**CLADEA 2014 - PROJECT PHD - MANAGEMENT**

**A MEASUREMENT INSTRUMENT TO FACILITATE THE DEVELOPMENT OF THE ORGANIZATIONAL AMBIDEXTERITY AS A HYBRID STRATEGIC OPTION**

**KEYWORDS:**

**AMBIDEXTERITY. HYBRID STRATEGY.**

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**ABSTRACT**

One of the main strategic management challenges in the existing increasingly turbulent and glocal environment is the development of a hybrid management system that would enable the generation of the dynamic capability of being simultaneously operationally efficient and strategically adaptive to the market changes and opportunities in order to maintain the long-term competitiveness and survival of organizations. I support that the Organizational Ambidexterity (OA) construct has the potential to capture the essence of this challenge. In order to meet this challenge I advocate that a relevant avenue for research could be the consideration of the OA as a strategic option, exploring its theoretical foundations, under which internal and external conditions it is recommended, how it is developed and how to continuously measure its evolution over time. In this research I will review these issues focusing specifically on the last theoretical challenge, the measurement of OA. To this end, I have elaborated on the characteristics that a new OA measurement instrument should have to support the continuous measurement of the OA as a strategic option and stated a framework for its development. In the following stages of this research I will develop this new measurement instrument and will put it in practice in an empirical research where the validity of this strategy and its measurement instrument will be assed.

**INTRODUCTION:**

The classic intended strategic management is based on the assumption of having limited turbulence, certain level of predictability and high global market homogenization. However, the business environment is increasingly turbulent and glocal in most sectors and countries. Under these market circumstances is increasingly challenging to achieve long-term competitive advantages given the high risks and costs implied and the limited window of time opportunity that organizations have to exploit the changing market opportunities.

The management response to this reality has been on the last decades to shift the dominant management logic until the 1980s, based on a pure modern and agency-based perspective with an intended and positioning-based approach where companies separate the exploration process from the exploitation processes to embrace a softer management approach with relevant influences of the symbolic and post-modern perspectives, the stewardship theory and the strategy as an emergent and resource-based process focused and elaborate on the need to integrate the exploration and exploitation processes by developing what has been referred as Organizational Ambidexterity (OA). On this research I theorize about the OA as a relevant dynamic capability especially relevant to compete especially in highly turbulent markets. In the following stages of this PHD research I will elaborate on the potential of OA as the catalyst for a hybrid strategic management option and I will emphasize that if we consider the OA as a strategic option the relevance of its objective, reliable and comparable measurement would be of prime importance. The existing OA measurement instruments developed were specifically designed to link the OA with performance in a given time ignoring aspects that are fundamental in the control of the OA as a strategic option as the dynamic and changing nature of OA, the efficiency and speed to the OA generation or the costs that its continuous measurement would imply. It is my thesis that the existing OA measurement methods would not be appropriate for the measurement of OA as a strategic option and to this end I will use a framework to assess their intrinsic characteristics and how they differ from the ones required for this new measurement objective. I will use as well this framework to depict the esencial characteristics that a new measurement instrument should have to facilitate the control of the evolution of the OA as a strategic option. Once this measurement instrument will be completely developed I intend to use it in an empirical study applied to assess its validity to support the control of the OA as a strategic option.

**LITERATURE REVIEW:**

On this research we refer to the global markets as increasingly turbulent and glocal. The definition of turbulence is based on the Joyce & Woods scale of turbulence (Joyce & Woods, 2003) that is the result of the confluence of four factors in the same environment: complexity, rate of change, novelty and visibility. This scale relates reasonably well with other turbulence definitions and scales referred in other relevant papers ( Ansoff & Sullivan, 1993; Chakravarthy, 1997; Johannesson, 2010). The term glocal (Svensson, 2001) refers to the need to remain competitive and ultimately survive to balance the standardisation of the global strategies and activities to achieve economies of scale with the development of local strategies and activities to adapt to the local market trends.

The classic intended strategic management is based on the assumption of having limited turbulence, certain level of predictability and high global market homogenization (Chakravarthy, 1997, Feurer, R., 1995; Sanchez, R. , 1995). However, the business environment is increasingly turbulent and glocal in most sectors and countries. Under these market circumstances is increasingly challenging to achieve long-term competitive advantages given the high risks and costs implied and the limited window of time opportunity that organizations have to exploit the changing market opportunities. The management response to the competitive, turbulent and glocal market reality on the two decades has been based in shifting the dominant management logic until the 1980s, based on a pure modern (Hatch, 2012) and agency-based perspective (Davis, J., 1997) with an intended (Ansoff, 1965) and positioning-based approach (Porter, 1980) where companies separate the exploration process from the exploitation processes ( Tushman & O´Reilly, 1996) to embrace a softer management approach with relevant influences of the symbolic and post-modern perspectives (Hatch, 2012), where the individuals are managed taking as well the stewardship theory in mind (Davis, J, 1997), where the strategy is considered an emergent ( Mintzberg & Waters, 1982; Pascale, 1984) and resource-based process (Wernerfelt, B, 1984) focused on the development of general dynamic capabilities (Teece, 1997; Ambrosini and Bowman, 2009) and that start to elaborate on the need to integrate the exploration and exploitation processes by developing what has been referred as Organizational Ambidexterity (Birkinshaw, 2013, O´Reilly & Tushman, 2013).

The term Organizational Ambidexterity (OA) is applied in Management to the organizational capacity to simultaneously achieve and maintain over time high and/or balanced levels of efficiency on the explorative - search, variation, risk taking, experimentation, discovery or innovation - and exploitative processes - production, execution, implementation, selection, choice, etc - that are necessary to remain competitive and ultimately survive (Birkinshaw, 2013; March, 1991; Tushman & O´Reilly, 1996). I consider that becoming a highly efficient ambidextrous company could be a very relevant dynamic capability (O`Reilly & Tushman, 2008) and that it could be the key of a strategic option to compete especially in highly turbulent markets. The organizational ambidexterity literature frequently refers to OA as a managerial capability (Birkinshaw, J, 2013) and in some cases as a dynamic capability (O´Reilly & Tushman, 2008). However, the OA has very rarely explicitly referred as a conscious strategic option to compete on or to differentiate from competitors (Van den Bosch et al, 2005). This strategic option could be a very promising especially in turbulent and glocal environments. However, it would require a clear and concious collective effort, patience and steadiness (Sasson, A. & Minoja, M. 2010).

The underlying theory of the OA as a strategic option is the complex adaptive systems theory (Stacey, R., 1995), based in the complexity theory, as a hybrid strategic management approach that advocates that to compete in turbulent environments it is required to actively promote an state of bounded instability were constant tensions between stability and instability naturally coexists in state of constant adaptation. The complex adaptive systems theory argue that to remain truly innovative, term that I use as a synonym of being able to efficiently sense and seize market opportunities, it is necessary to position the company in a state at the edge of stability-instability called bounded instability were emergent and intended strategic management processes coexist, a hybrid human resources management system would be necessary with elements and influences of both agency and stewardship theories and where the modern rationality coexists with the symbolic and postmodern relevance given to the informal systems, language and culture to conform and influence the organizational reality ( Stacey, R., 1995). Under the lenses of the complex adaptive systems theory in order to achieve a high level of OA the hybrid management approach will be recommended in the strategic management dilemmas previously referred: strategic intended-emerging processes (Mc Kiernan, 1997; Goold, M., 1996) and human resource management, agency-stewardship, (Franco-Santos, M. et al, 2014) would be considered a pre-requisite for the development of sustainable high levels of OA. I have stated as well, as a key proposition of this research, that this hybrid management approach wold require a fundamental and concious shift in the management attention (Ocasio, 1997) to balance the attention of the short-term agency-based focus with an equally relevant long-term and stewardship-based focus arguing that the Organizational Ambidexterity could be the management construct that could serve this operationalize that necessity by creating ambidextrous management systems.

I here after synthesize the main topics that have focused the attention of the OA researchers on the last decade to facilitate the connection of the OA construct with the research objectives. I have classified the OA academic advances in the research of the OA construct into three main general blocks that are related to the following research questions: What is OA? Is there a positive relationship between OA and P? What are the antecedents and moderators of OA? In order to make an in-depth analysis of the first research question that refers to the meaning of OA, it has to be stated that unless there is a broad consensus on the fact that OA should be based on the original March´s concept (Birkinshaw, 2013;O´Reilly&Tushman, 2013) that defines it as the simultaneous pursuit of exploration and exploitation, it is necessary to specify that this concept is frequently adapted to explore different management challenges (Raisch and Birkinshaw, 2008): Organizational learning (March, 1991), Organizational design (Duncan, 1976), Organizational adaptation (Tushman, 1985), Strategic Management (Hamel & Prahalad, 1993), Innovation Technology (Tushman, 1986) and others such as networks, product development, software development, intellectual capital, etc ( O´Reilly & Tushman, 2013). Another different conceptual distinction that has to be taken into account refers to the use of the balanced or combined Ambidexterity concept: the Balanced OA, is focused on measuring the difference in intensity between both dichotomies, and the combined ambidexterity, on measuring the sum or multiplication on both poles (Cao et al, 2009; Junni et al, 2013). Additionally, as in other academic management constructs, it is relevant to specify the level of analysis studied on each paper. In previous OA research the majority of papers analyze OA from the firm level. However, some researchers have already developed relevant academic studies focusing the attention on the inter-organizational, business unit, department and individual levels (Simsek, Z. 2009; Birkinshaw, 2013; Junni et al, 2013) raising the question of how the OA construct has to be adapted to each of them and about the mechanisms required to integrate the different levels of analysis (Gibson & Birkinshaw, 2004). Finally, another conceptual challenge raised by Junni et al (2013) is the type of research designs used: Unless most of OA studies have used cross-sectional survey designs there are some that have used archival or multi-method designs (Beckman, 2006; Mudambi & Swift, 2011) and longitudinal studies (Geerts, Blingenbach-Driessen and Gemmel, 2012; Goosen, Bazzazian and Phelps, 2012; Caspin-Wagner et al, 2012; Uotila et al, 2008). The diversity on the conceptual understanding of the OA construct speaks about its high versatility but certainly affects the comparability of the conclussions to which the different authors arrive (Richard, et al, 2009) and raise the challenge of arriving to manageable integrated conclussions. As a conclusion of the first question, we can state that in order to discuss or compare different OA papers it is recommended first to clarify their positioning regarding the following OA conceptual dimensions: OA streams (organizational learning, organizational adaptation, organizational adaptation, Strategic Management or Innovation technology) , OA calculation (Balanced or Combined), OA level (organizational, Business Unit, department or individual) and OA research design type (survey/archival/mixed and cross-sectional/longitudinal) in order to make sure of the complete comparability or to take into account their conceptual differences.

To analyse the second academic question that refers to the study of the relationship between OA and P I have used as the main academic reference a recent comprehensive meta-analysis (Junni et al, 2013) that is focused on the study of the relationship between OA and P. Unless this paper has been a clear step forward for the OA–P understanding and facilitated to great extent my literature review on the OA-P relationship, it was focused on the demonstration of the OA-P positive relationship than on the analysis of the different OA measurement instruments as I do in this study. This meta-analysis concludes that there is an extensive support for the positive relationship between OA and performance. However, at the same time they state that we still could not be utterly conclusive about the relationship between OA and P as in some studies the relationship found was negative, inexistent, not statistically significant, limited to companies with specific characteristics or to specific contexts (Junni, et al, 2013; Lavie et al, 2010; O´Reilly and Tushman, 2013). It is worth stating as well that other papers referred that ambidexterity comes at a cost that could potentially exceed its benefits (Gibson&Birkinshaw, 2004; O´Reilly&Tushman, 2013). In addition, some authors have stated that the relationship between OA-P is mediated by the development of key capabilities that enable the company to have simultaneously a high level of short-term efficiency and long-term market adaptation. However, there is no consensus on the nature of these capabilities. They have been referred as sensing and seizing as capability mediators (O´Reilly&Tushman, 2008), Product innovation and Process Innovation (He & Wong, 2004) and organizational capacity for change (Turner et al, 2013). On this research I will follow O`Reilly and Tushman sensing and seizing concepts as mediators of OA and performance (P).

On the third question, the OA-P moderators and antecedents there is extensive literature that study the existence of different moderators and antecedents that influence the OA-P relationship. On one hand, the OA moderators, variables that affect positively or negatively the OA–P result, are normally classified in two groups, the internals and the externals. The main internal moderators to be taken into account are size (Beckman, 2004;Cao, 2009; Levie et al, 2010), industry (Junni et al, 2013), life cycle (He&Wong, 2004; Lavie et al, 2010; Raisch & Birkinshaw, 2008) and number of business units (He&Wong, 2004; Markides, 2013; Raisch & Birkinshaw, 2008). The main external moderators are sector dynamism (Benner & Tushman, 2003; Gibson&Birkinshaw, 2004; Lavie et al, 2010; O´Reilly & Tushman, 2013; Raisch et al, 2009; Simsek, 2009), sector munificence (Cao, 2009; Raisch & Birkinshaw, 2008) and level of sector competition (Lavie et al, 2010; March, 1991; O´Reilly &Tushman, 2013). The main conclussions to which the referred papers arrived is that OA is significantly more necessary and effective in large, mature, service multi-business unit companies that operate on highly dynamic environments with high sector munificence and high competition levels. Taken into account the above moderators it is logical to suggest that if a research random selection of companies has a majority of organizations with the above characteristics the probability to find a conclusive relationship between OA–P will be higher than if the sample contains a majority of small start-ups with a single business unit that compete in stable industrial sectors with scarce resources and low to medium level of competition and that as a result the random composition of a sample in a research of OA could seriously compromise the reliability of their conclussions. On the other hand, the main antecedents that foster OA are the existence of exploration departments or units specialized on long-term activities (Tushman & O´Reilly, 1996), a business culture that combines disciplined performance management with team support and trust (Gibson & Birkinshaw, 2004), the high level of individual CEO OA and the high level of integration between the top management team (Lubatkin, 2006). Based on the above conclussions on the OA moderators and antecedents, we can state that when measuring OA-P, the use of the above factors as control variables is critical to assess the validity of the general conclusions on the OA-P relationship and to favour the reliability of the comparison between different empirical studies.

Moving to the topic of OA measurement, it is outstanding that unless a lot empirical research has been developed to assess the validity of the link between OA and performance ( Junni et al, 2013), the OA measurement has always been just used as an instrument on the research of the relationship between OA and performance (Junni et al, 2013) being limited the specific relevance and the depth of the research developed on this topic especially when compared with other mature management constructs (Lettice & Roth, 2009). In addition, the OA measurement instruments developed were specifically designed to link the OA with performance in a given time and as a result they have not taken in consideration aspects that are of critical relevance for the control of the OA as a strategic option as the dynamic and changing nature of OA, the efficiency and speed to the OA generation or the costs that its continuous measurement would imply (O´Reilly & Tushman, 2008; Birkinshaw, 2013). I have studied how the OA is measured in the existing OA literature by reviewing and classifying the existing OA empirical research published in four stars journals. The table 2 lists the main instruments specifying the ones referred by other authors.



Table 2: References to other author OA-P measurement instrument

**OBJECTIVES**

The objective of this research is double. First, theorize about the potential of the OA as a hybrid strategic management option establishing theoretical connexions with other management dilemmas as well as elaborating on its theoretical foundations and influences. Second, the development of a new organizational ambidexterity measurement instrument that fits the stated theoretical challenge to enable the control of the evolution of the OA as a strategy over time.

These objectives can be encapsulated into two questions: Can the organizational ambidexterity be a valid hybrid strategic management option? And, how the organizational ambidexterity as a strategic option can be measured over time?

**METHODOLOGY:**

On the following stages of this research I intend to extend the preliminary literature review already developed to refine the stated theoretical arguments. More concretely, I intend to deepen on the analysis of the underlying theories of OA as I believe that this could influence how the OA should be measured. I have special interest in analysing in more detail the dynamic capabilities and organizational learning, the complexity theory and the attention-based view theory. I will, as well, deepen on the analysis of specific statistical techniques that could be useful for the OA measurement. I later on intend to develop a case study in a global company that would have an outstanding interest in taking the OA as the key element of its strategy. On this empirical research I intend to develop a mixed methods approach on which objective measures will be taken but as well the use of personal interviews would play a relevant role to record how the OA hybrid approach develops and influences the human behaviour over time.

**FINDINGS:**

At this stage of the research I just have elaborated on the potential of the OA as an strategy to compete in turbulent environments and have developed a framework that will facilitate the development of a customized measurement instrument that intends to be a critical step forward to allow the control of its evolution over time and in comparison with other competitors. This framework stated in table 4 has been already used to compare the fundamental characteristics of the existing OA measurement methods and conclude that they are not appropriate to succeed in meeting the challenge of controlling the evolution of the OA as a strategy. As a result, the need to create a customized measurement instrument for this research has been justified.

**DISCUSSION:**

One of the two main propositions of this research is that achieving and sustaining a high level of ambidexterity understood as the dynamic capability to simultaneously achieve short-term operational efficiency and long-term capacity to efficiently and quickly sense the market opportunities and reconfigure its business model to seize them is the key for the competitiveness and survival in glocal and turbulent environments. This definition is conceptually equivalent to the original March definition but has been adapted to fit the specific challenge of operationalize the OA as a corporate strategy to compete and succeed in turbulent and glocal environments.

The second proposition of this research is that in order to succeed in making of this dynamic capacity the essence of the company strategy one of the main challenges is to measure its OA level over time and in comparison with the one of your competitors allowing as well the possibility of incorporating this as a key indicator of your performance management system (Ferreira and Otley, 2009). After having analysed the main existing OA measurement instruments ( He&Wong, 2004; Lubatkin, et al, 2006; Gibson & Birkinshaw, 2004) it is my understanding that as they were specifically developed to fit the challenge of demonstrating the link between OA and performance and that their fundamental principles and characteristics are not in line with the ones required to implement and control (Preble, 1992) the OA as a strategy.

I have developed the framework for comparison of OA measurement instruments illustrated in the table 2 to assess the validity of the existing measurement instruments for the objective of this research and to build the skeleton of a new measurement if the existing ones do not fit our needs.

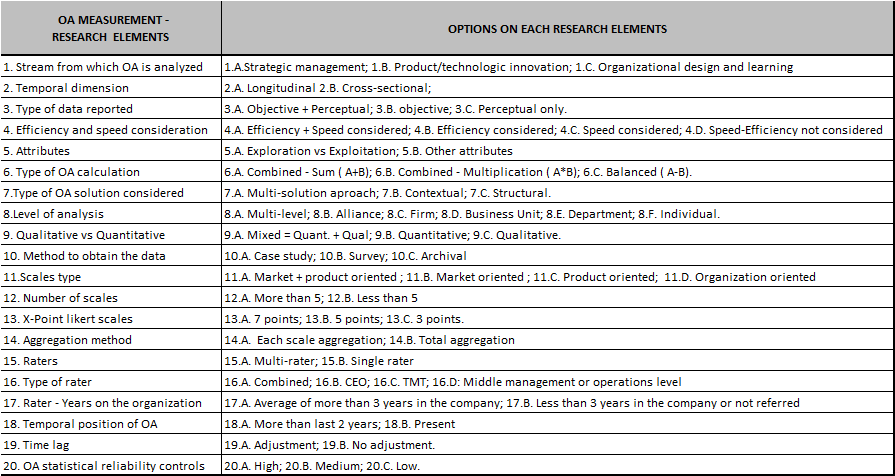


Table 3: Framework for OA development of OA measurement instruments

In order to justify the need to develop a new OA measurement that truly fits the objective of this research I will use the framework shown in the table 4 to outline the methodological choices that I believe are more appropriate for the objective of this research, with the ones that were chosen in the three most referred OA measurement instruments.

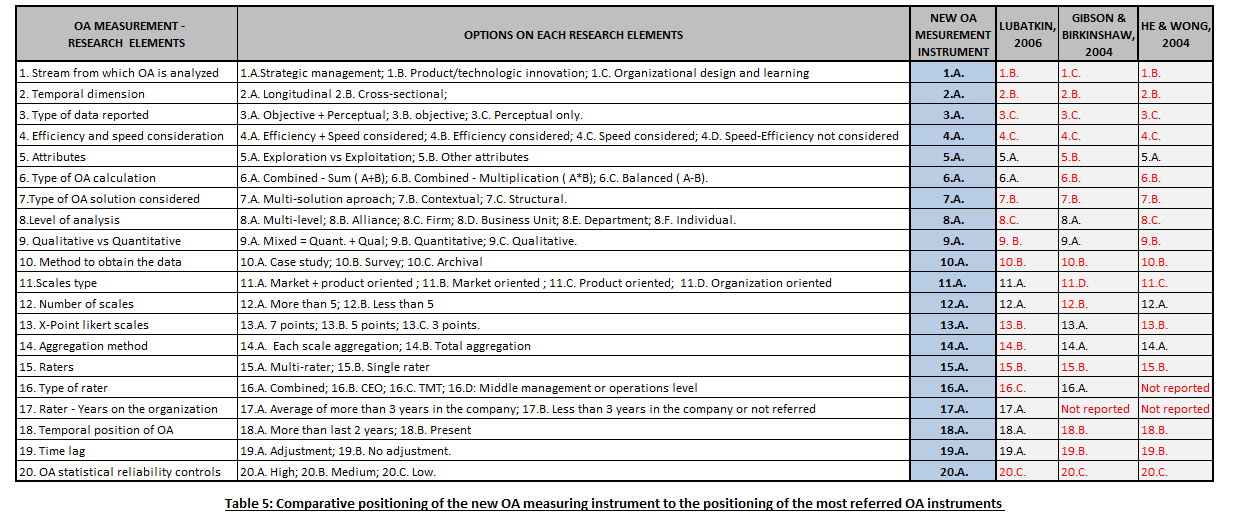


Table 4: Comparative Framework of OA measurement instruments

In the table 4 I have developed a comparison between the characteristics that the new instrument is intended to have with the existing measurement instruments in order to show the fundamental differences (shown in red colour) of the choices of the new intended method and the existing ones to justify the need to develop a new measurement instrument that would be more aligned with the objectives of this research. More specifically, the following features, that are not present in any of the most referred OA measurement instruments, are in nature attached to the OA and as a result should be incorporated to a OA measurement instrument that intends to facilitate the control of the OA as a strategy: 1. The OA is a dynamic concept: The OA is a construct that is dynamic in nature and as a result to properly measure, assess and manage the OA of a given company it has to be measured on the long-term to be able to assess its average level and its evolution over time. As a result I consider that the OA measurement instruments should be designed to develop longitudinal research, rather than cross-sectional research. 2. The OA and its poles (exploitation vs exploration, sensing vs seizing, etc) have a complex and abstract nature and as a result they are easily transformed into quantitative Likert scales. As a result, it is my understanding that the management perception as the unique method to measure ambidexterity could seriously compromise the reliability of the research conclusions as they would be biased by the perception of the raters, their position on the company and the short-term circumstances experienced by the rater on the company. 3. The achievement of a high OA level involves the constant and simultaneous development of efficient operational processes together with a successful, efficient and quick sensing-seizing process to grasp the market opportunities with time enough to have a net gain when the costs implied in its generation are deducted.

**CONCLUSSIONS:**

We have elaborated on the high potential of the OA to encapsulate the challenge of managing strategically companies in turbulent and glocal environments adopting a hybrid approach in the main dilemmas of strategic management. We have as well argued that in highly turbulent and glocal markets it could be a possible strategic option to focus on the maximization of the company capacity to exploit simultaneously and efficiently their operational processes and the strategic process by which they sense and seize the market opportunities advocating that in such changing and complex markets this capacity would be crucial to remain competitive.

In order to operationalize such strategic option we have stated that it will be of key importance to have an appropriate measurement instrument that would facilitate the control of its evolution over time and in comparison with other companies. I have stated, based on the framework developed in this research, the main characteristics that it should have and objectively justified why the existing measurement methods would not be appropriate for this objective. On the next stages of this research I will elaborate in more depth about the OA as a strategy and I will develop the intended new measurement instrument. I will then use it in an empirical research where I will further explore to which extent its use to control the evolution of the OA in a given company would enhance the continuous improvement of its OA level and facilitate its capacity to outperform their competitors in its capacity to achieve short-term efficiency and long term adaptation to the changing market conditions.

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