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# Open Strategy: A Review and Research Agenda

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# Open Strategy: A Review and Research Agenda

## **SUMMARY**

*In the whole, preceding literature reviews on the contemporary strategic management phenomena of open strategy include a number of limitations: they are deficient of a detailed concentration, deliver an excessive definitional focus or are absent of a distinct empirical analysis of research in the field. In order to address these shortcomings, this paper endeavours to systematically examine the existing literature on open strategy by classifying its main characteristics, connecting the different aspects together in a structured and comprehensive definition. This considered review of extant literature assesses numerous characteristics of open strategizing as they are presented in preceding research. Consequently, the systematic and methodical approach taken by this paper affords an alternative way of comprehending open strategy and contributes to the field by providing a consolidation of the literature and signifying potential streams for future research to explore.*

**Keywords:** Open Strategy, Inclusivity, Transparency, Participation

**Word Count:** 6,397 words

## INTRODUCTION

Considering the growing body of literature exploring the tendency of organisations to engage a wide-ranging audience of internal and external stakeholders in their strategy formulation stages (Whittington et al., 2011). As well as the growing trend to publicise the strategic direction being followed (Stieger et al., 2012; Whittington et al., 2016). There is merit in exploring the implications of both these approaches in strategy design and implementation. There remains both a theoretical and practical need to understand how openness in strategy practices influence strategy formulation and how organisations can incorporate larger audiences in their strategic decision-making processes. Herein resides the challenge and impact of this paper: firstly, how the underpinnings of open strategy can be conceptualised in practical terms. Secondly, how the mechanisms through which engagement with a wider base of stakeholders is reached, can be achieved. And, although the involvement of several actors at various layers of organisational hierarchy isn't necessarily a novel concept (Burgelman, 1983; Pettigrew, 1992; Andersen, 2004), with Birkinshaw (2017: 423) crediting it as a form of "sharing information widely as a means of gaining buy-in and alignment". Nevertheless, openness in strategic decision-making has noticeably manifest itself over the last two decades (Appleyard & Chesbrough, 2017).

Notwithstanding its relatively youthful heritage; the anticipated progression of strategy, as a field of management practice, is one shrouded in limited consensus over its future direction (Stacey, 1993). What is more certain however, is that the purpose of strategy remains to identify paths for organisations to maintain competitiveness amidst the chaos and complexity of contemporary business environments (Chakravarthy, 1982). In an increasingly complex world, one that is characterised by perpetual change, technological turbulence and progressively more integrated global workforces; the role of strategy bears significance in navigating organisations through this maze of complexity (Lewin, 1999).

Whilst a growing body of academic literature recognises "strategizing practices [which are] aimed at including more internal and external stakeholders and communicating strategic choices more transparently" (Luedicke et al., 2017, p.g.371). There remains a lack of consensus over how prevalent these practices are in the domain of contemporary strategic management, or the extent to which these are measured empirically in extant strategic scholarship. This paper outlines the key debates in the field of open strategy; since the initial publication of Chesbrough and Appleyard's (2007) 'open innovation and strategy' strands of literature have attempted to progress the scholarly debate (Gassmann et al., 2010; Whittington et al., 2011; Pittz & Adler, 2016; Hutz et al., 2017; Hutter et al., 2017; Mack & Szulanski, 2017; Dobusch & Kapeller, 2018). Nonetheless, there remains a need to establish a consolidated theoretical grasp of what open strategy constitutes. This paper concludes with a framework for future research to explore areas of promise and interest in light of recent trends in business management research.

## **BACKGROUND: Evolution of the Strategy Domain**

Strategy scholars have long grappled with providing a linear progression for the origins of strategy, with consensus over a standard ancestry being further complicated by the existence of the strategy content and strategy process schools of thought (Appleyard & Chesbrough, 2017). And whilst both approaches continue to carry weight in the contemporary discipline, it is important to map out the dominant perspectives ideating the lineage of strategy. McKiernan (1997: 791) separates the historical evolutionary phases into ‘two generic sources [that carry] momentum’; the ‘ancient’ and ‘modern’ narratives. The latter is widely recognised as the organic evolution of strategy, founded upon the premise of competition where the phrase ‘survival of the fittest’ best captures the application of the Darwinian evolutionary theory (McKiernan, 1997). Whilst the ancient narrative is derived from its militia origins. The Eastern perspective influenced by Sun Tzu’s ‘The Art of War’, whereas in the Western world there are parallels from the ancient Greek stance of ‘strategos’. Whilst it’s insuperable to deduce a linear progression from these historical narratives to modern day strategy practice, it’s not entirely inconceivable to derive contemporary strategy terminology from its historical heritages. Influences on the contemporary school of thought can also be observed from the ‘competitive exclusion’ principle of ecology scholar G.F. Gause, which Henderson (1989: 139) effectively surmises as “*competitors that make their living in the same way cannot coexist – no more in business than in nature*”. These intricacies in the ancestral underpinnings are further confounded through the lack of a consistent vocabulary in strategy theory, despite dating back to the Victorian era, “*the lexicon of strategic management is internally inconsistent and tends to be confusing, even for the cognoscenti*” (Ronda-Pupo & Guerras-Martin, 2012: 162).

Despite the above constraints, the origins of strategy practice in contemporary strategic management at least, can be disseminated into four categorisations where the evolution of the ‘modern’ strategy narrative can be mapped from the early days of the rational planning and marketing-inspired strategic thinking (Von Neumann & Morgenstern, 1947; Drucker, 1954; Chandler, 1962 and Ansoff, 1965) through to the Industrial Organisations approach (Bain, 1972; Porter, 1980, 1981) and the static resource-based view (Penrose, 1959; Wernerfelt, 1984) all of which find their roots in economic theory (Barney, 1991). In elaborating, Sminia (2018) extends the notion of the rationalistic nature of these approaches attributing them as a snapshot of the organisation, where the external environment in which the organisation operates is taken to be homogenous and therefore a constant, and the organisation independent of the institutional changes that would invariably impact the focal firm. The juncture of departure from this rationalistic logic emerges with the dynamic resource-based perspectives (Helfat & Peteraf, 2003), agency theory (Eisenhardt, 1985), stakeholder analysis theory (Freeman, 1994) and institutional theory (Meyer & Rowan, 1977). Where the complexities of the external environment, in which the focal firm operates, are recognised in the sphere of strategic decision-making and the significance of internal competencies becomes paramount as a means of not only attaining but also sustaining competitive advantage. The call is for strategists to become visionaries and to creatively propel their organisation ‘towards an imagined future and translate core competencies into new business’ (Sminia, 2018: 158).

Holistically these initial groundworks interpret strategy making as a foundation for organisational being. An outcome-driven objective or purpose that guides the firm and its component parts. A gesticulation of normative control ensuring obligatory consensus to achieve organisational targets contingent upon the internal and external macro environmental

constraints under which the firm operates (Bracker, 1980). As such strategy – under this definition – is viewed as an extension of the firm itself, an embodiment of the organisation; however, intrinsically static and innately devoid of humanistic form.

Referring to mainstream scholarly thought in strategic management discourse, the underlying components of strategy are centred upon creating a blueprint to enable an organisation to compete, by assigning goals and setting policies required to achieve those goals (Porter, 1980: 16). In Porterian terms competition is seen as a key driver that spurs organisations, and the pursuit of overcoming the competition is seen as the hallmarks of what strategy represents. And it is this interpretation of strategy that has prevailed going into the new century and has provided the theoretical and practical underpinning for the rise of the multi-national corporation and recent trends of globalisation (Hart, 2015).

The emergence of open strategy into the domain of management science has been somewhat preceded by the emergence of the open innovation paradigm (Chesbrough, 2003; 2006) which first advocated the significance of collaborative practices in inter-organisational relationships. Manzini et al. (2017: 260) surmise the benefits from extant literature as the “*accessing [of] new competences and know-how, sharing costs and risks of innovation, reducing time to market, increasing creativity, broadening product range, catching market opportunities, and monitoring technological change*”. It is therefore somewhat inevitable that Chesbrough and Appleyard (2007) would deduce that this phenomena rests uneasily within the boundaries of the established theoretical stances in business strategy. Open innovation directly challenges the traditional school of thought through the advocacy of communities of participation and what Chesbrough and Appleyard (2007) refer to as innovation ecosystems. The concept of ecosystems is gaining traction in business research, seen as loosely connected networks of complementary firms that influence and, in turn, are influenced by the development, creation and commercialisation of a participating firm’s offering (Iansiti & Levein, 2004a). With governance and alignment across participating firms in the ecosystem a prominent area for investigation within the field of strategic management scholarship, research has yet to adequately address strategic decision-making in these organisational clusters.

The social theorists take on strategy; or strategy-as-practice as it is more commonly recognised, attempts to bridge the gap between the theoretical depictions of what managers do as opposed to what is observed in practice (Jarzabkowski, 2005). The recognition of recursive practices and the bounded cognitive nature of organisational roles and routines, as Giddens (1984) describes in his structuration theory, represents these collective systems with which humans interact in their everyday tasks building an implicit level of habitual performance. The strategy-as-practice school of thought attempts to draw upon the internal systems of practice and organisational routines that are an institutionalised embodiment of what the firm represents, promoting the significance of contexts for the creativity and improvisatory practices that arise from repetitive engagement with artefacts (Whittington, 2003). In other words, the role of actors, tools, and organisational processes and practices cannot be ignored in the act of strategy formulation and implementation. There are parallels between the open innovation, strategy-as-practice and open strategy domains, these are explored in greater detail further into this paper.

The remainder of this paper is structured as follows; the methodology undertaken in this study is identified in order to explain the choice of extant work included within the scope of this review. Subsequently a comprehensive and informed definition is provided for the construct of ‘open strategy’, which is thereafter adopted as the dominant definition for the remainder of this paper. Finally, a synthesis of the key debates in the field on the basis of

extant literature is provided, prior to concluding with an agenda for potential streams of future research to explore in order to enhance our understanding of this emergent concept of open strategy in strategic management practice.

## METHOD

Given the objective of this paper is to identify, review and organise prevailing knowledge and insights into the phenomena of open strategy practices as reported in extant academic scholarship, this study deliberately adopts an eclectic approach to the literature review – similar to that described in Okwir et al. (2018). In line with the guidelines suggested by Transfield et al. (2003) a six-stage process for sample selection is implemented, as demonstrated in Figure A, and explained below.

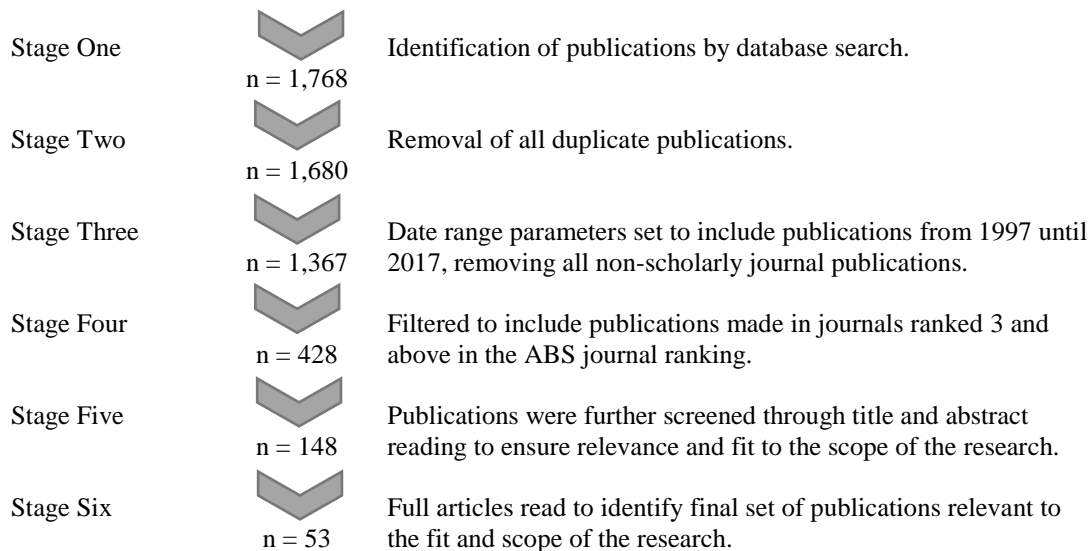


Figure A. Six stage process for SLR sample selection

*Stage 1.* Keywords selected for the database search were identified from the background literature as well as other publications in the domain; these were identified to be ‘open strategy’, ‘open innovation strategy’, ‘interactive strategy’ and ‘democratic strategy’ (Whittington et al., 2011; Stieger et al., 2012). Emphasis was placed on the facets of strategizing that encouraged this openness in practice, those being the dimensions of inclusiveness and transparency (Whittington et al., 2011) and participation (Hutter et al., 2017). Therefore, different strings related to strategy formed the primary sources with the integration of secondary keywords ‘transparency’, ‘inclusive’ or ‘participative’. The full strings used are identified in Figure B.

1. ‘open strategy’ AND inclusi\* OR transpar\* OR participat\*
2. ‘open innovation strategy’ AND inclusi\* OR transpar\* OR participat\*
3. ‘democratic strategy’ AND inclusi\* OR transpar\* OR participat\*
4. ‘interactive strategy’ AND inclusi\* OR transpar\* OR participat\*

Figure B. Key search strings used for sample selection

*Stage 2.* Removing duplicates narrowed the database search results from the original 1,768 results to an output of 1,680 outputs.



*Stage 3.* The publications were further filtered in order to include only peer-reviewed articles, with the dates ranging to incorporate publications until 2017.

*Stage 4.* The results were filtered again in relation to the journal rankings on the Chartered Association of Business Schools (ABS) journal guide. The primary purpose of employing this search strategy was to identify those academic journals that resonate best within the scientific community in the field of strategic management knowledge. Moreover, this method enables a consistent standard of publications to augment the literature review as noted by McGovern (2014) who adopts a similar methodology.

*Stage 5.* Screening the articles by reading the title and abstract enabling an assessment of relevance and fit of the identified publications to the scope of this research, resulting in 98 papers selected. Where the abstract was not entirely clear, the paper was included for full appraisal anyway.

*Stage 6.* The 98 papers were then fully appraised to assess their suitability to this research using filtering criteria to identify those with a clear definition or explanation for the construct of open strategy.

Focusing specifically on works published in peer-reviewed academic journals ensures a systematic and rigorous means of understanding the unique and distinctive contribution of such publications (McGovern, 2014). Excluding studies (stage 5 & stage 6) that fulfilled the original selection criteria, but not the objectives of this review, mainly because they do not address strategizing practices in the domains of strategic management or organisational studies. Consistent with the objectives of this review, the number of articles with a definitional focus were found to be predominantly conceptual in nature, with very few studies addressing open strategizing practices with an empirical focus. This is further explored in the proceeding section of this review paper.

## KEY FINDINGS: *What is Open Strategy?*

Whilst numerous terminologies have endeavoured to put forward a granular or seasoned description for what constitutes this recent phenomenon; more explicitly democratic strategy, strategy as a practice of thousands, open source strategy, open coordination and open strategizing have all been used interchangeably in literature to explain comparable concepts (Matzler et al., 2014). More ubiquitously though, the underlying fundamentals, or principles of open strategy (Amrollahi & Rowlands, 2016); those of *inclusion* and *transparency* (Whittington et al. 2011) and more recently *IT-enabledness* (Tavakoli et al. 2015a) have remained consistent in academic publications. Presently, these three philosophies of open strategy are widely acknowledged in the field of strategic management planning, with numerous theoretical studies (Whittington et al., 2011; Chesbrough & Appleyard, 2012) and empirical investigations (Stieger et al., 2012; Dobusch & Kapeller, 2013) upholding the view that these three foundational elements increase the effectiveness of strategic planning and decision making. This study proposes that there is a fourth dimension of *participation*, that whilst recognised in scholarly debate, has received relatively little attention as a standalone entity that merits further exploration under the more broad theoretical principles of open strategy. Referring to the existing literature, the concept of open strategy can be recognised through these four general principles identified above and discussed in more detail in Table 1.

**Table 1**

<i>Principles of Open Strategy</i>	<i>Facets/Descriptors</i>
<b>Inclusiveness</b>	<ul style="list-style-type: none"> <li>Seeking user opinion through active engagement and involvement of external stakeholders in the decision-making process (Gegenhuber &amp; Dobusch, 2017)</li> <li>Digital/internet-based forum participation to enable interactions between varied group of internal and external stakeholders (Malhotra et al., 2017)</li> <li>Dependency on external resources from out with the boundaries of the focal firm (Appleyard &amp; Chesbrough, 2017)</li> <li>Makes reference to involvement of both internal and external actors in the process of stakeholder consultations and co-strategizing (Doz &amp; Kosonen, 2008)</li> </ul>
<b>Participation</b>	<ul style="list-style-type: none"> <li>Means of amassing a greater level of input through the collation of ideas and suggestions to influence decision making (Quick &amp; Feldman, 2011)</li> <li>Enables centralised organisations to amass greater amounts of information about its environment and generate robust contingencies (Mack &amp; Szulanski, 2017)</li> </ul>
<b>Transparency</b>	<ul style="list-style-type: none"> <li>Accessibility of information about an organisation's strategy, both during the planning process and also the generated output (Mack &amp; Szulanski, 2017)</li> <li>Distribution of relevant information and material that is clearly visible (Gegenhuber &amp; Dobusch, 2017)</li> <li>Making project results visible and accessible for external actors (Appleyard &amp; Chesbrough, 2017)</li> <li>Visibility of information to both internal and external audiences, involving the creation and sharing of knowledge and ideas (Whittington et al., 2011)</li> </ul>
<b>IT-enabledness</b>	<ul style="list-style-type: none"> <li>Use of IT in order to increase participation is essential for the strategy process (Tavakoli et al., 2015a; Haefliger et al., 2011)</li> <li>Social media and associated platforms as facilitators for participation and engagement (Amrollahi et al., 2014)</li> <li>Co-creation and collaboration platform that enable participation in open strategy (Schlagwein et al., 2011)</li> </ul>

These four underlying principles have been investigated through numerous theoretical and empirical studies. For instance, Newstead & Lanzerotti (2010) imply open strategy is an enabler for leveraging the knowledge of external stakeholders in strategy creation. Whittington et al. (2011) promote the practice as a way of developing commitment and understanding in the implementation of strategy as well as informing the scope of ideas considered. Based on the literature, ultimately the four elements identified are interweaved as the foundational elements underpinning what changes open strategy represents in strategy formation and implementation. Significantly though it should be noted that the degree of openness in strategic decision-making is contingent upon a spectrum (Tavakoli et al., 2015b) rather than a binary, either-or category. “*Organisational strategies differ on the degree of openness on a continuum; that is, organisational strategies are not either completely open or completely closed*” (Tavakoli et al., 2015b: 4). Acknowledging the extent to which organisations become more (or less) inclusive, transparent, participative and IT-enabled intrinsically influences the degree of openness in strategy formulation.

## CONSOLIDATED DEFINITION

Initially, Chesbrough & Appleyard's (2007) innovations perspective and Doz & Kosonen's (2008) take on strategizing through a conversational dialogue through a wider organisational audience, were the original publications in the strategy management domain; the first recognition of open strategy appears in the psychological sciences field. Liinamaa et al. (2004) refer to this phenomenon as a form of 'collaborative strategic planning' where participants share knowledge and partake in strategic planning initiatives designed to encourage dialogue and conversation. With this social science take on collaborative strategy, Whittington et al. (2011) attempt to contemporise open strategy by characterising this as a transparent and inclusive means of strategizing that facilitates wider involvement of actors beyond the traditional inward-looking boundaries of the firm, before adding the third dimension of IT-enabledness as a support mechanism that enables the widespread dispersion and involvement of internal and external stakeholders. Whilst the fourth dimension of open strategy remains a recognised, however in our opinion undervalued component part, the widespread omission of participatory practices in the definition of open strategy is an oversight in existing academic publications. As the study has shown participation to be different from inclusion, it's submersion within the inclusion branch of open strategy literature diminishes its impact on open strategy practices. In order to compute a consolidated definition for open strategy, a review of the definitions given in prevalent literature is presented in Table 2.

Founded upon the review of existing literature, the four principles, dimensions or even characteristics of open strategy are taken to be sufficient underpinnings to define the 'open' element of open strategizing. Having already defined strategy under the umbrella of Porter (1980: 16) where strategy is seen to be a blueprint for "*how a business is going to compete, what its goals should be, and what policies will be needed to carry out those goals*".

Borrowing from Tavakoli et al. (2015b: 5), the practice of open strategy therefore is taken to be "*an inclusive, transparent, [participative] and information technology (IT)-enabled process to develop and enact a formula for how an organisation is going to compete, what its goals should be and what policies will be needed to carry out those goals*".

This definition of open strategy reciprocates to the requirement for a comprehensive characterisation of what the phenomena entails, and whilst the field remains relatively emergent this definition isn't absolute or definite, instead it provides the framework for more considered integration of future research in this field. This paper proceeds to outline a research agenda with suggested directions for future scholarly explorations to investigate, and whilst it is by no means exhaustive, it provides an indication of potential streams for scholarly debate.

**Table 2**

<b>Publications</b>	<b>Definition</b>	<b>Key Facets of Open Strategy</b>
Appleyard and Chesbrough (2017)	<i>Open strategy balances the tenets of traditional business strategy with the promise of open innovation. It embraces the benefits of openness as a means of expanding value creation for organisations.</i>	Collaboration Open Innovation Value Creation
Whittington, Caillaud & Yakis-Douglas (2011)	<i>Open strategy widens inclusion and increases transparency. Inclusion refers to participation in an organisation's strategic conversation, the exchanges of information, views and proposals intended to shape the continued evolution of an organisation's strategy. Transparency refers to the visibility of information about an organisation's strategy, potentially during the formulation process but particularly with regard the strategy finally produced.</i>	Inclusion Transparency IT Tools & Platforms
Hautz, Seidl & Whittington (2017)	<i>Openness in the strategy process is a multifaceted, contingent and complex phenomenon. The framework focuses on how increasing levels of openness through broader inclusion change the way how and with whom involved individuals interact and build relationships.</i>	Contingencies Network-Perspective Inclusion Transparency
Mack and Szulanski (2017)	<i>Open strategy in centralised organisations requires to overcome the generalisation that decision making is driven by top management, they suggest that centralised organisations can manage this tension by combining participatory and inclusive practices. Whereas participation is about increasing stakeholders' input for decisions, inclusion is about creating and sustaining a community of interacting stakeholders engaged in an ongoing stream of issues in the strategy process.</i>	Participation Inclusion Transparency (De)Centralisation
Luedicke, Husemann, Furnari and Ladstaetter (2017)	<i>Strategizing practices aimed at including more internal and external stakeholders and communicating strategic choices more transparently.</i>	Open agenda setting Open participation Open governance
Birkinshaw (2017)	<i>The easiest way to define Open Strategy is in terms of what it is not. The traditional model of strategy-making was elitist and secretive: a small number of executives at the top of the firm (plus their advisors) were involved in the formulation process, and information about key decisions was shared on a need-to-know basis. In truth, this traditional model is a caricature that few firms entirely lived up to, but it provides a useful anchor to our understanding of the ways in which strategy-making is changing, namely towards giving employees and outsiders more involvement in the process and more information about what is decided.</i>	Commons-based production Crowd-based inputs Collective buy-in and action Collective sensemaking
Hautz, Seidl & Whittington (2017)	<i>At its simplest, Open Strategy promises increased transparency and inclusion regarding strategic issues, involving both internal and external stakeholders. With openness, more strategic information is available, and more people can engage in the strategic conversation.</i>	Transparency Inclusiveness Degrees of openness
Appleyard & Chesbrough (2017)	<i>Two branches of Open Strategy have emerged: a 'content' branch that examines the ability of organisations to sustain themselves economically with an open approach to innovation; and a 'process' branch that explores the systems that can enhance strategy formulation by furthering participation of both internal and external actors and improving transparency inside and outside of the firm.</i>	Participation Open Innovation Reversion Strategies
Tavakoli et al. (2015a)	<i>Open strategy refers to an inclusive, transparent and IT-enabled process to develop and enact a formula for how an organisation is going to compete, what its goals should be and what policies will be needed to carry out those goals.</i>	Inclusion Transparency IT-enabledness Strategy Process Model

## AREAS OF EXTANT ACADEMIC EXPLORATION

Initial concepts of open strategy were diverse in their interpretation of what characterised this phenomenon. Chesbrough and Appleyard (2007) first derived the term open strategy as an extension of the open innovation paradigm, advocating the ideologies of collaboration and open dialogue as parallels between the two areas of discourse. They promote open strategy as an iteration of and strategic development following-on from the popular open innovation school of thought. Doz and Kosonen (2008) progress the increased dialogue nuance of open strategy resulting in a more comprehensive form of co-strategizing, whilst Schmitt (2010) in following a similar line of academic enquiry provides impetus on the flow of knowledge and ideas through a consultative approach to strategizing.

Whittington et al. (2011) attempted to capture these wide-ranging explanations across two dimensions in their conceptualisation of what constitutes open strategy. Namely the dimension of inclusion, “*referring to internal or external consultation*” (Hautz et al. 2017: 299) and transparency, “*referring to the internal and external visibility of information about an organisation’s strategy*” (Hautz et al. 2017: 299). However, these two dimensions should not be restricted in application to solely the early scholarly views, as they have been used to convey interrelated themes in equivalent research paths both within the specific domain of open strategy and in associated fields. Research in Information Technology (IT) is promoting the potential of social media channels and platforms as a means of accessing and engaging wider audiences, thus encouraging inclusiveness whilst also ensuring transparency of communication through increased visibility of conversations and threads of conversational exchanges between both internal and external actors (Gast & Zanini, 2012; Haefliger et al., 2011). Tavakoli et al., (2015a) provide a more informed discussion of where academic literature positions itself in relation to the empirical research conducted on open strategy – see Table 3 for an insight into the practitioner-based elements of open strategizing.

Moreover, looking at the transparency dimension, schools of thought in the impression management and public relations field have been investigating the role of increased openness towards external actors (Hautz et al., 2017) as means of significantly improving the comprehension of strategy by external stakeholders (Benner & Zenger, 2016). Baptista et al., (2017) explore the various mechanisms through which IT can facilitate open strategy practice, such as wikis, blogs, and live video streaming. They argue that these technologies harvest varying degrees of openness in transparency, particularly in relation to the types of information made available to certain audiences and the freedom from control measures and moderators. Yakis-Douglas et al. (2017) extend this notion further by distinguishing between the disclosure of information willingly by organisations as well as involuntarily due to external, and in some cases internal pressures.

The most pertinent example of this mandatory disclosure can be seen in the aftermath of the global financial crisis, where banks and other financial institutions came under immense pressure from regulators, government bodies and institutional investors to mandatorily disclose information regardless of managerial preference.

In a similar vein, the element of inclusiveness also incorporates differing levels of openness, the primary distinctions of which come in two forms; participation and inclusion. Quick and Feldman (2011) differentiate between participation and inclusion in government initiatives, conveying participation to be a lesser form of engagement, concerned with harnessing ideas and gathering information (Mack & Szulanski, 2017). Whereas inclusion refers to more powerful involvement of actors in the crowd-sourcing strategic efforts of an organisation,

**Table 3**

CASE	PRACTICES IN OPEN STRATEGY			
	<b>Transparency</b>	<b>Inclusivity</b>	<b>Participation</b>	<b>IT-Enabledness</b>
IBM	<ul style="list-style-type: none"> <li>&gt; Centralised platform used to facilitate social discussions</li> <li>&gt; Encouraging input through open internal calls that are all-encompassing.</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Following open strategy principles that encourage inclusiveness</li> <li>&gt; Online portal used to facilitate discussions and encourage sharing of knowledge and ideas.</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Collated ideas and gathered group consensus using machine learning and analytics to support this process.</li> </ul>	<ul style="list-style-type: none"> <li>&gt; ‘Jamming’ or ‘internal crowdsourcing’ technique used to facilitate amalgamated parallel online conferences.</li> </ul>
Wikimedia Foundation	<ul style="list-style-type: none"> <li>&gt; Public Wiki forum to discuss strategy initiatives and objectives</li> <li>&gt; Captured all ideas and discussions on accessible wiki pages</li> <li>&gt; Forums and accompanying commentary methods used to engage users.</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Collective process of generating ideas and strategic decision-making with the online community.</li> <li>&gt; Changes/alterations were tracked through multiple versions of Wiki page(s).</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Agreeing on topics to be progressed collaboratively through wide participation</li> <li>&gt; Made us of video conferencing technologies to facilitate discussions amongst decision makers.</li> </ul>	<ul style="list-style-type: none"> <li>&gt; ‘Strategy wiki’ or virtual workspace established that enabled transparent and collaborative authoring of strategic goals being developed.</li> </ul>

*\*Adapted from Tavakoli et al., (2015a: 175)*

whereby stakeholders are involved in the evaluation of and commenting on the wider sphere of strategic decision making and implementation (Hutter et al., 2017). Participation differs from inclusion, despite Whittington et al. (2011) using the two terms interchangeably to describe inclusivity in open strategy, Andersen (2004) advocates participations as a method for generating multiple ideas and suggestions. Herein lies the primary distinction between participation and inclusion, as broader stakeholders don’t necessary have the necessary insights to partake in prolonged strategic conversations, counterintuitively this could actually contribute to an ineffectual outcome as stakeholders may feel burdened with responsibilities that fall out with their remit (Mack & Szulanski, 2017; Westley, 1990). Instead by providing their ideas and suggestions through participatory involvement, stakeholders are not burdened with the deeper involvement more commonly associated with inclusiveness.

There is a growing sense that openness isn’t binary - as straightforward as being open or not - instead it is enacted across a spectrum with varying degrees of openness within which the nature of the disclosed information is not always discretionary (Hautz et al., 2017). Organisations are increasingly involving a wider range of internal and external stakeholders in their strategizing practices, yet the field remains relatively under-researched given the newness of the phenomena and its application as a practice-in-motion study that is constantly evolving.

## PROPOSED RESEARCH AGENDA

In developing a cohesive definition and conceptualisation of open strategy in the previous section and exploring the key domains in which this practice has been noted. This section looks to now provide support for future research and academic discourse in the field of open strategy. Whilst scholarly debate has long since surpassed the initial contributions to the topic (Chesbrough & Appleyard, 2007; Doz & Kosonen, 2008) with more dynamic understanding of what constitutes open strategy and the underlying dimensions that shape the practice. There is a recognition however that the academic discipline has only scratched the surface in the exploration of what open strategy represents. Practitioners and organisations are only beginning to employ open strategy practices and new ones are emerging as organisations experiment with the practice, all the while research attempts to make sense of this phenomenon in real time.

Firstly research has attempted to explore the role of practitioners, practices and praxis in open strategy, exploring their influences on the process of open strategizing. Morton et al. (2015) touch on the roles of external facilitators whilst Laari-Salmela et al. (2015) look at the levels of internal engagement across multiple layers of hierarchy. Birkinshaw (2017) suggests further exploration on the types of open practices used by organisations and how these may differ when addressing internal and external audiences, as well as their effectiveness when employed inside the boundaries of a firm as opposed to the external world. Whilst there is merit in exploring the underlying facets of open strategy relative to the aforementioned scenarios, this study suggests that researchers take a nuanced view by considering the proponents of agency theory in the relationship between the organisation and the external actors involved in open strategizing. Moreover, power balances should be considered between internal audiences as noted by Amrollahi and Rowlands (2016), where powerful stakeholders can carry more sway than other parties involved, even in the case of more open forms of strategy practice. Future research should look to extrapolate the underlying conditions that enable or as the case may be restrict open strategic practices in light of these areas of scholarly discourse.

Secondly, Appleyard & Chesbrough (2017) explore the adoption of and reversion to open or closed strategy as a continuum, whereby organisations may find themselves navigating between the two at various junctures of the organisational or product lifecycles. However not enough attention has been placed on the preparatory phases that precede the adoption of an open or closed strategy form. In what is referred to as the readiness phase, organisations need to make the necessary arrangements to enable the firm to successfully adopt a particular strategic form as with any change management program there are additional considerations to take into account. Involving a wider audience in the strategy formulation or implementation process is not straightforward as flicking a switch, there is a need to communicate this change to all stakeholders. Moreover, internal stakeholders may feel uneasy with the concept of open strategy and therefore may require additional support in the readiness phase to enable effective involvement and engagement within the open strategy process. Here the role of enabling technologies, tools and practices will inevitably shape the successful adoption of open or closed strategies.

Increasingly, the influence of network-inspired forms of ‘business ecosystems’ (Jacobides et al., 2018) on contemporary organisational practices is giving rise to new forms of competitive behaviours (Moore, 1996), more specifically cooperative competition – or ‘co-opetition’ (Tsai, 2002) – whereby creating and achieving shared value becomes the defining purpose (Iansiti & Levien, 2004a). Prevalent literature streams have explored strategic management of



these ecosystems from the perspective of focal or ‘keystone’ firms (Zaheer & Bell, 2005; McIntyre & Srinivasan, 2016; Helfat & Raubitschek, 2017; Jacobides et al., 2018), who are often determined as the leading organisation(s) responsible for the overarching health of the ecosystem. Iansiti & Levien (2004b: 71) explain a “*keystone strategy is an operating strategy that improves the overall health of the ecosystem*”, a sentiment echoed by Moore (1998) who extends the power of these ecosystem leaders noting that they “*tend to make other members of the ecosystem reluctant to switch*”. Despite the attention given to lead firms, prior research has thus far failed to adequately address the strategizing activity of participating firms who deliver the complimentary products essential for driving the core products (McIntyre & Srinivasan, 2016). Achieving strategic alignment amongst participating firms is the definition given to ecosystem strategy by Adner (2017), yet extant literature has thus far failed to address how this ‘strategic alignment’ can be achieved through strategizing practices; choosing instead to focus the analysis on governance and control mechanisms established by keystone firms. This paper posits that future research explore the strategizing activity of both keystone and complementary firms that participate in these ecosystems, with the intention of developing a structural understanding of how strategic alignment accrues in these ecosystem environments. Applying the lens of open strategy could provide valuable insights into the assumed participatory, inclusive and the relatively transparent nature of strategic decision-making with the boundaries of a business ecosystem.

Additionally, it is proposed that scholarly discourse investigate the application of institutional theory in relation to the developments observed within the open strategy paradigm. Goldenstein & Walgenbach (2018) suggest the convergence in globally shared cultural norms and beliefs in an ever more homogenous, globalised world should naturally signify the growth of open strategy practice. In their view there is nothing unexpected or revolutionary in the emergence of this recent phenomena, instead they propose that open strategy is a by-product of the general globalisation trend we have observed in an increasingly homogenous world society. Moreover, institutional theory may provide an alternative perspective or lens through which open strategy can be further explored. We have seen the parallels drawn between open innovation and open strategy and more loosely with the strategy-as-practice school of thought as well, however neo-institutional theory perspectives can provide additional insights into the social interactions an organisation has with its wider stakeholders. Considering the impact of these interactions and their role in strategic decision-making whether it be through participative, inclusive or transparent would be a potential stream for future research to address.

Strategy-as-practice researchers have already been angling for investigations into performative practice to be explored at lower aggregate levels of analysis (Johnson et al. 2007) looking at outcomes at the individual or group level as opposed to the aggregated divisional or firm level indicators usually reported in management literature. Guerard et al. (2013: 568) state that “*there is a lot to be gained from being able to see the chain of consequences leading from individual and collective strategic actions to outcomes at a lower level of analysis*”. This is one way (although not the only way) in which notions of performance might be usefully reconsidered in strategy research. This study suggests performativity be taken not only as a measurable output for strategic management but instead also as an input into the equation with respect to the choice of strategic intervention, whether closed or open forms of strategy would be most effective.

Moreover, scholarly debate has thus far failed to adequately capture the readiness efforts of organisations including those of their strategy managers or practitioners in preparing their firms and stakeholders for open strategizing. The methods and tools employed in

communicating with stakeholders, engaging them with the strategy initiative and securing their buy-in are all imperative in readying the organisation for the chosen form of strategic decision making. The role of IT has already been investigated as a means of dispersing information, making it widely available to a wide range of stakeholders both internal and external to the organisation. However, it is proposed that academic research has not sufficiently captured the pre- (open) strategizing efforts of an organisation and its senior strategists in preparing their firm and its stakeholders for open strategy making and implementation.

Finally, as outlined earlier in this paper, extant academic research has yet to truly realise how prevalent (or not) ‘open strategizing’ is within industry practice. Hence, it is paramount that future academic scholarship adopts more of an empirical lens for investigating this emergent phenomenon of ‘open strategy’ in order to validate some of the claims made in prevalent conceptual discourse.

## CONCLUSION

In summation this paper has considered the extant scholarly literature on open strategy and outlined the contribution of key authors in the academic domain of strategic management. In acknowledging the four underlying dimensions, namely those of inclusion, transparency, participation and IT-enabledness, this paper has delivered a consolidated definition for what constitutes open strategy. In line with Tavakoli et al. (2015b: 5), the practice of open strategy is taken to be “*an inclusive, transparent, [participative] and information technology (IT)-enabled process to develop and enact a formula for how an organisation is going to compete, what its goals should be and what policies will be needed to carry out those goals*”. Moreover, this research paper has identified facets of open strategy that require further attention than what is offered in existing scholarly reflection, thus encouraging future academic exploration to delve further into the nuances of the open strategy paradigm. Finally, through a considered review of extant literature and in recognition of the gaps in prevailing research, this study provides an agenda for future academic exploration to consider, and whilst these are by no means extensive, they do nonetheless outline a structured agenda for potential investigation.

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