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Chapter 1 - Introduction

Abstract

The realm of interorganizational relationships and their influence on firms' innovation have garnered significant attention, underscoring the crucial role of governance mechanisms in determining firm success. Performance disparities among firms engaged in IORs have become evident, with some effectively managing these partnerships while others struggle with high failure rates. The rise of technological disruption has emerged as a formidable force impacting the value of such relationships. The chapter explores the dynamics of governance mechanisms and their interplay with disruption, with a particular focus on the rapidly evolving automotive industry undergoing a transition to electric vehicles. By examining various forms of governance and their implications within this context, we seek to enhance understanding of how firms can effectively govern IORs in the face of disruption. This research contributes to filling the existing gap in the literature regarding the relationship between governance mechanisms, disruption, and firm performance in the realm of IORs.

1.1 Governance Mechanisms and the Impact of Disruption on Interorganizational Relationships

The realm of interorganizational relationships (IORs) and their impact on firms' innovative output has been widely acknowledged, highlighting the pivotal role of governance mechanisms in determining firm success (Zollo, Reuer, & Singh, 2002). As more firms recognize the specific advantages of engaging in IORs, it becomes evident that there are notable performance disparities among them, with some effectively undertaking these partnerships while others struggling with high failure rates. Although several theoretical perspectives have generated mixed and inconclusive findings (Cao, Mohan, Ramesh, & Sarkar, 2013; Keller, Lumineau, Mellewigt, & Ariño, 2021), the question of how firms define effective IOR governance strategies remains partially unanswered.

In today's ever-changing business landscape, the significance of performance disparities between firms that actively participate in interorganizational relationships and those that neglect such engagements cannot be underestimated. Technological disruption has emerged as a formidable force capable of significantly impacting the value of these relationships. In the field of management, the language of disruption has been consistently used to explore the emergence, evolution, and transformation of industry ecosystems. Within these ecosystems, the success of firms relies on the coordination and strategic alignment not only with traditional suppliers but also with other ecosystem members who function as "complementors" (Brandenburger & Nalebuff, 1997). The existing literature has primarily concentrated on the ways in which IORs can assist firms during periods of disruption. For instance, Ansari, Garud, and Kumaraswamy (2016) study exemplified how alliances can be utilized to disrupt established ecosystems. Kapoor and Lee (2013) research uncovered that alliances play a pivotal role in fostering trust within an industry. Additionally,

Furr and Shipilov (2018) work provided insights into the construction of new ecosystems through the formation of alliances.

Past literature on IORs has highlighted the significance of governance in determining their successful outcomes. Understanding how to effectively govern IORs is crucial for aligning them with a changing competitive landscape.

The longstanding debate originating from transaction cost economics, as proposed by Williamson (1979), has discussed the management of IORs through formal or informal mechanisms, or a combination of both. To assess the value of these mechanisms, previous studies have examined firms' utilization of formal contracts and other tangible documents that serve as evidence of partners' formal agreements. Examples of such documents include business plans, service level agreements, and performance monitoring systems that extend beyond the scope of the alliance contract (Hoetker & Mellewigt, 2009; Poppo & Zenger, 2002). Within this line of research, scholars interpreted relational norms as a complementary tool to legal contracts, jointly contributing to IORs' governance.

In a separate line of research influenced by sociology and organization theory, previous literature has underscored the importance of utilizing both formal and informal mechanisms in governing IORs. Within this field, formal structures encompass explicit organizational arrangements, while informal patterns involve implicit and uncodified rules of interaction and social dynamics for coordination. However, despite the extensive examination of the value and combined effects of formal and informal governance on firms' performance, the literature has often neglected to consider the significant influence of disruption on these mechanisms (Keller et al., 2021).

This chapter aims to examine various forms of governance and their implications for IORs, taking into account the impact of disruption. Additionally, we will explore the value of these different governance mechanisms. To provide concrete examples and insights, we will focus on the dynamic and rapidly evolving automotive industry, which is currently experiencing a disruptive technological change characterized by the transition to electric vehicles (EVs). The automotive context is particularly interesting as it allows us to consider not only the substitution of existing relationships but also the transformation of relationships with partners within a single industry. By studying the automotive industry, we can gain a deeper understanding of the dynamics and interactions between governance mechanisms and IORs in the face of disruption.

1.2 Exploring the Landscape: Unravelling the Typology of Governance Mechanisms in Interorganizational Relationships

The typology of governance mechanisms for IORs provide a comprehensive framework for understanding the diverse approaches taken to govern these complex collaborative arrangements. In this section, we delve into the intricacies of this typology, aiming to unravel the multifaceted nature of governance mechanisms employed in IORs. By exploring the classification proposed in the existing literature (Keller et al., 2021), we shed light on the different dimensions and perspectives that underpin the governance of interorganizational relationships. This exploration will enable us to gain a deeper understanding of how these mechanisms function, interact, and evolve within the dynamic landscape of IORs.

Before delving into an exploration of governance typology, it is necessary to establish some definitions. The literature on governance mechanisms for IORs often employs different conceptual labels, leading to variations in terminology. In previous research, the terms "contractual" and "formal" governance have largely been used interchangeably. For instance, Poppo and Zenger (2002) define "formal contracts" as legally binding written agreements. Similarly, Hoetker and Mellewigt (2009) encompass a broader scope with their definition of "formal mechanisms," which includes all written and documented interfaces utilized by partners in IORs to coordinate, cooperate, and monitor joint activities, extending beyond the confines of the alliance contract. On the other hand, informal governance are defined as agreements with no means of self-enforcing, relying on trust and reputation between the parties (Dyer & Singh, 1998). Poppo and Zenger (2002) go further in defining them as "the enforcement of obligations, promises, and expectations [that] occurs through social processes that promote norms of flexibility, solidarity, and information exchange" (Adler, 2001, p. 710).

To understand the dynamics and evolution of governance mechanisms, we offer a perspective that encompasses diverse dimensions concerning these mechanisms. Building on the work of Keller et al. (2021), we introduce a typology that distinguishes between the mechanisms used to enforce governance in IORs and the level of codification of these mechanisms.

The first dimension of governance in IORs centres on how partners intentionally structure their relationships to effectively enforce governance. Within this dimension, scholars have identified two key means of governance enforcement: the contractual and relational mechanisms. Contractual governance, as examined by Reuer and Ariño (2002) and reviewed by Schepker, Oh, Martynov, and Poppo (2014), focuses on the role of formal and written contracts that establish binding agreements between collaborating firms. These contracts explicitly outline responsibilities, obligations, and rights, serving as safeguards against self-interested behaviour, value appropriation, and future uncertainties. The extent of contract completeness has also been studied, linking it to the coverage of contingencies and the level of protection it provides. However, it is acknowledged that complete contracts may struggle to account for unforeseen contingencies, leading to the negotiation and development of rules governing IORs. These rules encompass not only complete contracts but also policies supplemented by other instrumental monitoring rules.

Conversely, relational mechanisms centre on the impact of social norms that govern behaviour within IORs. Scholars such as Lusch and Brown (1996) and Dyer and Singh (1998) have investigated how these norms shape expected behaviours and foster mutually beneficial relationships. Relational mechanisms rely on self-enforcement and emphasize the significance of trust and reliability in mitigating collaboration risks, facilitating coordination efforts, and promoting the exchange of information and knowledge among alliance partners.

In addition to the differentiation of enforcement mechanisms, Keller et al. (2021) introduce a second dimension in their typology of governance mechanisms, which focuses on the varying levels of codification of ruling principles within interorganizational relationships (McEvily, Soda, & Tortoriello, 2014). Some agreements may be formal and extensively documented, while others may be informal or based on verbal agreements and handshakes (P. Ring, 2002; P. S. Ring & Van de Ven, 1994). The level of codification reflects the degree to which the governance mechanisms are explicitly defined and recorded.

Formal mechanisms, for their specific nature, require documentation and updating as circumstances change, involving elaborate procedures and approvals. This enables accurate information on the timing and extent of changes, which can be collected, analysed, and used as data. On the other hand, informal mechanisms are sustained and transmitted through socialization with partners, establishing standards of appropriateness that discourage individual opportunism. If widely known and accepted, these informal mechanisms are often virtually self-enforcing and contribute to the reproduction of a social structure.

This typology of governance mechanisms provides invaluable insights into understanding their dynamics. The rules encompassing these mechanisms encompass explicit or implicit norms, regulations, and expectations that govern partner behaviour and interactions. Partners' actions are guided not only by anticipating uncertain consequences but also by a logic of appropriateness shaped by the structure of these rules. Rather than being strictly competitive or mutually exclusive, these perspectives on governance mechanisms are generally regarded as intertwined, recognizing their interconnected nature.

Having provided an overview of the typology and dynamics of governance mechanisms in IORs, we address discrepancies in conceptual labels and highlight different perspectives on governance mechanisms by exploring the classification proposed in the existing literature. The typology presented distinguishes between contractual and relational mechanisms as enforcement means for governance and explores their interplay. Additionally, it highlights the differentiation in the levels of codification of these mechanisms, whether formal or informal. This typology enables us to take a step forward in understanding the dynamics of governance mechanisms, thereby enhancing our comprehension of how they evolve and adapt within IORs. By delving into the intricacies of these mechanisms, researchers and practitioners can gain insights into their contingent value and effectiveness, enabling informed decision-making and strategic choices to sustain collaboration and achieve desired outcomes.

In the following sections of this chapter, we will delve deeper into the sources of turbulence that can impact the value of governance mechanisms, reviewing relevant literature and discussing their implications for managing change and ensuring effective collaboration within IORs. By advancing our knowledge in this field, we aim to contribute to the existing literature and provide practical insights for organizations engaged in interorganizational relationships.

1.3 Disruption in Inter-organizational relationships

The theory of disruptive innovation, initially proposed by Christensen (1997), has emerged as one of the most influential frameworks for comprehending how firms and industries navigate technological change. Its significance is evident not only in academic circles but also in the practical realm, where practitioners have keenly examined the strategies employed by notable disruptors such as Google, Amazon, Uber, and Airbnb. However, while significant attention has been devoted to understanding the strategies of incumbents and the dynamics of disruption within industries, there remains a critical oversight in comprehending the impact of disruptive innovation on IORs. Specifically, the interplay between disruptive forces and the governance of IORs warrants closer examination, as it

unveils the need for strategies that can effectively adapt and adjust interorganizational relationships in the face of these transformative changes. This section aims to bridge this gap by exploring the implications of disruptive innovation on IORs and delving into the strategies necessary to navigate and thrive amidst such disruptions.

The term "disruptions" encompasses a spectrum of shocks or changes that occur within the environment in which transacting parties operate. These disruptions have the potential to redefine the competitive landscape and render a firm's specific competencies less relevant, if not entirely obsolete. They can arise from a variety of factors, including breakthrough technologies, supply-side shocks, shifts in customer demand and preferences, and new industry regulations or deregulations (Kim & Prescott, 2005; Tripsas, 1997). Furthermore, disruptions can take on a more "mundane" form, resulting from errors of inattention, misalignment of actions, or failure to apply full effort (Simon, 1973). Whether stemming from major shocks or seemingly minor disturbances, disruptions can profoundly impact the scope of partnerships or the timely completion of partnership projects, potentially jeopardizing the very survival of the partnership itself (Mishra & Sinha, 2016).

Understanding the ramifications of such disruptions on interorganizational relationships is crucial for devising effective strategies to navigate and mitigate their adverse effects.

The existing studies investigating the impact of disruptive changes on interorganizational relationships have predominantly focused on two main areas: examining the forms of governance that can anticipate and address these hazards and exploring the processes through which partners enhance coordination and cooperation to influence long-term performance.

The first approach, rooted in transaction cost economics, centres on the transaction itself and the role that governance mechanisms play in ensuring the success of the partnership (Williamson, 1991). This perspective highlights the significance of the initial structural design of a transaction in explaining alliance performance (Hennart, 2006). However, as circumstances evolve, the constraints imposed by the governance choices made during the formation of the transaction may limit a firm's ability to adapt to changing conditions (Argyres & Liebeskind, 1999). It is crucial to note that inefficiency is not necessarily inherent in this account. Rather, a focus on the individual transaction may reveal that firms exhibit a form of path dependency whereby history matters not because it generates inefficiencies per se, but because reversing certain commitments becomes prohibitively costly (Liebowitz & Margolis, 1995).

Despite the insights offered by the transaction cost economics perspective, it is essential to consider the limitations associated with an exclusive focus on governance mechanisms. A comprehensive understanding of the impact of disruptive innovation on interorganizational relationships necessitates an examination of the processes and dynamics within these relationships. Such an analysis delves into the coordination and cooperation strategies developed by partnering firms to improve performance over time.

By focusing solely on governance mechanisms, the transaction cost economics perspective may overlook the dynamic nature of interorganizational relationships and the need for adaptive strategies. In contrast, exploring the processes within relationships provides insights into how partners evolve their interactions and adjust their collaborative efforts in response to disruptive changes. By fostering effective coordination and cooperation, partnering firms can enhance their ability to navigate the challenges posed by disruptive innovation and ensure the longevity of their interorganizational relationships.

Another perspective that has gained attention in the study of interorganizational relationships focuses on the processes and dynamics that characterize these relationships. Within this perspective, researchers have directed their attention toward understanding the relational content of transactions and their embeddedness. Embeddedness refers to the extent to which social and economic relationships are intertwined and interconnected. Firms are considered embedded when they demonstrate a preference for engaging in economic transactions with other firms (Granovetter, 1985). These types of exchanges have been argued to foster private knowledge transfer due to the presence of trust and reciprocity, creating an environment where both parties can benefit from the transfer of knowledge (Uzzi, 1999).

By examining the relational content of interorganizational transactions and the level of embeddedness between partnering firms, scholars have sought to uncover the mechanisms through which trust and reciprocity facilitate knowledge sharing and collaboration. The presence of trust and reciprocity encourages firms to engage in cooperative behaviours, as they believe that their partners will act in a mutually beneficial manner. This promotes knowledge transfer that is conducted in a manner that respects the interests and needs of both parties involved. As a result, interorganizational relationships characterized by trust and reciprocity are more likely to effectively leverage and share valuable knowledge, fostering innovation and enhancing the overall performance of the partnership.

Understanding the dynamics of interorganizational relationships and the role of trust and reciprocity in facilitating knowledge transfer is vital in the context of disruptive innovation. As disruptions occur and challenge the existing order, partnerships that exhibit high levels of embeddedness and foster trust and reciprocity are better equipped to adapt to the changing circumstances. The strong foundation of trust and mutual benefit allows partners to manoeuvre through the uncertainties and complexities associated with disruptive forces, leading to more effective collaboration and ultimately enhancing the resilience and longevity of the interorganizational relationship.

While the previous perspectives have shed light on the impact of disruptive forces on IORs, particularly in terms of reduced interpersonal trust and increased uncertainty (Bendapudi & Leone, 2002; Palmatier, 2008), it is important to recognize that the solutions proposed within these perspectives are not independent of one another. Instead, they are inherently linked and mutually influential, operating within and between transactions. Researchers have demonstrated the interconnected nature of structural and relational aspects, revealing how they mutually shape each other's dynamics within and across transactions (Faems, Janssens, Madhok, & Looy, 2008). This finding emphasizes the interdependence of governance mechanisms and relational dynamics, highlighting the need to consider both perspectives simultaneously.

In examining the interplay between governance mechanisms and relational dynamics, studies have uncovered a range of roles that these factors can assume within interorganizational relationships. They can act as substitutes or complements, exerting influence at different levels, including partnering organizations as a whole and specific groups of individuals within these organizations (Brattström & Faems, 2020; Schilke & Cook, 2013). Such research highlights the complexity of managing interorganizational relationships in the face of disruptive innovation, as different factors and actors interact to shape the overall effectiveness and outcomes of these relationships.

By recognizing the interconnections between governance mechanisms, relational dynamics, and their multi-faceted roles, a more comprehensive understanding of how to address the

challenges posed by disruptive forces in IORs can be attained. This integrative approach enables researchers and practitioners to develop strategies that leverage the interplay between governance mechanisms and relational dynamics, fostering resilience, adaptability, and innovative outcomes in the face of disruptive innovation.

In conclusion, this section has addressed critical gaps in existing research by examining the impact of disruptive innovation on interorganizational relationships. By delving into the interplay between disruptive forces and the governance mechanisms and relational dynamics within IORs, we have shed light on the need for strategies that can effectively adapt and adjust these relationships in the face of transformative changes. Our study brings together two essential elements that have been overlooked in previous research: (1) a detailed analysis of contingent factors that influence the structuring of efficient governance mechanisms, particularly those related to collaborating firms, and their influence on uncertainty levels and transaction-specific investments, as well as the relative effectiveness of contractual and relational governance; (2) an exploration of the dynamics that characterize the evolution of governance within and across interorganizational relationships.

By integrating these perspectives, our study contributes to a more comprehensive understanding of the challenges and opportunities presented by disruptive innovation in IORs. The fine-grained analysis of contingencies factors helps identify the contextual factors that shape the selection and effectiveness of governance mechanisms, allowing for tailored approaches that consider the specific characteristics of the collaboration and its associated uncertainty. Furthermore, studying the dynamics of governance within and across relationships reveals how these governance structures evolve over time and adapt to disruptive forces, providing insights into the mechanisms through which interorganizational relationships can remain resilient and foster innovation.

Overall, our research highlights the importance of addressing the interconnections between disruptive forces, governance mechanisms, and relational dynamics in order to navigate the complexities of interorganizational relationships amidst disruptive innovation. By taking into account the contingencies factors and understanding the dynamic nature of governance within and across relationships, organizations can develop strategies that enhance their ability to adapt, thrive, and foster innovation in the face of disruptive change.

1.4 Exploring the transformation of the Automotive industry: a methodological clarification

We aim to complete the analysis of the challenges of governing IORs for innovation in times of disruption using a case study of the automotive industry. The changing automotive ecosystem is particularly attractive for two reasons. First, it allows us to illustrate the impact of strong transformation within the context of a single industry that, despite many substantial technological modifications in the knowledge base, still does not seem subject to major disruptions. Incumbents still hold strong positions and no significant new entrant has challenged their dominant innovative position (Bergek, Berggren, Magnusson, & Hobday, 2013). Second, the changing automotive ecosystem provides a fertile context to study IORs governance mechanisms, since its innovation processes along the supply-chain have been traditionally based on collaborative IORs. As the industry experiences transformation, examining IORs governance in this dynamic context allows us to understand how governance adapts and evolves in response to industry changes. Our proposed methodological approach that departs from previous research will provide more fine-

grained analysis of how IORs are governed during industry evolution. This will contribute new insights into IORs governance sophistication and help address open questions about IORs governance amidst industry disruption.

With regards to the first point, the automotive industry was viewed as technologically mature, following a post dominant design path that was increasingly evolutionary and incremental (Abernathy & Utterback, 1978). By contrast, today's automotive industry has been going a series of radical change that might impact the structure of its entire ecosystem. Indeed, the electrification of the vehicle powertrain, the autonomous driving, the shared-use mobility platforms, and data connectivity might impact the role of incumbent that should have been displaced if we accept the analogy with the fate of the PC in recent decades (Jacobides & MacDuffie, 2013). While many of the incumbent global automakers such as Toyota, GM, Ford, Volkswagen, and BMW—commonly called original equipment manufacturers (OEMs) – have so far maintained their central positions, a key question is how the structure of current ecosystem of IORs will be disrupted by new entrants such as Tesla, Waymo and others, which are attempting to leverage new technologies.

Previous studies have described the IORs relationships in the automotive sectors in details. For instance, Mudambi and Helper (1998) posited a model of close but adversarial buyer–supplier relations in the U.S. auto industry, while Helper and Henderson (2014) remark how the automakers' relationships in the US were also very different from those of their Japanese competitors. They were characterized by short-term -usually one-year -- contracts, arms'-length relationships, and a reliance on as many as six to eight suppliers per part (MacDuffie & Helper, 1997). While this belief did not promote quality, it did facilitate the maintenance of “spot” relationships with suppliers. The differences that scholars have observes in the different contexts reinforce the idea that few aspects of the governance contextual features survive when these practices are transferred. Therefore, it is important to analyse the heterogeneity of the forms of IORs governance not only across the different firms but also across the relationships a firm establishes.

In order to provide detailed and accurate account of the form of governance across the firms' interorganisational relationships we developed methodological approach that differ from the traditional analysis of governance mechanism on the subsequent points. First, we collected a detailed account of the characteristics of the firms' IOR, and of their governance modes and changes. Second, while previous studies have traditionally focused on the characteristics of dyads (length, strength, governance arrangement, etc.) or the features of the alliance portfolio (variety/similarity, numerosity of relations, etc.), we conducted a cross-sectional analysis of the three most important relationships for each firm and we independently evaluated the IOR portfolio and the IOR network characteristics for each firm (Wang & Rajagopalan, 2015). Third, as IORs involve processes through which partnerships are formed, managed, changed, and terminated, we examined the evolution of these forms. Time is therefore another structuring element of our analysis of IORs' governance (Mitchell & James, 2001; Shi, Sun, & Prescott, 2012). This approach allowed us to have a pluralistic approach to the analysis of these IORs that could take into account the power of the governance mechanisms that we can attribute at each level as well as the nature of the dynamics nested across the different levels of analysis.

1.4 Overview of the book

The chapters in this book explore how to manage inter-organizational relationship and what are the strategies that support their development during times of disruption. In chapter 2, the theoretical analysis provides an account of how to design the form of governance given the hazard of the relationship. The different characteristics at the dyad, portfolio, and network level explain how the behavioural uncertainty that arises from the unpredictability of actions in disrupted relationships, shedding light on decision-making processes and the role of uncertainty in IORs.

In the chapter 3, we emphasize the significance of adaptation in response to disruptions, highlighting the actions taken to ensure project's or transaction's progress despite the challenges faced. The authors extensively examine the complexities involved in managing and adapting to disruptions in alliances. They achieve this through a comprehensive analysis of disruptive events and their effects on knowledge loss, interpersonal trust, and uncertainty. Moreover, they explore specific disruptions arising from technological advancements and regulatory changes. Recognizing that not all disruptions are drastic shocks but rather a collection of mundane disruptions, the book examines the cumulative effects of these seemingly minor disturbances and their impact on project delivery and overall success. By uncovering the underlying causes of disruptions and their implications, this volume offers valuable insights into managing and mitigating the risks associated with disruptions in IORs.

Ultimately, the overarching goal of this book is to enhance our understanding of how technological disruption influences alliance governance mechanisms. By synthesizing existing research and presenting novel perspectives, it aims to equip scholars, practitioners, and policymakers with the knowledge and tools needed to navigate the complexities of disruptions and foster resilient and adaptive interorganizational relationships.

In the chapter 4, the case study of the automotive industry show that as technological advancements continue to reshape industries and disrupt traditional business models, it is imperative to comprehend the transformative power of disruptions. This book serves as a valuable resource for researchers and professionals alike, enabling them to navigate the turbulent waters of technological disruption and forge robust IORs in an ever-evolving business landscape.

Chapter 5 concludes the book highlighting its main empirical and theoretical contributions. In conclusion, this book provides a timely and comprehensive exploration of the design and development of governance mechanisms for interorganizational relationships. Through its diverse range of contributions, it offers insights, frameworks, and strategies for effectively managing disruptions and foster resilient alliances in the face of technological change.

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