Robust disruption: Competition and collaboration dynamics in the launch of electric vehicles in the automotive industry

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Disruption increasingly piques the interest of scholars and practitioners for their destabilizing effect on the status quo and the uncertainty in the future of established practices and actors. Although we have made considerable progress on how disruptors compete with the disrupted, or how actors battle for their version of disruption to be successful, we are only beginning to understand the role of collaboration in the process of disruption. Our particular focus in this paper is therefore to seek answers on the question “How do organizations balance collaboration and competition over time in their responses to systemic and institutional disruption?” We investigate this question by looking at the emergence of electric vehicles (EVs) and recharging infrastructure in the period 2004-2018, and in Europe in particular. In dealing with EVs, we find that incumbents in the automotive industry did not respond to EVs with reluctance or blocking the disruption or seeking dominance, but reacted in ways that reflected a “robust action” strategy: keeping options open across unforeseeable futures to preempt hostile attempts of others to narrow those options. As a result, they collaborated both with startups as well as other incumbents, yet limited this collaboration when the time for doing so would slow down responsiveness of an alliance in such a way that it would shut down options or relinquish control. We discuss the implications of our findings for organizational theory, strategy and the ONE literature.

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