



The challenge of partner selection in collaborative foresight projects



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ABSTRACT

In recent years the interest in inter-organizational collaborations when conducting foresight has increased. One important and challenging aspect in such collaborative foresight projects is the selection of suitable partners, which is analyzed in this paper. We do so based on existing literature and by an action research study: this collaborative foresight project was conducted by the project initiators (Linz Center of Mechatronics Ltd. (LCM) and Institute of Strategic Management, Johannes Kepler University Linz (ISM)) in cooperation with five companies. The results show that there are – due to the objectives of collaborative foresight (e.g. joint creation of future knowledge and “out-of-the-box-thinking”) – special requirements regarding technological and organizational proximity, trust and commitment. Related to technological resources we claim that a higher degree of diversity is crucial and organizational proximity is less important. In this way unique learning opportunities can be created and opportunities for new ideas can be generated. However, the companies have to be similar enough to facilitate learning and to anticipate future developments. In addition, we suppose that geographical proximity is very helpful in bringing the organizations together and facilitating the exchange of tacit knowledge. Furthermore, the results show that criteria such as trust and commitment, often referred to as key factors, are of little relevance in this context.

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1. Introduction

Foresight is a gradually establishing approach that helps companies to understand environmental uncertainties and to facilitate the development of future insights (Rohrbeck et al., 2015; Vecchiato, 2015; Wayland, 2015). Keller and von der Gracht (2014, 81) state that “*Engaging in strategic foresight supports organizations in maintaining sufficient flexibility for future developments and unforeseen circumstances.*” Through corporate foresight, companies should be able to prepare themselves against external risks and to identify opportunities (e.g. new business, new products or new customer needs) (Boe-Lillegraven and Monterde, 2015; Rohrbeck, 2012).

For discovering new trends, innovation opportunities and new technologies corporate foresight instruments are also frequently used in the very early phases of the innovation process (Heger and Boman, 2015). Rohrbeck (2014, 72) claims that “*By applying foresight methods, firms are able to channel more future insights into their front end of innovation and thus increase the likelihood of discovering interesting opportunities.*”

However, diverse challenges – e.g. fast technological change, increasing environmental complexity, high innovation speed – and the need to analyze a large variety of data sources and perspectives make it increasingly difficult for companies to manage foresight activities on their own. They face the risk of leaving out important trends and of

being focused on existing mental models (Rohrbeck et al., 2015; Van der Duin et al., 2014).

Therefore, in recent years the interest in inter-organizational collaborations when conducting foresight has increased (Heger, 2014). By this, foresight has evolved, similar to the open innovation approach to open foresight, and Rohrbeck et al. (2015) state that the interest in collaborations in the field of foresight is growing.

In this research project we focus on collaborative foresight, which means a joint discussion and analysis process of various organizations concerning future developments in specific search fields. The great benefit of this approach is that resources and expertise can be shared, richer and broader data can be collected, and additional perspectives from various backgrounds can be considered. In this way collaborative foresight can foster out-of-the-box thinking and the risk of being limited to existing mental models can be avoided. Thus, know-how about the future can be generated together and then used on single company level (Burmeister and Schulz-Montag, 2009; Heger and Boman, 2015; Keinz and Prügl, 2010; Van der Duin et al., 2014).

However, the literature review shows that there are hardly any insights regarding the planning and realization of such collaborative foresight projects. Heger and Boman (2015) state that in spite of similarities to corporate or strategic foresight, fundamental questions are unanswered in matters of collaborative, respectively networked foresight.

One of these questions is the aspect of suitable partners for such a collaborative foresight project. As the literature regarding different forms of collaborations like open innovation and strategic alliances

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shows that partner selection is a critical aspect for the successful development of a collaboration (Guertler and Lindemann, 2016; Huizingh, 2011; Lazzarotti and Manzini, 2009), we claim that this is also a key factor in collaborative foresight projects.

As the criteria for partner selection vary depending on the alliance project type (Capaldo and Petruzzelli, 2015; Choi and Yeniyurt, 2015; Shah and Swaminathan, 2008) and collaborative foresight activities result in special tasks and challenges (e.g. joint creation of future knowledge and “out-of-the-box-thinking”) we assume that specific criteria of partner selection are relevant in collaborative foresight projects.

Therefore the objective of this paper is to identify crucial criteria for partner selection in collaborative foresight projects.

We do so based on existing literature and by an action research study. As there are no studies regarding partner selection in collaborative foresight projects, the fields of open innovation and strategic alliances - especially knowledge intensive alliances (e.g. R&D alliances, new product development alliances) - are analyzed. These findings provide the basis for the partner selection process in the action research study: The collaborative foresight approach is applied by the project initiators (ISM and LCM) in cooperation with five companies.

The research field of collaborative foresight is increasingly gaining importance in science and practice. For example, Rohrbeck et al. (2015, 6) state that the interest in collaboration in the foresight phase and corporate foresight in networked organizations will grow rapidly: “For cases that require radical change of behavior and/or substantial investments of multiple actors, it is imperative that a joint visioning, planning and execution program is established.”

Heger and Boman (2015) also argue that foresight can benefit from collaboration with heterogeneous partners (in the context of networked foresight) and that the emergence of this new form of foresight appears to be imminent.

However, to the best of our knowledge the literature provides no findings about partner selection in collaborative foresight projects. Therefore, we argue that the results of this study will bring new insights in a research field which will gain in importance in the future. As the selection of partners is a critical aspect for the successful development of collaborations (Guertler and Lindemann, 2016; Huizingh, 2011; Lazzarotti and Manzini, 2009) we state that these findings will provide fruitful theoretical and managerial insights for the planning and realization of collaborative foresight projects.

The remainder of the paper is structured as follows: the next section presents the theoretical background regarding foresight - especially collaborative foresight - and relevant aspects in the field of partner selection. The subsequent section explains the methodology of the study. Following this, the context, the phases and the findings from the action research process are described and discussed. The final section summarizes the paper's contributions, discusses its limitations, and suggests avenues for further research.

2. Theoretical background

2.1. Corporate foresight and collaborative foresight

The term foresight is widely used in the literature. In this paper foresight is described as follows: “Foresight is the process of developing a range of views of possible ways in which the future could develop, and understanding these sufficiently well to be able to decide what decisions can be taken today to create the best possible tomorrow.” (Horton, 1999, 5). In this study foresight activities in companies (corporate foresight) are of special interest.

The literature review shows that the realization of corporate foresight projects faces various limitations: e.g. companies are influenced by internal structures and therefore restricted to existing mental models. They are confronted with limited resources (time and budget) and with low methodological knowledge (Mietzner and Reger, 2009; Ruff, 2006). Moreover, diverse challenges - e.g. fast technological

change, increasing environmental complexity, high innovation speed - and the need to analyze a large variety of data sources and perspectives make it increasingly difficult for companies to manage foresight activities on their own. This complexity often goes beyond the capabilities of individual organizations and forces them to collaborate with other companies (Rohrbeck et al., 2015).

In response to these current challenges Daheim and Uerz (2006) recognize the emergence of a new form of foresight - an open foresight approach. Since then, several authors have dealt with this approach (e.g. Burmeister and Schulz-Montag, 2009; Daheim and Uerz, 2008; Miemis et al., 2012; Rau et al., 2014; Ruff, 2006) and have presented first insights to open foresight processes and the role of corporate culture in this context (Gattringer and Strehl, 2014a,b; Wiener et al., 2015, 2016).

However, the literature review shows that the definition of open foresight is vague and that there are several kinds of open foresight with different forms of openness. In the research field of open innovation the degree of openness depends on the degree to which the participation is open to anyone who wants to join (Pisano and Verganti, 2008). In a totally open collaboration (e.g. crowd sourcing) everyone can join. Closed forms of networks, in contrast, are “private clubs”. In these projects, themes and issues are shared with few partners (e.g. customers, suppliers), which are selected due to their crucial capabilities (Lazzarotti and Manzini, 2009).

Comparing this systematization with the open foresight idea, the following forms can be mentioned: Activities with a high degree of openness e.g. crowd sourcing activities (Miemis et al., 2012) and closed forms: e.g. participative approaches of corporate foresight (various internal and external experts or stakeholders are integrated in a single corporate foresight project; Andersen and Andersen, 2014; Heger and Rohrbeck, 2012; Könnölä et al., 2009; Rohrbeck et al., 2009), networked foresight (foresight activities in innovation networks¹; Heger and Boman, 2015; Van der Duin et al., 2014), or collaborative foresight (with a small number of participating companies; Burmeister and Schulz-Montag, 2009b; Gattringer and Strehl, 2014b; Rohrbeck et al., 2009; Wiener et al., 2015).

In this research project we focus on inter-organizational collaborations for foresight (e.g. networked and collaborative foresight). In this context the following examples are presented in the literature: Vecchiato and Roveda (2010) mention the multi-client collaborative foresight project “HyWays” for promoting and developing a hydrogen infrastructure, and Heger and Rohrbeck (2012) describe a foresight project where a consortium of nine partners explored new markets for intelligent and adaptive management of broadband networks. A similar approach is presented by Reger (2001) who describes the example of the active participation in specialist organizations, professional associations or standardization committees.

In the field of networks such a development is also demonstrated. Van der Duin et al. (2014) and Heger and Boman (2015) present the idea of “Networked-Foresight” (“foresight activities conducted in inter-organizational innovation networks” (Heger and Boman, 2015, 149). In their study Heger and Boman (2015) explore the value of networked foresight in the EIT ICT Labs Network. The results show that network partners use the new knowledge primarily for sensing activities (e.g. data collection) and rarely for activity initiation (e.g. strategy or decision making).

These inter-organizational collaborations can help to overcome core limitations of traditional approaches to foresight and benefit from the potential of integrating new insights into a company's foresight process. Internal corporate foresight departments can avoid the risk of being limited to existing mental models, becoming one dimensional and narrow-sighted or being influenced by the power structures within the company (Heger, 2014; Heger and Boman, 2015; Ruff, 2006).

¹ In these networks not only the participating partners but also the network organization itself should benefit from the foresight project.

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