

# ORGANIZATIONAL AMBIDEXTERITY MEASUREMENT: METHODOLOGICAL DILEMMAS AND THEORETICAL SOLUTION

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## Introduction

Firms constantly seek means to gain and sustain competitive advantage and to fortify their competitive positions among rivals. Organizational ambidexterity as a metaphor refers to firm's ability to „simultaneously exploiting existing competencies and exploring new opportunities” [Raisch et al., 2009, p. 685]. In other words, organizational ambidexterity refers to both exploit and capitalize on existing capabilities and remain adaptive and flexible to changes by exploring new options [Lubatkin et al., 2006, pp. 646–672]. More specifically, contextual organizational ambidexterity is defined as the capacity to simultaneously achieve alignment [Gibson, Birkinshaw, 2004, p. 209]. Researchers such as He and Wong [2004, pp. 481–494] and Hortinha et al. [2011, pp. 36–58] concluded that ambidexterity in organizations is a core driver of firm performance. According to D. March [1991, p. 71], „maintaining an appropriate balance between exploration and exploitation is a primary factor in system survival and prosperity”. A firm that exclusively engages in exploitation will invariably become obsolete, whereas a firm that solely focuses on exploration will never be able to reap the benefits of its discoveries [Levinthal, March, 1993]. Although balance between exploration and exploitation is fundamental for an firm's long-term performance, a central underlying assumption of this framework is the inherent tradeoffs between exploration and exploitation. While exploration refers to organizational activities such as „search, variation, risk taking, experimentation, play, flexibility, discovery, innovation”, exploitation denotes things such as „refinement, choice, production, efficiency, selection, implementation, execution” [March, 1991, p. 71]. Exploration and exploitation are thought to be conflicting activities because they demand different resources and routines, and produce different organizational outcomes [Gupta et al., 2006, pp. 693–706; Levinthal, March, 1993, pp. 95–112]. A reconciliation of this activities represents a strategic dilemma.

One of the most interesting and perplexing phenomenon – organizational ambidexterity – remained shrouded in mystery. Basically, the extant research reaches their limits when confronting data generated by stochastic, dynamic, nonlinear processes. There is a some amount of theoretical attention to an organizational ambidexterity measurement in the management literature. However there are almost no systematic reviews directly on this topic, which makes it an obvious candidate for future research.

Addressing this gap, a critical review the organizational ambidexterity literature with the specific focus on the operationalization of this theoretical construct was made, to provide an in-depth analysis of the underlying themes, issues, tensions and debates in the domain<sup>1</sup>. Priorities for future empirical research were proposed, together with the important methodological implications. Taking these insights to the organization level, it was argued that the key is to move beyond one-dimensional scale toward measurement of organizational ambidexterity as two-dimensional construct. Put it differently, it was explored in more depth how organizational ambidexterity has been measured and the way to approach it was clarified.

This paper is organized as follows. First section refers to briefly review research on organizational ambidexterity measurement and discusses the important role of the particular operationalization in research results. It is followed by description a compelling rationale for preferring two-dimensional measure of organizational ambidexterity. Next, suggestion to operationalize an organizational ambidexterity as a dynamic capability was presented. The paper was concluded with the discussion of the implications for theory and practice, and directions for future research.

## **More than one solution: Measurement dilemma**

As a starting point, an attention is paid to a more evidence-based line of inquiry to consider how researchers have actually been conceptualizing and operationalizing the organizational ambidexterity concept. The operationalization of ambidexterity varies enormously. The way ambidexterity is measured also varies. One of the central concerns of ambidexterity research is how two different objectives might be effectively managed. This issue manifests itself in how the construct gets operationalized. But these operational choices actually don't do full justice to the conceptual issues they seek to represent. The ambidexterity literature is extremely vague on whether two different objectives should be balanced, traded off against one another, reconciled, or simply managed. Even regarding this zone of agreement, however, there are qualifications.

The term „ambidexterity” becomes a management Rorschach test in which one sees whatever one wants as researchers apply the term to phenomena that have little to

do with the tensions in ensuring firm survival. Part of this potential confusion stems from the way ambidexterity has been measured. Many studies rely on Likert scales to define exploration and exploitation [Bierly, Daly, 2007, pp. 493–516; Gibson, Birkinshaw, 2004, pp. 209–226; He, Wong, 2004, pp. 481–494; Jansen et al., 2006, pp. 1661–1674]. While the psychometric properties of these measures are well documented, the underlying meaning is often ambiguous.

There has been variation in how researchers operationalize ambidexterity, with some opting for the product of the two [Gibson, Birkinshaw, 2004, pp. 209–226; Im, Rai, 2008, pp. 1281–1296; Jansen et al., 2008, pp. 982–1007; Jansen et al., 2012, pp. 1286–1303; Mom et al., 2009, pp. 812–828; Morgan, Berthon, 2008, pp. 1329–1353; Tiwana, 2008, pp. 251–272; Tushman et al., 2010, pp. 1331–1366], others using the sum or absolute difference of these [Cao et al., 2010, pp. 1272–1296; Jansen et al., 2009, pp. 797–811; Lubatkin et al., 2006, pp. 646–672]. Researchers also used a balance measure and still others arguing for a unidimensional or continuous measure [Boumgarden et al., 2012, pp. 587–610; Fernhaber, Patel 2012, pp. 1516–1539; Lin et al., 2007, pp. 1645–1658; Rothaermel, Alexandre, 2009, pp. 759–780], and finally there are works that used both product and balance [Cao et al., 2009, pp. 781–796; He, Wong, 2004, pp. 481–494]. These studies also used different techniques to gather their data, including surveys, secondary sources, and interviews. As was argued, this lacuna is significant because it limits the construct validity and explaining power of organizational ambidexterity which is increasingly loosing touch with their methodological context.

The most notable differences in the conceptualizations of organizational ambidexterity concern whether it refers to achieving an optimal balance between exploration and exploitation or whether it involves a combination of high levels of both exploration and exploitation [Cao et al., 2009, pp. 781–796]. In the management literature, the one-dimensional model has become near dominant model of organizational ambidexterity. Concerning the balance perspective, March [1991, pp. 71–87] initially argued that achieving and maintaining a proper balance between exploration and exploitation is essential for organizational survival. Accordingly, researchers have argued that organizational ambidexterity can be best described as a midpoint, or an optimal point, on a continuum with exploration lying at one end and exploitation at the other [March, 1991, pp. 71–87; Simsek et al., 2009, pp. 864–894]. The central premise of this framework concerns the inherent trade-offs between exploration and exploitation which derive from several stylized facts about resource-allocation constraints, short-term productivity versus long-term innovation, present versus future, and stability versus adaptability. These inherent trade-offs between exploration and exploitation reinforce their operationalization as opposing activities along a continuum. The distinction between exploration and exploitation is often a matter of degree rather than kind. Accordingly, exploration-exploitation is viewed as continuum rather than a choice between discrete options.

To align measurement with conceptualization of the construct, researchers use a single variable for capturing

exploration-exploitation [e.g., Uotila et al., 2009, pp. 221–231]. Scholars seeking to distinguish trade-offs from reconciliation efforts should attempt to capture directly these trade-offs and organizations attempts to manage exploration-exploitation. Another advantage of operationalizing exploration and exploitation with a single variable is the straight-forward measurement of balance between these activities. Firms that have limited internal resources or poor access to external resources are especially likely to need to balance between exploration – and exploitation-related activities [Cao et al., 2009, pp. 781–796].

Regarding the combination perspective, exploration and exploitation other researchers considered independent activities, implying that the levels of both exploration and exploitation can and should be maximized to achieve a high level of organizational ambidexterity [Cao et al., 2009, pp. 781–796; Simsek et al., 2009, pp. 864–894]. There is no compelling rationale for preferring one measure over the other, yet the results are highly sensitive to the particular operationalization. However, it seems to be less reasonable to use one-dimensional scale.

### ***Why multidimensional measures are more preferable than others? Evidence from the efficiency frontier theory***

Many of the previous studies on ambidexterity focus on organizational level ambidexterity. Conceptually, this makes sense, given the result of recent meta – analysis suggested that organizational ambidexterity – performance relationship become stronger as the level of analysis progressed from lower to more aggregate levels [Junni, et al., 2013, pp. 299–312].

The idea of organizational ambidexterity builds on one of the most fundamental principles in systems dynamics [Forrester, 1968], namely that the underlying structure of a system will determine the behaviours seen in that system. This implies that if we want to change behaviours in a system, we must first change the underlying structure of the system. The concept of contextual ambidexterity applies this principle to the challenge of managing two conflicting demands: If we want people to display ambidextrous behaviours in an organization, we must first create the appropriate organizational context for such behaviours to emerge.

Csaszar [2013, pp. 1083–1101] developed a mathematical model to explore a „design space” and identify trade – offs and dominance relationship among alternative organizations designs. The findings showed the set of efficient organizations called the efficient frontier. The number of efficient organizations is much smaller than the total number of organizations (82 organizations out of 1982 research sample). Organizational forms should therefore be selected with care, because otherwise ending up with a suboptimal form is likely.

So far organizational ambidexterity was discussed as one-dimensional construct. However a number of scholars suggested organizational two facets with unique predictive qualities. Drawing upon a Porter's [1996, pp. 61–78] efficiency frontier framework, Birkinshaw and Gupta [2013, pp. 287–298] examine the extent to which differ-

ent approaches to managing organizational ambidexterity influence organizational effectiveness. More specifically, they consider how firms seek to deliver on two orthogonal dimensions, exploration and exploitation, simultaneously. This view echoes organizational ambidexterity arguments in its perception that a firm must possess an exploration and exploitation at the same time in order to achieve high organizational effectiveness. However, they argue, it seems unlikely that firms can succeed in addressing the needs of both dimensions.

Here the assumption is that firms are choosing between various instruments that yield some combination between exploration and exploitation according to logic shown by simple curve. These findings support the possibility that organizational effectiveness accrues to the firm that implants combined measures of organizational ambidexterity in the face of the types of the choices firms make when seeking to become ambidextrous. A firm has an ambidextrous competitive advantage when it is implementing a combined strategy, featuring distinctive resources and activities enabled by its interactions with the organizational environment, which generates economic value in excess of its competitors.

The results of the recent meta-analysis suggested that combined organizational ambidexterity (formed as a multiplication or a sum of separate exploration and exploitation scales) was positively and significantly associated with performance [Junni et al., 2013, pp. 299–312]. Balanced organizational ambidexterity was positively and significantly associated with performance when measured as the absolute difference (subtraction) between exploration and exploitation, but not when continuous measures of organizational ambidexterity were used (i.e., one-dimensional scales and other measures that ranged from low to high organizational ambidexterity). Regarding the measurement of organizational ambidexterity, their results suggest that combined measures of organizational ambidexterity capture the performance effects better than balanced measures. This suggests that it is the combination of high levels of both exploration and exploitation that contributes most to performance, in line with the concept of combined ambidexterity. If exploration and exploitation are separate constructs, then my perspective, consistent with Birkinshaw and Gupta [2013, pp. 287–298], is that they should be measured as such. Interestingly, the meta-analysis by Junni et al. [2013, pp. 299–312] helps to resolve this confusion. They find that separate measures are most strongly associated with performance and that continuous measures are largely unrelated.

Too much focus on the exploitation of current competencies at the expense of exploration of new ideas will lead to a “success trap” – organizational inertia that prevents the organization from properly adapting to changing environmental conditions, which will cause poor performance outcomes in the long run [Levinthal, March, 1993, pp. 95–112; Smith, Tushman, 2005, pp. 522–536]. In contrast, too much focus on exploration leads to a “failure trap” of underdeveloped new ideas: Innovations are replaced by new ideas before they have had the opportunity to contribute to the firm’s revenue stream [Levinthal, March, 1993, pp. 95–112].

Thus, according to the balanced organizational ambidexterity perspective, firms need to ensure that they have the optimal mix of exploration and exploitation to ensure success in the short and long term [March, 1991, pp. 71–87]. Because exploration and exploitation compete for the same resources, ensuring the optimal balance of exploration and exploitation is challenging and involves possible trade-offs [Simsek et al., 2009, pp. 864–894]. The combined organizational ambidexterity perspective builds on the balance perspective but proposes that the greatest advantages of organizational ambidexterity are derived from maintaining high levels of both exploration and exploitation. This implies that efficiency is high in current operation while, simultaneously, new opportunities are identified and captured at a high level to prevent organizational inertia and the negative effects of path dependence [Simsek et al., 2009, pp. 864–894].

The above discussion illustrates why it is vital to measure exploration and exploitation as separate dimensions rather than as poles on a continuum. Various studies over the years have taken the latter approach, and it is unhelpful to do so, because it forces all data points onto a diagonal line from top left to bottom right. This ends up defining away the interesting parts of the story, that is, the ability of firms to deliver on both dimensions at the same time [see Lavie et al., 2010, pp. 109–155; Devinney et al., 2000, pp. 674–695, for a different perspective on this matter].

### ***Toward an operationalization of the organizational ambidexterity***

Some scholars measured an organization’s propensity to do something [Jansen et al., 2008, pp. 982–1007; Jansen et al., 2012, pp. 1286–1303; Jansen et al., 2009, pp. 797–811; Mom et al., 2009, pp. 812–828; Tushman et al., 2010, pp. 1331–1366]. Other scholars measured an organization’s intentions to do something [Cao et al., 2009, pp. 781–796; Cao et al., 2010, 1272–1296; He, Wong, 2004, pp. 481–494; Hill, Birkinshaw, 2014, pp. 1899–1931; Lubatkin et al., 2006, pp. 646–672; Morgan, Berthon, 2008, pp. 1329–1353]. Other works measured the outcomes from what the organization actually did [Fernhaber, Patel, 2012, pp. 1516–1539; Lin et al., 2007, pp. 1645–1658; Patel et al., 2012, pp. 1420–1442; Rothaermel, Alexandre, 2009, pp. 759–780; Tiwana, 2008, pp. 251–272]. Additionally researchers also measured an organization’s capacity to do something [Boumgarden et al., 2012, pp. 587–610; Gibson, Birkinshaw, 2004, pp. 209–226; Im, Rai, 2008, pp. 1281–1296].

To move beyond the limits of armchair thinking, one should take an empirical approach in line with conceptualization of organizational ambidexterity as dynamic capability. Dynamic capabilities are viewed as central to building organizational ambidexterity [He, Wong, 2004, pp. 481–494]. O’Reilly and Tushman [2013, pp. 324–338] relate organizational ambidexterity in terms of dynamic capability and defined it as a complex set of routines activities which include decentralization, targeted integration, and the ability of senior leadership to manage trade-offs that characterize the simultaneous pursuit of exploration and exploitation.

A growing body of research espouses the importance of excelling at both explanatory and exploitative activities for long – term success because it permits organizations to avoid traps associated with favoring one type of organizational processes over the other [Sirén et al., 2012, pp. 18–41]. The essence of organizational ambidexterity is to be found in the ability of the organization to leverage existing assets and capabilities from the mature side of the business to gain competitive advantage in new areas. Organizations focusing on exploratory efforts may not fully capture benefits associated with commercializing existing competences. Conversely, organizations focusing on exploitation may enjoy short – term profits yet face the risk of not being able to respond adequately to environmental changes. As such, the effective use of organizational ambidexterity leads to a comprehensive and integrated commitment to both sustaining and building firm capabilities.

It was relatively easy to find survey items for organizational ambidexterity because existing research studies provide a sound basis for developing one. The survey items were adapted from scale originally developed by Zahra, Ireland and Hitt [2000, pp. 925–950] and also using by Atuahene-Gima [2005, pp. 61–83]. This construct was measured on seven – point Likert scale ranging from 1 (strongly disagree) to 7 (strongly agree). Specifically, measures of competence exploration and competence exploitation have five items each. Competence exploration comprised a five item scale where top managers rated the extent to which the firm „Acquired manufacturing technologies and skills entirely new to the firm?“, „Learned product development skills and processes (such as product design, prototyping new products, timing of new product introductions, and customizing products for local markets) entirely new to the industry?“, „Acquired entirely new managerial and organizational skills that are important for innovation (such as forecasting technological and customer trends; identifying emerging markets and technologies; coordinating and integrating R&D; marketing, manufacturing, and other functions; managing the product development process)?“, „Learned new skills in areas such as funding new technology, staffing R&D function, training and development of R&D, and engineering personnel for the first time?“, „Strengthened innovation skills in areas where it had no prior experience?“.

The competence exploitation items ask top managers to rate the extent which the firm „Upgraded current knowledge and skills for familiar products and technologies?“, „Invested in enhancing skills in exploiting mature technologies that improve productivity of current innovation operations?“, „Enhanced competencies in searching for solutions to customer problems that are near to existing solutions rather than completely new solutions?“, „Upgraded skills in product development processes in which the firm already possesses significant experience?“, „Strengthened our knowledge and skills for projects that improve efficiency of existing innovation activities?“.

Following earlier studies the proposition is to measure organizational ambidexterity by multi-items scale to represent the dimension of exploration and exploitation. This means organizational ambidexterity is indirectly measured through

its component factors, which are in turn measured by the questionnaire items. Items for measurement scale should be modeled as latent construct. Drawing on recent debates on operationalizing congruence [Fernhaber, Patel, 2012, pp. 1516–1539] it seems that latent congruence modeling (LCM) is appropriate to operationalize organizational ambidexterity from both a theoretical and statistical standpoint. As such congruence represents similarity (difference) in the extent of exploration and exploitation in an organization.

## Conclusions

The definition of ambidexterity focuses on the need for firms to ensure their current as well future viability. However, ambidexterity has also presented a knotty challenge for firms given the practical difficulties of balancing exploration and exploitation activities since they rely on very different resources, processes, and mindsets. This paper relates to the stream of research examining new ways to meet the challenges of simultaneous exploration and exploitation.

In the field of management, both organization and strategy are uniquely independent disciplines with their own level of analysis: the organization. In particular, the precise methodological point of my research is to systematically look at the nature of organizational ambidexterity from strategic viewpoint when explaining its essence at the organization level of analysis. The proposal embedded in this paper is appropriate starting point for empirical testing. Perhaps the most critical issue for empirical researchers is the operationalization of the organizational ambidexterity construct. Moreover, because the proposition presents an organizational ambidexterity anchored in two underlying dimensions, there is opportunity for further inquiry of relationship between organizational ambidexterity and organizational effectiveness. Regarding the empirical measurement of organizational ambidexterity, researchers need to consider opportunities for using both combined and balanced approaches in a single study to allow for direct comparisons between different measures, in line with the approach of Cao et al. [2009, pp. 781–796].

In addition to addressing these proposals for the future empirical research, these are several potential extensions to my study. First, new insights could emerge from studying how the organizational ambidexterity links to organizational effectiveness. Junni et al. [2013, pp. 299–312] found that objective measures based on growth were positively and significantly associated with exploration. For exploitation, the objective measures based on profitability were positive and significant. Thus, exploration contributed to performance through growth, while exploitation contributed by enhancing profitability. In contrast, perceptual performance (absolute and relative) measures were positively and significantly related to both exploration and exploitation, with little difference between the effects of these dimensions. In sum, this implies that organizational ambidexterity may have different impacts depending on what aspect of financial performance we are looking at.

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### Endnote

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### **Pomiar oburęczności organizacyjnej: Dylematy metodologiczne i rozwiązania**

#### **Streszczenie**

Jedno z największych wyzwań stojących przed współczesnymi przedsiębiorstwami polega na tworzeniu nowych szans i zdolności wraz z równoczesnym wykorzystywaniem istniejących kompetencji, czyli zbudowaniu organizacji oburęcznej. W tym świetle zaskakujący jest fakt relatywnego braku w literaturze dotyczącej organizacji zarządzania, dyskusji odnośnie do pomiaru organizacyjnej oburęczności, co jest pewną słabością z punktu widzenia badań empirycznych. Wychodząc z koncepcji granicy efektywności, zaproponowano pomiar organizacyjnej oburęczności jako dwuwymiarowego procesu łączącego twórczą nowość i twórczą użyteczność. Całość przedstawionych argumentów teoretycznych rozszerza dotychczasowe i w pewnym sensie otwiera nowe perspektywy na konceptualizację i operacjonalizację organizacyjnej oburęczności.

#### **Słowa kluczowe**

oburęczność organizacyjna, pomiar, granica efektywności