

# 科技部補助專題研究計畫成果報告 期末報告

## 策略矛盾的整合型架構

計畫類別：個別型計畫  
計畫編號：MOST 104-2633-H-343-002-  
執行期間：104年08月01日至105年07月31日  
執行單位：南華大學企業管理學系

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中文摘要：即使有進展，策略矛盾研究將可獲益於重新定義、動態觀點和傳統智慧。本研究目的在於探討脈絡知識、理論基礎、傳統智慧與策略矛盾之間的關係。本研究重新定義策略矛盾的本質、架構和類型。透過彙整不同的理論觀點和實證研究結果，本研究發展一個整合架構來解釋和預測策略矛盾的動態關係。最後，本研究探討如何藉由融合東方經典、西方理論和傳統智慧來構思，可以超越不同脈絡與層次策略矛盾的途徑。

中文關鍵詞：脈絡化、動態、策略矛盾、傳統智慧、超越

英文摘要：Strategy paradox research, despite progress, can benefit from reconceptualization, a dynamic perspective, and traditional wisdom. The goal of this research is to explore contextual knowledge, theoretical foundations and, traditional wisdom related to the study of strategy paradox. We reconceptualize strategy paradox by critically examining its nature, structure, and architecture. Drawing on various theoretical perspectives and empirical findings, an integrative framework was proposed to explain and predict dynamic relationships of strategy paradox. Furthermore, we explore ways for transcending strategy paradox across contexts and levels through synthesizing Eastern classics, Western theories, and traditional wisdom.

英文關鍵詞：contextualization, dynamics, strategy paradox, traditional wisdom, transcendence

# **An Integrated Framework of Strategy Paradox**

## **INTRODUCTION**

The study of paradox has flourished in the areas of leadership, international business, organizational studies, management, and strategy (e.g., see Khanna et al., 2011; Lewis, 2000; Smith, 2014; Smith & Lewis, 2011; Yang et al., 2015). The metaphor of strategy paradox has been used to describe contradictions, dilemmas, inflections or tensions that individuals and organizations encounter in dynamic and uncertain environments (Christensen, 1997; de Wit & Meyer, 2010; Heracleous, & Wirtz, 2014; McGrath, 2013; Raynor, 2007; Smith, & Tushman, 2005; Smith, 2014). Increasingly, strategic management scholars and practitioners have emphasized contexts, frameworks, mindsets, and wisdom adopted to enrich the study and learning of strategy (Child, 2009; Christensen et al., 2012; Duggan, 2013; Ghoshal, 2005; Lafley & Martin, 2013; Nonaka & Zhu, 2012; Montgomery, 2012; Rumelt, 2011; Yoffie & Cusumano, 2015). How should strategy paradox be conceptualized? Can strategy paradox be reframed to incorporate contextual knowledge and multilevel approaches? How do dynamics of strategy paradox affect business model innovation and organizational sustainability? Are insights from traditional wisdom useful to suggest possible ways or methods for transcending strategy paradox across contexts and levels? Answering these questions is essential for advancing strategy research, educating future strategists, and informing strategic practices.

## **LITERATURE REVIEW**

This research contributes to several streams of the existing literature on strategy research, including contextualization, paradox, cognitive reframing and self-transcendence (Benner & Tripsas, 2012; Hahn et al., 2014; Hays, 2013; Kernochan et al., 2007; Khanna, 2014; Meyer, 2015; Rhee, 2010; Rousseau, & Fried, 2001; Smith & Lewis, 2014; Tsui, 2006; Weick & Putnam, 2006). Several studies have examined the effect of contextualization on theorizing research and diffusing management knowledge (Child, 2009; Meyer, 2015; Khanna, 2014; Rousseau & Fried, 2001; Smith & Lewis, 2014; Tsui, 2004; 2006). A number of scholars have further examined the rigor and relevance of strategy theories across different contexts and levels (e.g., see Christensen et al., 2012; Lafley & Martin, 2013; McGrath, 2013; Montgomery, 2012; Rumelt, 2011; Yoffie & Cusumano, 2015). Therefore, the assumptions, frameworks, and models adopted to contextualize strategy paradox deserve additional research. Increasingly, the paradox perspective has emerged with

the increase of environmental uncertainty and organizational complexity (Heracleous, & Wirtz, 2014; Jules & Good; 2014; Lewis, 2000; Smith & Lewis, 2014; Smith & Lewis, 2011). In a review article, Smith and Lewis (2014) explored the metatheoretical nature and core elements of paradox as well as suggested alternative ways in theorizing. As Smith and Lewis (2014:141) stated “The increased adoption of a paradox perspective may further reflect the increased exposure of Western traditions to Eastern principles.” In addition, several studies have investigated the influence of framing on strategic thinking and decision (Benner & Tripsas, 2012; Christensen et al., 2012; Duggan, 2013; Hahn et al., 2014; Goddard et al., 2012; Rumelt, 2011). For instance, a firm’s conceptualization of new products, services or ecosystems may affect its resource allocation and strategic choices in nascent industries (Benner & Tripsas, 2012; Christensen et al., 2012). Hahn et al. (2014) investigated the cognitive content and structure influence of paradoxical frame and their association with different types of responses to corporate sustainability issues. Furthermore, several studies have examined the influence of beliefs, spirituality, and traditional wisdom on developing knowledge and practices related to individual and organizational transcendence (Chen, 2002; Hays, 2013; Goddard et al, 2012; Walsh, 2014; Weick & Putnam, 2006). Chen (2002) explored the Chinese middle way philosophy and proposed a paradoxical integration framework. Weick and Putnam (2006) explore the concept of mindfulness and its implications for organizing in chaotic environments. Hays (2013) developed a dynamic model of organizational wisdom showing relationships amongst transcendence, transformation, and wisdom. A number of studies have highlighted the interconnection between Chinese classics and Western strategy theories (Chen, 2008; Rhee, 2010; Weick & Putnam, 2006; Nonaka & Zhu, 2012). Nonaka and Zhu (2012) investigated the correlation between Confucian teachings and best business practices developed by some Japanese companies such as Toyota.

## **METHODS**

This study adopted literature review and content analysis to investigate research questions. To reconceptualize the concept of strategy paradox, we reviewed theoretical perspectives and empirical studies related to the field of strategic management across a number of top-tier journals. In addition, we applied content analysis to develop an integrative framework and draw insights from traditional wisdom to explore ways for transcending strategy paradox across contexts and levels.

## RESULT AND DISCUSSIONS

This research reconceptualizes the concept of strategy paradox by reframing its nature, structure, and architecture. The nature of strategy paradox contains three types of logics and seven choices (see Figure 1). The structure of strategy paradox consists of four patterns including: insolation, intersection, inclusion, and interconnection that describe different influences and relationships among strategy paradox (see Figure 2). Drawing from prior studies (Grant, 2013; Kiechel, 2010; Mintzberg et al, 2005; de Wit & Meyer, 2010), the metaphor of architecture was adopted to classify nine different types of strategy paradox across different levels and contexts (see Figure 1). Following Buddhist methods (Sheng-yen & Stevenson, 2002), the metaphor of strategy was contextualized to include three elements, consisting of “strategist,” “strategic,” and “strategizing.” In addition, a multilevel approach was proposed to integrate individual, organizational, and institutional levels of strategy paradox. For instance, the position paradox shows how a company’s product can acquire competitive advantage through a strategic choice among different combinations of cost, focus, and differentiation. Drawing from contextualization and theoretical perspectives (Child, 2009; Tusi, 2004; 2006; Faulkner & Campbell; 2006; Smith & Hitt, 2007), an integrative framework was proposed to explain and predict dynamic relationships of strategy paradox (see Figure 4). The formation and intensity of a firm’s strategy paradox were influenced by national contexts, top management team, and performance measurement as well as moderated by selective organizational factors. Furthermore, the framework predicts that relationships strategy paradox, competing values, and performance measurement could contribute to virtuous or vicious cycles depending on ways or methods organizations adopt to transcend strategy paradox.

Based on the integrative framework and prior research, this study further proposes several propositions that explain the determinants, causal relationships, and consequences of strategy paradox. These include:

Proposition 1: When organizations encounter more uncertainty or conflicts from material systems, ideational systems, and institutional outcomes, the formation of strategy paradox is more obvious.

Proposition 2: Organizational factors including culture, resource base, and life cycle will moderate the formation of strategy paradox.

Proposition 3: Organizations can respond to strategy paradox through realigning competing values in sustainability, survival, and superiority.

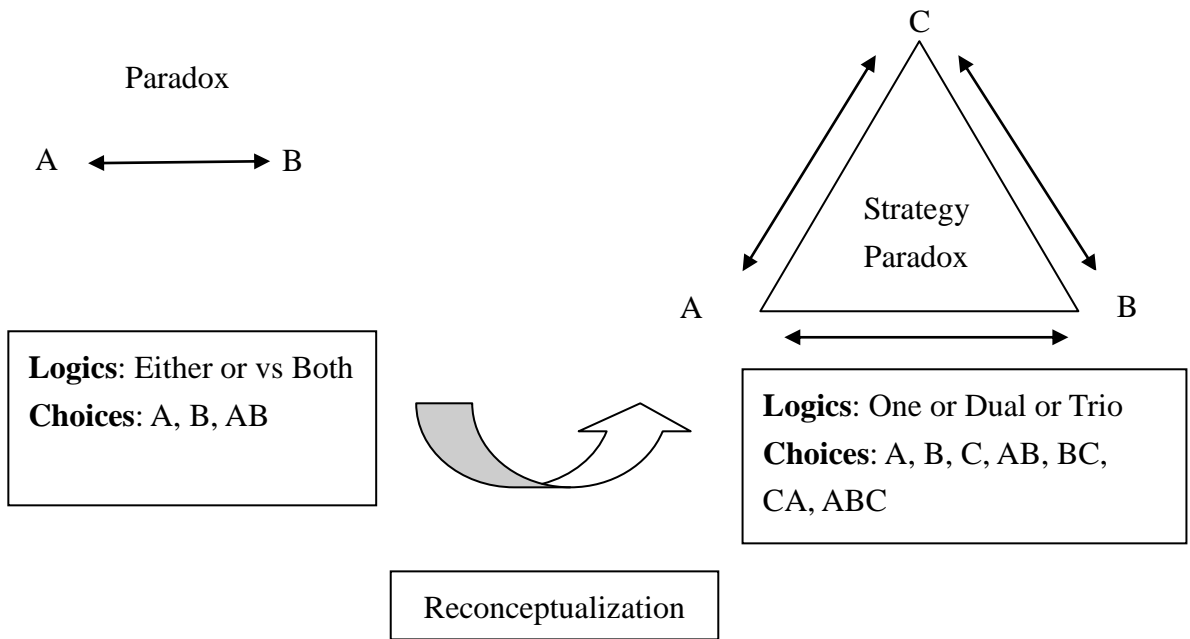
Proposition 4: Top management teams including CEO, governance structure, and entrepreneurial team will moderate the effect of strategic changes taken by organizations in response to strategy paradox.

Proposition 5: Competing values facing organizations will influence performance measurement in efficiency, effectiveness, and effect.

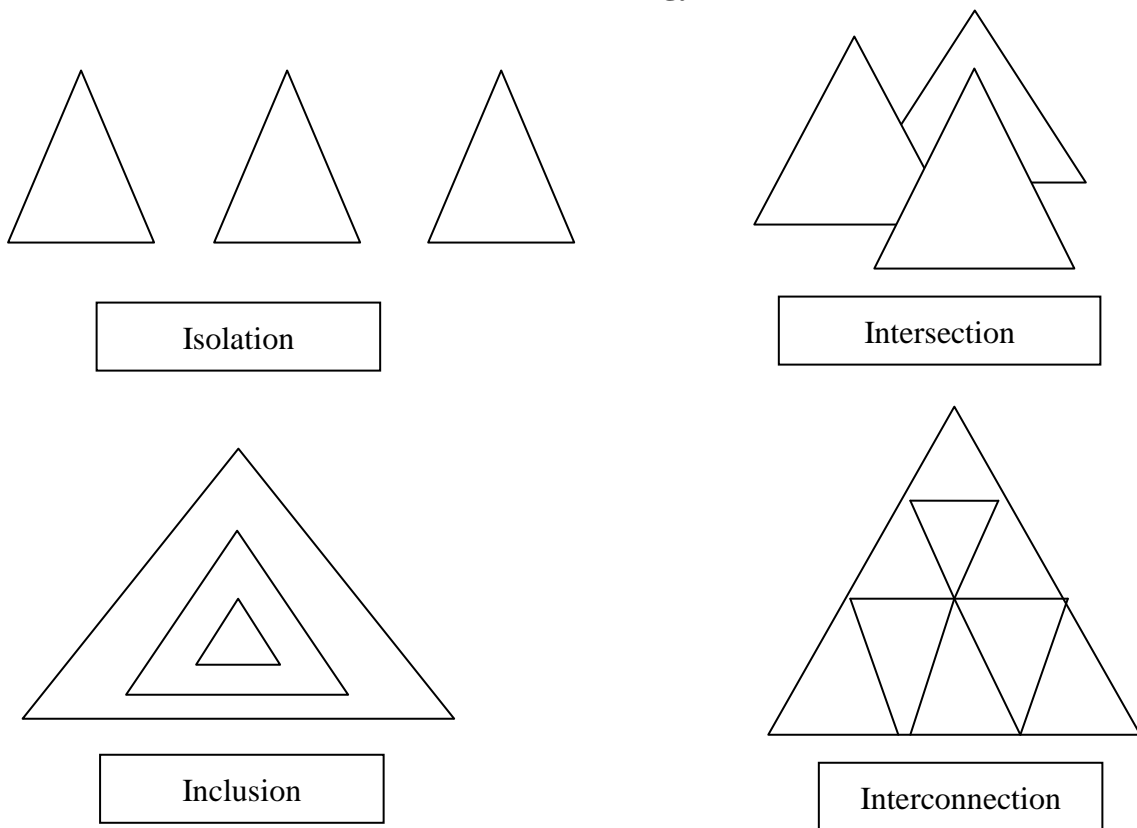
Proposition 6: Performance measurement in efficiency, effectiveness, and effect will incur virtuous or cycles of strategy paradox.

The work of Capra (2010), Rhee (2009), and Küpers and Pauleen (2013) have explored the links and similarities between Western theories, Eastern classics, and practical wisdom. In addition, Eastern religions and intellectual heritages have developed metaphors and methods such as *koan* in embracing concepts of contradictions (Sheng-yen & Stevenson, 2002; Phillips, 2011; Walsh, 2014). As shown in Table 1, insights from traditional wisdom can be creatively synthesized with Eastern Classics and Western theories to develop novel frameworks and ways that can be adopted to transcend strategy paradox. For instance, the notion of “union of heaven and human beings” from Yellow Emperor’s Inner Canon (黃帝內經) can be juxtaposed with dynamic capabilities theory to develop organizational practices that can sense, seize, and transform strategy paradox through daily routines.

**FIGURE 1**  
**Nature of Strategy Paradox**

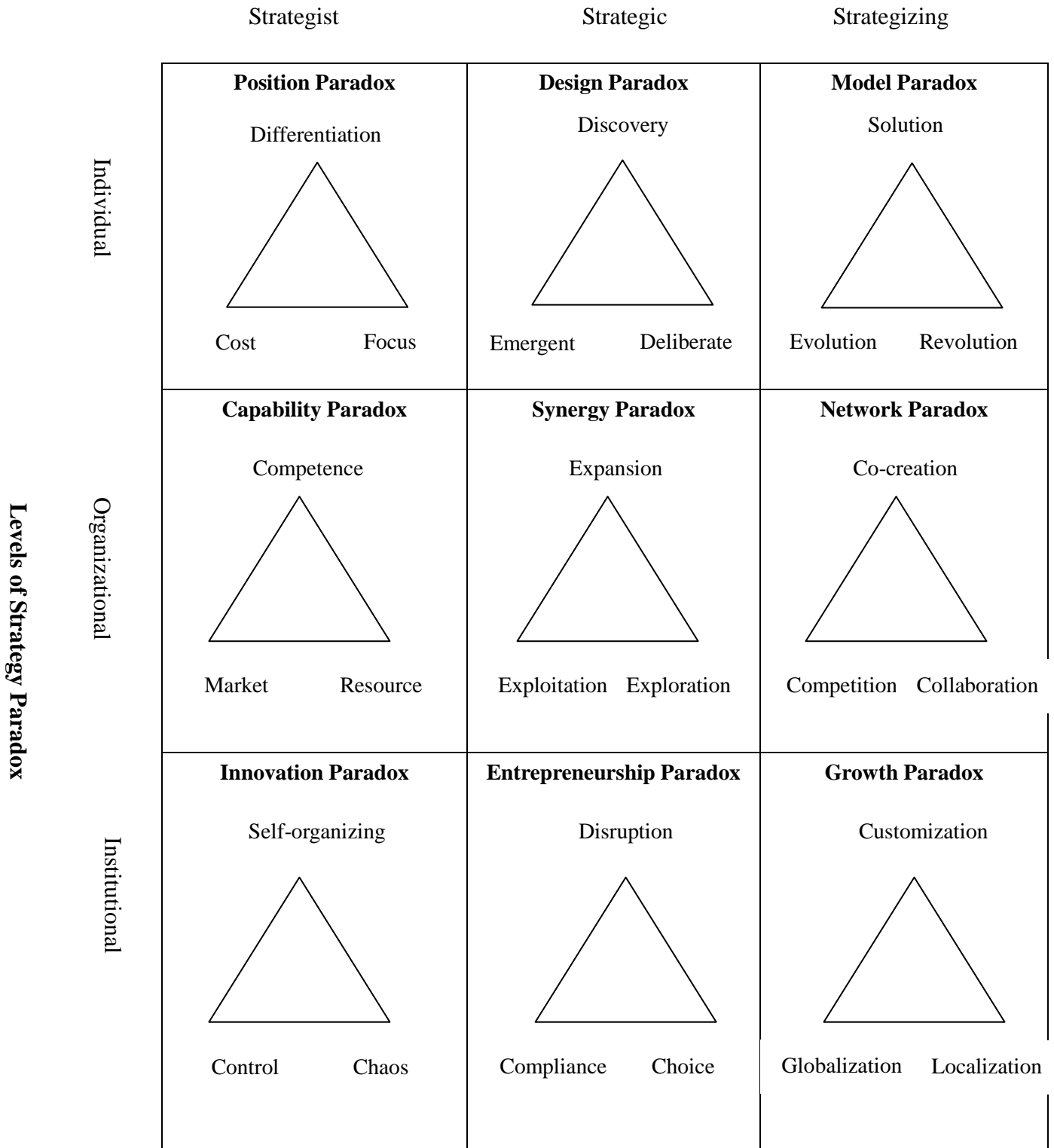


**FIGURE 2**  
**Structure of Strategy Paradox**



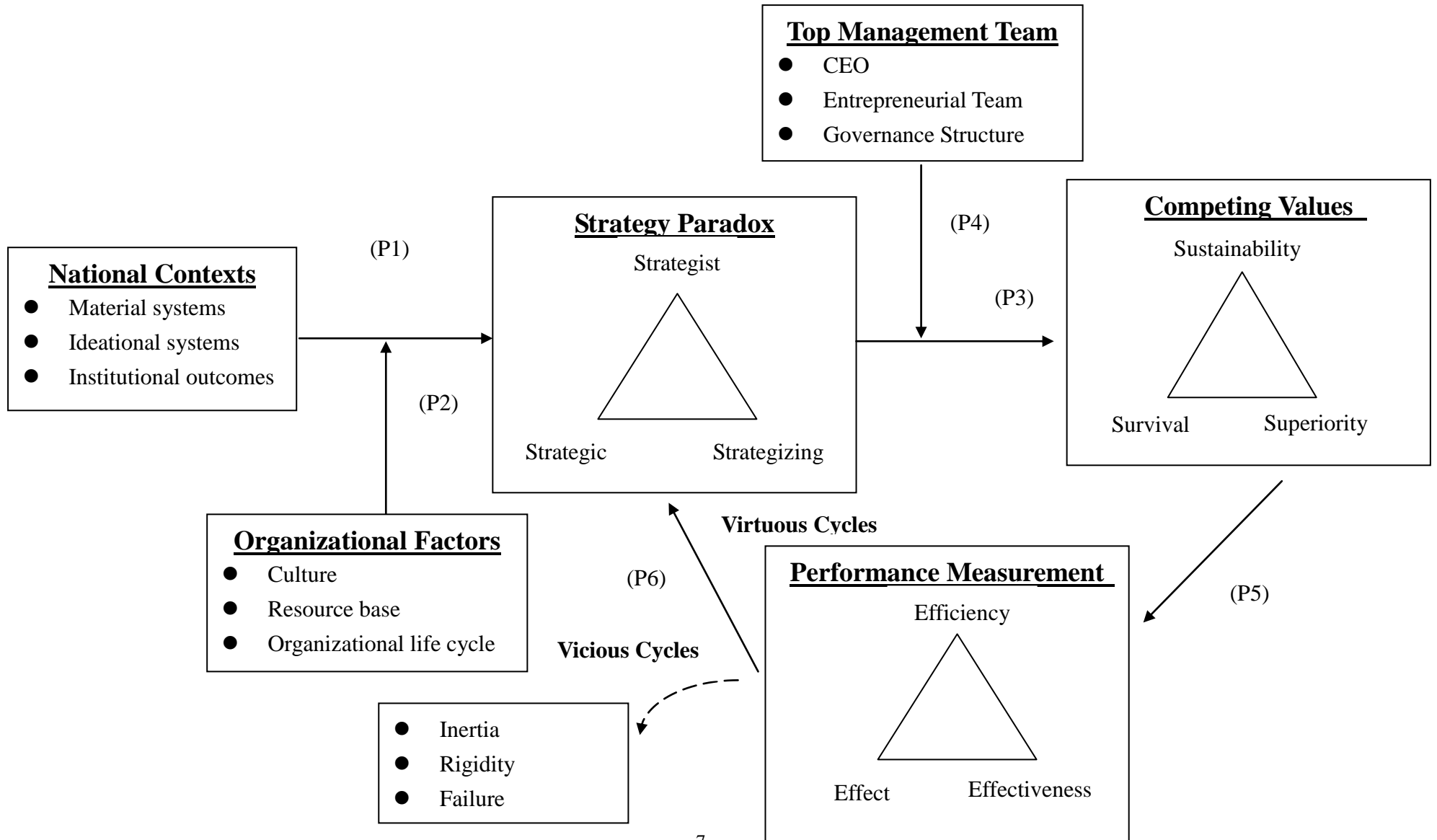
**FIGURE 3**  
**Architecture of Strategy Paradox**

Contexts of Strategy Paradox





**FIGURE 4**  
**An Integrative Framework of Strategy Paradox**



**TABLE 1****Transcending Strategy Paradox through Synthesizing Eastern Classics, Western Theories, and Traditional Wisdom**

Strategy Paradox	Eastern Classics	Traditional Wisdom	Western Theories
Position	The Book of Means (中庸)	Middle Way	Organizational Ambidexterity (Michael L. Tushman)
Design	Book of Change (易經)	Ying-yang	Simple Rules (Kathleen M. Eisenhardt)
Model	Tao Te Ching (道德經)	The three treasures	Planned Opportunism (Vijay Govindarajan)
Capability	Yellow Emperor's Inner Canon (黃帝內經)	The union of heaven and human beings	Dynamic Capabilities (David J. Teece)
Synergy	The Book of Five Rings (五輪書)	Five attitudes of swordsmanship	Platform Leadership (Michael A. Cusumano)
Network	Great Treatise on the Perfection of Wisdom (大智度論)	The six perfections (paramitas)	Blue Ocean Strategy (W. Chan Kim)
Innovation	The Art of War (孫子兵法)	Indirect methods will be needed in order to secure victory.	Disruptive Innovation (Clayton M. Christensen)
Entrepreneurship	Samyukta-āgama (雜阿含經)	The noble eightfold path	Internal Corporate Venturing (Robert A. Burgelman )
Growth	Bhagavad Gītā (薄伽梵歌)	Mandala thinking	Discovery Driven Planning (Rita G. McGrath )

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# 科技部補助計畫衍生研發成果推廣資料表

日期:2016/10/26

科技部補助計畫	計畫名稱: 策略矛盾的整合型架構
	計畫主持人: 涂瑞德
	計畫編號: 104-2633-H-343-002- 學門領域: 策略管理
無研發成果推廣資料	

104年度專題研究計畫成果彙整表

計畫主持人：涂瑞德			計畫編號：104-2633-H-343-002-			
計畫名稱：策略矛盾的整合型架構						
成果項目			量化	單位	質化 (說明：各成果項目請附佐證資料或細項說明，如期刊名稱、年份、卷期、起訖頁數、證號...等)	
國內	學術性論文	期刊論文		0	篇	
		研討會論文		1		
		專書		0	本	
		專書論文		0	章	
		技術報告		0	篇	
		其他		0	篇	
	智慧財產權及成果	專利權	發明專利	申請中	0	件
				已獲得	0	
			新型/設計專利		0	
		商標權		0		
		營業秘密		0		
		積體電路電路布局權		0		
		著作權		0		
		品種權		0		
		其他		0		
	技術移轉	件數		0	件	
		收入		0	千元	
	國外	學術性論文	期刊論文		0	篇
			研討會論文		0	
			專書		0	本
專書論文			0	章		
技術報告			0	篇		
其他			0	篇		
智慧財產權及成果		專利權	發明專利	申請中	0	件
				已獲得	0	
			新型/設計專利		0	
		商標權		0		
		營業秘密		0		
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		品種權		0		
其他		0				

	技術移轉	件數	0	件	
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參與計畫人力	本國籍	大專生	1	人次	
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		專任助理	0		
其他成果 (無法以量化表達之成果如辦理學術活動、獲得獎項、重要國際合作、研究成果國際影響力及其他協助產業技術發展之具體效益事項等，請以文字敘述填列。)					



## 科技部補助專題研究計畫成果自評表

請就研究內容與原計畫相符程度、達成預期目標情況、研究成果之學術或應用價值（簡要敘述成果所代表之意義、價值、影響或進一步發展之可能性）、是否適合在學術期刊發表或申請專利、主要發現（簡要敘述成果是否具有政策應用參考價值及具影響公共利益之重大發現）或其他有關價值等，作一綜合評估。

1. 請就研究內容與原計畫相符程度、達成預期目標情況作一綜合評估

達成目標

未達成目標（請說明，以100字為限）

實驗失敗

因故實驗中斷

其他原因

說明：

2. 研究成果在學術期刊發表或申請專利等情形（請於其他欄註明專利及技轉之證號、合約、申請及洽談等詳細資訊）

論文： 已發表  未發表之文稿  撰寫中  無

專利： 已獲得  申請中  無

技轉： 已技轉  洽談中  無

其他：（以200字為限）

3. 請依學術成就、技術創新、社會影響等方面，評估研究成果之學術或應用價值（簡要敘述成果所代表之意義、價值、影響或進一步發展之可能性，以500字為限）

本研究試圖結合西方策略理論、東方傳統智慧和在地脈絡觀點，建構一個策略矛盾的整合型架構。首先對於策略矛盾的本質、架構和類型，進行重新定義，之後本研究也分析策略矛盾的前置因素、複雜關係和結果。最後，本研究探討如何藉由融合東方經典、傳統智慧和西方策略理論來超越不同類型的策略矛盾。研究成果可以促進未來以"策略矛盾"為分析單位的策略學術探討，也可以進一步發展策略矛盾的個案撰寫與分析方法，實際應用於策略管理教學與實務交流。

4. 主要發現

本研究具有政策應用參考價值： 否  是，建議提供機關

（勾選「是」者，請列舉建議可提供施政參考之業務主管機關）

本研究具影響公共利益之重大發現： 否  是

說明：（以150字為限）