

REVIEW

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The Rise of Platform-Based Competition: A Review of Theoretical Perspectives on Digital Marketplaces, Network Effects, and Ecosystem Strategy

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Abstract

Platform-based competition has fundamentally transformed competitive dynamics in digital markets by shifting the locus of rivalry from firm-level products to multi-sided ecosystems sustained by network effects and orchestrated participation. This integrative review synthesizes theoretical and empirical insights from peer-reviewed scholarship to examine how digital marketplaces, network externalities, and ecosystem strategies reshape value creation, competitive advantage, and strategic positioning. Early foundations in two-sided market theory established the centrality of cross-side and same-side network effects in driving platform scale and winner-take-most outcomes. Subsequent scholarship advanced understanding of platform envelopment, multihoming, complementor dynamics, and governance tensions between openness and control. The review identifies persistent strategic paradoxes: platforms must simultaneously encourage generativity to fuel innovation while safeguarding value appropriation and architectural integrity. By organizing the literature into a conceptual synthesis, the paper illuminates the interdependent layers through which platform leaders coordinate users and complementors, navigate openness-control trade-offs, and evolve in response to competitive feedback. Contributions include bridging fragmented perspectives across strategy, information systems, and economics, highlighting the temporal evolution from network effects to ecosystem orchestration, and delineating future research directions for platform evolution amid rapid technological change and regulatory scrutiny. The analysis underscores that sustainable competitive advantage in platform markets derives less from proprietary assets than from dynamic capabilities in governance, orchestration, and adaptive ecosystem design.

Keywords Platform-based competition, Digital marketplaces, Network effects, Ecosystem strategy, Platform governance, Complementor dynamics

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Introduction

The competitive landscape of the digital economy is increasingly dominated by platform-based organizations that orchestrate interactions among multiple distinct user groups rather than producing standalone products or services [1-3]. Unlike traditional markets characterized by linear value chains and firm-centric rivalry [1], platform markets exhibit distinct structural properties wherein value

is co-created through network effects that link participants across sides of the market [2, 3]. This shift has profound implications for competitive advantage, market entry, and strategic decision-making [2]. Platform leaders such as those operating mobile operating systems, online marketplaces, and cloud infrastructure have demonstrated the capacity to achieve rapid scale and sustained dominance by leveraging indirect network effects that make participation more valuable as user bases grow [1, 4].

Theoretical foundations for understanding these phenomena trace back to foundational work on two-sided markets and network externalities [1, 2]. Early contributions clarified how pricing structures and compatibility choices can internalize externalities to maximize platform adoption and welfare [1]. Subsequent research extended these insights to digital contexts [3], demonstrating that platforms differ from traditional firms because their competitive position depends critically on the design of participation incentives, governance rules, and architectural choices that shape complementor behavior [3]. Empirical studies further revealed that platform competition often follows winner-take-most patterns [4], yet outcomes are not predetermined [5]; strategic trade-offs in openness, multihoming, and entry into complementary markets materially influence long-term performance [4–11].

The rise of platform-based competition also foregrounds ecosystem strategy as a core dimension of competitive advantage [9, 12–20]. Platform owners must act as orchestrators [8], balancing the need to stimulate generativity among independent complementors with the imperative to maintain control over critical resources and quality standards [14]. This dual role generates inherent tensions: excessive openness risks value leakage and quality degradation [6], while excessive control may stifle innovation and limit scale [10, 21]. Research has documented how these tensions manifest in platform envelopment strategies [18], gatekeeping mechanisms [22–34], and evolutionary governance adjustments [35]. Moreover, complementors themselves are strategic actors whose multihoming decisions and innovation investments shape the overall ecosystem trajectory [7], creating competitive interdependence between platform owners and their partners [9, 21].

Over the past two decades, scholarly attention has evolved from isolated analyses of network effects to more holistic examinations of platform ecosystems as meta-organizations characterized by dynamic interplay among architecture, governance, and strategy [2, 20, 30]. This progression reflects the increasing sophistication of digital technologies and the proliferation of platform-mediated markets across industries [29]. Yet the literature remains fragmented across disciplinary boundaries [30], with strategy scholars emphasizing competitive positioning, information systems researchers focusing on technical architecture and governance, and economists modeling pricing and welfare implications [30]. An integrative synthesis is therefore timely for consolidating theoretical

perspectives, identifying cross-cutting themes, and illuminating pathways for future research [1].

This review addresses that need by systematically examining how competition changes under platform market structures [6, 13]. It explores the role of network effects in shaping scaling advantages [2, 4], the strategic positioning choices available in digital marketplaces [5, 11], and the orchestration challenges inherent to ecosystem strategy [15, 16]. Particular attention is devoted to complementor participation dynamics [7, 9, 21] and the persistent tensions between openness, control, innovation, and value capture [21, 32]. By tracing the evolution of platform competition research and synthesizing its core theoretical perspectives [30], the paper provides a coherent framework for understanding the mechanisms through which platforms achieve and sustain competitive advantage in digital environments [1].

Table 1 consolidates fragmented theoretical perspectives by systematically comparing their assumptions, mechanisms, and strategic implications, thereby clarifying how distinct lenses contribute to understanding platform-based competition.

Table 1. Theoretical lenses on platform-based competition: assumptions, mechanisms, and strategic implications

Theoretical lens	Core unit of analysis	Key mechanism	View competition
Two-sided market economics	Market sides (users)	Pricing and cross-side externalities	Market tipping equilibrium outcomes
Network effects theory	Installed base	Positive feedback loops	Winner-take-most dynamics
Platform strategy	Platform firm	Architectural positioning	Boundary expansion and envelopment
Ecosystem strategy	Ecosystem (meta-organization)	Co-specialization	Relational competitive advantage

		and interdependence	across ecosystems
Complementor dynamics	Complementor actors	Innovation and multihoming behavior	Co-opetition with ecosystems
Governance theory	Rules and institutions	Openness– control balancing	Institutional design competence
Dynamic capabilities	Platform organization	Sensing– seizing– transforming	Adaptation repositioning over time

The subsequent sections detail the review methodology, present a thematic synthesis of the literature, and introduce an original integrative architecture that organizes the field’s insights into interconnected layers [2].

Review Method and Corpus Delimitation

This integrative review follows a systematic yet interpretive approach to synthesize theoretical perspectives on platform-based competition while accommodating the field’s conceptual and empirical diversity [30]. The objective was to assemble a focused corpus of high-quality, peer-reviewed publications that collectively address the core themes articulated in the title: digital marketplaces, network effects, and ecosystem strategy [1].

The search strategy targeted major academic databases, including Web of Science and Scopus [2]. It was supplemented by targeted hand-searching of leading journals in strategic management, information systems, and innovation studies [3]. Keywords combined terms such as “platform competition,” “digital marketplaces,” “multi-sided platforms,” “network effects,” “ecosystem strategy,” “platform governance,” “complementor dynamics,” and “platform orchestration” [4], applied in Boolean combinations to capture conceptual breadth without sacrificing precision [5]. Journal selection prioritized outlets recognized for rigorous theoretical and empirical contributions to digital business and management studies [5]. Publication dates spanned from the foundational contributions of the mid-1980s to the most recent work available at the time of corpus finalization [1], ensuring

coverage of both seminal theory and contemporary developments [2, 30].

Inclusion criteria required that each publication (1) be peer-reviewed [7], (2) directly engage with at least one of the specified thematic areas [8], and (3) offer theoretical, conceptual, or empirically grounded insights applicable to digital platform contexts [9]. Exclusion criteria eliminated non-peer-reviewed works, purely practitioner-oriented articles, and studies focused exclusively on non-digital or non-platform settings [10]. Screening proceeded in stages: initial database retrieval was refined through title and abstract review for topical relevance [11], followed by full-text assessment to confirm alignment with the review’s integrative objectives [12]. The final corpus was delimited to exactly 35 publications that satisfy all inclusion criteria and collectively provide broad, non-redundant coverage of the target literature [30]. These references form the evidentiary foundation for all subsequent synthesis and are cited exclusively throughout the manuscript in Vancouver numeric style [1]. This curated approach ensures methodological transparency, thematic coherence, and fidelity to the most influential scholarly contributions on platform-based competition [2].

Literature Synthesis and Thematic Integration

Platform-based competition research has coalesced around several interlocking themes that together explain the distinct competitive logic of digital marketplaces [1]. The literature can be usefully grouped into five thematic domains that reveal both convergence and productive tensions in theoretical perspectives [2].

Digital marketplaces and competitive structure constitute the foundational layer [1, 3, 5, 18]. Early theoretical work established that platforms operate as multi-sided markets in which value derives from facilitating interactions across distinct user groups rather than from unilateral production [1]. Cross-side network effects create feedback loops that reward rapid scaling [2], often resulting in concentrated market structures [3]. Empirical examinations of platform envelopment demonstrated how incumbent platforms can leverage installed bases to enter adjacent markets [18], thereby reshaping competitive boundaries [4]. Later contributions highlighted strategic trade-offs in platform competition [6], showing that differentiation through architectural choices and complement quality can sustain

advantage even in the presence of strong network effects [11].

Network effects and scaling advantage form a second critical domain [2, 4, 10, 25]. Foundational models of network externalities illustrated how compatibility decisions and installed-base dynamics influence market outcomes and competitive positioning [2]. Empirical studies in specific industries confirmed that network strength moderates the relationship between platform investments and performance [4], with indirect effects often outweighing direct ones in consumer-facing platforms [10]. Research on unpaid crowd complementors further nuanced these dynamics [25], revealing that the anticipated virtuous cycle of participation can prove illusory when complementors face low incentives or high multihoming costs [4]. Recent work on platform diffusion and within-platform growth underscores that scaling is not automatic but depends on deliberate orchestration of adoption cascades and complementor product strategies [2].

Ecosystem strategy and complementor dynamics represent a third integrative theme [7, 9, 15, 21]. Platforms function as meta-organizations in which the focal firm orchestrates a community of independent complementors whose collective output determines overall ecosystem value [2]. Studies of application software developers and mobile ecosystems demonstrate that superior performance arises from sustained investment in complementor capabilities and alignment of motives [7, 9]. Complementors are not passive participants [9]; their innovation patterns, multihoming behavior, and knowledge-sharing decisions actively shape platform trajectories [21]. Research on cocreation and generativity tension reveals that excessive platform control can crowd out complementor innovation [15], while insufficient coordination risks fragmentation and quality erosion [21].

Governance, control, and participation tensions constitute a fourth domain characterized by persistent strategic paradoxes [8, 14, 32, 34, 35]. This domain moves beyond simple notions of platform ownership to confront the inherent contradictions of managing an ecosystem where value is co-created with autonomous external actors [8]. Platform leaders must design governance mechanisms that balance openness—a prerequisite for stimulating generativity, attracting a diverse base of complementors, and achieving rapid scale [14]—against control, which is essential for protecting value capture, ensuring quality and security, and maintaining the architectural integrity of the

platform itself [32]. Empirical evidence from diverse contexts, ranging from enterprise software ecosystems to consumer platforms such as iOS and Android, shows that three critical levers are repeatedly employed [8]. First, gatekeeping, or the establishment of access rules and curation mechanisms, serves as the primary filter for participation [34]. Second, architectural modularity, which dictates the degree of interdependence between the platform core and its complementary components, allows leaders to manage complexity and decide where to impose standards and where to allow experimentation [32]. Third, evolutionary governance adjustments, such as shifting from open to more restrictive policies or vice versa in response to ecosystem threats or opportunities, highlight that governance is not a static design choice but a dynamic process [34, 35]. Consequently, dynamic capabilities for ecosystem orchestration—the ability to sense changes in the ecosystem, seize opportunities by reconfiguring governance rules, and transform the platform's structure—emerge as essential for navigating these tensions over time [31]. Moreover, the literature documents how governance logics often follow a discernible arc [14], evolving from proprietary, centralized control in a platform's nascent stages to more collective, federated, or even distributed forms as the platform matures, competitive pressures intensify, and the collective bargaining power of complementors grows [21].

Finally, value creation, value capture, and competitive positioning integrate the preceding themes into a coherent set of strategic outcomes [11, 17, 24, 28]. While platform owners capture value through a variety of mechanisms—including pricing structures, data advantages, and the strategic management of architectural bottlenecks [17]—their ultimate ability to do so is not guaranteed [28]. It critically depends on the intricate interplay among three foundational elements: the strength and direction of network effects, the level of complementor engagement and their dependence on the platform, and the efficacy of the chosen governance design [17, 28]. Studies of pioneering platforms—from Microsoft in the PC era to iOS and Android in mobile—emphasize the role of aligned capabilities and motives in shaping the early strategic choices that create path dependencies and lock in long-term performance trajectories [11, 24]. Competitive positioning in this context is therefore not a static structural attribute derived from industry analysis but is fundamentally relational and dynamic [2]. A platform's position is continuously and recursively reshaped by a feedback loop: strategic adaptations by the platform leader influence

ecosystem outcomes, and those outcomes, in turn, feed back to constrain or enable future strategic moves by both the platform and its rivals [2, 30].

Collectively, these thematic domains illustrate a clear evolutionary trajectory in platform competition research. Early work was dominated by static models of network effects [1], focusing on the conditions for market tipping and the logic of “winner-take-all” dynamics [2, 4]. The literature has since matured into dynamic, multilevel analyses of ecosystem strategy [3], where the unit of analysis has shifted from the platform firm to the broader ecosystem [7]. The focus has expanded to encompass governance, orchestration, and the co-evolution of platforms and their complementors [20, 30]. The literature converges on the insight that sustainable competitive advantage stems from superior orchestration capabilities—the ability to attract, align, and manage a network of heterogeneous actors [28]—rather than from any single resource or technology, no matter how defensible [29]. Yet important tensions remain unresolved, creating fertile ground for future research [21]. These are particularly acute regarding the sustainability of openness-control balances under conditions of rapid technological change and increasing regulatory attention [32]. The following section introduces an original integrative architecture that organizes these domains into a coherent, layered framework, providing a structure to address these unresolved questions [1].

Integrative Architecture of Platform Rivalry: The PECS Framework

To synthesize the fragmented yet complementary perspectives identified above, this review introduces the PECS framework (platform ecosystem competition synthesis) [1]. The PECS Framework is designed to move beyond the siloed analysis of individual themes by organizing the literature into five interconnected layers that collectively capture the structural, dynamic, and strategic dimensions of platform-based competition [2]. It functions as an analytical scaffold rather than a predictive causal model [3], enabling systematic comparison of theoretical contributions, facilitating the identification of cross-layer interdependencies, and offering a structured lens for diagnosing competitive dynamics in both established and emerging platform markets [30].

The five layers are:

1. **Marketplace structures layer** – This foundational layer conceptualizes the multi-sided architecture of digital platforms and the competitive logic that emerges from it [1, 3, 5]. It focuses on the structural elements defined by the platform owner, such as the number and type of distinct user groups, the nature of the transactions or interactions between them, and the modular design of the technology core [1]. This layer establishes the basic “rules of the game” by defining who can interact and how value exchange is structured [3], thus shaping the potential for network effects and the locus of control [5].
2. **Network effects layer** – Building upon the structural foundation, this layer examines the scaling dynamics driven by direct and indirect externalities [2, 4, 10]. It analyzes how the value to each user changes as the size and composition of the other user groups change [2]. This layer concerns the drivers of growth, the potential for market tipping, and the strategic thresholds that platforms must achieve [4]. It also considers more complex forms, such as same-side and cross-side network effects [10], and how these dynamics can be both a source of immense value and a strategic vulnerability [2].
3. **Governance and orchestration layer** – This layer addresses the mechanisms of control, openness, and coordination that platform leaders deploy to manage the ecosystem [8, 14, 31, 32]. It covers the explicit rules and policies, the technological levers, and the relational strategies used to align the interests of diverse participants [8]. This layer represents the platform’s active management and is the primary locus for resolving the tensions between openness and control [14, 32].
4. **Ecosystem participation layer** – This layer shifts the focus from the platform leader’s perspective to the dynamics of complementors, examining generativity, interdependence, and the agency of third-party actors [7, 9, 12, 21]. It explores why complementors join or leave a platform, how they compete and cooperate with the platform owner, and the strategies they employ to manage their own risks and dependencies [7]. Concepts such as platform envelopment, piggybacking, and the emergence of niche ecosystems within a broader platform fall within this layer [9], highlighting that outcomes are co-determined by the strategic actions of both the platform and its participants [21].

5. Value creation, capture, and evolution layer – This topmost layer integrates the outcomes of the lower layers, focusing on competitive positioning, value appropriation, and adaptive responses over time [11, 17, 24, 28]. It analyzes the performance implications of the choices and dynamics captured in the previous layers [17]. This includes how platforms monetize the value they generate, how they evolve their strategies in response to ecosystem feedback and competitive threats, and how sustainable competitive advantage is achieved not through static efficiency but through dynamic orchestration that continuously aligns market structure, network effects, governance, and participation, as shown in Figure 1.

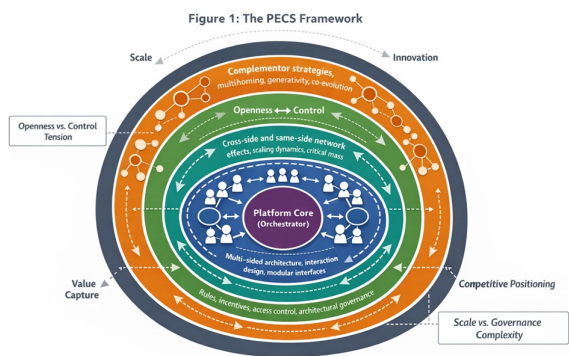


Figure 1. The PECS framework for synthesizing platform-based competition research. The figure is rendered as a set of five concentric circles with directional flows and feedback loops.

Table 2 explicates the cross-layer interdependencies of the PECS framework, highlighting how strategic tensions propagate across layers to shape platform outcomes and evolutionary trajectories.

Table 2. Cross-layer interdependencies in the PECS framework: mechanisms, tensions, and strategic outcomes

PECS layer	Core function	Key mechanisms	Interdependence
Marketplace structures	Define interaction architecture	Multi-sided design, modularity	Enables network effects and governance structures
Network effects	Drive scaling dynamics	Cross-side and same-side externalities	Amplified participation and governance

Governance and orchestration	Align ecosystem behavior	Rules, incentives, and gatekeeping	Shapes participation and value capture
Ecosystem participation	Generate innovation and variety	Complementor entry, multi-homing, and co-creation	Influenced governance and network structure
Value creation, capture, and evolution	Realize competitive outcomes	Monetization, data leverage, and adaptation	Feedback to lower layers

The PECS Framework reveals that platform competition cannot be understood through any single layer in isolation [1]; competitive outcomes in the outer layer recursively influence governance and structural choices in the inner layers [13], producing the evolutionary patterns documented in the literature [16, 26]. By mapping the 35 references onto these layers [2], the framework clarifies both the cumulative progress and the remaining theoretical gaps in platform-based competition research [30].

Orchestration Challenges and Complementor Coordination in Platform Ecosystems

Platform orchestration extends beyond static governance design to encompass active coordination of complementor activities across multi-level ecosystems [5, 12, 19, 23]. Research on platform owners entering complementary markets shows that such moves can accelerate innovation when aligned with ecosystem needs [5]. Still, it may crowd out independent complementors when perceived as competitive encroachment [33]. Complementor coordination is further complicated by multi-homing decisions [12], in which developers distribute their innovations across rival platforms to mitigate dependence risks while diluting loyalty to a single ecosystem [11]. Empirical patterns from mobile operating systems illustrate how platform leaders sustain superior performance by aligning capability investments with complementor motives [9], thereby converting potential free-riding into collective

value creation [25]. These dynamics highlight the relational nature of ecosystem strategy [16]: platform success hinges on the ability to manage competitive interdependence without undermining the very generativity that fuels network effects [21]. Orchestration, therefore, emerges as a meta-capability that integrates technical architecture, incentive design, and relational governance to steer ecosystem evolution amid continuous external pressures [29, 31].

Adaptive Dynamics and Competitive Evolution in Digital Marketplaces

Platform-based competition is inherently evolutionary, with market outcomes feeding back into governance and structural adjustments over time [13, 26, 28]. Early platform diffusion often relies on temporary social coordination mechanisms that seed initial network effects [23], after which sustained advantage requires ongoing adaptation of scope, innovation pipelines, and collaborative centrality [27]. Studies of nascent ecosystems reveal that firms navigate cooperation-competition tensions by dynamically reconfiguring roles, boundaries, and value propositions as the ecosystem matures [16, 26]. Dynamic and integrative capabilities enable platform leaders to profit from innovation by recombining internal resources with external complementor contributions [28], particularly under conditions of rapid technological change [29]. This adaptive process underscores that competitive positioning is not a static equilibrium but a continuous reconfiguration shaped by the interplay of network feedback, governance recalibration, and complementor responses [13, 24]. The literature collectively demonstrates that platforms achieving long-term leadership do so by treating ecosystem evolution as an iterative learning cycle rather than a one-time design choice [15, 20].

Conclusion

The PECS Framework and thematic synthesis presented across both parts converge on a central proposition: platform-based competition is defined by layered interdependencies in which marketplace structure, network effects, governance, participation, and value dynamics mutually reinforce or undermine one another. Sustainable advantage arises from superior orchestration that resolves openness-control tensions while harnessing generativity and adaptive feedback. This integrative view bridges earlier economic models of network externalities with contemporary strategy perspectives on meta-organizations and ecosystem orchestration, offering a unified lens for digital business and management studies. The corpus reveals consistent progress toward multilevel, dynamic explanations of platform rivalry while surfacing unresolved questions around regulatory influences, cross-platform data flows, and long-term ecosystem resilience. The framework and synthesis thereby provide both a retrospective map of the field's theoretical evolution and a forward-looking scaffold for continued scholarship in platform-based competition.

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