編輯區

------------以下------- Unpacking Organizational Ambidexterity: Dimensions, Contingencies, and Synergistic Effect2009-----------------------------------------------------------------------

三情境式雙元性

【後面的章節他在討論組織如何實現雙元性】

【這是作者說的】

* Sequential Ambidexterity循序式雙元性(分類是大家一起的)

企業會透過間歇式變革來因應環境的轉變，藉此重新調整結構與流程，這正是一種循序過程，「時間轉換（temporal shifting）」亦被視為實踐雙元性的方式之一。有關循序式雙元性的研究，通常著重於發展歷程漫長的大型企業案例firms evolve through punctuated changes in which firms adapt to environmental shifts by realigning their structures and processes, a sequential process. More recently, temporal shifting has been proposed as a way for firms to be ambidextrous，Studies of sequential ambidexterity often focus on large-scale examples with the changes taking place over long time periods

在高度抽象的層次上，企業可聲稱其在利用與探索之間轉換結構，但若要具體操作，實際轉換會是什麼樣貌？畢竟，大規模的結構性轉換可能具有高度破壞性。At a high level of abstraction, it is easy to claim that firms shift structures between exploitative and exploratory modes—but what would this mean at ground level? Major structural transitions can be highly disruptive. What does it mean to go from exploitation to exploration, or the reverse? Here the research is not fine-gained enough to provide much insight.

* 同時性或結構式雙元性（Simultaneous or Structural Ambidexterity）

另一種平衡探索（exploration）與利用（exploitation）之間權衡的方法，是同時追求兩者，透過設置獨立子單位來實現。這種方法通常被稱為「結構式雙元性」，但正如 O’Reilly 與 Tushman（2008）所指出，這不僅包括為探索與利用分設結構單位，還涵蓋彼此對應的能力、系統、激勵機制、流程與文化，每一部分都需在內部達成一致（p.192）（structural ambidexterity）A second way proposed to balance the exploration/exploitation trade-off is through the simultaneous pursuit of both using separate subunits. This approach is typically characterized as structural ambidexterity but, as O’Reilly and Tushman (2008) noted, this “entails not only separate structural units for exploration and exploitation but also different competencies, systems, incentives, processes, and cultures—each internally aligned (p. 192)

【這篇論文的P12】提到【Organizational Ambidexterity in Action: How Managers Explore and Exploit2011，摘錄如下】這一觀點來看，雙元性的關鍵在於組織能否「感知並掌握新機會」，透過同時進行探索與利用來實現，而這本質上是一個「領導問題」而非純粹的結構安排（O’Reilly & Tushman, 2011From this perspective, the key to ambidexterity is the ability of the organization to sense and seize new opportunities through simultaneous exploration and exploitation. This is, at heart, a leadership issue more than a structural one (O’Reilly & Tushman, 2011

【作者對結構是雙元性的結論】結構式雙元性包含自主的探索與利用子單位、資源整合機制、賦予探索與利用正當性的願景與價值觀，以及能夠調和多元組織配置張力的領導能力Although the results are not completely consistent across studies, in general they confirm that structural ambidexterity consists of autonomous structural units for exploration and exploitation, targeted integration to leverage assets, an overarching vision to legitimate the need for exploration and exploitation, and leadership that is capable of managing the tensions associated with multiple organizational alignment

* 情境式雙元性（Contextual Ambidexterity）

Gibson 與 Birkinshaw（2004）則提出，這種張力亦可於個人層級被調和，並以「情境式雙元性」（contextual ambidexterity）概念說明：此種雙元性乃指「在整個事業單位中，同時展現對齊（alignment）與適應（adaptability）之行為能力」（p.209）In 2004 Gibson and Birkinshaw proposed that this tension could be resolved at the individual level through what they termed contextual ambidexterity, which they defined as “the behavioral capacity to simultaneously demonstrate alignment and adaptability across an entire business unit (p. 209).” 此情境由「張力（stretch）、紀律（discipline）與信任（trust）」三要素交織而成（p.214）

【例子之一】情境式雙元性最具代表性的例子之一Flexibility versus efficiency? A case study of model changeovers in the Toyota production system1999

【作者對於情境式雙元的想法】情境式雙元性似乎能有效於穩定環境中協調探索與利用，但當企業面臨破壞式或不連續的技術與市場變化時，其運作機制便顯得不足While conceptually easy to imagine how contextual ambidexterity might operate within a given setting or technological regime, it is harder to see how it would permit a company to adjust to disruptive or discontinuous changes in technologies and markets

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【也有學者認為他們該被分開討論】或者，一些研究人員最近開始將探索和利用描述為相互獨立、相互正交的活動，以便企業可以選擇同時高水準地進行這兩項活動（Gupta等人，2006年）Alternatively, some researchers have recently begun to describe exploration and exploitation as separate, orthogonal activities, such that firms can choose to perform both activities simultaneously at high levels (Gupta et al., 2006在這一觀點中，人們強調「二元化」是指企業同時追求高水準探索和利用的能力（例如，Beckman 2006、Jansen 等人 2006、Lavie 和 Rosenkopf 2006、Lubatkin 等人 2006），而不是指企業如何權衡利弊以找到兩者之間的最佳平衡。In this view, ambidexterty has been emphasized to pertain to the capacity of a firm to pursue high levels of exploration and exploitation concurrently (e.g., Beckman 2006, Jansen et al. 2006, Lavie and Rosenkopf 2006, Lubatkin et al. 2006) rather than managing trade-offs to find the most appropriate balance between the two.

------------以上------- Unpacking Organizational Ambidexterity: Dimensions, Contingencies, and Synergistic Effect2009-----------------------------------------------------------------------

平衡專區

-----------以下------- O'Reilly & Tushman2013 Organizational ambidexterity: Past, present, and future-----------------------------------------------------------------------------

過去有學者指出雙元性與績效的研究

【過去研究的整理】

【大量實證研究整理了雙元性對企業績效存在關聯的研究】，大量證據呈現出一致的趨勢：研究顯示雙元性與企業銷售成長呈現正向關係(這是作者的結論)

【如2篇: 1 Balancing exploration and exploitation: The moderating role of competitive intensity 2 [The performance consequences of ambidexterity in strategic alliance formations: Empirical investigation and computational theorizing](https://pubsonline.informs.org/doi/abs/10.1287/mnsc.1070.0712)】

還有多項研究指出雙元性的價值通常在環境高度不確定的情況下更為明顯In addition to these, other studies of the antecedents of ambidexterity have shown that it is typically more valuable under conditions of environmental uncertainty【找Speed and Search: Designing Organizations for Turbulence and Complexity2005這篇的作者在摘要也提到他們得到的結論是【動盪環境，企業必須快速提升績效；複雜環境，企業必須廣泛搜尋；以及同時存在動盪和複雜性的環境，企業必須在速度和搜尋之間取得平衡One set pinpoints formal designs that cope well with threedifferent environments: turbulent settings, in which ﬁrms must improve their performance speedily; complex environments,in which ﬁrms must search broadly; and settings with both turbulence and complexity, in which ﬁrms must balance speedand search.】

【作者指出的結論】這些研究指出三項結論。第一，雙元性與企業績效呈現正向關係；第二，這種影響會受到企業所處環境的調節，例如在不確定性高且資源充足的情況下，雙元性較能發揮效益，這在大型企業中尤為明顯In aggregate, these studies suggest three conclusions. First, ambidexterity is positively associated with firm performance. Second these effects can be contingent on the firm’s environment, with ambidexterity more beneficial under conditions of uncertainty and when sufficient resources are available, which is often the case with larger rather than smaller firms.

【進入到結論瞜~】

【如何完成完美整合仍沒有解答】成功完成這些轉型，要求企業能在既有成熟業務中維持競爭力的同時，有效整合資源，發展出足以開拓新市場所需的新能力。然而，企業在何時、如何達成此目標，至今仍未有明確解答，值得進一步深入研究To make these transitions required these companies to simultaneously compete in mature businesses and to orchestrate firm assets to allow them to develop the requisite new capabilities to compete in new businesses. The full story about when and how they do this is still not clear and deserving of more research

-----以上------- O'Reilly & Tushman2013 Organizational ambidexterity: Past, present, and future------------------------------------------------------------------------

------------以下------- Exploration and Exploitation in Organizational Learning Author(s): James G. March1991-----------------------------------------------------------------------

【均衡兩者很重要】因此，在探索與利用之間保持適當的平衡是系統生存和繁榮的首要因素。Therefore, maintaining the right balance between exploration and exploitation is paramount for a system to survive and thrive.

【知識的對於兩者的貢獻並不均分，是導致策略難以平衡的原因之一】知識對競爭優勢的貢獻各不相同，這導致在組織環境中難以定義和安排探索與利用之間的適當平衡。Organizations often compete with each other under conditions where relative position matters. In the case of competition for dominance, the contribution of knowledge to competitive advantage varies, making it difficult to define and arrange the appropriate balance between exploration and exploitation in an organizational context.

------------以上------- Exploration and Exploitation in Organizational Learning Author(s): James G. March1991-----------------------------------------------------------------------

------------以下------- Unpacking Organizational Ambidexterity: Dimensions, Contingencies, and Synergistic Effect2009-----------------------------------------------------------------------

【動態平衡又助於結構化控制績效風險提升企業績效】更高程度的動態平衡，或探索性活動和開發性活動的相對規模更接近，有助於透過更結構化地控制績效風險來提升企業績效。We reason that a higher level of BD, or a closer match in the relative magnitude of exploratory and exploitative activities, contributes to firm performance through more structured control of performance risk.

基於此邏輯，我們認為，如果探索與利用之間未能取得緊密的平衡，企業可能會面臨過時的風險或無法獲得相應資源的風險。相反，如果在這兩類活動之間取得更緊密的平衡，企業就可以避免或更好地管理此類損害績效的風險。Building on this logic, we reason that the failure to achieve a close balance between exploration and exploitation can leave a firm susceptible to either the risk of obsolescence or the risk of failure to appropriate. Conversely, striking a closer balance between the two types of activities enables a firm to avoid or better manage such performance-impairing risks.

【不平衡會增加風險】相反，探索性活動和開發性活動的不平衡會透過增加此類風險對企業績效構成威脅（Levinthal and March 1993, March 1991）。Conversely, an imbalance between exploration and exploitation poses threats to firm performance through an increase in such risks (Levinthal and March 1993, March 1991).

【資源可得性的是關鍵】並明確指出：**資源可得性是決定企業是否必須面對探索與深化之間取捨問題的關鍵因素**。The results reported here shed light on this ongoing debate, and they provide a strong indication that resource availability plays a pivotal role in determining whether there exists a binding trade-off necessitating a concern with finding an appropriate balance of exploitation and exploration.

【妥善管理探索與深化之間的取捨是重要的、有助於提升整體績效】在資源有限的情境下，管理者可透過妥善管理探索與深化之間的取捨來獲益；但對於擁有充足資源的企業而言，同時進行探索與深化策略不僅是可行的，亦是值得追求的目標。On this point, our results indicate that managers in resource-constrained contexts may benefit from a focus on managing trade-offs between exploration and exploitation demands, but for firms that have access to sufficient resources, the simultaneous pursuit of exploration and exploitation is both possible and desirable.

------------以上------- Unpacking Organizational Ambidexterity: Dimensions, Contingencies, and Synergistic Effect2009-----------------------------------------------------------------------

------------以下---------- Exploration vs. Exploitation: An Empirical Test of the Ambidexterity Hypoth Zi-Lin He /Poh-Kam Wong2004:下面是這篇裡面的重點

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**探索與深化之間存在張力**。一方面，為了因應當前環境需求而進行調適，可能導致組織僵化，降低企業因應未來環境變化與新機會的能力，而這探索與利用之間的張力也可能使企業陷入加速探索或加速深化的惡性循環之中

These studies have shown that exploration and exploitation require substantially different structures, processes, strategies, capabilities, and cultures to pursue and may have different impacts on firm adaptation and performance..探索與深化所需的組織結構、流程、策略、能力與文化有顯著差異，且對企業的適應與績效亦會產生不同影響。

【探索失敗的原因，是忽略深耕】許多具有創新能力的企業未能在市場上成功，其原因至少部分來自於：他們持續投入新產品與新市場的探索，但未能在熟悉的利基領域中分配足夠資源以發揮既有能力The inability of many otherwise innovative firms to achieve success in the marketplace can be traced at least partly to their tendency to constantly explore new products and unfamiliar markets without allocating enough resources to exploit their competences in a more familiar or narrower niche

【強調資源管理分配重要性】探索與深化本質上屬於不同邏輯，兩者間的張力來自於資源競爭，因此企業需進行權衡管理。兩者之間也可能產生綜效效果，若能有效進行平衡或整合，將有助於提升企業整體績效。In sum, exploration and exploitation are fundamentally different logics that create tensions.They compete for firms’ scarce resources, resulting in the need for firms to manage the trade-offs between the two.However, there may be a synergistic effect between the two, where it becomes beneficial for a firm to manage the balance and/or integration of exploration and exploitation.

【結論】高階管理者應更清楚地意識到，在探索型與深化型創新間進行資源分配的必要性。One obvious managerial implication is the need for senior managers to become more explicitly aware of the need to allocate resources between explorative versus exploitative innovation.

【導入衡量工具】高階管理者可能需要重新思考是否導入新的衡量工具，以在探索與深化兩大創新維度間更精確地進行資源配置與績效評估senior managers may need to consider introducing new metrics to prioritize resource allocation and benchmark performance along the explorative versus exploitative innovation dimensions.

【雙元性的限制】本研究除了提供雙元性潛在效益的實證支持外，亦指出雙元性本身可能存在**極限**，這或許是因為：當探索與深化都被推至極端程度時，兩者之間固有的張力將變得難以調和。  
我們同時發現，若企業在探索與深化兩者的投入皆處於極低水準，則其績效表現亦不理想，此類企業不應被視為具備雙元性。  
這些發現顯示出，**管理探索與深化的平衡是一項極為複雜且精細的任務**

Besides providing empirical evidence on the potential benefits of ambidexterity, our findings also suggest that there may be limits to ambidexterity, possibly due to the fact that the organizational tension inherent between exploration and exploitation may become unmanageable when both are pushed to extreme limits.We also find that very low levels of both exploration and exploitation may not contribute to superior firm performance, and such firms therefore should not be regarded as ambidextrous.These findings indicate the complexity and delicacy of managing the balance between exploration and exploitation.。

------------以上--------- Exploration vs. Exploitation: An Empirical Test of the Ambidexterity Hypoth Zi-Lin He /Poh-Kam Wong2004--------------------------------------------------------------------

探索與深耕專區

------------以下---------- Exploration vs. Exploitation: An Empirical Test of the Ambidexterity Hypoth Zi-Lin He /Poh-Kam Wong2004:下面是這篇裡面的重點

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【探索報酬更具變異性、回報時間也較長】The returns associated with exploration are more variable and distant in time,探索所帶來的報酬具有更高的變異性，且通常需較長時間才能實現，專注於探索的企業其績效變動幅度較大，可能會經歷巨大的成功，也可能遭遇嚴重失敗In other words, explorative firms generate larger performance variation by experiencing substantial success as well as failure,

【深耕、深化、利用exploitative報酬更加確定，回報時間較短】較之下，深化利用所產生的報酬則更為確定，實現時間也較短。專注於深化的企業則較可能取得穩定的績效表現。while exploitative firms are likely to generate more stable performance.

------------以上--------- Exploration vs. Exploitation: An Empirical Test of the Ambidexterity Hypoth Zi-Lin He /Poh-Kam Wong2004--------------------------------------------------------------------

------------以下Exploration and Exploitation in Organizational Learning Author(s): James G. March1991:下面是這篇裡面的重點

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【何謂探索、未來，定義】探索包括搜尋、變異、風險承擔、實驗、遊戲、靈活性、發現、創新等術語。Explore terms including search, variation, risk taking, experimentation, play, flexibility, discovery, innovation, and more. 專注於探索而忽略利用的適應性系統可能會發現，它們承受著實驗的成本，卻無法獲得太多收益。Adaptive systems that focus on exploration and neglect exploitation may find that they incur the costs of experimentation without gaining much benefit.

過度嘗試新方案，會減緩企業對既有能力的提升與精煉速度On the other hand, experimenting with new alternatives reduces the speed at which existing competencies are improved and refined而這探索與利用之間的張力也可能使企業陷入加速探索或加速深化的惡性循環之中（March, 1991）。

【探索的時間較長與不確定性】與進一步發展現有理念、市場或關係相比，尋求新理念、新市場或新關係的結果確定性較低，時間跨度較長，且影響更為分散。The pursuit of new ideas, markets, or relationships has lower outcome certainty, longer time horizons, and more diffuse impacts than the further development of existing ideas, markets, or relationships【探索具有脆弱性The fragility of exploration】探索的脆弱性

與利用的回報相比，探索的回報在系統上更不確定，時間上更遙遠，並且從組織上來說，與行動和適應的軌跡更疏遠。The rewards of exploration are systematically more uncertain, temporally more distant, and organizationally more distant from trajectories of action and adaptation than the rewards of exploitation.

【新技術技術較優的情況下，學會他能帶來更高的價值，同時也帶來差異性】如果一項新技術明顯優於舊技術，能夠克服不熟悉它的缺點，那麼它將提供比舊技術更高的預期價值。If a new technology is clearly superior to the old technology and can overcome the disadvantages of unfamiliarity with it, then it will provide higher expected value than the old technology. 同時，新技術經驗有限（相對於舊技術經驗）會導致差異增加。At the same time, limited experience with the new technology (relative to experience with the old technology) leads to increased variance

【定義利用】利用包括改進、選擇、生產、效率、甄選、實施、執行等。Utilization includes improvement, selection, production, efficiency, selection, implementation, execution, etc. 相反，專注於利用而忽略探索的系統可能會發現自己陷入次優的穩定均衡。In contrast, a system that focuses on exploitation and neglects exploration may find itself stuck in a suboptimal stable equilibrium

【過於拘泥於利用會帶來潛在自我毀滅性】適應環境的這些特徵導致了一種傾向，即用對已知替代方案的利用來代替對未知替代方案的探索，以提高績效的可靠性，而不是其平均值。These features of the adaptation environment lead to a tendency to replace the exploration of unknown alternatives with the exploitation of known alternatives in order to increase the reliability of performance rather than its mean. 適應性過程的這種特性具有潛在的自我毀滅性。This characteristic of adaptive processes is potentially self-destructive. 如我們所見，適應性會在相互學習的情況下降低組織學習的效果。As we have seen, it reduces the effectiveness of organizational learning in the context of mutual learning.

------------以上-- Exploration and Exploitation in Organizational Learning Author(s): James G. March1991----------------------------------------------------------------------------