaviours among partners (Das & Teng, 2002; Zeng & Chen, 2003). We could therefore expect that in multilateral coopetition the presence of multiple coopetitors could increase coopetitive tensions resulting from: the complex simultaneity of cooperation and competition among multiple coopetitors (Li et al., 2012; Raza-Ullah et al., 2014); the difficulty of detecting freeriding (Doz, 2019; Lazzarini, 2007); and the involvement of coopetitors who are rivals at the same stage in the industry value chain (Gnyawali et al., 2008; Wilhelm, 2011).

2.3. Exploring tensions in multilateral coopetition in response to disruptive innovation

Disruptive innovations enable (disrupted) firms in an industry's value chain (Gnyawali et al., 2008) to reconsider their extant competitive and cooperative strategies to create and capture value from the disruptive business model (Ansari et al., 2016; Cozzolino, Verona, & Rothaermel, 2018). There have, however, been only a few attempts to connect the coopetition and disruptive innovation literature streams (Ansari et al., 2016; Cozzolino & Rothaermel, 2018; Gnyawali & Park, 2009). Extant research has argued that, as disruptive innovations challenge existing value networks, they provide opportunities for incumbent firms in established value networks to reconsider their competitive and cooperative strategies (Cozzolino & Rothaermel, 2018; Dolfsma, Chong-Simandjuntak, & Geurts, 2017; Eggers & Park, 2018) to create and capture value from the disruptive business model (Ansari et al., 2016; Cozzolino et al., 2018). This represents considerable market uncertainty. To mitigate this uncertainty, firms engage in coopetition (Chiambaretto & Fernandez, 2016) as it allows them not only to share the associated risks and costs but also to improve market and innovation performance (Ritala, 2012).

Similar to radical innovation (Rouyre & Fernandez, 2019), the uncertain and equivocal nature of disruptive innovation (Christensen, 1997; Tushman & Anderson, 1986, 1990) incentivizes firms to engage in *multilateral* coopetition, through which firms can share resources, costs and risks (Bouncken et al., 2015; Padula & Dagnino, 2007; Tsai, 2002; Yami & Nemeh, 2014). Furthermore, Ansari et al. (2016) show how a disruptor may need the coopetitive support of the very incumbents they disrupt to pioneer their disruptive innovation. Despite these important advances, extant research has largely ignored the possibility that disrupted firms may themselves engage in coopetition to launch disruptive innovations.

We find that, despite the promise of coopetition for joint value creation during disruptive technological change, extant research has focused on dyadic coopetition between incumbents and new entrants, often taking one of the two firms as focal firm. Thus, the possibility of a response from multiple incumbents and hence the tensions that occur in multilateral coopetition are ignored. We therefore explore multilateral coopetition in response to disruptive innovation from the perspective of a coopetitive entity. Aiming to understand coopetition from the perspective of the coopetitive entity itself rather than a focal firm in the entity requires a thorough analysis of the specific tensions inherent to multilateral coopetition. In this study, we thus focus on multilateral coopetition in response to disruptive innovation to explore how coopetitive tensions among multiple coopetitors arise and how they are managed within the coopetition entity.

3. Methodology

We follow a qualitative approach based on a single case study methodology, which is considered a valuable method when analysing previously unexplored phenomena to answer 'how' and 'why' questions (Yin, 1994). Moreover, because the research field on coopetitive tensions in multilateral coopetition in response to disruptive innovations is still small, a case study methodology enables more systematic and deep examination of the phenomenon to provide a multifaceted description and better understanding of it. The value of the (single) case study methodology for advancing coopetition research is endorsed by various studies (see e.g. Bengtsson, Eriksson, & Wincent, 2010; Chiambaretto & Fernandez, 2016; Fernandez et al., 2014; Pattinson, Nicholson, & Lindgreen, 2018; Ritala et al., 2014; Yami & Nemeh, 2014).

We deploy an in-depth, inductive single case study (Yin, 1994) of a multilateral coopetition entity comprising nine vertical and horizontal actors in the Dutch music industry: *MusicNL*. We selected *MusicNL* via purposeful sampling (Palys, 2008). First, its multilateral design allows us to focus not only on how tensions arise within the entity over time but also to identify how they are managed. Furthermore, by focusing on this multilateral entity we avoid narrating the empirical story from the perspective of a single participating firm. Finally, the digital disruption of the music industry enables us to explore the opportunities of attending to disruptive innovation through a coopetition lens.

The longitudinal focus of our single case study is important because we need to examine the sequence of events, actions and activities unfolding over time in our context, using strategies to analyse data as described by Langley (1999). Building upon the interpretations of our empirical data, we inductively develop our findings to derive a conceptual framework. The inductive approach helps to grasp the phenomenon being studied in exploratory research or when no theoretical concepts are immediately available (Strauss & Corbin, 1990). Furthermore, this inductively derived conceptual framework establishes the potential for greater analytic transferability (Yin, 1994).

3.1. Empirical setting

We selected *MusicNL* during an extensive pilot study that focused on the digital disruption of the Dutch music industry (Geurts, 2017; Moreau, 2013). *MusicNL* fulfils three fundamental elements of multilateral coopetition (Gnyawali & Charleton, 2018) occurring in a disruptive innovation context.

First, it meets the criterion of the simultaneous pursuit of competition and cooperation. *MusicNL* is a collaborative platform in which competing firms have made voluntary arrangements to share knowledge and other resources to develop and exploit *MusicNL*. At the same time, the record companies continue to compete in the same target market, both *off*-platform via non-digital (physical) retail channels and *on* the *MusicNL* platform and other platforms (Brandenburger & Nalebuff, 1996). Second, it meets the criterion of value creation intent: the primary ambition of the *MusicNL* platform is to increase the digital streaming music market for Dutch-language music and to enable coopetitors to create value via platform-based business models (Benner & Waldfogel, 2016; Cozzolino et al., 2018). Third, the case is a response to disruptive innovation in the music industry. The coopetition entity responds to this disruption by jointly introducing a disruptive innovation itself, namely a new digital streaming platform that enables coopetitors to assume new industry roles as platform owners and digital music distributors. The nine coopetitors have recognized the streaming platform business model as a disruptive innovation that will likely make their existing business models – based on physical distribution (bricks-and-mortar retail) and traditional promotion (radio) channels – obsolete (Mitsuhashi & Alcantara, 2021). Thus, the coopetitive entity recognizes as competition (Porac, Thomas, Wilson, Paton, & Kanfer, 1995) the streaming platform business model, as pioneered by new entrants such as Spotify. This recognition drives development of the *MusicNL* platform, which ultimately enables the participating firms to redefine their capabilities and roles.

We were able to gain access to the initiative and the participating firms several months before the official foundation of *MusicNL*. *MusicNL* is a streaming platform that, unlike internationally and pop-focused streaming platforms such as Spotify, Tidal and Apple Music, targets a niche audience: consumers of Dutch-language music. *MusicNL* is a collaborative project of a diverse set of firms that compete with one other for a larger share of the same target market: the Dutch music industry. *MusicNL* comprises six independent record companies, one major record company, one marketing company and one so-called 'white label',[2] which we refer to from now on as 'coopetitors' (for an overview see Table 1). These coopetitors have coopetitive relationships with other industry actors, both horizontally (all independent record companies) and vertically (firms with different positions in the industry value chain).

3.2. Data collection

We follow the multilateral coopetition entity for more than a year, starting shortly before its foundation in 2014 until a few months after the official platform launch at the end of 2015. Using a process research approach (Langley, 1999), we study the competitive and collaborative actions within the coopetition entity prior, during and after the foundation and launch of *MusicNL*. Every six to eight weeks, the coopetitors held a formal meeting that was attended by at least one of the researchers. The meetings' primary purpose was to discuss the progress of the platform's development. The meetings were a means for the coopetitors to share their opinions, perceptions, experiences, knowledge and other resources, and to direct the development of the platform. Meetings lasted 2–4 h and had 8–11 participants, each of whom received an agenda beforehand. The real-time set-up of the meetings had important advantages: it allowed us to follow participant interactions closely and gather information rarely available from interviews or surveys with individual coopetitors; we were able to gain insights from individuals' ideas, opinions and thoughts when making collective decisions about *MusicNL*, and observe the group dynamics during these meetings; and we kept notes on the topics discussed as well as the circumstances, behaviours, agreement and disagreement of the coopetitors during discussions and breaks.

Apart from formal interactions during the meetings, the principal researcher made notes on what coopetitors – both formally and informally – discussed before, during and after the meetings. The collection of verbal and nonverbal data allows for the close observation and registration of competitive and cooperative actions of multiple coopetitors in real time. To mitigate observer or participant bias, the researchers' notes were compared with the minutes of the secretary and the chair of the meetings. Additionally, we collected data from: semi-structured face-to-face interviews with individual coopetitors and industry experts; coopetitors' internal communications, handouts, emails and archival data, including news articles; and other product and

[2] A white label is a services provider who, on commission, develops software for innovative (platform) services for record companies, including apps, downloading and streaming platforms and online payment systems.

Table 1
Overview of coopetitors in case study.

Firm Domain Type of firm Target market	Year of establishment	No. of full-time employees	Participant(s)	Secondary sources
Firm A Independent Record company Dutch	2006	3	Mr. P (CEO) Ms. D Ms. S Mr. Z	Individual (informal) interviews News articles Company website Industry meetings
Firm B Independent Record company Dutch	1997	7	Mr. B (CEO)	Individual (informal) interviews News articles Company website Industry meetings
Firm C Independent Record company Dutch	2013	3	Mr. V (CEO) Mr. L (CEO)	Individual (informal) interviews News articles Company website Industry meetings
Firm D Independent Record company & publisher Dutch	2006	5	Mrs. R (CEO) Mr. VN (CEO)	Individual (informal) interviews News articles Company website Industry meetings
Firm E Independent Record company Electronic dance music/Dutch	2004	9	Mr. D	Individual (informal) interviews News articles Company website Industry meetings
Firm F Independent Record company Dutch/Pop	2006	7	Mr. VB (CEO)	Individual (informal) interviews News articles Company website Industry meetings
Firm G Major All	1934	25+	Mr. VE (GMD)	Individual (informal) interviews News articles Company website Industry meetings
Firm H Marketing Entertainment	2009	9	Mr. C (CEO)	Individual (informal) interviews News articles Company website Industry meetings
Firm I White label Technology	2007	10	Mr. VR (CEO) Mr. Y	Individual (informal) interviews News articles Company website Industry meetings

Table 2
Data sources.

Source	Pre-coopetition (<2014)	Coopetition (2014–2016)	After launch of platform (>2016)
Interviews	9 (expert pilot study)	9 (coopetitors)	3 (coopetitors)
Meeting documentation	–	9 (8–11 participants)	2 (8–11 participants)
Other	• Formal coopetitors' communication, including company presentations, development and progress reports, meeting minutes, publicity plan, promotion materials, news material and email exchanges • Strategic plan of *MusicNL* • *MusicNL*'s web content • News articles on *MusicNL* • *MusicNL*'s social media content		

company documentation, including coopetitors and *MusicNL*'s web and social media content (see Tables 1 and 2 for an overview of the data sources).

We supplemented the data from the coopetitors' meetings with these additional data sources for three reasons: first, to extend the breadth and depth of the study by providing additional insights that complement the findings from the meetings; second, to help the researchers better understand the drivers of the coopetitors' behaviours by identifying their (individual) perceptions, motives, attitudes, opinions and intentions regarding *MusicNL*; and third, to address potential information bias resulting from a focus on information retrieved from the meetings or the interviews alone. These steps therefore enhance confidence in the findings from our inductive case study. Triangulation of the data sources (Yin, 1994) ensures that novel insights can be developed on the evolution of the multilateral coopetition entity, specifically with regard to tensions that arise over time, and how these tensions are managed in a disruptive innovation context.

3.3. Data analysis

We analyse the collected data using a combination of an inductive single case study approach (Yin, 1994) and critical event timelines, visual mapping and other process designs (Langley, 1999) to provide further support for our narrative. The multitude of data sources requires an iterative approach to refine our theoretical and methodological focus, which is why our data analysis has been conducted in two steps. Guided by Langley (1999) and Makkonen, Aarikka-Stenroos, and Olkkonen (2012), we apply narrative, temporal bracketing and visual process mapping approaches to identify stages of the process.

3.3.1. Step 1: Critical event timeline and case narrative

Using data from the pilot study, the face-to-face interviews, the meetings and additional data sources, we construct a chronological, critical event timeline that traces the occurrence and timing of developments and actions within both *MusicNL* and the Dutch music industry (Langley, 1999) (see Appendix, Fig. A.1). This timeline highlights the major developments and events that occurred prior, during and after the official launch of *MusicNL*, and situates the coopetition in the context of other industry developments. Drawing upon the face-to-face interviews and the (observational) notes, we first complemented the critical event timeline with descriptive narratives of the experiences, opinions and considerations of the coopetitors over time (Langley, 1999) before later refining them. These analyses started after most data had been collected (Yin, 1994).

3.3.2. Step 2: Analysis of (sub-) themes via inductive coding

To systematically analyse our data regarding the development of *MusicNL*, we construct a data analysis matrix (see Appendix, Table A.1) using open coding (Strauss & Corbin, 1990). First, the matrix encodes: 1) the different topics discussed during meetings; 2) the roles assumed and tasks performed by each coopetitor (i.e. initiator, contributor or non-response; joint or individual task); and 3) the level of consensus among coopetitors over time based on the indicated agreement–disagreement among the coopetitors, and significant statements that influence the decision-making. Organizing and displaying the data in the matrix helps to inductively understand the case and provides the basis for our open coding. Second, using cross-matrix comparisons between coopetitors and between topics, we identify recurrent subthemes and organize them as theoretical categories (Strauss & Corbin, 1990). These subthemes and theoretical categories relate to different types of multilateral coopetition tensions (value creation–capture, generalist–specialist contributions) and the management of these tensions (redirecting events, orchestrating complexity). We use interview and archival data to further specify the identified themes. We refine the themes and coopetition dynamics by regularly reviewing each company meeting to compare and verify the findings. Fig. 1 visualizes our coding scheme.

We further analyse our subthemes and theoretical categories to create an understanding of the competitive and cooperative environment within *MusicNL* and coalition building between coopetitors. Using our coding to make sense of how tensions arise and are managed in the coopetition entity, we subsequently create a process model of multilateral coopetition in a disruptive innovation context based on two distinct phases of coopetition: an early *development* and a later *implementation* phase.

4. Findings

Our analysis of the joint efforts of multiple coopetitors in the Dutch music industry to introduce and establish *MusicNL* as an innovative digital platform shows how the multilateral coopetition entity experienced and managed two coopetitive tensions. The first tension refers to the generalist–specialist contribution tension where coopetitors contribute different sets of resources: specialists contribute a few resources in a concentrated effort often at one point in time, while generalists contribute a range of resources and capabilities through efforts dispersed over time. This complicates the commensuration of contributions, which thwarts the orchestration of multilateral coopetition. The second tension refers to the value creation–capture tension. That is, coopetitors need to balance their need for joint value creation and individual value capture through a mix of what we call cooperation- and competition-inducing mechanisms, as well as respond to redirecting external events. We find that, over time, either tension resurfaces when the coopetition entity attempts to manage the other tension: the less manageable and more unpredictable generalist–specialist contribution tension triggers informal coalition building, which drives a focus on

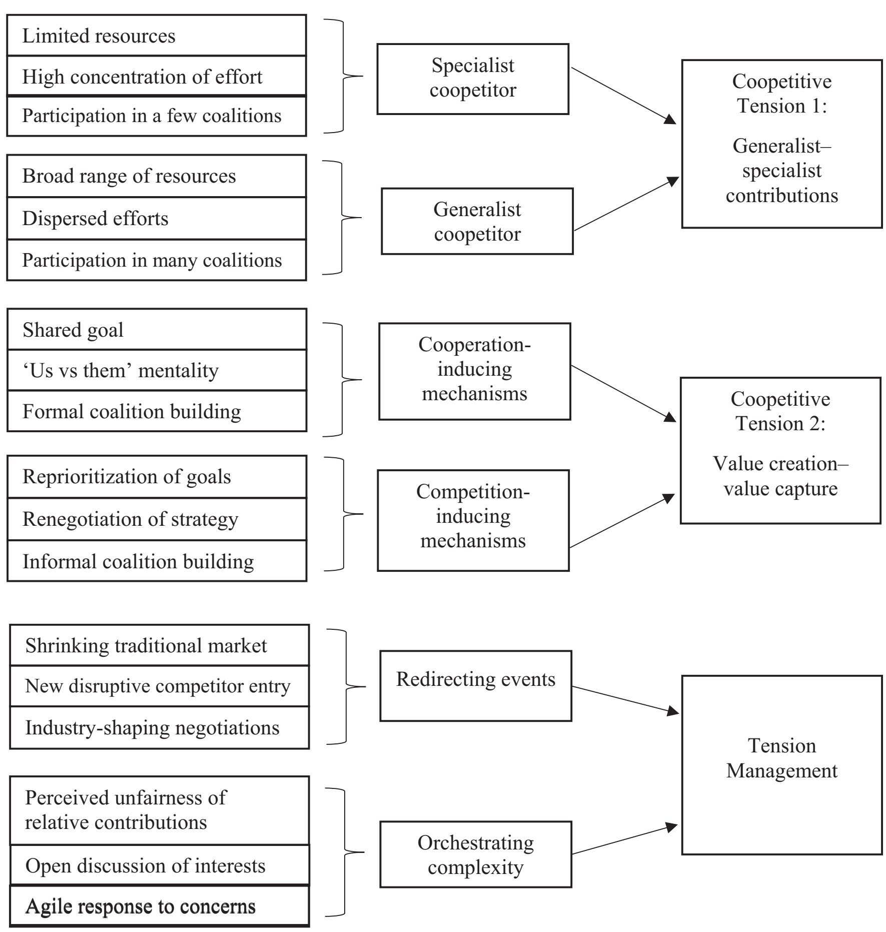

Fig. 1. Coding scheme.

competition and unilateral value capture. When competition-dominant behaviour becomes too strong, coopetitors openly address their interests through formal coalition building to refocus on cooperation and value creation.

4.1. Multilateral coopetition as a response to disruptive innovation

As the digital disruption of the Dutch music industry introduced a period of high uncertainty and equivocality, many firms struggled to adapt to the disruptive business model, which demanded collaborations with new, emerging industry players, such as aggregators (intermediaries that distribute content to multiple platforms at once) and platform owners (e.g. Apple Music, Deezer, Spotify, etc.). For Dutch record companies, the digital disruption of the Dutch music industry meant that established value networks lost their value. The incumbents actively started industry-wide collaborations with a range of firms, including direct competitors: '*Dutch record companies realize that […] the development in the growth of potential streaming subscribers, especially those that consume Dutch-language content [read: music], […] experiences serious delays. We need to ensure that Dutch-language music will be given a platform within the streaming world*' (Internal documentation of the coopetition entity).

The threat of losing the traditional music market through digital disruption was the catalyst that brought nine industry incumbents together to form *MusicNL* in response. Yet, our findings show that such multilateral coopetition across a range of competitors with such varying resource and capability portfolios in turn created two strongly interlinked coopetitive tensions that play out differently over time. In what follows we discuss the emergence and management of these tensions.

4.2. Coopetitive tension 1: Generalist–specialist contributions

The first coopetitive tension arises because of the involvement of *multiple* coopetitors who not only make diverse contributions (in our case: content (music genres), marketing and technology) but also possess diverse knowledge, resources, motives, opinions and experiences. To succeed, *MusicNL* needed this diversity of contributions, knowledge and resources to be able to develop a music-streaming platform in the first place. That is, developing a streaming platform not only requires technological development, digital distribution and digital legal knowledge (1), but also market knowledge (2) and content (3) to be streamed on the platform. As the CEO of Firm D explained: '*We cannot do this on our own. To develop such a platform, we need knowledge, technique and content … and we only provide the content.*' The CEO of Firm H remarked: '*If I didn't need the others, I would have done it myself*.'

This is why a number of firms contribute resources to manage and promote content, artists and networks (firms A–G), while other coopetitors contribute their marketing and branding expertise (Firm H), legal expertise (firms F and G), digital distribution expertise (Firm A) and/or technological expertise (Firm I). This resource diversity leads to differences in levels of specialization. Based on these differences, we identify two types of coopetitors: *generalists* and *specialists*. Fig. 2 visualizes their competitive and cooperative relationships.

4.2.1. Generalist coopetitors

Our coopetition entity comprises five generalist coopetitors: A, B, E, F and G that contribute diverse resources. These generalists mainly joined the *MusicNL* coopetition entity to share their content, but their additional knowledge and other resources triggered them to extend their contribution beyond the sharing of content. For example, some coopetitors started to contribute their prior experience with and knowledge of local markets and marketing (market knowledge; firms A, B, F, G), digital legal and contractual requirements (Firm E), digital music distribution (firms E and G) or technological experience (firms E, F, G). As a result, these coopetitors are engaged in more, and often simultaneous, activities tied to the development of the platform.

Generalists must therefore decide how best to allocate their scarce time and resources between these various activities. For instance, a representative of Firm G explained in a personal interview that attention needs to be divided among the core activities in which Firm G is involved: '*From the content we deliver to our knowledge of the digital music market, our knowledge of digital policies for streaming and downloading, or even the possibility to offer back office help*.' In addition, the general manager of Firm E explained that, for each activity he is involved in, he is pressured by timelines, retainers, deadlines and ownership of the activity to ensure continuity: '*I can build upon my knowledge and experience in developing apps and I know there are various activities that need to evolve simultaneously to realize an end product that can be marketed.*'

This involvement in multiple activities makes it difficult for generalists to interact with, learn from and cater to the diverse needs of the other coopetitors involved in the activity. Consequently, generalists are more likely to receive criticism from specialist coopetitors. For instance, after the initiation of *MusicNL*, a representative of coopetitor G (generalist) requested more time to discuss legal and contractual issues. For the CEO of specialist coopetitor H, this was difficult to understand, as he explained in a personal interview: '*If [Firm G* representative*] calls for more time to consider those [legal] issues, well then we come to a standstill. Things will not proceed. And that kills the motivation for me to start doing my work*.'

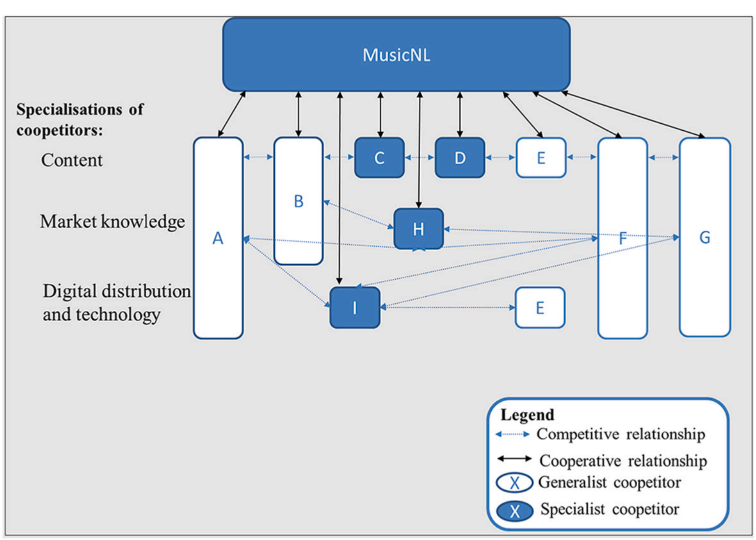

Fig. 2. Coopetitive relationships between generalists and specialists within MusicNL.

4.2.2. Specialist coopetitors

In firms C, D, H and I, we identify four specialist coopetitors that contribute only a specific set of resources to the coopetition entity (see Fig. 2). For instance, the CEO of Firm I explained that his expertise is limited to technological development: *'Look, MusicNL is developing on two fronts. One front is the technical one. That's what I know. The other side is more organizational. And if I'm honest with you, I don't know much about that side.'*

These specialist coopetitors are involved in only one specific platform activity tied to their resource contribution, and they are able to dedicate all of their time and resources to this activity. As such, specialist coopetitors do not need to make trade-offs in their allocation of time and resources. For instance, in a personal interview, a representative of generalist Firm G explains how they value the specialist contribution of Firm H: *'If it comes down to making a substantial contribution, […] they would come to mind. They have a lot of knowledge and experience with marketing and communication, and an interesting network with the big brands as well. So that is an interesting party to involve [in MusicNL]. They might seem a bit odd, but I do think we will need them once our product is ready'*.

As specialist coopetitors are involved in only one core activity, their need to interact with and learn from the other coopetitors is greater than the generalists. That is, without regular updates on the developments in other fronts, these coopetitors are unaware of the overall progress of the platform. The following quote from a representative of specialist Firm C is illustrative: *'Well, because we don't know, as I'm not a tech-savvy person, I don't know those processes. I have never built a digital music platform. But if you ask me about what I do, for instance 'How's that recording developing in the studio?' or 'How is that artist developing itself?' then I can tell you exactly how that goes because that's my job. But I can't really say anything meaningful about the whole process of building [MusicNL]. I simply have no idea. So, we are very dependent on the other parties that develop it [MusicNL]'*.

In addition to the need to be informed by and learn from others, specialist coopetitors are more likely to voice criticism. That is, as the contribution of specialist coopetitors is more focused at one point in time, there is time and space to consider the activities of other coopetitors. For instance, the CEO of Firm H regularly complained about the follow-up speed of other coopetitors, arguing: '*We would all receive an invite to test the app. I still haven't seen it. I don't know why that is, but I would like to see it soon.'* A representative of Firm C voiced a similar concern, arguing: '*Delay is not good, but I feel I cannot criticize because I'm not an expert on the technique. But it won't happen for the work I need to deliver.'*

4.2.3. Tension 1: Generalist–specialist contribution tension

As coopetitors vary in their level of specialization, we notice significant variation in the organizational involvement and commitment of coopetitors in the coopetition entity over time. That is, generalists contribute their resources through efforts dispersed over time, while specialist coopetitors contribute them in a concentrated effort often at one point in time. As a result of this imbalance in cross-coopetitor involvement, contributions and interactions, we identify what we term the *generalist–specialist* coopetitive tension: coopetitors need to balance the variable generalist or specialist coopetitor contributions over time. This tension stems from the very nature of multilateral coopetition and remains dormant but increases over the lifetime of the coopetition entity.

The generalist–specialist contribution tension is paradoxical: the coopetitive entity benefits from generalists' broad involvement across multiple activities, yet when generalists spread their resources thinly across a broad range of activities, specialists feel that the progress of the coopetitive entity is stalled. The source of this paradox lies in generalists and specialists' relative vantage points: as each type of firm sees the coopetition entity's progress only from its own perspective, coopetitors from either type have difficulties to commensurate contributions of coopetitors across activities.

For instance, the specialist coopetitor Firm H led the launch and the marketing of *MusicNL*. However, most of the coopetitors contributing to marketing (firms E, F, G) prioritized the development of the technological infrastructure, the content and the digital distribution over marketing activities. This perceived inequality in focus created friction and tensions with the specialist coopetitor: '*Too much time is spent on things that we already addressed long ago. The other partners should create more excitement [about MusicNL] and come with ideas for the launch and marketing [of MusicNL]'* (CEO of Firm H during informal discussion after coopetitor Meeting 3). Similarly, the representative of Firm C raised his concern during coopetitor Meeting 6 that one of the generalists did not have the time to look at the first version of the platform app: '*If [the representative of] Firm G now calls for more time, we can't make progress. […] This will delay the development and damage motivation.'* Nevertheless, when a generalist coopetitor, like Firm G, dedicates more time and resources to activities performed in one task, it does so at the expense of other tasks. Consequently, generalists rate the criticism as unfair because they (compared with specialists) dedicate significantly more time and other resources to coordinate and develop the platform. As the representative of Firm G explained during a personal interview: *'As one of the market leaders, we have a far better understanding of the digital music market; that is what we contribute [to MusicNL]. However, that requires a division of our attention and resources.'* This imbalance thus creates a generalist–specialist contribution tension.

4.2.4. Orchestrating complexity

Our findings suggest that coopetitors try to actively manage the generalist–specialist contribution tension by openly discussing individual firms and the coopetitive entity's interests and attending to issues promptly. As the CEO of Firm A said during a personal interview: *'It is hard to have nine opinions next to each other at the same time, especially if all nine are reputable firms in the Dutch music industry.'* However, the coopetitors agreed that such *'critical notes'* (representative of Firm B) had to be discussed in *'an open and honest manner'* (CEO of Firm D). Even though *'the setbacks and delays, alongside developments in the market can seriously affect our USP [unique selling point]'* (General Manager of Firm E), *'[we] shouldn't rush the development of the platform and release a sub-optimal platform'* (representative of Firm F). Resolving the tension that arises from the different but simultaneous coopetition activities of multiple coopetitors therefore forms an integral part of the further configuration and reconfiguration of the multilateral coopetition entity.

4.3. Coopetitive tension 2: Value creation and value capture

The second tension we observe is rooted in the opposing goals of coopetition: coopetitors need to balance their need for joint value creation and individual capture through a mix of cooperation- and competition-inducing mechanisms. We saw this tension unfold differently in the early development (i.e. pre-coopetition and coopetition) and the later implementation (i.e. coopetition and after platform launch) phases of coopetition.

In the early development phase, the value creation–capture tension was pronounced. Facing high levels of uncertainty, the coopetition entity needed to overcome internal instability through a combination of coming together around a shared goal and identity (cooperation-inducing mechanism) while individually reprioritizing goals and negotiating strategy (competition-inducing mechanism). *Redirecting events* – external shocks that cause coopetitors to refocus from competition for value capture towards collaboration for joint value creation – play an important role in balancing these two mechanisms. During the implementation phase, the coopetition entity's response to and management of the generalist–specialist contribution tensions caused recurrent value creation–capture tensions.

4.3.1. Cooperation-inducing mechanisms

We identify two cooperation-inducing mechanisms in the early development phase of the coopetitive entity, namely: 1) the identification of a shared goal, and 2) the development of an 'us vs them' mentality. First, we find that digital disruption enables competing firms to realize that individual firm struggles and frustrations with the disruptive global platforms in their industry – Apple or Spotify for example – are shared: disruptive global platforms in the music industry largely neglect national or local differences and offer suboptimal solutions to Dutch record companies in terms of price, ease of use, payment methods and music labelling: *'The amount of effort and time [from 2010 to 2013] it took us [major record company] just to convince Spotify to use iDEAL [Dutch payment service like PayPal] in the Netherlands! But now [2014] >80% of their payments are done via iDEAL. However, in general, services like Spotify, Google and Apple are not going to make adjustments just to make it work better in the Netherlands'*.(Representative of Firm G)

Identification of these shared struggles enables competitors to formulate a *shared goal* that develops strong ties and trust for cooperation among competitors. By 2013, these interactions led to the idea of developing a digital streaming platform that would feature Dutch record companies' core product: Dutch-language music. By offering such a streaming service, the coopetitors could stimulate value creation for their core products in the nascent digital music industry and determine the terms of their idiosyncratic value appropriation on the platform. As such, the platform would allow the coopetitors to assume a different role in the industry value chain by becoming themselves distributors of content to end consumers. As individual coopetitors *alone* lacked the resources to develop such a platform successfully, it made sense for them to seek opportunities to pool resources and utilize network effects.

Second, we find that by identifying a shared interest and goal, these firms could reformulate the roles of, and the interdependencies between, different types of (competing) firms within the industry in favour of a more cooperative position. As such, we find that coopetitors redefine 'competition' in light of the disruption: positioning 'them' (the disruptors) against 'us' (the coopetitors), as illustrated by the following quote: *'How can **we** ensure that **our** Dutch-language music will be given a platform within the streaming world, in order to ensure that **our** music remains visible in the millions [of songs] on offer, and that **our** music receives the attention that it deserves and highly needs?*' (Internal documentation, emphasis added)

This 'us vs them' mentality created a strong incentive to increase the level of cooperation, while coopetitors purposefully suppressed competitive elements – albeit temporarily – that originated from direct competition in the traditional music market or on other digital platforms. The shared 'us' mentality and understanding of the need to work together to counter disruptors highlights the need to cooperate and jointly create value that no individual firm could create: *'If **we**stand along the side line waiting for the giants like Spotify and Deezer [i.e. **them**] to invest in Dutch [language] repertoire, then **we**might be way too late!'* (representative of Firm C, emphasis added).

4.3.2. Competition-inducing mechanisms

Whenever coopetitors perceived that the dynamics in the coopetition entity had shifted too strongly towards collaboration for joint value creation, they saw this as a natural turning point at which to reconsider their own value capture. We identify two concrete competition-inducing mechanisms in the development phase of the coopetition entity: renegotiation of strategy and reprioritization of objectives.

First, after the initial focus on cooperation for joint value creation, we find that individual firms introduce strategic private demands to enhance their idiosyncratic (future) value appropriation: firms start to *renegotiate strategy*. For instance, one of the conditions the coopetitors agreed upon was supplier exclusivity to *MusicNL*, such that music content would only be distributed to the *MusicNL* platform to increase the value of the platform relative to competing platforms like Spotify and Deezer. For the record companies solely dedicated to Dutch-language music (firms A, B, C and D), this requirement would still be highly profitable as streaming revenues from other platforms remained rather small and value creation on the *MusicNL* platform could be maximized via this strategy. However, for the other record companies (firms E, F and G), Dutch-language music comprised only part of their catalogue and platform revenues were increasing over time. For them, creating such an exclusivity agreement would thwart existing platform relationships, significantly reduce firms' value capture and increase their distribution efforts. Ultimately, the exclusivity agreement was abandoned after firms E, F and G threatened to withdraw their content from *MusicNL*.

Second, coopetitors occasionally *reprioritized their objectives* as a response to new disputes. Several disputes created pressure on the initial cooperative spirit of the entity regarding, for example: design of the platform (i.e. artist profiling, inclusion of composers or producers); restricting or granting access to competing third-party suppliers; or contractual arrangements of the coopetition. While these strategic choices may make the platform more or less attractive, they do not produce equal and equitable (economic) benefits for all coopetitors. These disputes are driven by individual coopetitors' interest in securing their fair share of (future) economic benefits. Yet, given the heterogeneity across coopetitors, it is evident that these points of contestation suit some coopetitors' strategies better than others. Hence, as the situation evolved, individual coopetitors reprioritized objectives to secure a larger share of private benefits.

4.3.3. Managing the value creation-value capture tension: Redirecting events

In response to the rising intensity of competition within the coopetition entity, we find that *redirecting events* play an important counterbalancing role in managing the value creation–capture tension. Redirecting events are external shocks that cause coopetitors to refocus from competition for value capture towards collaboration for joint value creation.

During the development of the *MusicNL* platform, there was mounting evidence that the traditional music space was shrinking. For instance, in the Netherlands in the years 2014–2015, two important physical retail chains went bankrupt and one of the coopetitors (Firm B) closed its last physical store. Another retail chain reduced floor space for the sale of CDs, which affected retail sales even more. Meanwhile, there was growing evidence of an expanding online music space, as all coopetitors indicated that there was a general – albeit slow for some – growth in digital revenues. Furthermore, during the development of the *MusicNL* platform, two new competitive streaming platforms (i.e. Apple and Deezer) entered the Dutch music market. While these developments heightened competition outside the coopetition entity (i.e. through limiting physical retailing space, and fierce competition on external platforms), they reaffirmed the importance of reaching the coopetition entity's shared goal: the establishment of a digital Dutch-language music platform. As a result, the increasing off-platform competition reinvigorates, paradoxically, on-platform cooperation (*MusicNL*). As the CEO of Firm A explained: *'At the big record companies, >50% revenues come from digital. […] For us [Dutch-language record companies], digital [revenues] still account for only 10% of our revenues. So we can only recover from the gaps created by the loss of physical revenues if we can find a way to increase our streaming revenues'*.

We call these exogenous shocks redirecting events because they remind coopetitors of the importance of competing with their 'new' competitors (i.e. streaming platforms), providing the necessary impetus to restore the cooperation–competition balance. Coopetitors switch from competition-dominant coopetition back to cooperation-dominant coopetition by responding effectively to these redirecting events. The successful navigation of redirecting events stabilizes coopetition and allows the coopetition entity to enter the implementation phase. Coopetitors build a joint understanding of how cooperation-inducing mechanisms help the coopetition entity battle exogenous shocks. Such understanding of redirecting events and cooperation- and competition-inducing mechanisms strengthens coopetitive relationships and limits excessive cooperation or competition.

4.4. Responding to one tension triggers the other

In the implementation phase, we find that coopetitors become increasingly aware of the generalist–specialist contribution tension. Because commensuration of varied generalist and specialist contributions is difficult, we find that coopetitors initiate a number of *formal* and *informal coalitions* to address the tensions. Formal coalitions are joint multilateral attempts to formalize contributions to allow for more transparent value creation and capture activities across all actors, while informal coalitions are unilateral attempts to redress perceived inequalities in coopetitor contributions. As such, we identify formal coalitions as cooperation-inducing mechanisms, and informal coalitions as competition-inducing mechanisms. As coopetitors actively manage the generalist–specialist contribution tension via these coalition formations, we find the value creation–capture tension resurfaces.

4.4.1. Formal coalitions as a cooperation-inducing mechanism

Coopetitors in multilateral coopetition engage in various, but not necessarily the same, coopetition activities. Formal coalitions are predominantly the result of coopetitors' involvement in diverse and formally formulated activities and tasks (see Table 3). Formal coalitions establish concrete tasks and agree respective coopetitor contributions as the collective works towards its goal, which in this case is the *MusicNL* platform. Formal clarification of roles and responsibilities, tasks and contributions represents a cooperation-inducing mechanism because it allows coopetitors to feel that there is equal and equitable value creation and capture among the member firms.

Yet, we observe that with every step towards creating value in the form of a digital platform collectively, individual coopetitors' ability to observe the other coopetitors' contribution decreases. Thus, individual coopetitors increasingly start to focus on ensuring their own value appropriation by entering into informal coalitions. However, these informal coalitions further obfuscate individual coopetitors' contributions and therefore act as a competition-inducing mechanism, which we will describe next.

4.4.2. Informal coalitions as a competition-inducing mechanism

We find that the formation of informal coalitions diminishes cooperation and increases competition-dominant behaviour in the entity. *For instance,* the frequent interactions of firms E, F and G in the various coopetition activities led them to form an informal coalition. Having similar interests and challenges, this coalition represented a front

Table 3
Coopetitor coalitions.

Coopetition coalition based on capability/ resource	Coalition 1: Content (Dutch-language music)	Coalition 2: Market knowledge (promotion, branding, market info.)	Coalition 3: Legal knowledge (legal experts, legal experience)	Coalition 4: Digital distribution (aggregator tech. ownership, aggregator relationships)	Coalition 5: Technology (technology ownership, technology experience)
Firm A	√	√		√	
	'Most of us are really inexperienced in this world [of being a platform]. We know our music and how [physical music] distribution works, we know our consumers and we know how [traditional] marketing works. But we don't have experience with this [MusicNL], aside from what we see from Spotify.'				
Firm B	√	√			
	'We provide the largest [musical] input into this platform. And we also have a video company. We make video clips for all our music, and we reach a large audience with that, especially for Dutch [music] products.'				
Firm C	√				
	'The biggest chunk of our revenues come from our Dutch-language [music] repertoire.'				
Firm D	√				
	'This [a streaming platform] is the future, we cannot deny it. So we should embrace it, especially when it focuses on our specialism of Dutch music. I mean, I don't know anything about technology, but that is also not necessary as there are others in this collaboration who do.'				
Firm E	√		√	√	√
	'See, we are a rather large company as we not only have a record company, but also a large back catalogue. That back catalogue contains >10,000 masters. *[…]* And we have a lot of experience and know-how when it comes to digital streaming and technology development, also regarding the legal requirements etcetera.'				
Firm F	√	√	√		√
	'We did see that the pure exploitation of music was facing some heavy weather. *[…]* So, we were actually the first independent label in the Netherlands that had established a direct deal with iTunes. […] As a company, we have experimented with digital technologies quite a bit. I know what is required, also legally. In the past we lost everything when a tech company went bankrupt. This won't happen again.'				
Firm G	√	√	√	√	√
	'We are a major record company. I participate in this initiative from our Netherlands department.'				
Firm H		√			
	'What we do is part of our name. We focus on music branding, often with a new perspective on concepts with a specific focus on the live entertainment industry.'				
Firm I				√	√
	'We are a technical facility service company. And from a technical point of view, I'm on top of it. Otherwise, I do not concern myself too much.'				

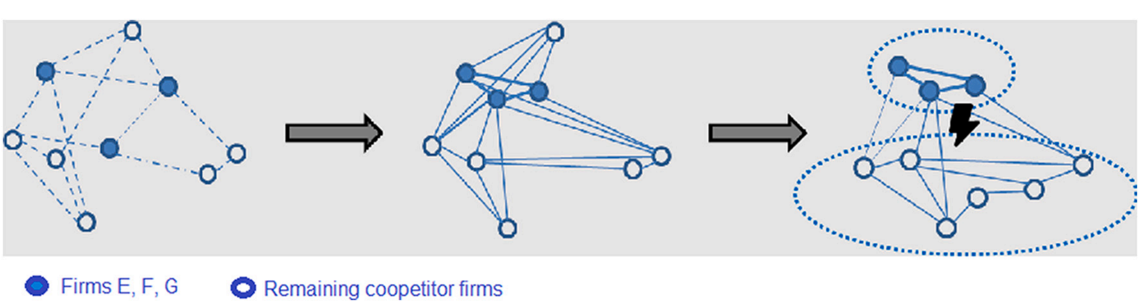

Fig. 3. Informal coalition building between coopetitors.

against the other coopetitors (seeFig. 3). The coalition used its combined power to favour the competitive value appropriation outcomes for firms E, F and G, as mentioned in the dispute over the exclusivity agreement.

The strength of the informal coalition of firms E, F and G put strain on the cooperation with the remaining coopetitors of the coopetition entity. Voicing their opposition (‘*You [firms E, F and G] are ruling us from your balcony positions’* (CEO of Firm A)), a number of coopetitors motivated other coopetitors to contain the eruption of coopetitive tensions. In response, firms A, B, C and D also formed an informal coalition in an attempt to weaken the powerful position of firms E, F and G. As the representative of Firm B explained: *‘We share our vision for what needs to be done. That is different for them [firms E, F and G].’* Furthermore, the informal coalition between firms A, B, C and D enabled them to discover new ways to appropriate value for themselves. Due to their frequent informal interactions, firms A, B, C and D were able to establish important scale and scope advantages (by pooling their physical distribution) and establish their artists as key representatives of the MusicNL platform. In so doing, they increased their opportunities to capture value from the MusicNL platform. Hence, while formal coalitions act as cooperation-inducing mechanisms, informal coalitions may act as competition-inducing mechanisms that undermine cooperation and stimulate competitive behaviours.

5. Discussion

Our findings describe how tensions arise and how they are managed in a multilateral coopetition in a disruptive innovation context. The greater the number and variety of coopetitors in multilateral coopetition, the more unpredictable and uncontrollable the tensions produced. Most notably, the diverse resources, interests and objectives of the actors and their respective contributions generate a new, unpredictable generalist–specialist contribution tension that complicates management of the well-established and more predictable value creation–capture tension. In Fig. 4, we theorize how these two tensions are interlinked: the less manageable and more unpredictable generalist–specialist contribution tension triggers informal coalition building, which drives a focus on competition and value capture. When competition-dominant behaviour becomes too strong, coopetitors need to review their interests through formal coalition building to refocus on cooperation and value creation, thus causing the value-creation–capture tension to resurface.

At the start of the *development phase* of the coopetition entity, disruptive innovation (in our case the entry of Spotify’s platform business model) caused multiple dissimilar competitor firms to convene around a shared goal. Adopting a shared ‘us vs them’ mentality, coopetitors of various backgrounds looked for ways to jointly build their own digital platform to counter the disruptor’s platform and the disruptive threat. To do so, coopetitors navigated the complex demands of jointly creating value while appropriating value individually (Bengtsson & Kock, 2014; Gnyawali et al., 2016; Gnyawali & Charleton, 2018). After establishing an acceptable level of collaboration, the coopetition entity reached a natural turning point as coopetitors refocused on unilateral activities for value appropriation, self-focused renegotiating of strategy and unilateral reprioritizing of coopetition objectives. While the turning point from cooperation-dominant to competition-dominant behaviour is a natural one and stems from within the coopetition entity, returning from competition-dominant to cooperation-dominant behaviour requires attending to what we term ‘redirecting events’, such as the shrinking of the traditional market or industry-spanning negotiations – another reason to come together to counter looming disruption (Christensen, 1997; Markides, 2006).

As the development phase nears the implementation phase, a second tension arises: the *generalist–specialist contribution tension* intensifies suddenly, leaving coopetitors with little time to prepare and manage it.

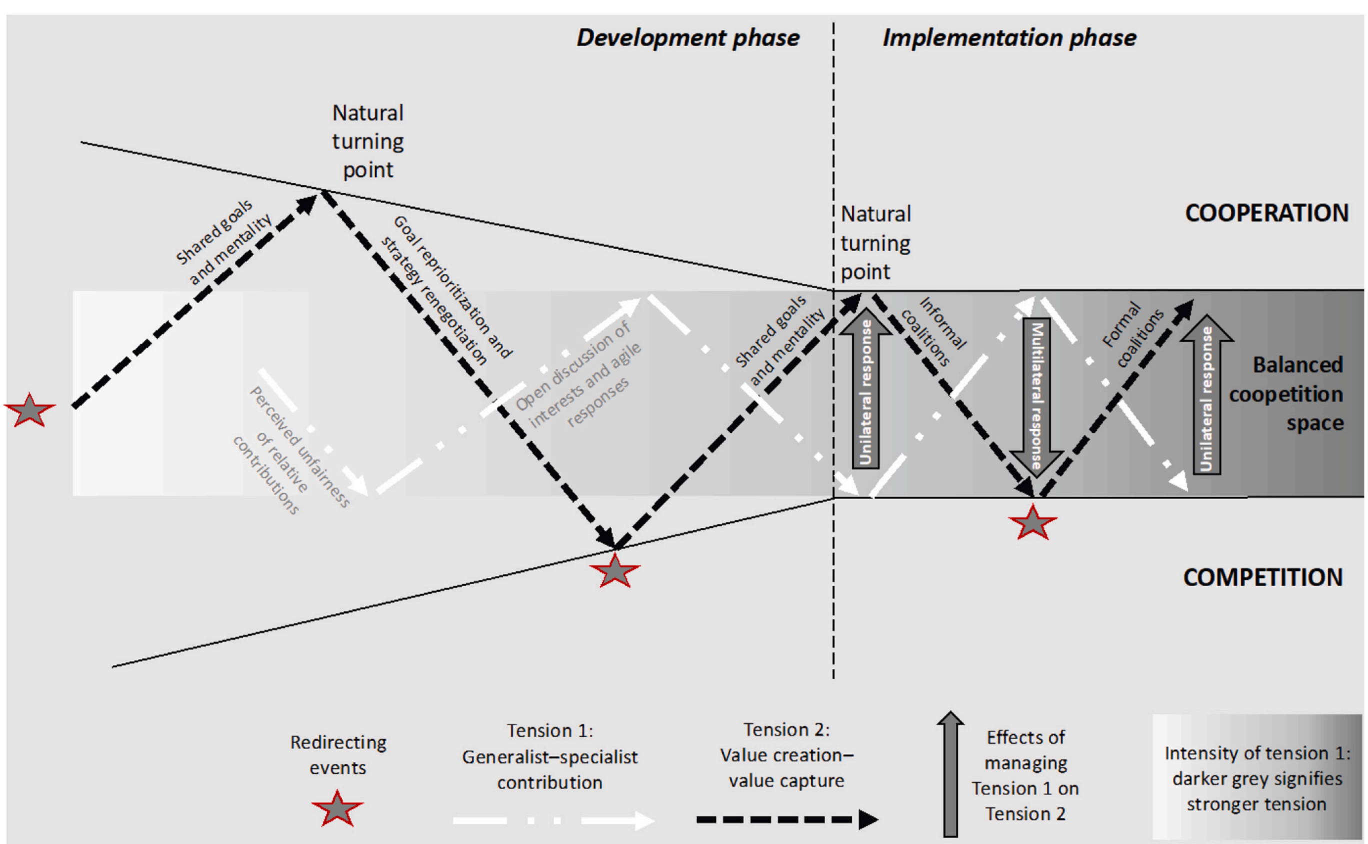

Fig. 4. Managing tensions in multilateral coopetition.

The multitude of activities generated by various actors in multilateral collaboration creates a situation in which individual coopetitors are unable to observe the various (in)direct exchanges between their peers, and are therefore uncertain whether their own contributions will be reciprocated in the future (Doz, 2019; Lazzarini, 2007). To manage the generalist–specialist contribution tension (Tension 1), coopetitors enter into a number of iterative formal and informal coalitions. Realizing their limited power as individual actors, and in an attempt not to lose voting power and influence over the entity, coopetitors connect to similar others by creating informal coalitions. Single coopetitors (or a subgroup) start this unilateral response by forming informal coalitions with the aim to secure fair private value capture (Tension 2), which fosters competition-dominant behaviour. Yet, this process also highlights the differences between individual coopetitors, further aggravating perceived unfairness of relative contributions (Tension 1). To de-escalate and reduce the generalist–specialist contribution tension, coopetitors form formal coalitions to create an overall group response to multilaterally address these concerns. By openly discussing the interests and contributions of coopetitors, they ratify the joint decisions made by the entity. Such formal agreements refocus attention towards value creation (Tension 2) and drive cooperation-dominant behaviour.

Our study generates two theoretical contributions. First, we identify a new, uniquely multilateral tension and theorize how tensions emerge and are managed over time in multilateral coopetition. In doing so, we identify the temporality of and the interlink between the generalist–specialist and value creation–capture tensions. Second, we theorize how the uncertain disruptive innovation context may uniquely shape multilateral coopetition. Despite the high uncertainty involved with the development and commercialization of disruptive innovation, the disruptive innovation context may help to overcome coopetitive tensions by inducing a strong collaborative environment via redirecting events. Below, we will discuss our contributions before concluding with managerial implications, limitations and avenues for future research.

5.1. Tensions in multilateral coopetition

Our findings highlight a new tension unique to multilateral coopetition: the generalist–specialist contribution tension that differs from dyadic or triadic coopetition tensions (Fernandez et al., 2014; Raza-Ullah et al., 2014; Tidström, 2014) in terms of its origin, management and dynamics. We propose that subgroup formation (i.e. formal and informal coalitions) is an inherent component of multilateral coopetition that complicates the management of the generalist–specialist contribution tension.

Origin. The generalist–specialist contribution tension originates from the varying incommensurable contributions across various coopetitors. In theory, coopetitors are incentivized to pool their complementary resources when developing joint innovation responses (Bouncken et al., 2015; Padula & Dagnino, 2007; Tsai, 2002). However, our findings suggest that multilateral coopetition is likely to be asymmetric: the more firms that join a coopetition entity, the likelier it is that they will be of different sizes, contribute different resources and capabilities (Hora, Gast, Kailer, Rey-Marti, & Mas-Tur, 2018) and participate with different intensity in various timeframes. While optimal contributions to multilateral coopetition depend on the relative size of the coopetitors (Chiambaretto et al., 2020), the heterogeneity in coopetitor characteristics and contributions complicates the commensuration of each individual coopetitor's contribution. This creates a tension because every coopetitor wants a fair share based on their inputs (i.e. value creation–capture tension), which is difficult to evaluate if coopetitors lack an overview of what others do and their individual contributions of time, resources or effort differ from their peers (Doz, 2019).

The greater number and variety of actors involved and their heterogeneous contributions, coupled with the temporal uncertainty of reciprocal contributions of coopetitors, limits a coopetitor's understanding of who contributes what and why some coopetitors take longer to complete certain tasks. While such commensuration is often feasible in dyadic coopetition – for example, through governance structures (Fernandez & Chiambaretto, 2016) and tit-for-tat exchanges (Doz, 2019) – it becomes increasingly difficult and a source of tension for larger multilateral coopetition entities. Opportunistic behaviours of the partner in dyadic coopetition can easily be identified and punished (Das & Teng, 2002), but this is not the case in multilateral coopetition. This reasoning is supported by insights from the alliance literature, which suggests that a greater number of indirect and unobservable exchanges in multilateral alliances may foster freeriding and other opportunistic behaviours as they are less detectable and more difficult to penalize (Doz, 2019; Lazzarini, 2007).

Management. The management of the generalist–specialist contribution tension is much more complex (and dynamic, see the following subsection on *dynamics*) as it links closely to the well-established value creation–capture tension in dyadic coopetition (e.g. Fernandez et al., 2014; Le Roy & Czakon, 2016; Raza-Ullah et al., 2014; Tidström, 2014). That is, similar to coopetitors in dyadic coopetition, coopetitors in multilateral coopetition are incentivized to appropriate private benefits from the coopetition (Dyer, Singh, & Hesterly, 2018; Gnyawali & Charleton, 2018). However, rather than doing this individually, coopetitors in multilateral coopetition can achieve this by forming formal and informal coalitions (Rouyre & Fernandez, 2019) that cause the value creation-caption tension to resurface. As a result, the management of the generalist–specialist contribution tension in multilateral coopetition is much more complex because subgroup formations not only facilitate coopetition (cf. Rouyre & Fernandez, 2019) but also destabilize it.

We thus find that subgroup formation can destabilize coopetition. As individual coopetitors experience the generalist–specialist contribution tension, they seek informal coalitions with similar coopetitors to rectify – or 'counter' (Madhavan, Gnyawali, & He, 2004) – the perceived 'imbalance' between their contributions relative to others. These informal coalitions are intended to leverage individual coopetitors' power and steer the development to secure 'private' benefits as a subgroup from the coopetition. Such informal coalitions are specific to multilateral coopetition and may threaten the stability of the coopetition entity by fostering competition-dominant behaviours.

To manage this tension and counter competition-dominant behaviour, coopetitors then form formal coalitions and intervene to purposefully stimulate cooperation-dominant behaviour that facilitates coopetition (cf. Rouyre & Fernandez, 2019). Such formal coalition building resembles 'clustering' (Madhavan et al., 2004) where partners cooperate and combine resources to create value. The formation of these formal coalitions is facilitated through two unrelated mechanisms. First, the growing success of the disruptive innovation draws attention anew to their shared problem. Second, coopetitors reunite via the establishment of formal coalitions to address this shared problem. Formal coalitions therefore refocus the entity's attention to joint value creation by clearly outlining individual coopetitors' goals and contributions. In formally addressing perceived contribution inequalities, coopetitors openly discuss individual coopetitors' objectives, efforts and needs and re-emphasize the shared goal and required commitment from all coopetitors. Thus, we find that to manage (Le Roy & Fernandez, 2015) the complexities of multilateral coopetitive tensions, purposeful formal multilateral governance structures are necessary rather than the replication of bilateral mechanisms (cf. Rouyre & Fernandez, 2019).

Dynamics. Our process view (see Fig. 4) demonstrates the different temporal trajectories of the two tensions in multilateral coopetition: the value creation–capture tension is more prevalent in the development phase of coopetition, while the generalist–specialist contribution tension is more prevalent in the later implementation phase. In highlighting these dynamics, we extend prior research (Bouncken et al., 2018) by showing that multilateral tensions emerge and are managed differently in these two phases and thus may vary in strength over time.

Bouncken et al. (2018) suggest that tensions are likely to be most severe in the early phases of radical product innovation when uncertainties add to the difficulties of securing proprietary knowledge. In the later implementation phase, functionalities become more visible, allowing firms to divide tasks between them (Le Roy & Fernandez, 2015; Raza-Ullah et al., 2014) to define safeguards and reduce partner opportunism. Taking the value creation–capture tension alone, our findings concur with the results of Bouncken et al. (2018). As coopetitors come together in the formation of the coopetition entity, they encounter the expected value creation–capture tension, but manage this tension in a collaborative spirit as the objectives become increasingly clear during the development phase. Yet, over time, we find that the generalist–specialist contribution tension emerges more profoundly in the implementation phase and reveals interdependencies among actors. This actor-based tension requires active tension management because it triggers the value-creation–capture tension to resurface.

Compared with the emergence and management of the value creation–capture tension in dyadic coopetition (Bouncken et al., 2018), we thus show that in multilateral coopetition the management of tensions grows more complex over time as tensions differ in intensity over time *and* become increasingly interrelated and may therefore play out simultaneously. This exploration of the temporality and interrelatedness of tensions in multilateral coopetition further advances our understanding of the importance of time in coopetitive interactions (Pattinson et al., 2018). In particular, we extend prior research on coopetitive mindsets and the evolution of coopetition entities to explain how the different temporal trajectories of distinct coopetitive tensions may link and complicate their management over time.

5.2. Influence of disruptive innovation context on multilateral coopetition

Our case study results also show how multilateral coopetition helps firms to overcome path-dependent trajectories that hinder their individual response to disruption (Christensen, 1997, 2006) and enables the pursuit of opportunities that go beyond the reach of individual firms. In particular, the results show how disruptive innovation can facilitate cooperation-dominant behaviour in multilateral coopetition via redirecting events. That is, the relative success of the disruptive innovation over time makes coopetitors aware that their existing business models lose viability, and that a collective response is needed to survive in the disrupted industry. Hence, we find that disruptive innovation – despite its conflictive and uncertain nature – can *facilitate* coopetition by a) strengthening the need to respond collectively in the early development phase and b) increasing cooperation among coopetitors during the development and implementation stage of the coopetition.

In contrast to existing research that finds that there are low levels of cooperation in coopetition during the initial phases of radical innovation due to the high risk of opportunism and technical delays (Bouncken et al., 2018; Gnyawali & Park, 2009; Ritala, 2012), we find that coopetition in response to disruptive innovation can provide a *collective drive* to address these problems. Furthermore, in comparison to a radical innovation context, the disruptive innovation context provides an additional boost for cooperation. First, because the successful commercialization of disruptive innovation (e.g. a platform) requires the input of all (horizontal) coopetitors to compete effectively against the disruptor's offerings. Second, the increasing success of the disruptive innovation combined with the coopetitors' mutual dependency creates a situation that forces them to collaborate by removing the alternative of continuing with the existing business model. As such, we provide further insights into how a disruptive innovation context shapes collaboration dynamically in multilateral coopetition.

5.3. Managerial implications

Our study indicates that disruptive innovation facilitates multilateral coopetition by strengthening the need to respond collectively and increasing the intensity of cooperation among coopetitors during the development of the coopetition. Via multilateral coopetition, coopetitors can develop their own 'disruptive capacity'. This suggests multilateral coopetition is a promising response to disruptive innovation, especially in cases where firms are unlikely to develop their own disruptive capacity individually or where several relatively small firms are faced with large or global new entrants. With increasing platformization, such multilateral coopetition may prove a valuable approach to local incumbents to remain relevant in industries dominated by powerful platforms.

However, firms should be aware and deal with specific tensions arising from multilateral coopetition. For instance, multilateral coopetition entities should be aware of the generalist–specialist contribution tension that may result following the formation of informal coalitions. Such informal coalitions may increase trust building among informal coalition members but risk undermining trust building across the entire coopetition entity. Thus, trust can be located inside certain subgroups or activities but not between subgroups or activities. This is problematic, because trust building across the entity alleviates coopetitive tensions (Tidström, 2014). The severity and prevalence of such tensions is likely to increase with the number of coopetitors. Hence, although it makes intuitive sense to approach multiple partners with a diverse set of resources to address knowledge, resource and competency gaps (whether or not created by disruptive innovation), firms should realize the additional complexity and greater likelihood of tensions that result from a greater number of coopetitors. Firms should therefore consider ways of addressing such tensions, such as establishing open communication channels to discuss strategic objectives (Le Roy & Fernandez, 2015) or making formal and informal agreements (Estrada, Faems, & De Faria, 2016).

Finally, our results suggest that proactive management of multilateral tensions might prove beneficial. In multilateral coopetition, it might make sense to ex ante rationally select a diversity of partners based on their prospective resources (Deken, Berends, Gemser, & Lauche, 2018; Gnyawali & Charleton, 2018) and a priori discuss ways to document individual coopetitors' contributions. However, the range of informal coalition options indicates that resource complementarity among these rationally selected coopetitors is not a given. Instead, a joint understanding of what the coopetition entity entails, does and needs should be constructed via cross-coopetitor interactions over time, including formal and informal coalition building. Dynamic interaction processes thus form an integral part in the strategy formation of the multilateral coopetition entity.

5.4. Limitations and future research

Although our single in-depth case study and specific research design enabled one of the first empirical explorations of multilateral coopetition in a disruptive innovation context, more research is needed to ascertain whether the findings can be generalized across different countries, industries, types of disruption and inter-firm constellations. Moreover, the disruptive innovation present in this case clearly shapes the development of the multilateral coopetition by resolving multilateral coopetition tensions that could endanger the coopetition. Longitudinal and comparative case studies are therefore needed to dissect how the disruptive innovation and/or the multilateral nature of the coopetition shapes coopetition.

Another limitation of this study is that the investigated period of the commercialization phase is limited. The long-term commercialization of the platform and how coopetitors capture value from the platform is beyond the scope of this study. Future research could investigate the coopetitive dynamics over an extended product lifecycle to assess whether the generalist–specialist contribution tension can be resolved and contained over a longer timeframe, and/or whether new coopetitive tensions appear and possibly affect tension dynamics. Furthermore, it would be interesting to see how tensions emerge and are managed when coopetitors leave the coopetition entity, or when new coopetitors join the coopetition entity in later stages. Finally, our findings provide insights on how national industry actors react to the entry of a global digital disruptor platform. This is a very valuable contribution, but, equally, it represents a boundary condition. For instance, we cannot ascertain the degree to which the shared Dutch identity among coopetitors incited the 'us vs them' mentality that facilitated the formation and stabilization of the coopetition entity ('us') versus the disruptors ('them'). Nonetheless, many digital disruptions are driven by the entry of a global disruptor platform, such that local industry actors may feel equally motivated to counter such intrusion on their turf in other countries and industries. Cross-country case studies are therefore needed to dissect how the disruptive innovation, the multilateral nature of the coopetition or the nationality of incumbents and disruptors shapes multilateral coopetition.

Declaration of Competing Interest

None

Acknowledgements

The authors thank the editor and the anonymous reviewers for their constructive feedback. The authors thank the representatives from the nine firms participating in MusicNL for allowing us to closely follow their efforts over time.

Appendix A. Digital disruption of the Dutch music industry and MusicNL

The origins of the disruption of the (Dutch) music industry can be traced back to the end of the 1990s, when increasing internet bandwidth and new MP3 and peer-to-peer (P2P) networking technologies enabled the introduction of innovative file-sharing services, such as Napster, KaZaA and LimeWire (Moreau, 2013). However, it was not until the introduction of iTunes in the Netherlands in 2006 that a new business model was introduced to the Dutch music industry that challenged the traditional business model. As a result, incumbent firms started to reconsider existing capabilities and their roles in the extant value system. During the period 2010–2012, Spotify and other streaming services introduced a disruptive business model that ultimately found mainstream consumption. This further enhanced music companies' need to reconsider extant capabilities and roles.

MusicNL (2014) can be placed alongside these developments. The need to develop *MusicNL* was fuelled by the realization that while the Dutch music industry reached a tipping point in which online sales dominated offline sales (NVPI 2012–2015), Dutch-language music consumers comprised only 10% of the total online music-streaming audience (GfK 2014). Furthermore, existing platforms were slow to respond to the requirements Dutch record companies deemed essential to convert their consumers into streaming consumers (e.g. introducing the national paying system iDEAL rather than credit card payments, introducing the identification label 'Dutch' to allow streaming algorithms to create dedicated playlists, etc.).

Fig. A.1 describes the critical events for the Dutch music industry that increased the need to respond to the disruptive innovation, as well as the critical events for *MusicNL* when developing its platform to regain a competitive position in the disrupted music industry.

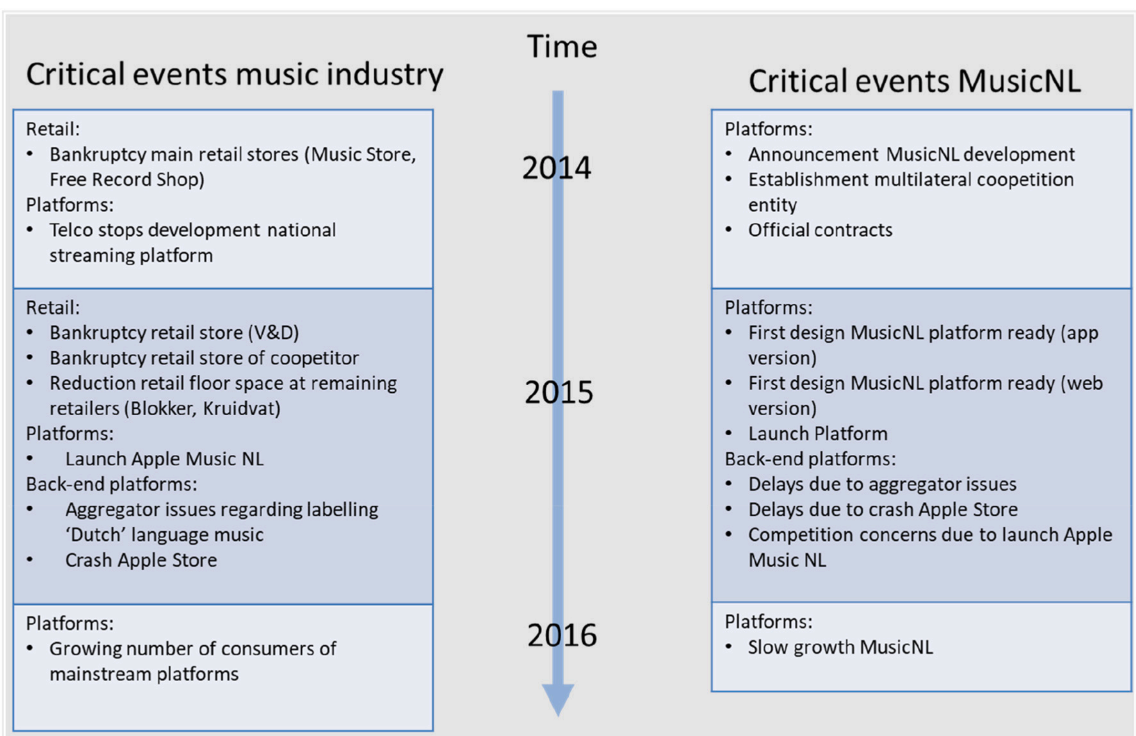

Fig. A.1. Critical events for the Dutch music industry and MusicNL.

Table A.1
Data analysis matrix – coopetitor alignment.

Question/Issue	Firm A	Firm B	Firm …	Firm F	Firm G	Firm H	Firm I
Topic 1: Technological issues	C, SA	NR	…	D	SD	D, SD	I
Topic 2: Labour division	I	A	…	A	A	NR	NR
Topic 3: Launch communication	C, SA	NR	…	SA	SD	I	NR
Topic 4: New technological possibilities	A	NR	…	SA	A	NR	I
Topic […]	…	…	…	…	…	…	…

Role of the coopetitors

Overall level of agreement (what)

Overall level of agreement (who)

Role of the coopetitor

Notes:
I = Initiated discussion.
C = Contributor.
A = Indicated agreement (verbal or nonverbal).
D = Indicated disagreement (verbal or nonverbal).
SA = Provided significant statement suggesting agreement.
SD = Provided significant statement suggesting disagreement.
SW = Provided significant written statement.
NR = Did not indicate agreement or disagreement (non-response).
General: this is a simplification of reality; firm-specific content has been removed.

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