

Evolving Strategies for Competitive Markets: Commercial Radio Industry and Regulator Orientations in Finland

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This paper examines evolving firm strategies in competitive markets, in a business environment that has specific characteristics; the industry studied is commercial radio industry in which firm future depends not only on its performance, on the performance and development of the industry but, strongly, on the policy of governmental regulators who grant broadcasting licenses for a set of years at a time. The study reflects on the evolution of strategic thinking of media corporations and of the regulator. It builds upon the framework of business strategic orientation in competition and uses qualitative and quantitative data from studying radio business in Finland. Within the studied time period, strategies have evolved from competitive to co-operative, and further, to coopetitive - a hybrid of the two. The development of strategies by the changes in competition is found to be iterative for radio industry and its regulator. The governmental policymaker's coordination shows challenges in managing change in the industry and in technology.

JEL Codes: L82, L88, L96, M10, M31

Keyword: Competition, co-operation, coopetition, strategy, government policy, orientation, industry reshaping, radio industry, media business, technology.

1. Introduction

This paper aims to fill a gap in strategy research on regulated markets and on radio as strategic media business. It studies industry and regulator orientations toward the competitive market. Radio studies, traditionally, are carried out mostly by researchers in Journalism and Media studies. Yet, also these have somewhat neglected radio – radio studies are also a relatively new discipline (Chignell 2008).

In business research, radio is scarcely (Ahlfors 2006) studied. This unique, regulated industry is an interesting and multidimensional arena to study, and the young age of commercial radio in Finland, offers an opportunity to study strategy evolution in an industry.

The findings increase our knowledge in how business strategies develop by changes in a regulated industry. No earlier studies, except for Ahlfors (2006), have to date been found exploring strategic orientations in regulated markets, let alone radio industry. This paper complements the mentioned study and, through further data collection, enables conclusions for iterative strategy developments. The findings may help study strategy evolution in other regulated industries or emerging markets.

The term *commercial radio* reflects its financing-base; a commercial radio is financed through revenues from broadcast-advertising and program-sponsoring. While public radio receives funding from government-based sources, commercial radio operates creating value to various groups and capturing value through revenue-creation.

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Some channels receive support from associations or public institutions; most are commercially funded. This is why the industry is called 'commercial' here, instead of 'private', a term that practitioners lately have preferred.

The industry of commercial radio is young in Finland; for instance in USA it existed already in late 1920s (Ahlfors 2001, Chignell 2008). Among the Northern countries, Finland was the first to open radio broadcasting to commercial actors in 1985. The environment for radio business has changed several times, initiated by the regulator and industry actors themselves. Today, the Finnish commercial radio incorporates local, regional and nationwide channels, as opposed to the birth of the industry when all stations were local. Radio can today be a chain of network-owned stations, a network of independent radio stations, a participant in such a loose network through ownership, or individually acting local radio (Ahlfors 2001, 2006).

Strategic orientation to competition creates the theoretical framework for this study, the perspectives being (i) strategic behavior of actors in the industry; their strategic choices, and (ii) governmental regulation of the industry; policymaker encouraging and pushing specific strategies in changing competitive and political pressure, and their behavior.

Two research questions are stated: 1) "How does strategic orientation toward competition evolve among businesses in a changing, regulated competitive environment like radio industry?" and 2) "How is a licensed radio industry regulated in a changing environment?"

The structure of this paper in what follows is: Through a literature review in Chapter 2, definitions are made for focal concepts, and relevant body of knowledge in these discussed briefly. Methodological aspects are addressed in Chapter 3, presenting the research design and the time period of the study and providing justifications for sample sizes and research methods. In Chapter 3, major changes in Finnish radio industry through time are analyzed, and developments in orientations and industry change interpreted. In the same chapter, also regulator policy and changes in orientation are presented through interpretation of interviews and radio licensing decisions for two periods. Conclusions are made in Chapter 5, identifying also research limitations and topics for future research.

2. Literature Review

2.1 Competition Strategy

The strategy of competition, for dealing with corporate environment, represents a conventional approach to competitors. It is much used for pursuing above-average profits through an advantageous position in an industry (Porter 1980) or for mobilizing or deploying resources and competences (Prahalad & Hamel 1990). Competition is also maintained in search for value in vertical exchange (Osarenkhoe 2010). The study of competition strategy has a long history (Venkatraman 1989, Hamel & Prahalad 1996), and has resulted in various competitive strategies, of which for instance Porter's (1980, 1985, 1990) approaches are famous. According to this theory, a firm addresses other actors in its chosen market as sources of threat, against which the firm needs to gain competitive advantage through outperforming competition or distinctive approaches.

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The strategy of competition is largely based on Nash's game theory (1950, 1951) and is applicable for a number of situations, in business and in societal and natural research. Mathematician John Forbes Nash found that there can be one strategy to win other players in a card game, in a given situation, and elaborated on this theme in 1950 and 1951. The terms *competitive* and *competition* strategy are distinguishable in semantics, yet both are in their own inner meanings applicable to this approach of a company dealing with other actors in its target market.

2.2 Co-Operation Strategy

Also this strategy was established with the help of game theory. Nash (1953) developed a model of co-operation in a card-game setting, exploring possible outcomes of co-operation between two players. The strategy is called both *co-operation* and *collaboration*. Gray defined it in 1989 as "a process through which parties who see different aspects of a problem can explore constructively their differences and search for solutions that go beyond their own limited vision of what is possible" (Lasker *et al.* 2001). Collaborative advantage (Kanter 1994) has been seen as basis for superior business performance, through synergy gains created by co-operating with others (Blumberg 2001, Kanter 1994), instead of putting time and other resources developing strengths such as efficiency and effectiveness (Palmer 2002) for thriving (Abodor 2002).

Also co-operation is found in both horizontal and vertical relations - such as supplier-dealer (Skinner *et al.* 1992) or customer-provider relations - where inter-dependencies come from cross-functional characteristics and collaborative process integration (Christopher 2000, Lancioni 2000).

The school of thought that identifies co-operative strategy as strengthening firm performance (Kanter 1994) was particularly strong in 1990s and emphasized the positive role of co-operative arrangements between industry participants bringing benefits to both parties (Lorange 1996, Lorange & Roos 1991).

2.3 Coopetition Strategy

As found by several researchers, the earlier-discussed co-operation is demanding (Kanter 1994, Skinner, Gassenheimer & Kelley 1992, Vangen & Huxham 2006). Creating successful alliances takes time and energy and should only be adopted as strategy when there is real potential for synergy advantages (Vangen & Huxham 2006). Vertical relationships face conflicts within co-operation due to interdependencies and distinctive goals, demanded allowances, trust, power, and such issues (Skinner *et al.* 1992).

Coopetition strategy theory takes a combinatory, sometimes comparative view of competition and co-operation (Abodor 2002, Ahlfors 2004, 2005, Bengtsson & Kock 2000, Laine 2002, Skinner *et al.* 1992); the two are seen as integrated (Laine 2002). Coopetitive strategy is a natural set of overlapping, intertwined, sometimes subsequent approaches of actors, depending on a situation or position in the marketing network (Bengtsson and Kock 2000). One approach does not exclude the other when dealing with one same organization in the pursuit of competitive strength (Ahlfors 2005; Bengtsson and Kock 2000). This strategy has been found on most successful e-business companies (Ahlfors 2005).

3. Methodology

This exploratory study aims at identifying and interpreting strategic behavior, specifically in radio industry. Present knowledge and insights of the research community cannot provide a tested basis for explicit hypotheses; the study uses quantitative and qualitative data through multiple qualitative methods. To understand strategic evolution in the industry, participatory observation, interviews and documentary analyses are used for *primary data*, and analysis is made on *secondary data*. Document analysis, for example content analysis of Web documents, is useful when studying complex environments (Gil-Garcia and Pardo 2006).

A multi-method approach is seen to strengthen qualitative research and help understand the studied phenomenon (ibid.) Interpretation is here based on the researcher's *a priori* knowledge from earlier studies (Ahlfors 2001, 2004, 2006) and a wide set of data that cover years 1988...2012, which is considered adequate in an industry that saw daylight in 1985. Data on regulator decisions on industry actors cover 2006...2012 and yield through the latest license-period 2012...2019. Various interviews made in 2000, 2001, 2006, 2010 and 2011 have been conducted with two top managers of three radio stations - radio program provider/advertiser, and top manager of domestic and international industry associations; the sample is heterogeneous. The interviews complement and corroborate other information, and similar thematic findings have been made over time. The analysis of 2011 interviews shows data saturation.

Quotations of interviews in 2011 are included in the findings-discussion; these were made with Seppo Mustonen, representing both Iskelmä Rex and OiFm and the industry association; Eija Kölhi representing Radio Foni Oy, and Stefan Möller representing industry association RadioMedia and Association of European Radios.

4. Findings

4.1 Industry Orientations

Competitive climate is identifiable for 1980s when commercial radio started through local stations (Ahlfors, 2001). No direct competition existed between channels that operated in distinct areas; the atmosphere within the industry was enthusiastic and simultaneously competitive - companies saw themselves as sole ventures. The race for developing quality in the industry increased rivalry. A highly competitive climate is identified in this period toward public radio, YLE, and all other media. Many stations were at least partly owned by print media or telecommunication companies; the distinctive goals and the weakening of economy in early 1990s created conflicts.

“It was sometime in 1992, we were three different...it was such a horror-balancing-arrangement...it just did not work.”

Radio competed under financial pressure and faced a need to reorganize corporate structures and ownership.

“We, everyone in the staff, knew...and we decided to continue...”

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Strong rivalry over corporate advertising and over audiences is identifiable for this period. Also co-operative attitude is found toward non-competing environment. For the regulator, competition only was acceptable, and alliances controversial to competitive regulations, also endangering the freedom of speech.

Co-operative orientation emerged with legislation change and start of a nationwide commercial channel in 1995. Tension intensified as new competition was given way to all local listening areas. The nationwide marketing system for local radio to sell clients' campaigns to other listening areas, Radio Booking, lost its business. Earlier, local radio differentiated from national public radio as this, contrary to some countries, is by legislation not sponsored but purely government-funded. The regulator's policy changed the markets in 1995 and was challenged by industry actors, for the licensing terms for nationwide spot radio. In meeting with practitioners, ministry representative gave explicit advice for these to build networks - an utterance that was not a planned strategy, rather a reaction to pressure.

“They said: Co-operate! Create networks!”

“They said to us: Co-operate...well he didn't actually say so, but...when nicely put, that was the message...”

Co-operation created competitive advantage increasing efficiency, thus productivity. An exemplification of co-operation is Traffic Radio, a venture among South-coast channels with unified traffic programming. The co-operation strengthened further through various networking activities and formations. Toward other channels, especially the new entrant with price competition strategy, competitive approach continued. Radio advertising increase followed industry expansion, and the entrant was soon accepted as useful competitor. Rivalry strengthened in the coming of 2000s, against other networks and stations in the same listening area, also against other media. The atmosphere paved way for combined co-operation and competition.

Coopetitive *orientation* through consolidation of radio industry can be identified since the change of the millennium. For some actors, the networking resulted in consolidation also by ownership and became as strategic rescue after the economic recess and new nationwide competition. Coopetition is identifiable in the activity of the formed networks and chains. The stations competed in a given market, simultaneously co-operating in another, or in integrating processes.

Radio stations have seemingly found coopetitive strategy sensible in optimizing their resource allocation. This has raised complaints among competitors about centralized ownership or decision-making. Not all companies, however, have gone through changes in power or ownership, even if they have adopted coopetitive networking. Differentiation as local is important to local practitioners.

“We are foremost a local news-radio. We broadcast news once in every hour...Local news is the thing...also a community of “radio people”...and local co-operation.”

“If there weren't us, who would tell about the local events, decision-making and such...serve the small advertisers...and, we send Swedish programs, music and have Swedish commercial spots.”

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Competitive climate increase implies a shift to competitive orientation in the industry. Cooperation is found for many networking stations, also co-operative for individual stations that are yet regarded as competition-oriented. The climate in negotiations and public discourse gets competitive as the industry turns attractive to new entrants. The circle of orientations iterates to competition, with this orientation getting additional co-operative characteristics. This was also seen in the first phase of commercial radio that, in general, was competitive in its strategic orientation.

4.2 Interpretations of Regulator Activity and Orientations

Regulator goals in licensing radio are expressed as licensing rounds are opened; the general goals are to secure competition and versatile program structure, also versatility in radio ownership. These, the regulator sees secure the freedom of speech, and addresses through enabling various orientation strategies when licensing practitioners.

Regulator communications with the industry include argumentation on industry change, or technology change, as factors in licensing. For periods 2007 – 2011 and 2012 – 2019, a need for technology change has been argued in shifting the industry toward nationwide radio. The policy during latest licensing first included only nationwide radio but was altered to secure opportunities to both local and nationwide radio – and the freedom of speech that the Ministry of Transport and Communications (MTC) points out in its several publications and argumentations in its licensing decisions, as a requisite in radio business. Practitioners interpret the technology change argumentations as reactions to political pressure from information-and-communication technology (ICT) operators, more than to needs of markets, for implementing digital transmission technology.

“The consumer doesn’t care what the technology is, they listen to radio from various devices...[it is] the same how it is transmitted to them.”

“The listener uses car radio, mobile, and other...online...and traditional radio...it gets there, they don’t need digitalization...The [idea of] DAT was buried a long time ago.”

The short licensing-periods of early 2000s, the shifting of radio toward nationwide, and leaving requirement-meeting actors unlicensed in 2006 is characterized as policymaker’s reactive response to industry changes it had not anticipated nor was ready for. The policy changed into more interactive during the latest round. Liberation in license conditions is evident. Regulator orientation shifts to cooperative strategy from competitive and co-operative. The licensing round 2011 implies increased competitiveness. Plans were to admit only nationwide radio to apply for new licenses. This changed as a result of local radio competing for their business and of industry-meeting discussions led by the regulator.

Next, two periods of radio licensing are depicted in Tables 1 – 4. The first three tables depict licensing various types of local and regional radio licensing. Distinction is made through operation models to identify strategic orientation of companies and regulator, and to identify decision-making structure, in order to validate interpretations on the topics above. The operation models are categorized as individual local radio, chain-owned radio, and networked radio in loose networks. Table 4 illustrates licensing of nationwide radio.

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Licensing individually-acting local stations in 2006 and 2011 is exhibited in Table 1, by regions, with number of stations and their listening areas. In 2011, a 12 percent growth from 2006 is identified, which implies that competition between a sufficient number of actors is encouraged for the new license-period, and that regulator secures sufficient decentralization of ownership and decision-making, to secure competition whilst the licensees may co-operate with other actors, indicating a shift into cooperative orientation.

Table 1: Individually Acting Radio Licensed in 2006, 2011, by Region

Region	Year	Stations	Areas
Uusimaa	2011	3	Helsinki (Hki3); Hki4; Espoo1
	2006	3	Hki1; Hki2; Espoo/Hki
South-West Finland	2011	6 (3 owners)	Salo1; Salo2; Turku (Tku1); Tku2;Tku4; West-Turunmaa
	2006	5 (4 owners)	Iniö; Salo;Tku1;Tku3 & Tku4
Satakunta	2011	4 (3 owners)	Pori-Rauma; Pori1;Pori2; Rauma
	2006	3	Pori-Rauma; Pori; Rauma
Häme & Päijät-Häme	2011	3 (2 owners)	Lahti (L1; L2); Hämeenlinna
	2006	2 (1 owner)	Lahti (L1 & L2); Lahti (L2)
Tampere Region	2011	5 (4 owners)	Tampere (Tre1); Tre2; Tre3; Tre4; Tre5
	2006	3	Tampere (Tre1); Tre4; Tre5
Southern and Northern Savo	2011	1	Mikkeli
	2006	1	Kuopio – Iisalmi
North Karelia	2011	1	Joensuu (JO1)
	2006	2 (1 new, 1 owner)	Joensuu (JO1); JO2
Central Finland	2011	1	Jyväskylä (Jkl1)
	2006	1	Jyväskylä (Jkl2)
Ostrobothnia, Southern Ostrobothnia, Central & Northern Ostrobothnia	2011	11 (2 new)	Alajärvi; Kemi; Kokkola1; Kokkola2; Lapua; Oulu(O1); O2; O3;Seinäjoki1; Seinäjoki2; Vaasa
	2006	10 (1 new)	Alaärvi; Seinäjoki;Kemi; Kokkola; Kokkola (K1); Lapua; Oulu (O1); O2; O3; Vaasa
Lapland & Kainuu	2011	4	Inari; Kajaani; Rovaniemi; Tornio
	2006	4 (1 new)	Inari; Kajaani; Rovaniemi; Tornio

Licensing chain-owned local radio is exemplified in Table 2. Ownership is centralized in this type of chain model. Regionally, these stations and their ownership are spread across Finland. Orientation in a chained network is co-operative between member stations; on chain level, competition is focused on, through internal co-operation in the

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network, and external competition. In 2011, the number of network-owned local licenses decreased by 80 percent from 2006.

Table 2: Chain--Owned Local Radio Licensed in 2006, 2011

Year; licensee/s	Year	Stations	Areas
2011	2011		
Metroradio Finland Oy		1	Espoo2
2006	2006		
Metroradio Finland Oy		1	Helsinki (Hki1)
Pro Radio Oy		4	Jyväskylä (Jkl3); Oulu (O4); Tampere (Tre3); Turku (Tku5)

Licensing networked local stations in a loose network is depicted in Table 3. Actors in the networked format are individual companies, either networking with the formation with own decision-making, or participants of the network-chain through ownership. Growth of 58 percent from 2006 is found in 2011; cooperative orientation is encouraged.

Table 3: Networked Local Radio Licensed in 2006, 2011

Uusimaa	Year	Stations	Area/s
	2011	4 (2 owners)	Helsinki (Hki1) & Hki2 & Lohja; Porvoo
	2006	3 (2 owners)	Helsinki (Hki3) & Lohja; Porvoo
South-West Finland		Stations	Area/s
	2011	2 (1 owner)	Turku(Tku3) & Tku5;
	2006	1	Turku (Tku2)
Häme & Päijät-Häme		Stations	Area/s
	2011	-	
	2006	1	Hämeenlinna
Tampere region		Stations	Area/s
	2011	2 (1 owner)	Tampere (Tre2); Tre5
	2006	1	Tampere (Tre2)
South Karelia & Kymenlaakso		Stations	Area/s
	2011	1	Kotka – Lappeenranta
	2006	1	Kotka - Lappeenranta
Noth Karelia		Stations	Area/s
	2011	1	Joensuu 2
	2006	1	Joensuu 2
Central Finland		Stations	Area/s
	2011	2 (1 owner)	Jyväskylä (Jkl1); Jkl2
	2006	1	Jyväskylä (Jkl1)
Ostrobothnia & South, Central & Northern Ostrobothnia		Stations	Area/s
	2011	4 (2 owners)	Lapua & Oulu(O3) & Seinäjoki1 & Sjoki2; Oulu (O4)
	2006	2	Oulu (O2); Lapua
Lapland & Kainuu		Stations	Area/s
	2011	1	Kemi
	2006	-	

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MTC announced a change to information on Table 3 in late 2011, accepting ownership and decision-making transfer from Radio Pooki (3 stations) to SBS Finland Oy, in Northern Ostrobothnia. Two actors remained in the area.

Table 4: Nationwide Commercial Radio Licensed in 2006, 2011

Spectrum 1	2011	Suomen Uutisradio
	2006	Suomen Uutisradio
Spectrum 2	2011	SBS Finland
	2006	Pro Radio
Spectrum 3	2011	NRJ Finland
	2006	NRJ
Spectrum 4	2011	Sanoma Entertainment
	2006	SWelcom
Spectrum 5	2011	Metroradio Finland
	2006	Metroradio
Spectrum 6	2011	Sanoma Entertainment
	2006	SWelcom
Spectrum 7	2011	Metroradio
	2006	Metroradio
Spectrum 8	2011	Classicus
	2006	Metroradio
Spectrum 9	2011	Kristillinen Media
	2006	Kristillinen Media
Spectrum 10	2011	Radio Satellite
	2006	Radio Satellite
Spectrum 11	2011	Basso Media
	-	
Spectrum 12	2011	NRJ Finland
	-	

Table 4 depicts licensing of nationwide, or alike, radio in 2006 and 2011; most company names are shortened. Dramatic change to earlier couple of licenses has occurred. Seven companies with ten channels were licensed in 2006 for wide, within-corporation or distinct spectra. This indicates regulator orientation shift from earlier competitive to co-operative in 2006, and to cooperative in 2011 with 20 %-growth and increasing competition within co-operation, also for local radio, for 2012...2019.

As an update to Table 4, also Table 2, MTC announced in May, 2012 acceptance of Sanoma Entertainment purchasing all stocks of Metroradio. Three biggest actors became alike in size and power.

To conclude, the regulator orientation is cooperative in the licensing of both local and nationwide radio and their networks - competition for future seems to be pushed for local radio through the increase in nationwide licensing, but also for big actors. This implies future digitalization plans of transmission, and securing momentum for it. As two interviewees said, the policymaker seems to be under pressure and put forth technology change, losing sight of consumer needs and use habits. Transmission technology today is multifaceted and serves several types of radio listening.

5. Conclusions

An aim in this paper was to study how strategic orientation toward competition evolves in a changing, regulated competitive environment like radio industry. An iterative development of strategic orientations among industry actors is shown in the progress of developments and market conditions. Radio industry has followed a competitive, co-operative and coopetitive orientation and is now in iterative phase where climate is competitive.

Another aim was to explore how licensed radio industry is regulated in a changing environment. In a regulated industry, developments in its organization, competitive tensions and political pressure affect the aspects and strategic orientation of the regulator that decides on appropriate orientations. The policy has shifted from competition and co-operation to a combined view, coopetition, with a more discussing attitude. Liberalization is identifiable in corporate formations licensed and in the length of the latest licenses. Also the regulator puts forth change. Industry coopetition seems to be led to furthered competition, through increased push for competing for the future of radio businesses.

Combinations of local, regional and nationwide actors, and firm networking, increase industry efficiency, which also the regulator today appreciates. Individual local actors remain important parts of radio industry and politically, their existence is secured through this license period. The push for technology change may change this in the next round.

This study focused on strategic orientation of both radio industry and regulator. It gives insight to strategic behavior in a given setting; wide generalizations are not possible nor aimed in such exploratory study. This paper offers insight and is helpful in further investigation on similar environments. The iterative development of strategy through industry developments needs further investigation. Changes may come frequently in the coming era, and strategic orientation may skip a phase as needed. Research on regulated industries, such as radio business, is needed on topics such as ownership development, globalization, and performance. Also consumer need/benefit studies are needed to better understand markets for radio technology.

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