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Open Strategy: A Modern Approach to Strategy Formulation – Theory and Practice

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Jan Jeżak[1], Joanna Jagiełło[2]

Abstract:

Purpose: *This article aims to review and synthesize world research related to Open Strategy, a contemporary concept of inclusive and transparent strategy formulation, selection and implementation. The trend of openness, with its hallmarks of transparent access to information and the demand for stakeholder inclusion, has become a global social expectation in almost all dimensions of life, including strategy development. At the same time, the need to reconcile effectively multiple stakeholders' interests and still be able to build coherent strategy remains the field of focus for scientists and business practitioners. Open Strategy may help to solve this dilemma and become an efficient framework for building coalition of interests among multiple stakeholders.*

Design/Methodology/Approach: *This study employs a systematic literature review (SLR) with bibliometric analysis to identify genesis and key characteristics of OS concept. Comprehensive analysis of most relevant articles from top rated journals has been applied to understand scientific achievements of this research stream and implications of OS concept to strategy practice.*

Findings: *The analysis reveals Open Strategy brings fundamental changes to strategy process and is the opposite of the classic strategy development. Its attributes alter from "confidential" and "exclusive for top management" to "transparent" and "inclusive". In the research we raise two questions: RQ1 What are the genesis and characteristics of OS?and RQ2 What are the changes OS concept is bringing to the process of strategy formulation and selection?We respond to the first question with systematic literature review (SLR) of OS research published between 2007 and November 2024, identifying key contributors (researchers and research centres) and key attributes of the concept established. We leverage bibliometric analysis of key words clusters to identify key themes and connections. Based on this we elaborate on the concept, analyse seminal works and identify connected research streams. They are centered around open innovation, transparency, inclusion, strategy as practice and recently collaborative governance.*

Practical Implications: *Inclusion of stakeholders and transparency of information form major expectations towards company governance in the modern economy. As the review presents, openness in strategy process can bring many benefits but carries certain risks at the same time. Executives need to build their understanding of Open Strategy to balance openness and closure depending on the business situation.*

[1]*Prof., dr., hab., Faculty of Management, University of Lodz, Poland,*
ORCID: 0000-0002-6277-2079, e-mail: jan.jezak@uni.lodz.pl;
[2]*M.Sc., Doctoral School of Social Sciences, University of Lodz, Poland,*
ORCID: 0009-0006-2195-9204, e-mail: joanna.jagiello@edu.uni.lodz.pl;

Originality/Value: *This study provides the comprehensive analysis of Open Strategy, its characteristics and practical implications.*

Keywords: *Strategy process, openness, stakeholders, transparency, inclusion, participation.*

JEL codes: *M14, DO1, D00, D02, D04.*

Paper type: *Research article.*

1. Introduction

The trend of openness, with its hallmarks of transparent access to information and the demand for stakeholder inclusion, has become a global social expectation in almost all dimensions of life (open science, open sourcing, open governance, open organizations). Two decades ago, originating from the open innovation, this trend entered the field of strategy and strategic management (Chesbrough and Appleyard 2007; Whittington *et al.*, 2011).

Open Strategy (OS) is a contemporary concept of inclusive and transparent strategy formulation, selection and implementation. Its main benefits allow for more diverse and innovative ideas generation which largely impact competitive potential of the firm. Also, it offers better understanding, acceptance and therefore implementation of strategy due to early inclusion of stakeholders (Whittington *et al.*, 2011; Whittington and Yakis-Douglas 2012; Weinert 2019).

Because of its practicality and usefulness, OS concept is widely implemented around the world. Many multinational companies (IBM, Siemens, Wikimedia, Premium Cola and others) have adopted the Open Strategy as a way to build their strategy (Tavakoli *et al.*, 2017). Many global organizations, such as the EU, NATO, Griffith University, Oxfam, UK Public Research University and others are using the Open Strategy approach (Morton *et al.*, 2020; Amrollahi and Rowland 2018).

There are two international organizations that bring together practitioners and researchers in the field of Open Strategy (Open Strategy Network (OSN) and Strategy as Practice International Network (SAP-IN). The concept of Open Strategy is moving beyond the canon of research and academic discourse into the field of consulting and advisory (Stadler *et al.*, 2021; 2023). This demonstrates the importance of this approach for management science and practice.

Inclusion of stakeholders (internal and external) and transparency of information form major expectations towards company governance in the modern economy (ESG, Business Roundtable, 2019). At the same time, in the world that has become multiple stakeholder eco-system, the need to reconcile effectively multiple stakeholders' interests and still be able to build coherent strategy remains the field of focus for scientists and business practitioners (Rumelt, 2022; Business Roundtable 2019; Amis *et al.*, 2020; Jeżak. 2023).

Open Strategy may help to solve this dilemma and become an efficient framework for building coalition of interests among multiple stakeholders. Therefore this paper aims to fill the cognitive gap by providing a review of the world literature and current research output in the area of OS. The purpose of the review is to assess and synthesize the published world literature related to this concept in order to identify its characteristics and implications to strategy process practice. The research questions we aim to answer are:

- *RQ1: What are the genesis and characteristics of OS?*
- *RQ2: What are the changes OS concept is bringing to the process of strategy formulation and selection?*

2. Research Methodology

The objective of the article will be achieved by the use of the systematic literature review (SLR) method along with elements of descriptive bibliometric analysis. The method of systematic literature review, with the number of scientific publications increasing exponentially, is currently regarded the most reliable method for analyzing the research output (Marzi *et al.*, 2024). The feature that determines this is its comprehensiveness and reproducibility (Czakon, 2011; Lenart-Gansiniec, 2017).

The recommended procedure for this method includes the following four steps:

- Determine the purpose of the study and formulate the research questions,
- Collection of literature and its preliminary evaluation,
- Selection of publications,
- Interpretive analysis of the content from the point of view of the purpose of the study and the research questions posed.

Table 1 presents in detail the search procedure and its results.

Table 1. *SLR procedure*

Stage 1 Identify the purpose of the study and formulate the research questions	
Main objective: to synthesize the published world literature related to the OS concept in order to identify current research areas and directions for their evolution	Research Questions: PB 1. What is the current state of knowledge and existing research directions on Open Strategy? PB 2. In what direction are the research areas of

	Open Strategy evolving?
Stage 2 Collection of primary literature and preliminary assessment of bibliographic data set	
Selection criteria:	Number of literature items obtained
"open strateg*" as article abstract, title, keyword	323
Publications from 2007 to October 24, 2024	308
English, French,Polish	287
General data set of 287 documents, including 183 articles and review articles	
Stage 3: Clean up the overall dataset	
Step 1	
Inclusion criteria	Number of literature items obtained
Selection criterion- keywords (phrases): open* or"participat* or transparen* or inclusi*.	110
Core dataset: 110 articles and review articles from the Scopus database	
Step 2 Clearing the base set	
Inclusion criteria:	Number of literature items obtained
Key journals: number of subject publications and CiteScore	98
Stage 4 Selection of a set of relevant articles	
Inclusion criteria:	
Subject matter limited to: Business, Management and Accounting according to Scopus nomenclature (80)	
Analysis of abstracts: direct relevance to the subject of the study and content of the article of a review or empirical nature (75)	
Core dataset: 75 articles and review articles from the Scopus database	
Content analysis of the collected articles to answer the research questions posed	

Source: *Own study.*

The Scopus database, which is the largest collection of scientific abstracts (75 millions of records), has been chosen as the data source for the analysis. The first stage of the search was based on the term "open strateg*" with the use of the special character (" ") to search for conjunction of exactly these two words and the use of the special character (*) to ensure that different variations of the word strategy (strategic, strategizing, etc.) were searched for as "Title, abstract, keyword."

As a result, 323 records were obtained. The bibliometric collection was then restricted to scientific papers published between 2007 and November 2024 (present time). The narrowing of the starting date is dictated by the fact that the term "Open Strategy" was first used by Chesbrough and Appleyard in 2007 to describe the need for a new approach to strategy that would enable effective implementation of open innovation. This moment is accepted as the emergence of OS as a new, distinct concept.

The next step was to select documents published in English, French and Polish. This yielded 287 literature items, 183 of which were articles and reviews. The next step was to clean up the overall dataset. This was done by a refinement search using

Boolean logic, typing in the key OS characteristics: open* (for openness) OR transparen* (for transparency) OR inclusi* (inclusion) OR participat* (for participation).

This resulted in 110 documents, which were then subjected to the next step of cleaning, namely verification of the subject matter of the publication and the reputation of the publication source. It is worth mentioning that 40% of the articles in the pool were published in the most prestigious scientific journals with a citation index (CiteScore) of more than 10 or slightly below (9.8), and half (50%) with a citation index of more than 8.

Also most reputable sources in Business and Management that is Long Range Planning, Strategic Management Journal, Journal of Strategy and Management and Strategic Organization account for the publication of nearly a quarter (22%) of the collection in question (illustrated below in Table 2) Of the remaining publications, most of which were "scattered" individually across academic journals, twelve were rejected as not meeting the criteria (Cite Score below 3).

Table 2. *Journals CiteScore for OS publications*

Lp		CiteScore 2023 rating	Nr of publications 2007-2024
1	Business Strategy and the Environment	22,5	1
2	Technological Forecasting and Social Change	21,3	1
3	Journal of Business Research	20,3	2
4	Technology in Society	17,9	1
5	Information and Management	17,9	1
6	Business Horizons	17,7	1
7	Journal of Strategic Information Systems	17,4	3
8	Industrial Marketing Management	17,3	1
9	Journal of Management Studies	16,4	2
10	Business and Society	14,8	1
11	Strategic Management Journal	13,7	5
12	Organization Theory	13,7	3
13	Journal of Knowledge Management	13,7	1
14	International Journal of Operations and Production Management	13,3	1
15	Long Range Planning	13	10
16	European Management Journal	12,9	1
17	Research Policy	12,8	1
18	Organization Studies	11,5	3
19	Journal of Technology Transfer	10,2	1
20	Journal of Information Technology	10	1
21	Strategic Organization	9,8	4
22			45

Source: *Own work based on Scopus database data.*

In the fourth stage, the previously obtained collection was further processed to identify relevant publications. The research area was limited to Business, Management and Accounting (in Scopus nomenclature), resulting in 80 bibliographic items. Subsequently, the abstracts of the above set of bibliographic items were reviewed in order to identify publications directly relevant to the subject of the study.

As a result, the collection subject to further analysis in step four consisted of 75 items. In order to answer the research questions as fully as possible, the selected body of literature was examined using bibliometric analysis tools (Scopus analytical diagrams and VOSviewer cluster mapping). Its detailed results are discussed below. Selected leading articles have been subsequently subjected to descriptive analysis as their themes and research methods has been very diverse and disperse, preventing direct comparison and evaluation.

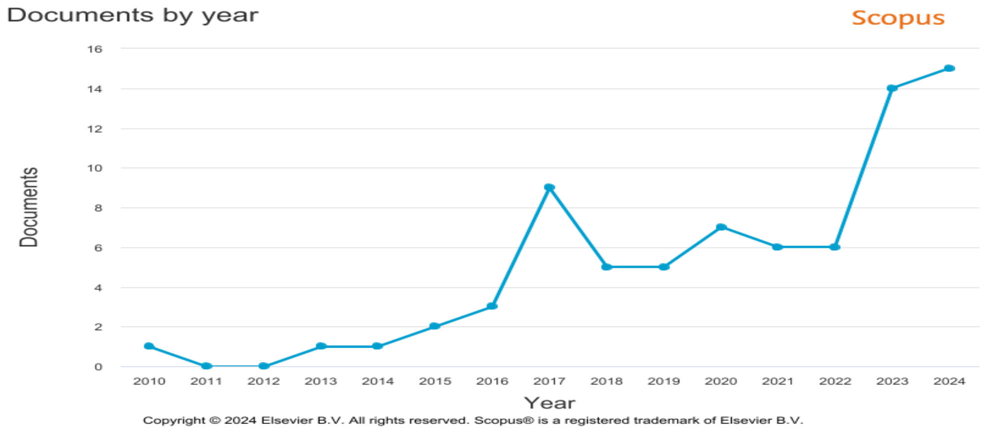
3. Research Results and Discussion

3.1 PB1: What are the Genesis and Characteristics of OS?

OS, despite its emergence two decades back, seems to be still at its dynamic growth path in terms of research. Chart1 below illustrates the number of papers published from 2007 to today. The trend of publications on Open Strategy has been increasing since the 2000s, with a clearly accelerating dynamic as of 2012.

The peak result in 2017 corresponds to the publication of the Special Issue dedicated to Open Strategy in Long Range Planning, one of the most influential and reputable journals. The trend regains dynamic increase since 2022 and amounts to record high publication numbers in 2023 and 2024.

Figure 1. *Evolution of the number of publications on the Open Strategy*

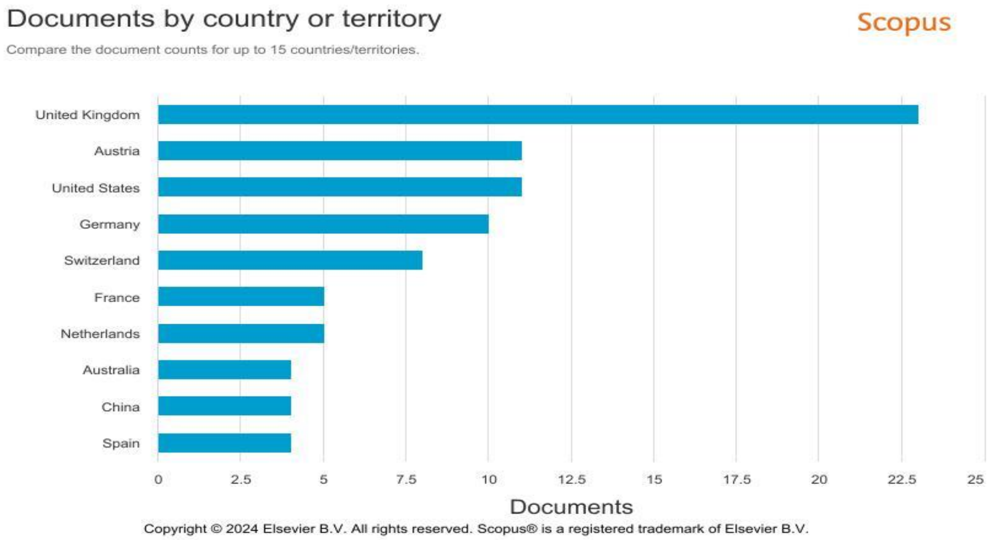


Source: *Chart based on data from Scopus database.*

The largest amount of research in the OS area comes from Anglo-Saxon countries: UK, USA, Australia. Of the European countries, researchers from Austria, Germany and Switzerland have devoted the most attention to OS. This is an interesting fact given that corporate governance models are different in these groups of countries. Anglo-Saxon countries assign primacy to shareholders, while European countries assign (or even entrust, as in the case of Germany) a much greater share of corporate governance to broader stakeholders.

Since the inclusion of stakeholders, both external and internal is one of the distinguishing features of the Open Strategy concept, its increasing popularity in Anglo-Saxon countries forms an interesting observation (Figure 2).

Figure 2. *Open Strategy publications by country in years 2010-2024*



Source: *Chart based on data from Scopus database.*

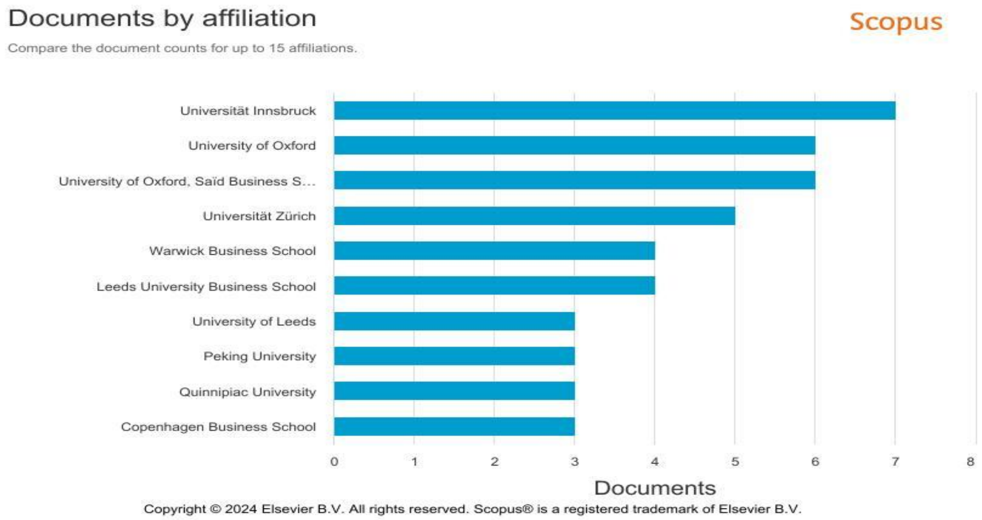
As for the research units, the outstanding ones are the British universities with the University of Oxford in a lead (appearing in the listing as the University of Oxford and the University of Oxford Said Business School) (with leading researcher Prof. Whittington), followed by the University of Leeds and Leeds University Business School (with prof. Morton).

As for the other centers, the Universities of Innsbruck and Zurich certainly draw attention, with very committed teams of researchers led by Prof. Julia Hautz (University of Innsbruck) and Prof. David Seidle (University of Zurich).

Open Strategy originated as a consequence of open innovation, coined by Chesbrough and Appleyard calling for new „open" approach to strategy that would facilitate innovation absorption (Chesbrough and Appleyard, 2007).

Initially, Open Strategy commenced with two streams of research: „content", focused on the content of the strategy built from a number of collaborative, interacting initiatives within the company (Chesbrough and Appleyard 2007; 2017), and „process", focused on the process of strategic management, including the involvement of internal and external actors in the process (Whittington *et al.*, 2011; 2015; Tavakoli *et al.*, 2017; Kozarkiewicz 2018).

Figure 3. *Open Strategy publications affiliation in years 2010-*2024



Source: *Chart based on data from Scopus database.*

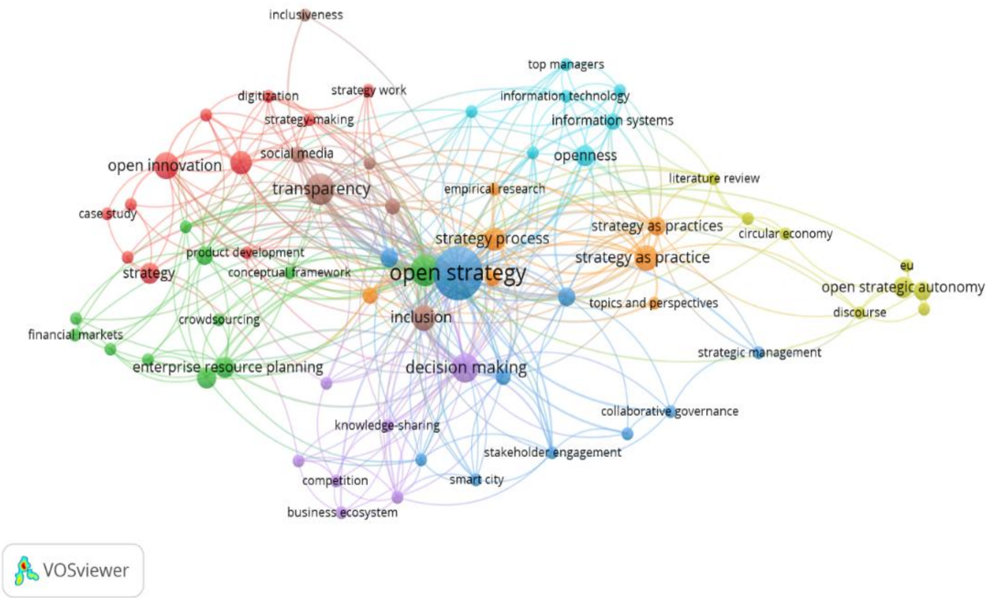
According to "content" approach, the effectiveness of OS is determined by the company's ability to generate value for itself from its participation in a given venture. This approach is derived from the trend of open innovation and sees opportunities in the organization's ability to effectively adapt innovations from outside.

According to the "process" approach, it is the transparency and inclusion aspect that determines the success of the OS approach, as this stream identifies stakeholder involvement (both internal and external) as the main factor that improves the quality of the strategy development and implementation process (Whittington *et al.*, 2011; Whittington, 2015; Tavakoli *et al.*, 2017; Yakis-Douglas *et al.*, 2017).

A later strand of the process approach in the Open Strategy area drew on the "strategy as a practice" approach, focusing on the role and importance of the participants in the process, as well as the conditions (transparency and inclusion) that affect maximizing the involvement of stakeholders in the process of strategy development and implementation.

This evolution is visualized by below key words clusters' map with red cluster on the upper left including "open innovation", "digitization", "social media", "strategy-making" (reflecting "content" stream) and orange "strategy as practice" cluster (comprising other key words like "strategy as practices", "strategy process" reflecting "process" stream).

Figure 1. *Network Map of Open Strategy*



Source: *Own composition based on VOSviewer (version 1.6.20).*

Most differentiating elements of transparency and inclusion are visualized in the above map with "brownish" cluster. OS is the opposite of the classic strategy development process. Its attributes change from "confidential" and "exclusive" to "transparent" and "inclusive" (Whittington *et al.*, 2011; Hautz *et al.*, 2017). It calls for inclusion of diverse range of participants in the strategy process: external experts, business partners, middle managers, employees and other stakeholders. transparency", or transparency, sharing information regarding strategy.

As already outlined, the concept started with open innovation (marked red) and product development (marked green). Open Strategy (central item, marked blue) was a new strategic approach (item next to OS, marked green) which based on crowdsourcing and therefore transparency as novelty element in strategy process.

Classical approach assumed confidentiality or even top secrecy over strategic information. Crowdsourcing and open innovations showed the benefits organization could gain provided they share transparently with the environment some portion of their data. Therefore transparency is indispensable characteristic of OS, by many researchers named aa prerequisite necessary for inclusion.

Also the use of ICT infrastructure is its distinguishing feature, as social media tools enable effective collaboration, collection and sharing of information available to a wide and diverse audience. This aspect is clearly visible with light blue cluster of “information systems”, “information technology” linked with social media.

ICT technology is clearly an element making mass participation in strategy process possible. Most seminal works in OS exemplify strategy processes where technology played critical role (Ribe *et al.,* 2021; Plotnikova *et al.*, 2021; Morton *et al.,* 2020; Dobusch *et al.,* 2019; Weinert, 2019; Kozarkiewicz, 2018; Schlagwein *et al.,* 2017; Malhorta *et al.*, 2016; Baptista *et al.,* 2016; Boudreau, 2010).

3.2 PB2: What Are the Changes OS Concept Is Bringing to the Process of Strategy Formulation and Selection?

The analysis of selected leading articles in the area of OS enabled us to define the changes OS brough to the strategy practice. It is worth to mention that OS is a non binary concept. It is a continuum on which company executives can (and must) adjust their level of openness depending on the goals and needs of organization (Hautz *et al.,* 2017; Mack and Szulanski, 2017; Stadler *et al.,* 2023; Dobusch *et al.*, 2019).

The level of openness of a given organization is dynamic. It can change over time in both directions (decrease or intensify) depending on the needs of the business. It tends to be more open at the early stage when a product (or service) needs more external validation or input and tends to close at the maturity stage (Chesbrough and Appleyard 2017; Hautz *et al.,* 2017; Gegenhuber and Dobusch, 2016). It is worth to add that Chesbrough and Appleyard identified cases open at the early stage and closing at maturity and vice versa (Chesbrough and Appleyard, 2017).

Researchers agree on the benefits that openness can bring to the strategy process, greater creativity of ideas associated with a broader and more diverse group of participants (Stieger *et al.,* 2012; Stadler *et al.,* 2023), greater commitment and understanding of the chosen strategy among participants in the process (Doz and Kasonen, 2008; Hutter *et al.,* 2017; Baptista *et al.,* 2017), positive impact on the company's image (Gegenhuber and Dobusch, 2017; Yakis-Douglas *et al.,* 2017).

However, it is a “double-edged sword” that the company must know how to manage properly (Hautz, 2017; Stadler *et al.,* 2023). That relates to both elements, transparency and inclusion. Mismanaged sharing of internal information may place company at a risk. Mismanged inclusion (intended or unintended) can lead to process participants frustration, failure of strategy process as far as to challenging the legitimacy of strategy leaders to lead the process on behalf of stakeholders (Lundgren-Henriksson and Sorsa, 2023; Brielmaier and Friesl, 2023; Zimmermann and Kenter 2023; Reischauer and Ringel, 2023).

Therefore OS is bringing new capability requirement for the executives in the strategy process: ability to manage and balance openness and closure.

Speaking of Open Strategy as a concept that brings opportunities, but also risks, it is necessary to mention the body of research relating to the aspect of conflict and tensions that can arise in an organization as a reaction to change, the transition from a closed strategic process to an open one.

Hautz *et al.* (2017) identified five of these, process dilemma (the course of the discussion can drift toward strategically irrelevant topics, creating conflicts in the discussion), commitment dilemma (involved people expect their voice to influence the decision; when this doesn't happen, their commitment declines), disclosure dilemma (disclosure of information may carry a threat to the company's competitiveness), empowerment dilemma (employees' feeling of information overload by working on the strategy and pressure of being responsible for the strategy), escalation dilemma (including employees in the discussion in one area creates a similar expectation in other areas, including the decision-making).

When the latest doesn't happen, it creates employee disillusionment and accusations of “cheap talk,” i.e., inconsistency and manipulation (Dobusch *et al.,* 2013).

Openness in the strategy process is also been identified as potential conflict dynamics point. It is connected with the fact that some groups of stakeholder (e.g., strategy experts, middle managers) losing their power of influence or privileged position while others are gaining, although they don't necessarily like it. Previous research shows a transformation of the role of the manager into the strategist, and a change in the role of the strategists themselves in the organization (Mantere and Whittington 2020; Whittington *et al.,* 2011; Belmondo and Sargis-Roussel 2023).

Particular sensitivity is shown by managerial groups (top and middle management), whose influence on the strategic process is crucial, while at the same time depleting their area of influence in the process of openness (Splitter, Jarzabkowski, and Seidl 2023). Studies also show the dilemmas of rank-and-file employees (or citizens) suddenly involved in the strategy process, who are often lost trying to transfer previously existing rules to the new situation (Brielmaier and Friesl 2023) or feeling chaotic, incompetent and lacking leadership in the open strategy process (Zimmermann and Kenter 2023).

However, like any change in an organization, the shift toward Open Strategy builds new competencies in stakeholders over time, facilitating their communication and inclusion in the strategic process (discursive) (Splitter *et al.,* 2023) and the competencies of the organization as one that learns to incorporate feedback and change in its modus operandi (Baptista *et al.*, 2017).

Admittedly, the literature indicates moderating factors of the impact of the Open Strategy approach, which, skillfully used by managers of the strategic process, can prove helpful.

These include organizational culture and climate of openness (Adobor 2020; Mack and Szulanski, 2017; Radomska *et al.*, 2023), leadership style (Doeleman *et al.*, 2021), the cultural context of the company's country of origin (Bellucci *et al.*, 2023; Adobor, 2021), the stage of development of the company or product (Chesbrough and Appleyard, 2017; Gegenhuber and Dobusch, 2017), the degree of centralization/decentralization of the organization (Mack and Szulanski 2017), the ownership structure (Radomska *et al.*, 2023; Adobor, 2021), clash of political interest groups (Belmondo and Sargis-Roussel, 2023), self-promotion (Malhorta *et al.*, 2017), and formal-legal requirements (Yakis-Douglas *et al.*, 2017).

4. Conclusions, Proposals, Recommendations

Open Strategy is still a concept in evolution. The amount of changes it brought to classic strategy process is overwhelming. Emerging from solid grounds of product, innovation, through new ventures, investments into strategy and its praxis, it already made a long journey. It raised the elements of transparency of information, sometimes referred to as voluntary disclosures, and stakeholders inclusion to the level not present before. It resonates with ESG mindset and can potentially serve as framework for implementing its postulates.

The appearance of new cluster formations covering governance (please see Figure1: Stakeholder engagement, collaborative governance, discourse) seem to indicate this relevant trend. Other new appearances, like circular economy and smart city (ibidem) prove that OS is a change-inducing factor beyond the strategy process itself. EU, open strategy autonomy present that this concept becomes relevant in increasing range of socio-economic life.

It also indicates that OS has already transcended the single "organization" level. It proved it can serve wider goals and wider constructs as smart city, circular economy and new EU strategy that is Open Strategic Autonomy. This can offer explanation for regained dynamic in OS publications (Figure 1). It indicates OS is the concept in evolution and will remain framework for increasing number of our socio-economic phenomenon.

Despite the two decades of research and solid evolution, the question posed by Tavakoli *et al.* (2017) in their review, of what are constitutive factors of OS, differentiating it from other organizations, what remains valid is whether they are specific enough to maintain concept distinguished. Richness of internal research themes may pose the danger that the concept will become blurred and dissolve in the myriad of competitive adjacent phenomenon, like inclusive strategizing or open organizing or stakeholder governance.

Nevertheless, the wider field of application, presented in above part of the article, proves that OS is concept useful in practice and that is what makes it resilient. It is being chosen and applied as it offers a solution or effective framework to a wider range of contemporary challenges like European Union renewal, circular economy and smart city, just to name the few.

There seem to be no one obvious direction for OS to develop. It will be an interesting journey to see how this concept grows and evolves and what it will be able to offer for the challenges of tomorrow.

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