



**PhD Program in
Business
Administration**

PhD THESIS WORK SUMMARY

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**Formation of Contextual Ambidexterity in Middle-Sized
Companies**

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Department of Strategic Management

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1. The Choice of Topic and Justification of the Central Research Question

I've started my doctoral studies at the PhD Program in Business Administration at Corvinus University of Budapest in strategic management specialization in 2010 under the supervision of Prof. Károly Balaton. From the beginning, I was deeply involved in the research and educational activities of the Department of Strategic Management led by Prof. Károly Balaton and Lilla Hortoványi, Ph.D. My supervisors, Zsolt Roland Szabó, Ph.D and the leaders of the Institute of Management, namely Prof. Miklós Dobák and György Drótos, Ph.D. had a significant influence on my PhD research. In 2009, Prof. Miklós Dobák's lecture about organizational ambidexterity aroused my interest. As a young economist born into an entrepreneur family, I quickly recognized that the duality of exploitation and exploration is a very interesting research topic both from practical and theoretical point of view. I would like to thank my previously introduced supervisors and the whole team of the Institute of Management, especially for Ádám Angyal and Ernő Tari for their critics, support and inspiration. In the past few years my research covered the topic of internal organizational mechanisms [Taródy, 2012] and growth crises [Taródy, 2015]. I deeply explored the literature of organizational ambidexterity [Taródy, 2016a] and examined the effect of TMT's behavior on the organizational stress, dysfunctions and performance [Taródy 2016b, 2017].

During the lifecycle of a company, managers' responsibility is the continuous and ongoing pursuit of balance between the efficient exploitation of current opportunities and the exploration of new ones. In my interpretation, ambidexterity is the challenge to find balance between these two, basically different kind of growth. But it's not likely, that an organization have to face with this contradiction in every period in its lifecycle. Conversely, it's highly probable that difficult management situations or growth crises will emerge, when managers definitely must be able to handle this duality. Nowadays, when Hungarian firms face the challenge of generational change, international competitiveness and the need for being effective, productive and innovative at the same time, these questions become more and more important also from a practical point of view. A whole generation of entrepreneurs who started their business after the regime change in 1990 are forced to handle somehow the constant collision of new and old cultural values, management tools, technologies and consumer behaviors, if they want to maintain the success of their businesses. My research would like to contribute to this problem on theoretical and practical level as well.

My thesis introduces a possible process of organizational transformations that can enable firms to maintain efficiency and become innovative at the same time. I believe that this problem is actual for the practice as well, because if leaders mismanage these challenges, growth will be challenged by itself. The constantly increasing complexity and size will make previously successful organizational contexts obsolete and create self-generating growth crises. Managers' main responsibility is therefore to understand and perceive the situation correctly and accomplish the required transformations by creating new organizational contexts.

Because successful organizations are aligned and efficient in the present and adaptive enough to future opportunities, but being able to exploit current competencies, products, technologies and markets while simultaneously exploring new ones is complex managerial challenge [Birkinshaw & Gibson, 2004; March 1991; Tushman & O'Reilly, 1996]. Duality and discrepancy are characteristics of ambidexterity that require balance between the conflicting and paradoxical activities of exploration and exploitation, concentrating on both future and present, and maintaining innovation and efficiency in one structure, all of which are essential for long-term survival and growth. Organizational ambidexterity, as an organizational theory, is one of the most active fields in strategic management literature. Little, however, is known about its evolution.

I identified several research gaps based on the most comprehensive typologies in the field [O'Reilly & Tushman, 2013; Raisch & Birkinshaw, 2008; Simsek et al. 2009]. Organizational context, or the complex combination of "hard" and "soft" management tools used in the organization, can shape and modify individual and organizational behavior, to find a balance between short-term exploitation and exploration activities that will become profitable in the longer term. According to the literature, the current definition of organizational context is quite crude and unformed [Gibson & Birkinshaw, 2004; Güttel & Konlechner, 2009; O'Reilly & Tushman, 2013, Simsek et al., 2009]. Its key drivers are still unknown, as is the role of managers in the process of developing an organizational configuration that can enable the firm to create or re-establish balance between exploitation and exploration [Güttel & Konlechner, 2009].

Furthermore, ambidexterity, especially its structural and leadership aspects, is well-researched in multinational enterprises, but little is known about how it develops in single business units or middle-sized companies, especially growth-oriented ones [O'Reilly & Tushman, 2013; Raisch & Birkinshaw, 2008; Simsek et al., 2009]. The majority of previous research examined mature, multinational companies showing ambidextrous operations [O'Reilly and Tushman, 2013; Raisch & Birkinshaw, 2008; Simsek et al., 2009].

I seek answers for two questions in my research. First, I would like to understand the most important elements of the organizational context in ambidextrous organizations, because I would like to contribute to the literature with a more detailed definition of context and complement previous researches [i.e. Güttel & Konlechner, 2009]. Second, I would like to examine the process how ambidexterity evolves and develops in earlier stages of growth [Raisch & Birkinshaw, 2008]. Therefore I formed the following research question: *The presence or the absence of what intentional, organizational, control, leadership and cultural elements will support or obstruct the development of ambidextrous organizational context in middle-size corporations?*

2. Methodology

2. 1. Research Goals

Little is known about how small organizations or business units develop ambidextrous contexts, the drivers of these contexts and how leaders manage these processes and develop the human capital of the firm. There is a particular shortage of field observations and qualitative case studies examining how leaders manage the interfaces between exploration and exploitation, how organizations develop their contexts over time and how they overcome path dependencies [Birkinshaw et al., 2014; Lavie, Stettner & Tushman, 2010; O'Reilly & Tushman, 2013; Raisch & Birkinshaw, 2008; Simsek et al., 2009].

My research aim is therefore to understand which systems and processes are essential to support the evolution of ambidextrous organizational context, and the lack of which systems and processes holds this back. The reason for choosing contextual, rather than structural, ambidexterity as a conceptual framework is based on the assumption that the size of the organization and the involvement of a founder-manager in exploitative and explorative activities do not make it necessary or feasible to develop separated structures. Organizations may show different patterns along differentiation versus integration and simultaneous versus cyclical ambidexterity tensions [Raisch et al., 2009], but I assume that these differences are rooted in environmental factors, and that organizational context will integrate structural and leadership aspects in middle-sized companies.

At this point, it is important to highlight what questions are not in my research focus. I do not propose to examine individual and interorganizational levels. My focus is the context and not behavioral patterns shaped by contextual elements or individual management characteristics.

I do not wish to consider which construct (contextual, structural or cyclical) is appropriate, because I interpret these aspects as complementary.

2. 2. Definitions

2. 2. 1. Definition of the Conceptual Framework

I define contextual ambidexterity, the main theoretical background of my thesis as [Gibson & Birkinshaw, 2004]:

- A set of processes and systems that enables and encourages individuals to make their own judgments about how to divide their time between exploration and exploitation;
- A more sustainable model that eliminates the coordination costs of separated business units and facilitates the adaptation of the whole organization;
- A multi-level construct where the context is the reason and behavior is the effect: ambidexterity is facilitated (or constrained) by the organizational context in which the individual operates.
- Creating an environment in which flexible, generalist managers perform better.

I interpret ambidexterity as the continuous and ongoing pursuit of balance between the efficient exploitation of current opportunities and the necessary exploration of new ones, using contextual, structural, or cyclical solutions or a combination of these. I interpret these constructs as complementary. If exploration and exploitation are not balanced over time, long-term growth is challenged [O'Reilly & Tushman, 2011], because complexity and size increase as a result of exploration, making organizational contexts obsolete and forcing management to reconfigure.

2. 2. 2. Definition of the Organizational Context

Lavie, Stettner & Tushman [2010] stated that organizational structure, culture, identity, age, and size and managerial systems and processes are important antecedents of ambidexterity. Ghoshal & Bartlett [1994] commented that union of these factors, the organizational context is created and renewed through tangible and concrete management actions that influence every individual in the organization. They identified discipline, stretch, trust and support as key factors of context, but this classification was criticized by others, who called for more detailed definitions.

The current definition of organizational context was repeatedly criticized by its ambiguity in the literature. To conceptualize and understand organizational context better, I interpret its

definition as the basic management functions of Dobák and Antal [2010], who built their classification on the most important management classics of strategy and target-setting, organizing (structures and processes), control and leadership (see table).

Elements of organizational context [Ghoshal & Bartlett, 1994]	Management functions [Dobák & Antal, 2010; Fayol, 1916; Gulick & Urwick, 1937; Koontz & O'Donnel, 1964]	Personal interpretation of context element	Main authors
Stretch	Strategy and goal-setting	Management by objectives: strategy, vision, goal-setting	Drucker [1986]; Marlow & Schilhavy [1991],
Support	Organizing	Clear structures and processes with appropriate coordination, division of labor, authority and responsibilities	Taylor [1911], Fayol [1916], Bühner[1994], Khandwalla[1975]
Discipline	Control	Control process: standards, measurement, performance gaps, feedback, change in behavior and performance.	Anthony & Govindarajan [2009], Herzberg [1968], Skinner [1938], Ouchi [1980]
Trust	Leadership	Leadership style and roles, decision-making processes	Hersey & Blanchard [1977], Mintzberg[1979]

2. 3. Decision on Methods

Birkinshaw and colleagues [2014:47] criticized the overuse of quantitative methods of management research, because “*management and organization researchers expend a tiny proportion of their energies actually observing the phenomena they want to understand*”. They suggested in an article debating the future of management research that “*researchers have to get their hands dirty and closely observe and study, or even live with, people in organizations*” to “*gain insight, inspiration, curiosity, and ecological validity*” [p. 47]. As I have shown, ambidexterity is a complex and complicated management challenge with diverse aspects (structure, context, time, behavior) that are hard to separate, which is why determinative scholars have called for more qualitative and longitudinal in-depth studies with diverse multi-level data. This will support deeper understanding of the organizational context (including structural solutions, planning and reward systems and decision-making processes) that affects individual behavior patterns, culture, values and collective identity [Birkinshaw & Gupta, 2013; Gupta, Smith & Shalley, 2006; Raisch et al., 2009; Raisch & Birkinshaw, 2008].

“Research on ambidexterity has focused rather on the performance implications of ambidextrous organizational designs, than on how (especially contextual) ambidexterity is achieved and under which circumstances it is successful” [Güttel & Konlechner, 2009:888]. Many scholars have noted this gap and highlighted that we know far less about the process of how organizations achieve [Adler et al., 1999; Siggelkow & Levinthal, 2003] and maintain ambidexterity, and reconfigure their context over time [Güttel and Konlechner, 2009; O’Reilly and Tushman, 2013; Raisch & Birkinshaw, 2008; Simsek et al., 2009]. I want to understand the process of how business units and middle-sized organizations achieve ambidexterity.

But this process is, however, a dynamic phenomenon. My research aims to understand the process of formation of organizational context and the role of management in it from a dynamic point of view, so I therefore apply case study-based, qualitative methodology with a longitudinal, historic approach.

This methodology is suitable if the researcher wants to understand the particular context within which the participants act and its influence on their actions, and the process by which events and actions take place to create a new grounded theory that explains new phenomena and influences [Maxwell, 1996; Miles & Huberman, 1984]. Miles and Huberman [1984] suggested that field research is a better methodology than quantitative approaches when the aim is to develop explanations of causality. A case study is an appropriate methodological choice if the researcher wants to expand the theory and generalize from the study of complex phenomena in their contexts.

2. 3. 1. Sampling and Data Collection

I carefully selected five companies: a manufacturer and trading, a machine manufacturing, an agricultural, a logistics and an IT-company. My sampling criteria were the followings:

- Size: annual turnover between €2 million and €30 million with high growth rate.
- Age: this is a critical factor in growth, so I decided to choose an organization that is at least 10 years old.
- Structure: the organization has to have at least three organizational levels and two managerial levels.
- The firms must perform explicitly intended explorative and exploitative projects and activities.

Interviews were conducted with top managers, middle managers and key employees. The total numbers of interviews are 35. The interview results were completed with the following field observations: management meetings, process standardization, strategic, organizational design and annual planning workshops. The data collection was complemented with document analysis that covered the following types: IT-system specifications, internal regulations and processes, norms, forms, meeting notes, reports, reward systems, directives and plans.

Interviews covered the following topics based on Dobák and Antal [2010] and Ghoshal and Bartlett [1994]:

- Stretch – strategy and goal-setting, including management by objectives.
- Support – organizing, including clear structures and processes with coordination tools, division of labor, authority and responsibilities.
- Discipline – control process, standards, measurement, performance gaps, feedback, changes in behavior and performance.
- Trust – leadership style and roles, decision-making processes.

The results were analyzed with the software QSR Nvivo.

3. Findings, Scholarly and Managerial Implications

Nowadays economic topics of public speech are strongly determined. The generation of entrepreneurs with 20-25 years of experience who have started off at the time of the regime-change wants to transfer their hard-earned business. In order to enhance international competitiveness and export, the middle and big companies of which the spine of the economy consists of, must become innovative. Meanwhile they have to overcome the issues of effectiveness and capacity in comparison to the western countries. The list could be long continuable, however it is clear, that Hungarian companies will face innovation, new leaders and tools, new products, markets and methods, while they will have to keep the current business and income sources. The need to deal with duality makes the yet slightly popular theory of ambidexterity relevant, which became one of the most favoured topics of strategic management in recent international economical thinking.

The organisational ambidexterity is one of the latest areas with great potential in strategic management literature, which did not have considerable attention in the domestic scientific bibliography.

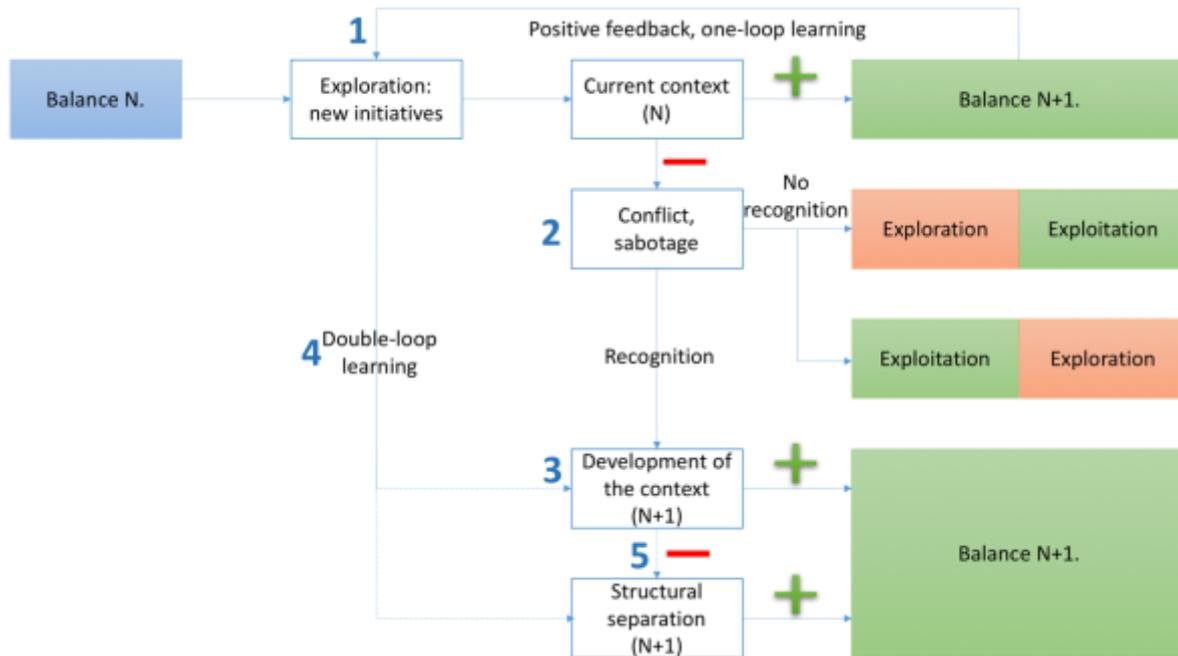
But the field is fractured, and there are many unanswered questions. Until the beginning of my doctoral studies I am determined to research ambidexterity hereby contributing the development of international literature and the domestic popularity of the field through writing publications in Hungarian and attending conferences.

I can only shape the ultimate conclusions of the cases made by quantitative approach. In my analytic process section I have compared the case studies in the system of Birkinshaw and Gibson [2004] and identified their performance levels. As a result of my analysis I have determined the five possible next steps in the development of ambidexterity and defined the significant management tools of the context and their relation:

1. Development by single-loop learning
2. Conflicts and detection
3. Development of context or the lack of development
 - a. Strategic and planning systems, MbO, resource-allocation, reporting
 - b. IT support, indicator systems, rewarding
 - c. Development of well-defined base structure and flexible substructures
- d. Change into integrating strategic leader, who builds and safeguards cultures, and ensures strategic unity and performance-orientation
4. Double-loop learning, reaching ambidexterity
5. Possible structural separation

3. 1. Formation Process of Organizational Ambidexterity, Key Elements of Context

The results of my research support that the lack of the context's development generates severe tensions and conflicts, and the solution of these tensions blocks the development of ambidexterity and causes grave damages. The reaching of the ambidextrous process, and the definition of context precisely describe the dynamics of these conflicts and the tools for termination (see figure).



The first step of the process is the development by single-loop learning. In this life stage the organisations work in a form built on quality task division, and the simple organisational mechanisms are really dominant. The leader himself is the central element. A charismatic, entrepreneurial person builds a flexible, swift and alterable team with people of his like. Regulation and predictability made a cultural counterpoint in more cases. Until the supreme leader's capacity is enough to identify the opportunities of exploration and exploitation, and for the operative management of the conflict, the company will grow without questioning the fundamental mechanisms of the system. This perception and the external feedbacks will affirm the leader and the organisation, that these circumstances ensure the proper context.

In the second step, the size, complexity, external changes and extraordinary strategic moves will press the organisation, and the context will reach its border because the leader is overburdened. The founder justly expects more self-reliance and proactivity from the partners, meanwhile he wants to formalize the operation. But the members are not interested in this, they were not socialized this way. Moreover, instead of the discarding of regulations and organization, the favouring of flexibility and swiftness will be the fundament of business success and the motivation for forming identity. The distance grows between the leader and the organisational reality, the leader becomes isolated, for which he reacts by IT development and hiring new people. This sets off the situation, coalitions will form, serious cultural gaps come into existence.

The key point of the process is if the leader can detect this situation. His attention will be distorted by internal and external feedback, the inertia and bound course as the results of former success. Those who interpret the situation only as resource problem and aim to solve the situation by buying new leaders and systems will fail and only keep activities connected directly to the leader's competence.

In cases of successful companies the change begins and ends with the leader. The economic qualification and external feedbacks of the environment (learning from buyers and competitors) facilitate the acceptance of the necessity of change. The organisational context needed for ambidexterity is an entirety of well-definable strategic, planning, and organisational and control mechanisms, which are encompassed by a changing leadership role. The companies create a uniformly interpreted strategy by an involving approach, which is continuously communicated in the organisation. This is followed by an informationally and methodically developed framework-planning and the project planning of the legitimated exploring initiatives.

The match by objectives (MbO), and the connected reporting and monitoring systems, and the presence of leadership by corporate governance systems is able to contain the individual conflicts between exploration and exploitation. In contrary to the preconceptions, ambidextrous organization put very much effort in the standardization of work organization and in the definition of structures, positions and regulations, as this safety may create capacity for the secondary structures or projects that perform exploration activities. Though through different indicators, but the all projects are controlled by the management, and the decision on projects is also determined strictly by the strategy. However, the work within substructures is flexible and creative.

In the fourth step of the process, leaders understand the value and limits of organisational context, therefore become able to detect if the organisation does not tolerate their strategic plans. At this point they either discard the initiative, or modify the structure. This is a huge improvement compared to the earlier life stage. They maintain ambidexterity by changed organisational systems of planning, controlling and rewarding, which are encompassed by their culture- and identity-forming role. Throughout the work processes continuous learning happens between exploration and exploitation.

But maintaining contextual ambidexterity comes with tensions and costs of coordination. As the final, optional step of the process, if the leader perceives, that the costs of coordination reach the level of resource profligacy, and if decides so, he can change course towards organisational differentiation.

3. 2. Scholarly Implications

My research aims to contribute to the theory by the above presented process of reaching ambidexterity and by giving a deeper definition of context, as until now only its behavioural aspect was widely researched [Gibson & Birkinshaw, 2004], management tools were only observed in very special corporations [Güttel & Konlechner, 2009]. A very important added value for the earlier is the role of IT and change management, and the relation of specific tools.

An unexpected result of my thesis is, that the observation of the possible change between contextual and structural ambidexterity enriches the scientific debate that is about the relation of aspects [Birkinshaw & Gibson, 2004; Birkinshaw & Gupta, 2013]. My results support that each constructions are equivalent solutions, which are suitable to equally solve corporate problems in different situations. According to my results there is no order or subordination, asking question is senseless.

My results also enrich the growth-theory. On one hand the discovering, qualitative research enables to see the dynamics of growth-trap development, on the other hand it highlights that not only the amount of growth, but also the wrongly determined quality may cause the companies to collapse. It also raises the awareness that organisations may also grow by half-measures that are different than theoretical life cycles, but they going to backfire and create deeper crises later. However, my results support those views regarded as axioms, that management skills of the leadership are the main limit of growth in a company, even form the early life stages.

Finally, my paper contributes to that traditional scientific debate, which is about how organisations might be able to overcome course dependency [Greiner, 1972; Simsek et al., 2009; Tushman & Anderson, 1986]. My results outline, that internal and external feedback drives organisations in trap situations, which can be decreased by the development of personal management knowledge and objective (unbiased) external feedback. At the same time the results of case studies and the definition of context give direction for the practice about the management tools and systems required for further growth and development.

3. 3. Managerial Implications

My thesis also provides important conclusions for the practice. The organisational defaults of the early stage have generated deep crises of growth in all cases. This highlights the importance of management development already in the small-business stage, as the best cure for crisis is prevention, for which it is important to know why crises may occur. It is an interesting finding, that where the professional power was dominant, the management counted as a culturally despised skill which made the implementation of OD initiatives more difficult.

Positive examples highlight the fact, that the development of the leaders' management skills is a good investment, which radically facilitates the cultural changes caused by the change of the organisation. The most important point of my thesis is, that it depends exclusively on the detection of the leader if the company will be able to develop further or, being torn apart by conflicts, will be forced to give up some activities. The role of leadership is outstanding. Leaders must move in the environment with their eyes open, they must learn and slowly advance within the capacity limits of organisation. They must emphasise the development of IT, but this cannot be independent from the individual improvement of the leaders and the company. The flexibility of the early life stage is also accessible in a standardized environment, but the slight slowing and the bureaucratization of the organisation is a natural phenomenon without which it would not be able to maintain size and complexity. The development of structure is inevitable, and the company may only grow until a point which is enabled by the skills and capacity of the leaders – one must invest in the organisation, even from external resources! I trust that (in case the professionals of practice will at least partly recognize themselves) my thesis gives useful conclusion and guidance in the complex maze of growth and organisational development.

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5. Publication Related to the Dissertation

Taródy, D. [2012]: Formalizált rugalmasság: A kettős képesség kialakulása egy középállalatban *Vezetéstudomány* 43:[12] pp. 49-60.

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