

Cite as Fernandez A-S., Chiambaretto P., Le Roy F., Czakon W. (2018), “Coopetition: from neologism to a new paradigm”, in Fernandez A-S., Chiambaretto P., Le Roy F., Czakon W. (eds), *The Routledge Companion to Coopetition Strategies*, Routledge, Abingdon

## **Coopetition: from neologism to a new paradigm**

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Comfortably sitting in your sofa, you are watching your favorite show on your Sony TV. Did you know that the screen in front of you was jointly developed by both Sony and Samsung, two rival firms in the consumer electronics industry (Gnyawali & Park, 2011)?

You are in Dubai on top of the tallest building in the world, the Burj Khalifa. Despite being very high in the sky, your smartphone perfectly receives a signal. Did you know that the telecommunication network system in the Emirates is the fruit of two competing giants of the satellite telecommunication industry, Airbus and Thales (Fernandez et al., 2014)?

You feel a bit dizzy. Since your doctor has diagnosed you with heart disease, you have to take a pill. On the package, you read Plavix. Did you know this drug would not have existed without the collaboration of two competing pharmaceutical companies, BMS and Sanofi (Bez et al., 2016)?

You are at a New York airport waiting to board your flight across the Atlantic Ocean. Did you know that when you buy a Delta Airlines ticket on an intercontinental flight, you have more than a 50% of chance of being on an Air France flight? Despite being strong competitors, Air France and Delta Airlines cooperate together to offer more flights and destinations, as well as reduced connecting times and the best experience during the flight (Chiambaretto & Fernandez, 2016).

You have just arrived at your hotel for a well-deserved holiday break. You decided to enjoy your holidays in Poland because you saw an advertisement in a subway back home. Did you know that competing hotels and theme parks in this region have decided to join their forces to promote their region while remaining in competition to make sure you visit (Czakon & Czernek, 2016)?

All these examples show that in many industries, competing firms widely rely on collaboration with their direct rivals to better and faster achieve their objectives, to provide their customers with the utmost satisfaction and to reach higher performance levels. To grasp this paradoxical combination of simultaneous cooperation and competition, a specific term was coined several decades ago, “coopetition”. The neologism “coopetition”, invented at the beginning of the 20<sup>th</sup> century, results from the combination of “cooperation” and “competition”. In the 1990s, Ray Noorda, the CEO of Novell, used this term to describe the firm’s relationships, which were

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simultaneously cooperative and competitive, with other firms in the IT industry (Brandenburger & Nalebuff, 1996).

In the early 2000s, the term was seized by academics, and coopetition became a concept. Since then, the interest in coopetition continued to grow in strategic management and beyond into other disciplines and sciences. Because they combine the benefits of both cooperation and competition, coopetition strategies are expected to help firms increase their chance of success in the marketplace. As a result, coopetition became a new paradigm, a new way to analyze social and economic phenomena.

Coopetition has become a behavioral standard for most companies in most industries. Very diverse types of firms and organizations widely use it. Coopetition among large companies or even between smaller firms helps them overcome their specific challenges. Furthermore, large firms may also collaborate with smaller competitors. However, coopetition is not only relevant for firms; NGOs, associations, and institutions rely on coopetition to reach their objectives. Coopetition is everywhere; it is not exclusive to one industry or one activity.

Coopetition offers various benefits to develop radical and incremental innovation (Bouncken & Kraus, 2013). New product development is far from the only activity in which competing firms can work together. Market share, productivity, and financial performance all can be improved through collaboration with carefully chosen and closely managed coopetition (Le Roy & Czakon, 2016). Coopetition relationships can be useful across many functions in the firm, such as marketing activities (Chiambaretto et al., 2016), logistics (Wilhelm, 2011), operations (Czernek et al., 2017), or management control (Graftona & Mundy, in press). All the functions of the firm can potentially be used to foster collaboration between competing firms. This is even truer in the current economy. New issues in globalization and digitalization have contributed to the creation of new business models based on coopetition (Ritala et al., 2014; Velu et al., 2016).

## **1. The need for a dedicated theory of coopetition**

The only successful way to address contemporary challenges beneficially to all involved firms and to customers, is coopetition. Traditional strategies, such as pure competition or pure collaboration, are widespread across industries; their potential has widely been captured, and thus, comparative advantages have eroded. Recent development of coopetition in various economic areas challenges scholars, first in strategic management. It is absolutely essential for researchers to understand this paradoxical phenomenon and explain how it can safely lead to the creation of superior performance. To address this theoretical challenge, researchers have tried to rely on traditional perspectives in strategic management, such as the competitive advantage theory or the collaborative advantage theory.

On one hand, the competitive advantage theory, first developed by Porter (1980), explained that the competitive advantage depends on the position of the firm in its industrial environment. A rigorous analysis of the industry combined with an analysis of the strategic groups and with the value chain of the firm will make it possible to identify the best strategy for the firm. In a similar line, Barney (1986, 1991), with the Resource Based View of the firm, explains that the creation or the control of strategic resources is key to the firm's success. Firms are invited to invest in

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the development of strategic resources in order to differentiate themselves from their competitors and to improve their performance.

While shifting attention from the external contingencies to the internal potential in a swift pendulum movement (Hoskinsson et al. 1999), both Industry Organization and RBV face the same limitations. They conceive inter-organizational relationships exclusively through a competitive lens. They fail to incorporate collaborative relationships developed between different actors in an industry with substitutes, new entrants or even with competitors. Firms also collaborate to actually develop the strategic resources they need to compete efficiently in the market. Consequently, the competitive advantage theory is not comprehensive to capture the coopetition phenomenon.

On the other hand, the collaborative advantage theory builds on sociological approaches to explain firm performance. From a social network perspective, firms are encouraged to develop strong collaborative ties with all members of the network. The position of the firm within the network determines its performance (Gulati et al. 2000). In a similar view, alliance theory presents alliances as the key for the success of firms (Dyer & Singh, 1998). Because firms cannot control all resources they need, they have to look for access to missing resources through alliances with partners (Gulati, 2007). The success of the firm thus relies on its ability to access "network resources" and its relational capabilities to maintain stable alliances. As a consequence, the social network and the alliance theories analyze inter-organizational relationships only from a collaboration perspective. The theories neglect the competitive dimension that actually exists in any collaboration. Thus, collaborative advantage is relevant to understand coopetition, but it is not comprehensive enough and is thus inadequate to address cooperative relationships.

As a result, both competitive advantage and collaborative advantage theories focus on only one side of the coin, either the competition or the cooperation, without considering interactions between them. By doing so, they fail to address tensions (Fernandez et al. 2014), to observe and incorporate balance (Bengtsson et al., 2016), to explain how this interaction of collaboration with competition can be understood by managers (Gnyawali & Park, 2009) and to propose how collaboration and competition interplay can be turned into successful management of coopetition (Le Roy & Czakon, 2016). As a consequence, established theories are not relevant enough to analyze the specifics of coopetition.

## **2. The emergence of a coopetition theory**

Because of its paradoxical nature, coopetition invites scholars to analyze strategies, behaviors and relationships from a dual perspective. The very nature of coopetition raises new, stimulating questions that need to be addressed by scholars. Considering the simultaneous combination of cooperation and competition, why do actors put themselves in such complexity when they have simpler alternatives? How do they address this complexity over time? What outcomes do they expect from these relationships? How do they manage potential risks? How do they capture the value created?

A dedicated theory of coopetition is needed to explain the success of firms involved simultaneously in cooperative and competitive relationships. Approaching cooperation and competition as two opposites of a continuum becomes nonsense. One of the theoretical challenges is to address both directions simultaneously, focusing on the interdependences

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between collaboration and competition. Building a new theory was the only option for academics to explain this new strategy. Studies, research articles and books have flourished over the recent years to understand this new strategic behavior.

Since the seminal work of Brandenburger and Nalebuff (1996), coopetition research continued to grow. As shown in Figure 0.1., coopetition research has considerably increased over the last two decades. This extraordinary growth of publications on coopetition reflects a growing and sustained interest of scholars all over the world. In addition to this growth, we can notice a significant improvement of the ranking of the outlets. This publication upgrading demonstrates the recognition of coopetition as a real research topic by scholars. Looking deeper, we must highlight that these publications address a wide range and offer a large variety. Such diversity leads us to think that the coopetition concept appears as one of the richest and the most inspiring concepts in strategic management. Recent publications highlight that coopetition pushes back the traditional boundaries of strategic management. Indeed, coopetition is becoming insightful to other disciplines in management (Chiambaretto et al., 2016; Graftona & Mundy, in press).

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Insert Figure 0.1.  
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The theory of coopetition is still a work in progress. Some systematic reviews show the richness, the youngness and the diversity of this new field of research (Czakon et al., 2014; Dorn et al., 2016). Coopetitive frameworks used by scholars are based on established theory as game theory (Brandenburger & Nalebuff, 2016), resource-based view (Bengtsson & Kock, 2000), network theory (Sanou et al., 2016) or, more recently, cognition theory (Bengtsson et al., 2016), resource dependence theory (Chiambaretto & Fernandez, 2016), etc. There is not yet a coopetition theory as established as the *Transaction Cost Theory*, for example. Building a theory or some theories of coopetition is a great challenge for the future. Going into this challenge is a key to understanding contemporary and future strategies of the firm. The construction of this theory is still a work in progress. It does not start from zero, and it can be based on past coopetition studies described here as a safari.

### **3. Coopetition safari**

Now that you are convinced of the interest of coopetition, you are willing to initiate or to pursue new investigations on coopetition. However, you might wonder where should I start? What question should I address? Am I sure that this issue has not been addressed yet? How could I contribute to coopetition theory? This *Routledge Companion to Coopetition Strategies* will help you to find your way in the wild world of coopetition. We provide an exhaustive and structured overview of coopetition research since the birth of the concept. Therefore, this *Routledge Companion to Coopetition Strategies* pursues a double objective. It will help to position your own research in coopetition literature, and it will inspire you to conduct future studies on coopetition.

We invite you to join us for a safari into the Coopetition world. Figure 0.2 maps the path we will follow. We will discover step-by-step the six major questions about coopetition.

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**Part 1: How do we theorize coopetition?** First it is important to understand the theoretical debates surrounding coopetition. Several theoretical approaches of coopetition are presented in the six chapters of this first part.

**Part 2: Why do firms adopt coopetition?** After understanding the theoretical debates surrounding coopetition, six chapters will analyze the drivers, antecedents and determinants explaining why firms adopt coopetition strategies.

**Part 3: How can firms succeed in coopetition?** After understanding the drivers and antecedents of coopetition, seven chapters will develop insights about the implementation and the management of coopetition strategies.

**Part 4: What can coopetition look like?** After acknowledging the implementation and the management of coopetition, we explore the morphology of coopetition through six chapters.

**Part 5: What can we get from coopetition?** After studying the morphology of coopetition, we invite you to dig into the outcomes and implications of coopetition.

**Part 6: How can coopetition take us beyond strategy?** To end the overview of coopetition research, we would like to open new doors and to explore studies built on coopetition, but go beyond strategic management.

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Insert Figure 0.2.  
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#### **4. Is it just the beginning?**

After this exciting safari, you might wonder: is coopetition research over or should we keep investigating coopetition? So much has been done; there is not much more to examine. We believe this is just the beginning of coopetition research.

As each chapter notes, coopetition created disruption and a new school of thought. Previous studies provided insights into some of the major questionings surrounding coopetition. However, all these contributions only represent the genesis of coopetition research such that most of the questions addressed are only partially answered. Many research directions require further investigation.

We, coopetition scholars, believe that coopetition is a promising research field, but contributions to this topic have only begun. We call for more research on coopetition and for more researchers to investigate the complexity and the challenges of coopetition relationships. Coopetition research already goes beyond the boundaries of strategic management to other management fields as marketing management (Chiambaretto et al., 2016) or accounting (Graftona & Mundy, in press). Furthermore, coopetition research is now a topic in economic science (Rey & Tirole, 2013), political science (Sack, 2011) and psychology (Landkammer & Sassenberg, 2016). Moreover, coopetition research escapes from social sciences to basic science! For instance, coopetition is now a concept used in biology (Khoury et al., 2014) and physics (Chu-Hui et al., 2017)!

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Therefore, we can assume that this *Routledge Companion to Coopetition* gives access to studies that are just the beginning of a new upcoming coopetitive world!

## 5. The *Routledge Companion to Coopetition strategies* outline

This book is structured in six parts that are related to the six major questions we identified on coopetition.

**Part A. Coopetition Theory.** First it is important to understand the theoretical debates surrounding coopetition. Several theoretical approaches of coopetition are presented.

The first one is offered by Maria Bengtsson (Umeå University, Sweden), Sören Kock (Hanken School of Economics, Finland) and Eva-Lena Hundgren Eriksson (Hanken School of Economics, Finland). They provide an overview of coopetition roots and argue that micro-level-oriented theories have major potential to advance future coopetition theory.

A second approach was developed by Tadhg Ryan Charleton (Maynooth University, Ireland), Devi R. Gnyawali (Virginia Tech, USA) and Robert Galavan (Maynooth University, Ireland). They combine insights from five important theories and illustrate how an integrative approach can generate a more systematic understanding of coopetition.

A third perspective was proposed by Frédéric Le Roy (University of Montpellier and Montpellier Business School, France), Anne-Sophie Fernandez (University of Montpellier, France) and Paul Chiambaretto (Montpellier Business School and Ecole Polytechnique, France). They present a managerial theory of coopetition, arguing that management is one of the most important factors for coopetition to be a successful strategy.

A fourth approach was taken by Wojciech Czakon (Jagiellonian University, Poland). The author advocates that coopetition at the network level displays distinctive features and promising advantages compared to dyadic coopetition. He presents the main knowledge and invites further research.

In the fifth chapter, Paavo Ritala (Lappeenranta University of Technology, Finland) and Pia Humerlinna-Laukkanen (University of Oulu, Finland) develop a dynamic interplay model of value creation and appropriation in coopetition that examines the roles and relationships of these two processes.

The last chapter of the first section is written by Giovanni Battista Dagnino (University of Catania, Italy) and Anna Mina (Kore University of Enna, Italy). They provide an overview of the four phases of coopetition research and offer some hints on its convergence on a few specific issues.

**Part B. Coopetition Antecedents and Drivers.** After understanding the theoretical debates surrounding coopetition, six chapters will analyze the drivers, antecedents and determinants explaining why firms adopt coopetition strategies.

The first chapter, written by Wojciech Czakon (Jagiellonian University, Poland) and Katarzyna Czernek (University of Katowice, Poland), explains how different trust-building mechanisms encourage competitors to enter into two types of dyadic and network-collaborative relationships.

The second chapter, proposed by Frédéric Le Roy (University of Montpellier and Montpellier Business School, France), Frank Lasch (Montpellier Business School, France), and Marc Robert (Montpellier Business School, France), questions the best partner choice in an innovation network. They underline in which conditions a competitor is the best partner for innovation.

In a third chapter, Marcello Mariani (University of Reading, United Kingdom) exposes the role of policy makers and regulators in driving and affecting coopetition. The author shows that economic actors did not intentionally plan to compete before the external institutional stakeholders created the conditions for the emergence of coopetition.

Fourth, Patrycja Klimas (University of Katowice, Poland) identifies organizational cultural features and cultural models that could drive competitive relationships in different industries.

Fifth, Anne Mione (University of Montpellier, France) introduces the context of standardization as an antecedent of competitive relationships. Interactions between standardization and coopetition are discussed.

Finally, Mahito Okura (Doshisha Women's College of Liberal Arts, Japan) & David Carfi (University of California, USA) explain the advantages of building on game theory to understand coopetition. They present some models and encourage further research.

***Part C. Competition Tensions and Management.*** After understanding the drivers and antecedents of coopetition, seven chapters will develop insights about the implementation and the management of coopetition strategies.

The first chapter, written by Annika Tidström (University of Vaasa, Finland), highlights the tensions resulting from the combination of cooperation and competition. She encourages a dynamic, multilevel, and practice perspective to analyze the phenomenon.

In the second chapter, Anne-Sophie Fernandez (University of Montpellier, France) and Paul Chiambaretto (Montpellier Business School and Ecole Polytechnique, France) study the specific tension related to sharing and the protecting information at the same time in competitive relationships. They analyze the resulting tensions and suggest ways to manage those efficiently in competitive projects.

Third, Isabel Estrada (University of Groningen, Netherlands) focuses her attention on knowledge management in competitive projects. Competitors need to share their knowledge with one another and, at the same time, protect their knowledge from one another. She highlights promising directions to advance the field.

Fourth, Eva-Lena Lundgren-Henriksson (Hanken School of Economics, Finland) and Sören Kock (Hanken School of Economics, Finland) study the place of individuals in competition. They discuss possible incorporation of the sense-making perspective to analyze the interplay of discourses and emotions at the individual and collective levels.

In the fifth chapter, Anne-Sophie Fernandez (University of Montpellier, France) and Frédéric Le Roy (University of Montpellier & Montpellier Business School, France) reveal an original organizational design and a specific managerial principle to manage competition at the project level.

The sixth chapter, written by Tatbeeq Raza-Ullah (Umeå University, Sweden), Maria Bengtsson (Umeå University, Sweden) and Vladimir Vanyushyn (Umeå University, Sweden), develop the concept of competition capability. Competition capability helps managers to address competition paradox inherent to alliances between competitors and the resulting paradoxical tensions.

Finally, Stefanie Dorn (University of Cologne, Germany) and Sascha Albers (University of Antwerp, Belgium) propose an integrative multi-level approach to competition management. They highlight the interdependencies between these different levels.

***Part D. Competition at Different Levels.*** After acknowledging the implementation and the management of competition, we explore the morphology of competition through six chapters.

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First, Philippe Baumard (CNAM, France) introduces some thoughts about the possible asymmetric gains when small and large firms coopete. He shows that the mismatch of scale between the partners can create dramatic levels of asymmetry.

In a second chapter, Paul Chiambaretto (Montpellier Business School and Ecole Polytechnique, France) and Anne-Sophie Fernandez (University of Montpellier, France) adopt a portfolio perspective to analyze the evolution of coopetition. They show that the share of competition in an alliance portfolio tends to increase under high levels of uncertainty.

Third, Aleksios Gotsopoulos (Sungkyunkwan University, South Korea) shows that coopetition could occur in larger groups, involving larger size and more diverse resources. He encourages further research on cooperative groups to grasp their dynamics.

Alain Wegmann (Ecole Polytechnique Fédérale de Lausanne, Switzerland), Paavo Ritala (Lappeenranta University of Technology, Finland), Gorica Tapandjieva (Ecole Polytechnique Fédérale de Lausanne, Switzerland) and Arash Golnam (Ecole Polytechnique Fédérale de Lausanne, Switzerland) show in the fourth chapter that ecosystem is a useful concept for analyzing strategies in which competitors are also considered as complementary partners.

In the fifth chapter, Heloise Berkowitz (CNRS-Toulouse School of Management, France) and Jamal Azzam (Toulouse School of Management, France) focus on the dynamics of coopetition in meta-organizations. They explore coopetition among actors who agree to license their patents through meta-organizational devices such as patent pools.

Finally, Alain Jeunemaitre (Ecole Polytechnique, France), Hervé Dumez (Ecole Polytechnique, France), and Benjamin Lehiany (SKEMA Business School and Ecole Polytechnique, France) present coopetition as a multifaceted concept. They analyze how visuals substantiate the concept and how far visualization may explain it and recommend the use of specific templates.

***Part E. Coopetition Outcomes and Implications.*** After studying the morphology of competition, we invite you to dig into the outcomes and implications of coopetition.

We will take the first step with Johanna Gast (Montpellier Business School, France), Wolfgang Hora (University of Liechtenstein, Liechtenstein), Ricarda Bouncken (Bayreuth University, Germany) and Sascha Kraus (University of Liechtenstein, Liechtenstein) to explore the complicated relationship between coopetition and innovation. The authors analyzed quantitative contributions to present the debate on coopetition and innovation performance.

Then, André Nemeh (Rennes School of Business, France) presents a discussion about coopetition strategy and the first mover advantage (FMA) perspective. He shows that different approaches to orchestration of resources will lead to different benefits/speeds of products' introduction for cooperative NPD projects.

Third, Marcus Holgersson (Chalmers University of Technology, Sweden) offers a reflection on intellectual property management in technology-based coopetition. He designs a framework to analyze IP agreements in coopetition and shows that knowledge, technology, and IP can be protected to enable controlled sharing through licensing in coopetition.

In the fourth chapter, Paavo Ritala (Lappeenranta University of Technology, Finland) presents an overview of previous studies about coopetition and market performance. He reviews the existing evidence for key mechanisms, contingencies, and practical examples to explain how and why a firm's market performance is affected by its coopetition strategy.

Fifth, Jako Volschenk (University of Stellenbosch Business School, South Africa) discusses the different types of value that can be generated and captured in coopetition. He incorporates the stakeholder theory and the six capital models into an integrated typology of value creation in coopetition.



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Lastly, Chandler Velu (University of Cambridge, United Kingdom) explores the relationship between business model design and coopetition-based strategies among competing firms. The chapter proposes a framework on how, when and why business model innovation is required for coopetition-based strategies in order to contribute to competitive advantage.

**Part F. Coopetition Beyond Strategy.** To end the overview of coopetition research, we would like to open new doors and to explore studies built on coopetition but that go beyond strategic management.

The first perspective is offered by David Teece (Berkeley Haas, United States). Considering that coopetition can take numerous forms, David Teece analyzes strategic aspects of these arrangements and discusses how the dynamic capabilities' framework addresses the fundamental issues of how coopetition arrangements are selected.

Second, a marketing approach of coopetition is proposed by Călin Gurău (Montpellier Business School, France), Paul Chiambaretto (Montpellier Business School and Ecole Polytechnique, France), and Frédéric Le Roy (University of Montpellier and Montpellier Business School, France). After defining the concept of cooperative marketing and its origins, the authors show the interest of investigating coopetition strategies through a marketing lens, such as pricing or branding policies.

In a third chapter, Thuy Seran (University of Montpellier, France) and Hervé Chappert (University of Montpellier) combine management accounting and strategy approaches to shed new light on cooperative tension management. Based on Simon's levers of control, they design and discuss an integrative framework to efficiently manage coopetition at the network level.

Fourth, Miriam Wilhelm (University of Groningen, The Netherlands) opens a discussion between coopetition and supply chain management. She outlines the concept of vertical coopetition that occurs in buyer-supplier relations, and she demonstrates the value of applying a triadic perspective on vertical coopetition.

In the fifth chapter, Malin Näsholm (Umeå University, Sweden) and Maria Bengtsson (Umeå University, Sweden) adopt an entrepreneurship perspective on coopetition. They discuss the specificities of small firms that make coopetition important for their growth and success but also make them particularly vulnerable. They conclude on the capabilities required to make coopetition a successful strategy for SMEs.

Finally, Frédéric Le Roy (University of Montpellier and Montpellier Business School, France) and Henry Chesbrough (Berkeley Haas, United States) develop the concept of open coopetition, combining insights from both the open innovation and the coopetition literatures. After defining the concept, they question the key success factors of open innovation based on collaboration with a competitor.

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Cite as Fernandez A-S., Chiambaretto P., Le Roy F., Czakon W. (2018), "Coopetition: from neologism to a new paradigm", in Fernandez A-S., Chiambaretto P., Le Roy F., Czakon W. (eds), *The Routledge Companion to Coopetition Strategies*, Routledge, Abingdon

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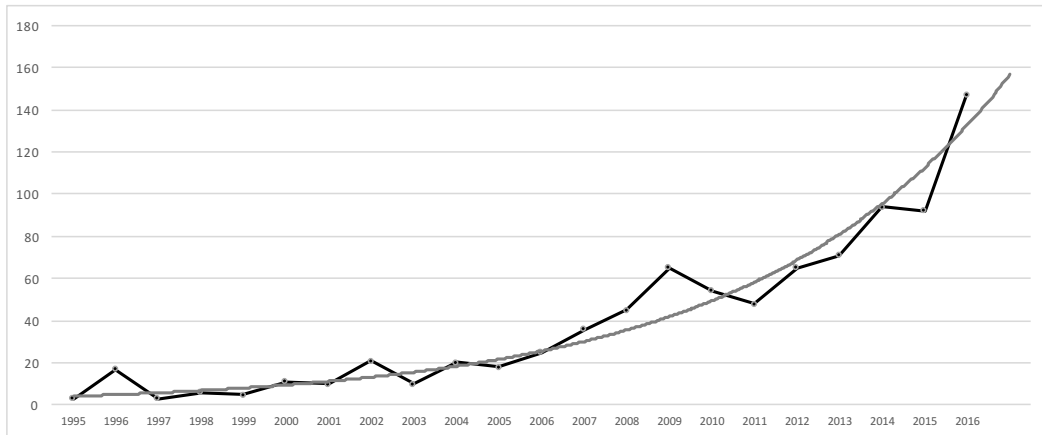
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**Figure 0.1. Number of research articles with the word “Coopetition” in the title**  
(Source: Google Scholar database)



**Figure 0.2. Roadmap of the coopetition safari**

