4. Inter-organizational strategizing

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Abstract

More and more organizations adopt a form of inter-organizational strategizing, i.e. they jointly engage in a strategy process with other organizations. The phenomenon is increasingly the subject of scholarly attention but not always under this label, and research has been scattered across domains. In this chapter we provide an overview of research that has studied inter-organizational strategizing from the theoretical perspectives of sensemaking, dynamic capabilities, operational research, business communication, and industrial networks. Building on these perspectives, we discuss four different purposes that inter-organizational strategizing can serve: exploring strategic issues, learning from past experiences, building legitimacy for strategic change, and strengthening relationships with other organizations. We discuss the difference between face-to-face and online inter-organizational strategizing in terms of the number of participants, place and time, topics, and structure. We indicate potential avenues for future research on the process of inter-organizational strategizing, its outcomes, as well as methodological opportunities.

1. Introduction

Increasingly, organizations choose to develop their strategy collaboratively with other organizations, which is known as 'inter-organizational strategizing'. These new forms of collaboration are quite remarkable not least because they seem to go against much of the traditional strategy research (Barney, 2001) which puts a premium on inimitability. Inter-organizational strategizing can be formally defined as *engaging in a strategy process jointly with other organizations*. This definition distinguishes inter-organizational strategizing from other forms of collaboration that do not involve autonomous organizations. Inter-organizational strategizing may be asymmetrical, with one organization explicitly taking the lead and asking other organizations to join its strategy process (e.g. Aten and Thomas, 2016), or symmetrical, with several organizations joining forces on a more or less equal basis (e.g. Teulier and Rouleau, 2013). Inter-organizational strategizing also varies in its degree of formality. On the one end of the spectrum we have collaborations in the form of official workshops and meetings. On the other end we have informal discussions on strategy among strategists that meet for instance at a conference.

Although many studies discuss instances of inter-organizational strategizing, few do so explicitly under this label. Indeed, there are numerous labels that describe broader or narrower phenomena related to inter-organizational strategizing. For instance, 'open foresight' (Schmidthuber and Wiener, 2018) and 'networked foresight' (Van der Duin et al., 2014) refer to inter-organizational discussions and analyses of future developments. These can be seen as more specific instances of the type of inter-organizational strategizing that focuses on the exploration of strategic issues. However, inter-organizational strategizing is much broader and can involve more than mere foresight – for example, joint decision-making. Another related term is 'stakeholder engagement', which refers to organizations collaborating with external stakeholders (de Gooyert et al., 2017). Stakeholder engagement, however, is a broader phenomenon than inter-organizational strategizing, as it is often about informing

external stakeholders, rather than including them in the process of forming a strategy, and can be operational and tactical as well as strategic (Green and Hunton-Clarke, 2003). Another difference between stakeholder engagement and inter-organizational strategizing is that the former can refer to collaborative strategy processes between otherwise unrelated organizations that are not necessarily stakeholders. Similar to stakeholder engagement, 'coopetition' and 'alliances' do not always represent cases of inter-organizational strategizing, but may describe short-term collaboration on tactical issues (Bengtsson and Kock, 2014).

In this chapter we provide an overview of the existing research on inter-organizational strategizing. We start by introducing the different theoretical perspectives from which inter-organizational strategizing is examined in the literature and then we discuss why firms engage in inter-organizational strategizing at all, and what forms this phenomenon may take. We conclude this chapter with a discussion of potential avenues for future research.

2. Theoretical perspectives on inter-organizational strategizing

In this section we present the main strands of the literature on inter-organizational strategizing (see Table 1 for an overview of all empirical studies). Several different approaches inform the study of inter-organizational strategizing: sensemaking, dynamic capabilities, operational research, industrial networking and business communication. Below we examine each in turn and look at how the findings from the respective strands of the literature contribute to inter-organizational strategizing research.

Table 1: Empirical studies on inter-organizational strategizing

Reference	Setting/topics	Main function	Main form	Perspective
Abrahamsen et al. (2016)	Norwegian food industry	Strengthening relationships	Face-to-face	Industrial networking

Aten and Thomas (2016)	U.S. Navy and stakeholders	Exploration	Online	Business communication
Bowman (2016)	Public planning by U.K. local council and partners	Exploration, legitimacy building	Face-to-face	Sensemaking
Brabham (2009)	Hypothetical participatory planning	Learning, legitimacy building	Online	Business communication
de Gooyert et al. (2016)	Dutch energy industry	Exploration, legitimacy building	Face-to-face	Operational research
Deken et al. (forthcoming)	Architecture industry	Exploration	Face-to-face	Dynamic capabilities
Franco (2008)	UK construction industry	Strengthening relationships	Face-to-face	Operational research
Hardy et al. (2006)	Canadian HIV/AIDS domain	Exploration	Face-to-face	Sensemaking
Heger and Boman (2015)	EIT ICT Labs and partners' innovation radar	Exploration	Face-to-face and online	Dynamic capabilities
Öberg et al. (2016)	Taiwanese optical recording media industry	Strengthening relationships	Face-to-face	Industrial networking
Rouwette et al. (2016)	Public policy in a Dutch problem-neighbourhood	Learning, legitimacy building	Face-to-face	Operational research
Seidl and Werle (2018)	1) Water as a resource and 2) flexible production	Exploration, learning	Face-to-face	Sensemaking
Teulier and Rouleau (2013)	3D design software in the civil engineering sector	Learning, exploration	Face-to-face	Sensemaking
Wilkinson and Mangalagiu (2012)	World Business Council for Sustainable Development	Exploration	Face-to-face	Dynamic capabilities
Wilkinson (2003)	Exploration of broad changes in society	Exploration	Face-to-face	Dynamic capabilities

Sensemaking

Sensemaking is the process through which people give meaning to experiences and observations (Weick, 1995). Several studies have adopted sensemaking and related approaches as a framework for studying how inter-organizational strategizing affects the meanings that strategists give to their experiences and observations. Seidl and Werle (2018) use the main aspects of sensemaking that Weick (1995) defined – namely, cues, frames and relations – to investigate the effect of the involved participants on the inter-organizational sensemaking process. In addition, they emphasize that the sensemaking process depends on how participants will bracket and label cues and how significant these cues are for them. The authors draw on observations, interviews, and documents from two longitudinal case studies on inter-organizational groups that got together to make sense of strategic meta-problems collectively and show that the success of inter-organizational strategizing also depends on the selection of participants. Their work investigates how the participants in a process of inter-organizational sensemaking were selected and how the selected participants influenced the sensemaking dynamics of that process. The authors found that the set of initial cues the initiators of the collaboration provided determined which frame repertoires the participants consider important and relevant and what type of partner they seek. The conclusion they draw is that when the cues change, the frame repertoire and the constellation of participants may also change.

Hardy et al. (2006) have shown that the success of inter-organizational collaborations depends on the conversations between the participants, who may represent a variety of organizations, on a particular issue. This research is based on a case study of the Canadian Treatment Advocates Council, a multi-sector collaboration set up to address treatment issues associated with HIV/AIDS. Hardy et al. (2006) show that whether these conversations are successful depends on four factors: identification, interest, coherence and contribution. More

specifically, the authors found that the participants must be interested in engaging in conversation with each other and able to identify with the conversation, to achieve coherence in meaning and to contribute without eradicating or ignoring the competing tensions between constituency and collaboration.

Teulier and Rouleau (2013) build on the study of Hardy et al. (2006). They focus on middle managers' sensemaking and sensegiving activities in a cross-sector study group. They investigate the Communic Group, a French inter-organizational collaboration project set up to examine the challenges and benefits that adopting a 3D-design software platform entailed for organizations in the public works and civil engineering sector. In their study, the authors adopted the so-called 'translation perspective' to show how middle managers make sense of change at the inter-organizational level. The translation perspective focuses on how ideas travel from one context to a different context and are 'translated' from one language into another on the basis of specific editing rules (e.g. Sahlin and Wedlin, 2008). They found multiple translation spaces at the inter-organizational level. Each of these 'translation spaces' has its own logic; at the same time, however, all translation spaces in the same broader context are interdependent. The translation spaces characterized by specific communication activities are intensive working sessions, industrial visits, writing sessions, and organizational meetings and talks. The middle managers of the studied organizations act as translators by transforming meaning from one context to the other. In each space, middle managers employed specific editing or translating practices, such as reframing and rationalizing the change.

In another study, Bowman (2016) demonstrated the flow of practices and artefacts used in sensemaking in the context of inter- and intra-organizational strategizing. Bowman examined the practice of scenario-planning in inter-organizational planning cycles through the so-called 'simplexity' lens. 'Simplexity' is understood as the interconnectedness between

sensemaking, organizing and storytelling (Colville et al., 2012, p. 5). Bowman (2016) based

his analysis on a longitudinal case study of Northshire Partnership (a pseudonym), consisting

of a local council, health services, policing, education, voluntary sector etc., to carry out a

community planning project for their region. His findings show that although scenario-

planning shaped the strategy process at the inter-organizational level, it did not influence the

strategy process at the intra-organizational level. This particular study also demonstrates how

strategy tools interact with and shape strategy processes in inter-organizational collaborations.

Dynamic capabilities

Studies based on the 'dynamic capabilities' approach investigate the ability of organizations

to adapt effectively to their changing environment (Teece et al., 1997). In this body of

literature there are several works that focus on the impact of inter-organizational strategizing

on an organization's ability to adapt to its environment, although not all use explicitly the

label 'dynamic capabilities'. Heger and Boman (2015) used data from the European Institute

of Innovation and Technology ICT Labs on the 'networked foresight tool' to examine its

impact on the basic aspects of dynamic capabilities (i.e., sensing, seizing, recombination and

reconfiguration) in inter-organizational innovation networks. This tool consists in a set of

practices that facilitate scanning, sensing, interpreting and utilizing internal and external

signals of change. Partnerships often use this tool to develop jointly preparatory strategies that

will enable the partners to meet the challenges they are facing or to influence their

environment. Heger and Boman (2015) found that the partners who form a network use this

tool primarily for sensing activities and that developing a shared vision is particularly

valuable for the entire network.

Deken et al. (forthcoming) explain how managers establish resource complementarity

in order to achieve inter-organizational collaboration. The authors base their analysis on a

longitudinal field study of an automotive company and show that resource complementarity is jointly established in the course of interacting with multiple potential partners and through recursive cycles of what the authors refer to as 'prospective resourcing' (Deken et al., forthcoming). Prospective resourcing mediates the interplay of strategizing and collaboration, thereby reversing the prevailing logic that strategy precedes and determines collaboration. The findings of this study offer new insights into resourcing as a mechanism for developing strategic initiatives and show how external actors may influence strategizing.

Wilkinson and Mangalagiu (2012) studied the inter-organizational strategizing process by the World Business Council for Sustainable Development, which used scenario-based methods and visioning. This process involved a total of 29 companies whose representatives formed project groups that organized face-to-face workshops, carried out research and engaged in decision-making over a period of 18 months. The participants reported that the benefits of this collaborative process included individual learning, achieving systemic insights and establishing and improving relationships among them.

Operational research

Operational research focuses on increasing knowledge about the tools and methods that organizations can use to improve the quality of decision making. These tools and methods are increasingly used in inter-organizational processes to arrive at strategic decisions (de Gooyert et al., 2017). One example is 'facilitated modelling'. This practice involves working closely with stakeholders to construct a qualitative map or formal model of an issue of interest (Franco and Montibeller, 2010). Depending on the specific approach to facilitated modelling, the participants in this process can start by mapping the situation at hand, the desired outcome or the strategic actions they could take. Rouwette et al. (2016) and de Gooyert et al. (2016) studied facilitated modelling in the context of inter-organizational strategizing processes.

Rouwette et al. (2016) studied a Dutch municipality that partnered with external stakeholders (police officers, education officials, citizens) to address structural disturbances of public order in a problematic neighbourhood. The study revealed that although facilitated modelling allowed the participants to exchange adequate amounts of task-relevant information, sensitive issues that might have caused tension between some of the participants were not raised at all.

In another study, de Gooyert et al. (2016) studied a Dutch distribution system operator (DSO) that involved 96 stakeholders in a facilitated modelling process in order to manage the transition of the energy system towards a more sustainable system. For that purpose, the Dutch DSO organized eight workshops with the stakeholders. The study showed that through facilitated modelling the partners developed a shared view of the energy system and of how its subsystems inter-related; however, the findings also revealed that the diversity of viewpoints among the participating strategists limited the extent to which a common view can indeed be shared by all.

Business communication

Research on business communication in the context of inter-organizational strategizing represents a more recent strand of the literature. This body of research focuses on the use of social media, including practices such as social networking and crowdsourcing, in inter-organizational strategizing. Social media have radically changed the way people interact (Leonardi et al. 2013; Whittington et al. 2011). Business communication scholars emphasize the potential of making use of the interactive features of social media in organizational strategizing (Brummans et al, 2014). In general, these scholars focus on the role of communication in organizational social processes (Cooren et al., 2011). Crowdsourcing, which enables potentially large numbers of external stakeholders to solve problems collaboratively in a common digital space (Brabham, 2009), is of particular interest in this

context. More specifically, organizations can use crowdsourcing to implement an open-strategy approach (Cardon and Marshall, 2015; Stieger et al., 2012). Aten and Thomas (2016) analysed how crowdsourcing influences strategizing in inter-organizational collaborations. The authors gathered data from the Massively Multiplayer Online War Game (Aten and Thomas, 2016, p. 153), which includes a crowdsourcing website featuring online games, a blog and various videos. Their findings show that crowdsourcing platforms increase participation in the strategizing process, stimulate strategic conversation between internal and external stakeholders and encourage users to contribute innovative ideas (Aten and Thomas, 2016, p. 175).

Industrial network

The industrial network perspective has also been applied to the study of inter-organizational strategizing processes. The industrial network perspective focusses on how organizations relate their activities to those of other firms in order to enhance performance (Gadde et al., 2003, p. 357). Strategizing in the industrial network perspective means that firms operate in the context of interconnected business relationships. These firms identify the scope of actions, interests, and frames from existing and potential relationships rather than from the focal firm's point of view (Hákansson and Ford, 2002). In this perspective, the resources of each member of the network are tied to the resources of other members of the same network. Mattsson (1987) points out that strategizing within an industrial network involves making choices that influence how an organization relates to other members. Gadde et al. (2003) compiled an overview of the implications of strategizing in the context of an industrial network. Their study indicates that researchers need to consider the heterogeneity of resources available to the members of such networks, the interdependencies between the members' activities across firm boundaries and the form of inter-organizational collaboration.

Abrahamsen et al. (2016) incorporated the concept of 'network pictures' in the inter-organizational strategizing process. They use the concept of 'network pictures' to analyse the interplay between cognition and action, in particular with regard to how managers perceive the environment and what they do. 'Network pictures' is the term the authors used to describe the situational cognitive representation of the network as a context. Network pictures indicate how actors view their surroundings and the logic underlying their actions (Henneberg et al., 2006). The authors follow a novel research approach, combining the methodologies of process research and action research to analyse a longitudinal case study of one of the leaders in the Norwegian food industry.

Many studies based on the industrial network perspective focus on the strategizing activities of firms in business networks. Few studies, however, examine how an organization develops different strategies. One of these exceptions is the study by Öberg et al. (2016), who developed a typology of network strategies and their effects on the other organizations. Their study focuses on how a Taiwanese manufacturer of optical recording media developed its strategies through its interaction with its business customers and suppliers. Öberg et al. (2016) identified 'complementary', 'shared', 'copying', 'company-rooted', and 'challenging strategies' and provide evidence that each has different effects.

3. The main functions of inter-organizational strategizing

Organizations deploy inter-organizational strategizing for four main purposes, which we will discuss in depth below: exploration, learning, legitimacy-building and strengthening relationships. Inter-organizational strategizing can also serve these different functions simultaneously, including functions different from those that the strategists originally planned (See also Table 1 on the different functions reported in the literature).

Exploration

Inter-organizational strategizing is often used in the early phases of decision-making to explore strategic issues before deciding which strategic direction to take. Exploration, or 'environmental scanning', helps organizations adapt to the changing circumstances in their environment in a timely manner (Aguilar, 1967). Environmental scanning is influenced by an organization's current and past strategies (Hambrick, 1982). Within an organization, different perceptions of the environment tend to converge over time. This convergence leads to a high degree of shared cognition within the boundaries of the organization (Sutcliffe and Huber, 1998). Collaborating with other organizations, in contrast, increases the diversity of viewpoints that strategists may consider in their efforts to understand their organization's environment (Doz and Kosonen, 2008; Pina e Cunha and Chia, 2007).

Research has shown that being able to perceive the environment accurately is an important condition for successful organizational performance (Cornelissen and Werner, 2014; Kaplan, 2011; Narayanan et al., 2011). Erroneous perceptions of the environment have been linked to decision debacles and organizational downturns (Barr et al., 1992; Hodgkinson, 1997; Porac et al., 1989; Reger and Palmer, 1996). Well-known examples include Shell's decision to dispose of the Brent Spar in the North Sea (Nutt, 2004) and Polaroid's decision to hold on to their traditional business model despite the overwhelming dominance of digital imaging (Tripsas and Gavetti, 2000). Studies on the antecedents of such decision debacles often suggest that if the organizations in question had explored the strategic issues in question more openly, those debacles could have been averted.

Nutt (2004) analysed more than 400 decisions and concluded that networking with other organizations constitutes best practice for avoiding decision blunders, because it allows individual organizations to become aware of concerns and considerations that may not be

visible from their particular angle. Similarly, Pina e Cunha and Chia call on strategists to team up with other strategists beyond the borders of their own organizations 'in order to obtain unusual perspectives and points of view' (Pina e Cunha and Chia, 2007, p. 565). In their book on 'strategic agility', Doz and Kosonen (2008) state that what they describe as 'external sensing' becomes crucial in complex environments: 'being exposed, being in touch, being connected' (Doz and Kosonen, 2008, p. 20). Recent empirical studies on inter-organizational strategizing describe very similar practices under different labels, including 'joint sensemaking' (Seidl and Werle, 2018), 'crowdsourced strategizing' (Aten and Thomas, 2016) and 'networked foresight' (Heger and Boman, 2015).

Learning

Learning refers to gathering and developing actionable knowledge (Argyris, 1976, p. 365). It is similar to exploration, which also involves exchanging views from different angles, but the two are very different in the nature of the information that is exchanged. Exploration is forward-looking and involves exchanging interpretations about developments in the future, while learning is backward-looking and involves exchanging interpretations about experiences in the past and the lessons learned from those experiences. Especially in the case of highly complex strategic issues, or so-called 'wicked' problems (Camillus, 2008), knowledge, in the sense of information on past experiences, often resides outside an organization's boundaries.

Hart and Sharma point out that it 'has now become essential to proactively seek out the voices from the fringe that had previously been ignored', because 'the knowledge that is required for competing successfully […] often lies outside the organization' (Hart and Sharma, 2004, p. 8). While exploration refers to scanning the environment for developments that have yet to become relevant, learning is about using past experiences to assess which

strategies are successful and which are not. Some studies use the term 'learning' in the context of exploring issues that may arise in the future (e.g. Wilkinson and Mangalagiu, 2011). In this chapter, however, we adopt a narrower definition of learning in order to distinguish it from exploration.

Inter-organizational strategizing aimed at learning allows organizations to share knowledge and build on the experiences of other organizations. In other words, it allows them to 'pool their expertise' (Hardy et al., 2006, p. 98) and compare the 'available data' (Rouwette et al., 2016, p. 64). An example of learning through inter-organizational strategizing is presented by Teulier and Rouleau (2013). The authors studied how engineers discussed the potential of a piece of 3D-design software by comparing their experiences of similar software in different settings. Another example is the study by Brabham (2009), who showed how inter-organizational strategizing in the form of crowdsourcing allows the participants to learn by drawing on 'local knowledge' (Brabham, 2009, p. 244); that is 'knowledge of specific characteristics, circumstances, events, and relationships, as well as important understandings of their meaning, in local contexts or settings'.

Legitimacy building

Many organizations experience difficulties when they try to follow a new strategic direction. The main problem is to convince stakeholders that the procedure of changing strategic direction is legitimate (Cropanzano et al., 2007). If an organization convinces internal or external stakeholders of the legitimacy of the decisions taken, even actors who are not directly involved or do not agree may be motivated to support the smooth implementation of the new strategy (Korsgaard et al., 1995). For example, de Gooyert et al. (2016) examined how organizations in the Dutch energy-industry collaboratively explore strategies that will facilitate their transition to more sustainable energy systems. The authors found that inter-

organizational strategizing 'increases commitment' towards the agreed upon strategic actions (de Gooyert et al., 2016, p. 136).

One aspect of strategic decision-making that has been shown to influence perceptions of legitimacy is the extent to which the decision has been preceded by open dialogue (Kim and Mauborgne, 1995). Engaging in dialogue on strategy with other organizations can be seen as a way of building legitimacy. Especially in business ecosystems, the strategic direction of one organization may increase or limit substantially the possible directions that other organizations in the same ecosystem can take. In such cases, inter-organizational strategizing can increase and maintain commitment to a collective strategy that the ecosystem as a whole will adopt. Bowman argues that inter-organizational strategizing fosters justification, because producing a collective strategic narrative fosters the 'legitimacy of strategic action' (Bowman, 2016, p. 81). Rouwette et al. (2016) have also stressed that inter-organizational strategizing increases commitment and prevents counter-productive responses from stakeholders. Similarly, Brabham (2009, p. 247) points out that inter-organizational strategizing has a positive effect on the 'sense of ownership' that stakeholders develop with regard to the agreed strategies.

Strengthening relationships

Inter-organizational strategizing may also be regarded as investing in building and maintaining good relationships with external stakeholders, either with or without concrete expectations about how these investments may eventually pay off. According to stakeholder theory relationships with stakeholders are crucial for an organization (Freeman, 1984; Parmar et al., 2010). Securing a good relationship with stakeholders can improve dealings with suppliers as well as the organization's image in the community and, as a result, increase the organization's performance (Bosse et al. , 2009; Choi and Wang, 2009). Moreover,

maintaining a good relationship with stakeholders can help minimize costly conflicts and reduce pressure on the organization to change its strategy (Hillman and Keim, 2001). To achieve this, organizations need to use inter-organizational strategizing to open up the strategic decision-making process, which is traditionally secretive and exclusive, and make it more transparent and inclusive, without necessarily granting to external stakeholders any decision-making rights.

The literature supports this idea. Abrahamsen et al. (2016) have stressed that relationships with stakeholders play a key role in strategizing and can prove crucial to the success or failure of companies. The authors explain that strategizing 'concerns choices about how to interact with, and mobilize as well as influence, other actors through connected business relationships' (Abrahamsen et al., 2016, p. 107). Öberg et al. (2016) have shown that inter-organizational strategizing can help organizations within an industry map a shared course. In the example the authors provide, companies decided to invest in Blu-ray rather than HD technology and thus helped set common industry standards. Similarly, Franco (2008) demonstrated that firms engage in inter-organizational strategizing to increase trust and that they regard committing time and resources to this form of strategizing as investing in their relationships with the other organizations.

4. Forms of inter-organizational strategizing: face-to-face versus online

Inter-organizational strategizing can take different forms. Most importantly, we can distinguish between face-to-face processes (e.g. strategy workshops) and online processes (e.g. interactions mediated by crowdsourcing platforms). In the literature, the former is the most common form, with only two studies reporting on the latter (Aten and Thomas, 2016; Brabham, 2009) or a combination of both (Heger and Boman, 2015) (see also Table 1).

In the following we compare face-to-face and online forms with regard to number of participants; time and place of interaction; topic and stage of analysis; and process structure.

Number of participants

Online interaction can include large numbers of participants. For example, Heger and Boman (2015) mention 100 participants, while Aten and Thomas (2016) mention 646. Brabham discusses an example of municipalities that allow all of its inhabitants to contribute to online interactions, but because of its nature participation will be limited by internet access and computer skills (Brabham, 2009, p. 255). In contrast, face-to-face workshops typically involve only between five and 12 participants (Rouwette et al., 2002). Depending on the strategic initiative, the number of participants involved can change over time because of the shift in strategic topics, and complementarity of resources that the participants bring to the table (Deken et al., forthcoming; Seidl and Werle, 2018).

Place and time

Which format of interaction organizations choose for the purposes of inter-organizational strategizing influences in important ways how the participants communicate. Online interaction enables a dispersed group to work together. It also offers its members the opportunity to contribute their input at different times (Brabham, 2009; Nunamaker et al., 1991). There is some evidence that while online interaction facilitates the exchange of information, it is not a suitable format for carrying out negotiations (Daft and Lengel, 1986). At a face-to-face meeting the participants may convey and receive both verbal and nonverbal information while communicating with each other, whereas communicating only through texts is limited to verbal exchanges. Telephone conferences (Seidl and Werle, 2018) take a middle position in between face-to-face and online communication. Telephone conferences

allow the participants to use intonation and pitch, but not facial expressions, as cues. According to Daft and Lengel (1986), actors need to make use of a broad range of cues to conduct negotiations, instead of being limited to verbal cues.

Topic and stage of analysis

In face-to-face meetings all participants are typically working on the same topic and at the same stage of information analysis. This is not the case in several versions of online interaction. In chatrooms, for instance, individual participants propose topics and initiate sequences of questions and answers. Organisations find it challenging to keep this type of online interaction sufficiently focused to achieve intended aims (Sutanto et al., 2011). At present there are several platforms available that attempt to harvest the power of social media networks for collaboration and team communication (Anderson, 2016). A recently launched platform that is quickly gaining popularity is Slack. Slack centres around teams and supports collaboration by organising communication into different channels. Messages are shown in a newsfeed format, making it easy to follow a conversation. A version of online interaction that has been in use since the 1980s is known as Electronic Meeting Systems (EMS, Nunamaker et al., 1991). In the same place/ same time mode, an EMS supports a face-to-face group with software tools that offer additional communication channels. Using an electronic brainstorm, for instance, participants individually type in ideas which are then shown on the central screen. This allows for simultaneous information input whereas in a traditional brainstorm only one person can speak at the same time.

Process structure

Online interaction can influence the structure of the collaborative process among the participants (Dennis et al., 2001). Whereas in workshops the participants have ample

opportunity to debate the proposed agenda, go off at a tangent, air emotions or explain their input to the discussion, online interaction offers fewer degrees of freedom. Online forms such as EMS offer a highly structured process: meetings follow an agenda and for each agenda item specific tools are available (e.g. electronic brainstorming for idea generation) ensuring that the group follows the agenda. In the online multiplayer game used by Aten and Thomas (2016), the participants were only allowed to take very specific actions. The game was developed by the US Naval Air Warfare Center Aircraft Division (NAWCAD) to provide a platform on which large and diverse groups could work together towards generating ideas and planning joint action. As the following description shows, the participants were limited to posting very brief comments: 'After registering to play, a participant may view a "call to action" video that introduces the focal problem or objective of a particular instance of the game. Participants play by posting comments on cards. Each post or card is limited to 140 characters, and the cards are organized in threads' (Aten and Thomas, 2016, p. 159). Players click on a card to add an idea, forming chains of ideas, and receive points when they click on another player's card or someone responds to theirs. Posts that increase discussion are therefore rewarded. What is of interest here with regard to collaborative strategizing is that the participants produce action plans through threads of interaction. At the end of the game, the players assess the proposed action plans by giving them one, two or three thumbs-up. Likewise, the crowdsourcing platform that Brabham (2009) discusses restricts the ways in which the participants are allowed to contribute. Brabham described a hypothetical example inviting the public to participate in a city-planning project through crowdsourcing. In this example, the municipal authorities would set out the problem, publish relevant data and invite the public to submit solutions. 'Finally, the call for solutions would clearly stipulate the format for uploading solutions. A specific set of guidelines for written comments […] or a specific template for solvers to work within […] would be ideal' (Brabham, 2009, p. 253).

Another tool that is available in online interaction but not in face-to-face meetings, is anonymity. Anonymity is expected to be helpful especially in sensitive, strategic issues. Aten and Thomas (2016) for instance use anonymous contributions for strategy development on strategic military planning.

In summary, online technology changes information exchange and collaboration in a number of ways (Dennis et al., 2001). Online technology allows more participants to engage in conversation and information analysis. The free format of some online technologies poses difficulties in keeping the discussion sufficiently focused, particularly in dispersed and asynchronous meetings. Same time same place applications, for instance using EMS, stick to a traditional meeting agenda and a facilitator. On the other hand, different place different time applications such as Slack introduce threads to structure information. Online technology also changes process structure by limiting participants' contributions to specific formats (e.g. short posts) or allowing anonymous contributions.

5. Research agenda on inter-organizational strategizing

In this section we present opportunities for future research in the area of inter-organizational strategizing. A first topic that deserves further investigation is how and to what extent the results of inter-organizational strategizing processes become incorporated into the strategizing processes of the organizations that participate in joint strategizing projects. As we explained earlier in this chapter, inter-organizational strategizing may fail, because within individual organizations the inter-organizational strategy process competes with a number of other strategy processes that are seen as more legitimate (Bowman, 2016; Heger and Boman, 2015). In contrast to this view, Seidl and Werle found that the studied inter-organizational strategizing project did have an impact on strategic thinking within the participating organizations, but did not study the mechanisms that brought this about (Seidl and Werle,

2018, p. 26). Heger and Boman (2015, p. 161) identified '[the] development of a shared vision—relatable to organizational learning and reconfiguration capabilities—[...] as particularly valuable for the network'. The authors conclude that how collaborating organizations exploit, absorb and adopt networked foresight data deserves further investigation.

A second question that deserves further investigation is, when do organizations decide to abandon inter-organizational strategizing projects? In the studies discussed in this chapter inter-organizational strategizing typically consisted in one-off, often precarious, projects. We characterize these projects as 'precarious' because the participating strategists repeatedly questioned whether continuing the collaboration was worth the investment (Seidl and Werle, 2018, p. 21) and carried out continuous cost–benefit analyses to decide whether their organizations should remain committed to the inter-organizational strategizing project or not. Comparing inter-organizational strategizing projects that have been abandoned with projects that have been completed may shed more light on the mechanisms that determine the outcome. The answer to this question has considerable practical relevance, as it may help organizations avoid projects that are likely to be abandoned. Seidl and Werle (2018) emphasize that the initiators of an inter-organizational strategizing project need to ensure that relevant frame repertoires (or 'knowledge structures') are adequately represented among the partners and that they are sufficiently diverse without being divergent. The interplay between frame repertoires, interests, and cues largely determines how the participants interact. When these three elements are aligned, cooperation becomes the driver of interaction among the participants; when they are misaligned, however, interaction is driven by narrow interests. Hardy et al. (2006, p. 96) point out that 'participants must successfully juggle their dual roles of collaborative partner and organizational representatives' if the collaboration is to succeed. Rouwette et al. (2016) identify a related type of tension that arises from the difficulty of

striking a balance between openly addressing differences of opinion and avoiding overt conflict. Indeed, conflict needs to be kept at a manageable level, otherwise it may destroy the joint enterprise. Nevertheless, conflicting interests or overt conflict over other matters is likely to arise when the participants have a high stake in the issue at hand. In the case studies that Aten and Thomas (2016), de Gooyert et al. (2016) and Heger and Bowman (2015) analysed, the participants were invited to join the collaborative endeavour on the basis of their content-related expertise but had no decision-making power. Therefore, it is important to increase the insights in the interplay between frame repertoires, interests, and cues as they largely determine how the participants interact.

A third question that future studies could investigate is, how can differences in the outcomes of various inter-organizational strategizing processes be explained? As we explained earlier in this chapter, skilful sensemaking on the part of the participating strategists (Hardy et al., 2006; Seidl and Werle, 2018; Teulier and Rouleau, 2013) and the choice of supporting tools and artefacts (Bowman, 2016; de Gooyert et al., 2016; Rouwette et al., 2016) both have a large impact on the outcome of a collaborative project. Future research could look at how these factors jointly determine the outcomes of inter-organizational strategizing processes (see also Jarzabkowski and Kaplan, 2015). For instance, models and related tools can help create a shared understanding among the collaborating organizations, but they may not be sufficient when it comes to implementing the conclusions that the partners derive: 'Policy makers may have a flawless understanding of the system they want to intervene in, but if individual stakes prevent them from coming to an agreement on implementing high leverage policies, such an understanding will not lead to improvements' (de Gooyert et al., 2016, p. 144).

A fourth question that deserves further attention concerns the different roles of the participants. The roles that participating organizations play and the insights that they share

also have a significant impact on the outcome of joint strategizing. Heger and Boman (2015) have found that the participants use the results of inter-organizational strategizing primarily for sensing activities (i.e. data collection) and that these results do not have a direct impact on the process of learning. Thus, the benefits are more at the level of the cooperation than at the level of contributing organizations: collectively new insights were gained, but these did not lead to changes in strategies of the participating organizations. These role of the participating organizations in the inter-organizational strategizing can be very different and may be symmetrical or, conversely, asymmetrical, if one organization takes the lead. So far, the roles that participating organizations play in inter-organizational strategizing received little attention in research. Given that the roles of the participants influence the dynamics of the process, research on this topic can help explain how the behaviour of the participating organizations affects the outcome of the collaborative strategizing project.

A fifth question concerns the measurement of outcomes. Measuring sensemaking and learning in inter-organizational strategizing is inherently difficult because of the nature of the cognitive processes each involves. Simply put, the participants filter certain cues and give meaning to the cues they retain on the basis of the mental models they already possess (Daft and Weick, 1984). The studies that have sought to assess whether inter-organizational strategizing did help the participants achieve sensemaking and learning mainly rely on self-reported data collected through interviews. In order to limit the subjectivity of self-assessments, future studies should aim to measure outcomes also with the aid of external instruments. It should be noted, however, that using external instruments is not without difficulties, because the very act of measuring mental models can alter those models and thus distort the construct that these instruments are meant to measure (this is referred to as the 'mental model uncertainty principle'; see Richardson et al., 1994, p. 191).

The study of inter-organizational strategizing also creates new methodological opportunities. Most studies on this topic to date are based on a single case or a few cases at most. This approach allows researchers to discuss in detail instances of inter-organizational strategizing and is typical of the explorative stage of theory building. However, as the body of knowledge on this phenomenon is growing, future works could combine the model of the detailed case study with quantitative research. Judging from the recent literature we can conclude that inter-organizational strategizing is gaining popularity among organizations. Quantitative approaches based on, e.g., large-scale surveys could reveal to what extent inter-organizational strategizing is adopted by organizations, what goals these aim to achieve and what practices they use for that purpose. For example, Hodgkinson et al. (2006) used a large-scale survey to study the experiences of managers who took part in strategy workshops and how frequently organizations rely on what type of workshops. Future studies could adapt this approach to the context of inter-organizational strategizing.

We conclude this chapter with the hope that our overview of inter-organizational strategizing and of the literature on this topic to date provides a coherent picture of recent and current research in the field that will form a basis for the further exploration on this important topic.

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