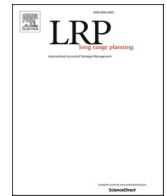




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## Strategy as engagement: What organization strategy can learn from military strategy<sup>☆</sup>

Martin Kornberger<sup>a,b,\*</sup>, Eero Vaara<sup>c</sup>

<sup>a</sup> University of Edinburgh, UK

<sup>b</sup> WU Vienna, Austria

<sup>c</sup> University of Oxford, UK

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### ABSTRACT

Strategy process and practice research has illuminated the internal dynamics of strategy work – at the cost of backgrounding processes and practices that relate to engagement with external actors. In this conceptual paper, we argue for an extension of this body of work by shifting the focus of research from internal practices and processes towards externally oriented practices of engagement. We do so by critically building on the military strategy literature and develop the concept of strategy as engagement. This concept suggests understanding the role of strategy as bridge between policy and tactics; the importance of grand strategy as the making of policy; and the need to focus attention on tactics as distributed collective action. Thus, we contribute to strategy process and practice research through 1) extending its repertoire to practices of engagement and 2) broadening its epistemic foundation through a critical reading of military strategy.

### Introduction

Over the past decades, the “pendulum” of strategy research has swung from an external orientation towards a more internal or organizational focus (see Nag et al., 2007; Hoskisson et al., 1999). This includes work on the resource-based view (Barney, 1991), dynamic capabilities (Helfat and Peteraf, 2003), the micro-foundations of strategy (Felin and Foss, 2005; Barney and Felin, 2013), behavioral strategy (Gavetti, 2012), strategy process (Floyd and Wooldridge, 1992; Mintzberg and Waters, 1985), strategy as practice (Vaara and Whittington, 2012; Whittington, 2006) and more critical work on strategy and its power effects (Knights and Morgan, 1991; Oakes et al., 1998; Kornberger and Clegg, 2011). In particular, strategy process and practice (SAPP) research has increasingly focused on the organizational, social and political aspects of strategy-making to understand what managers actually do when they strategize (Burgelman et al., 2018). However, SAPP scholars have recently called for an extension and a critical revision of this research agenda. In particular, critical commentaries have warned of too much focus on internal micro-practices as a “descriptive trap” (Suddaby et al., 2013: 337). Moreover, it has been argued that SAPP does not focus adequate attention on competitive situations in which opponents’ moves, and not internal practices, largely determine the outcomes.

In this paper, we address these points of critique and argue that the predominantly internal orientation of SAPP research has come at the price of a lesser focus on practices of engagement with the environment. There are only a few studies that have addressed such

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\* Corresponding author. University of Edinburgh, UK.

E-mail address: [Martin.Kornberger@ed.ac.uk](mailto:Martin.Kornberger@ed.ac.uk) (M. Kornberger).

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practices. For instance, Jarzabkowski and Bednarek (2018) examined practices of ‘micro-competition’ in the reinsurance market whereas Seidl and Werle (2018) studied inter-organizational strategic sensemaking. Luoma, Laamanen and Lamberg (2020) in turn developed the concept of competitive action routines to shed light on interfirm rivalry. However, thus far we are lacking a comprehensive understanding of the practices of engagement in SAPP research. As a preliminary definition, we understand strategy of engagement as processes and practices that aim at influencing and changing the schemes of another actor in one own’s favor. Notably, practices of engagement are not necessarily competitive – they can also be collaborative or co-optive: what engagement practices share is a focus on influencing external actors and their intentions, decisions and actions with the aim that they either join one’s own designs, give up their own agendas, or change their course of action. Thus, we suggest ‘engagement practices’ as new vocabulary within the SAPP tradition that has the potential to inspire further theoretical and empirical work and offer opportunities to relate this stream of work with more traditional work on competitive strategy (Miller & Chen, 1994, 1996; Grimm et al., 2006).

In order to theorize strategies of engagement we draw on military strategy. Organizational strategy and military strategy share common roots. Clausewitz already noted the fundamental relation between them:

“Rather than comparing [war] to art we could more accurately compare it to commerce, which is also a conflict of human interests and activities; and it [war] is still closer to politics, which in turn may be considered as a kind of commerce on a larger scale.” (1832/1989: 149).

Despite such a shared intellectual heritage, work in organizational strategy and military strategy have developed in separation, with surprisingly little interaction. It is only recently that organizational strategy scholars have started to engage more substantially with military strategy literature (Munro, 2010; Kornberger, 2013; Mackay and Zundel, 2017; Kornberger and Engberg-Pedersen, 2019). The tenet of this (and our) work is not to understand war as model of or for strategy; rather, it is about critically reflecting on a high-stakes context of strategic thought with a long tradition. Specifically, we argue that drawing on military strategy helps to elucidate three key points that advances ideas on strategy as engagement.

First, SAPP has increasingly pulverized strategy into verbs, adjectives and micro-foundations; consequently, the very meaning of strategy has become elusive. Military strategy is steadfast on this point, defining the locus of strategy as “bridge” between policy and tactics (Gray, 2010; Clausewitz, 1832/1989). The strategy bridge depicts strategy not as an action behavior but an effect that relates action to purpose. Second, on one side of the strategy bridge, we find the realm of tactics – a concept that has been curiously absent from contemporary strategy research (for an exception, see Mackay and Zundel, 2017). Military strategy defines tactics as the “raw material” out of which strategic effects are forged. In today’s context of hybrid warfare, it is especially this tactical dimension in which innovative organizational and strategic practices flourish (Mackay and Tatham, 2011; McChrystal et al., 2015). Third, on the other side of the bridge is policy or Grand Strategy, defined as overarching “intellectual architecture” that gives purpose and meaning to action (Brands, 2014; Gaddis, 2018). It is the North Star that guides strategic decision-making: unimplementable, yet invaluable for orientation and guidance.

Our contribution is to offer an alternative conceptualization of organizational strategy that helps to move contemporary strategy research, especially SAPP scholarship, from a focus on internal practices and processes towards externally oriented practices of engagement. The value-add of critically engaging with military strategy literature is that it offers a corrective to an overly internally focused view of strategy. In other words, we turn the “sociological eye” (Whittington, 2007) from its current focus on internal practices and processes towards outward-oriented practices of engagement between actors. In so doing, our analysis advances our understanding of the interactive nature of strategy work. Furthermore, by elaborating on the intersections of organizational and military strategy research, we open up avenues for a critical dialogue between military and organization strategy.

Our paper is structured as follows: In the next section we will discuss extant research on strategy process and practice research and outline how our argument contributes to current conversations. Second, the core of the paper presents three theorems drawn from military strategy: the locus of strategy as bridge; the role of tactics; and the concept of grand strategy. Each theorem concludes with a short summary which will be used in the discussion section to develop the strategy as engagement perspective and argue for an interactionist approach to the study of strategy. The paper concludes with reflections and suggestions for a possible future research agenda.

### *Status QUO: strategy process and practice research*

#### *Theoretical context*

Strategy scholars have made great strides to help us better understand how managers and organizational actors actually make strategic decisions and develop strategies. Especially the organizational perspective on strategy processes and practices has led to a shared interest in the social and political dynamics of strategy-making and its implications (Burgelman et al., 2018; Vaara and Whittington, 2012; Floyd et al., 2011; Whittington, 2007; Hutzschenreuter and Kleindienst, 2006). Strategy process research has developed as a line of inquiry which has focused on how managers and other organizational members actually develop strategies and implement them. Based on the seminal contributions of Pettigrew (2012), Mintzberg (Mintzberg, 1978; Mintzberg and Waters, 1985), Burgelman (1983) and others, this stream of work has shown that the realized strategies are usually something quite different from the intended ones – and that other strategies may emerge instead (Mirabeau and Maguire, 2014).

Closely linked, we have benefitted from the development of strategy as practice research (Golsorkhi et al., 2015). This approach draws on a micro-level interest in what managers actually do to elucidate how various practices may enable or constrain strategy work in organizations (Vaara and Whittington, 2012). Seminal empirical work includes research into strategy and its discursive constitution (Knights and Morgan, 1991; Mantere and Vaara, 2008; Balogun et al., 2014), its foundation in rituals and routines (Jarzabkowski, 2003; Whittington, 2006) and its reliance on tools and technologies (Kaplan, 2011; De Rond and Thietart, 2007; Jarzabkowski and

Kaplan, 2015), all of which together condition organizational strategy-making and illustrate the boundedness of supposedly rational strategizing.

While this body of work has helped to place strategists' practices, routines and rituals empirically at the front and center of strategy research, the steps taken to theorize how strategy work plays out in relation to the competitive environment appear limited. Through its largely empirical research agenda and its focus on "thick descriptions" of actual strategy-making in a variety of domains, strategy process and practice research has produced increasingly in-depth empirical accounts of how strategies are formulated and realized within organizational contexts. What is left unanswered is the question of how strategic processes and practices relate to external actors, including competitors and collaborators (for exceptions, see Jarzabkowski and Bednarek, 2018; Luoma et al., 2020; Seidl and Werle, 2018). Our critical point of departure suggests moving from a preoccupation with internal strategy-making towards strategy as engagement. We do so by drawing on insights from military strategy with the aim to extend the analytical repertoire of strategy process and practice research. We propose that the above mentioned "sociological eye" in strategy research has more to discover than internal practices; thus we extend its view onto practices of engagement with others.

### *Engaging with military strategy theory*

Our paper aims at conceptual development of SAPP through learning from military strategy. However, military strategy is by no means a homogenous body of work. Thus, we draw on the stream of research on military strategy that has focused on explaining the role of strategy as an activity linked with broader political processes on the one hand and operational issues of warfare on the other (see Heuser, 2010; Freedman, 2013). This stream of work includes classics from Thucydides to Clausewitz who have been concerned with the nature of war and the possibility of strategic action. This reflection on strategy continues unabated until today (Freedman, 2013; Gaddis, 2018). Drawing on military strategy research helps to elucidate key insights that have the potential to change and challenge the conversation in strategy process and practice research.

We present these insights in the form of "theorems" (defined as statements that can be demonstrated to be true) and discuss them in more detail in the final part of the paper. These theorems are designed to spark debate and extend the current vocabulary of strategy process and practice research, with the hope to inspire further theoretical and empirical analysis. Rhetorically, and unlike the Harvard case study approach, military strategy literature does not use cases as blueprints for the future or as best practice examples. Rather, cases are opportunities to critically deepen our understanding and sharpen conceptual distinctions. Thus, ancient strategies from Greece to Rome or (as in our case) Byzantium are still relevant today – despite much that has changed since then. In the conclusion of this essay we reflect on this point as we believe there are some methodological insights that can be gained from military scholarship's deployment of empirical evidence for the development of theory.

### **Three theorems for a renewed understanding of strategy as engagement**

#### *Point of departure: Clausewitz*

Our journey into military strategy takes us back to Clausewitz. In a letter to the philosopher Fichte from 1808 he writes that "I have seen all the traditional opinions and forms of military power among which I grew up come apart like rotten timber and collapse in the swift stream of events." (1809/1992: 280). Napoleon's dynamic warfare turned war into an "empire of chance" (Engberg-Pedersen, 2015) and made traditional strategy futile. Clausewitz identified three main conditions that had changed the nature of war and hence the possibility of strategy (Kornberger and Engberg-Pedersen, 2019).

First, war is the domain of uncertainty and shrouded in fog: "War is the realm of uncertainty; three quarters of the factors on which action in war is based are wrapped in a fog of greater or lesser uncertainty." (1832/1989: 101). Certainty is elusive as battles evolve dynamically and unpredictably. Tolstoy's *War and Peace* represents the masterly description of the resulting chaos. Second, war itself is characterized by friction. What seems simple in theory becomes difficult in practice, akin to "walking in water":

Friction is the only concept that more or less corresponds to the factors that distinguish real war from war on paper. The military machine - the army and everything related to it - is basically very simple and therefore seems easy to manage. But we should bear in mind that none of its components is of one piece: each part is composed of individuals, every one of whom retains his potential of friction. (1832/1989: 119–120)

Third, Clausewitz suggests war is a "conflict of living forces" (1832/1989: 149). This implies that every (planned) move influences the opponent, changing one's options continuously: a good road might turn into a bad road precisely because the enemy anticipates that one would use it; and *vice versa*, the bad road might become the good choice (Luttwalk, 1987). As Gray (1999: 42) argued, "Strategy is paradoxical in that what works well today will not work well tomorrow, *precisely because it worked well today*." (added emphasis). In the words of Clausewitz, war could be solved like a linear equation only if:

(a) war were a wholly isolated act, occurring suddenly and not produced by previous events in the political world; (b) it consisted of a single decisive act or a set of simultaneous ones; (c) the decision achieved was complete and perfect in itself, uninfluenced by any previous estimate of the political situation it would bring about. (1832/1989: 78).

But war is a "re-active" event that does not follow a linear logic or an a simple "algebra of action" (1832/1989: 75). Thus,

Clausewitz frustrates hopes that there could be “theory” of strategy as in the natural sciences:

It would however be disastrous to try to develop our understanding of strategy by analyzing these factors [moral, physical, mathematical, geographical, and statistical] in isolation, since they are usually interconnected in each military action in manifold and intricate ways. A dreary analytical labyrinth would result, a nightmare in which one tried in vain to bridge the gulf between this abstract basis and the facts of life. Heaven protect the theorist from such an undertaking! (1832/1989: 183).

This stance runs through Clausewitz’ oeuvre: for him it is impossible to define a theory or model of strategy that could account for the contingencies on the battlefield. This insights echoes strategy research that has acknowledged the role of choice and chance in strategic decision making (De Rond and Thietart, 2007; MacKay and Chia, 2013). Yet this begs the question: if there is no unifying strategy model or theory, how could we provide guidance for strategic thinking and handrails for strategic action? In the next section three theorems will elaborate how military strategy finds a *modus operandi* that accounts for the impossibility of theory whilst responding to the need of orientation in and for practice.

*Theorem #1: The strategy bridge or the locus proper of strategy*

Clausewitz (1832/1989) defined strategy as the “use of the engagement for the purpose of war.” This is a remarkably simple yet deep definition: strategy is defined as “use” of fighting, as mobilizing action on the battlefield for a specific purpose. The imagery here is strategy as a bridge (Gray, 2015). On the one side of the bridge is the domain of policy, and on the other side there is the realm of tactics. Strategy acts as the “bridge between purpose and action,” Gray posits (2015: 23). In a similar vein, Admiral Wylie (1967/2014: 65) described strategy as the “link between thought pattern and reality. It is a vehicle for conversion of an idea to a deed. It is the military mind in action.” (see Fig. 1)

Unpacking this definition, the strategist’s task is to relate what happens in the battlefield to the deliberations of politicians around a conference table, converting one currency (statecraft or Grand Strategy) into another (military prowess) and back again. “Strategy has just one function,” Gray (2010: 29) elaborates: “To provide a secure connection between the worlds of purpose, which contestably is generally called policy, though politics may be more accurate, and its agent and instruments, including the military.” Put metaphorically, strategy functions like a pair of scissors, one blade being policy, the other being military power; the strategist’s task is to relate them to each other and move them both so to cut (Gray, 2010).

This definition of the locus of strategy as bridge has important implications. Most importantly, it means that strategy “is not itself action behavior, it is the translation function, in theory and in practice, of operational and tactical action into (strategic) consequences ultimately for political effect.” (Gray, 2010: 81). The challenge for the strategist is to convert an action bound to a specific time and place into an effect that transcend its boundedness.

This insight highlights the relation between strategy and tactics. Everything that happens on the battlefield is tactics which in turn is the “material of which strategic effect is made” (Gray, 1999: 22). Action is always tactical, and strategy is concerned with the effect of these actions: “strategy is ‘done’ by tactics, tactics is ‘done’ by combat forces” (Gray, 1999: 26). Or even more concise: “Strategy in the doing is simply tactics.” (Gray, 2015: 27). The “effect” of actions is the strategist’s product. This is key to military strategy, as Gray continues: “Strategy effect is never what we do; by definition it can only be in the consequences of what we do. These consequences ultimately will not be material. People, not machines or buildings (e.g. the White House, the Kremlin) wage war.” (Gray, 2010: 171). Therefore, victory is a “moral,” rather than a “material” effect, as Liddell Hart argued: “The real target in war is the mind of the enemy command, not the bodies of his troops. If we operate against his troops it is fundamentally for the effect that action will produce on the mind and will of the commander.” (Hart, quoted in Heuser, 2010: 186). In all these instances, actions in the battlefield aim at the “dislocation of the enemy’s moral, mental or material balance” (Hart, *ibid.*) – it is about upsetting stability and equilibrium. Examples such as German blitzkrieg in WWII, the US doctrine of shock & awe during the first Iraq war or acts of terrorism aim primarily at the enemy’s mind, not the soldier’s bodies.

The focus on effects has important implications: one can control (to a degree) policy development; and one might be able to prevail on the battlefield (through the use of overwhelming military force, as in the Gulf Wars); but as history shows, the link between policy goals on the one hand and conduct on the battlefield on the other remains precarious. In this view, strategy’s key purpose is to ensure the translation of gains in one domain to the other. What follows is that victory can only be accomplished in the realm of policy – never on the battlefield. For instance, in WW II the German military was very good at fighting, but incapable of turning victories on the

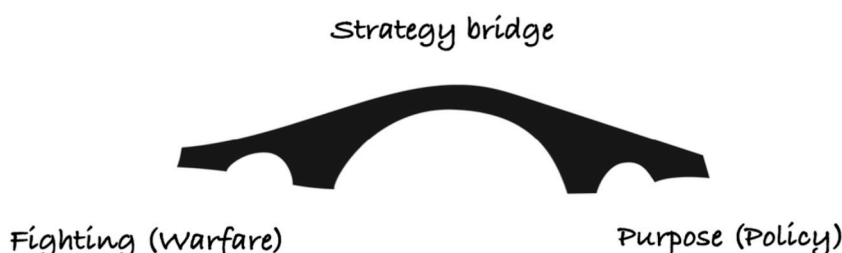


Fig. 1. The strategy bridge.

battlefield into political success (Grint, 2014). In this sense, strategy thought through properly can help preventing war and secure its ultimate aim – peace.

### *Military example of the strategy bridge*

The Allied raid on the French port of Dieppe on August 19, 1942 illustrates the idea of strategy as bridge (see Gray, 2010). The attack of the 7000 Allied troops resulted in disaster and was described by a military historian as “one of the most ill-conceived operations of the war” (Carlo D’Este, quoted in Gray, 2010: 109). Thinking of strategy as use of the engagement for the purpose of war (in short: as bridge), we have to reevaluate the event: Dieppe offered invaluable lessons for the planned landing in the Normandy. But the German enemy also learnt about Allied tactics and how to organize coastal defense against amphibious assault. In Dieppe, the strategic effect was on the Allied side. The raid and its failure were a signal by the British Navy to show the US allies that 1942 was too early for an invasion. The raid demonstrated to the Russian allies that the West too was “prepared to shed their blood” (Gray, 2010: 108). Above all, the consequence of the failed attack was to intensify Allied planning and preparation and to feed German complacency that an invasion was beyond the enemy’s capabilities and hence unlikely. We see the logic of the strategy bridge at work: the engagement (combat) is crucial; combat is the “raw material” of which strategic effect is made; the effect has to be directed at winning the war. Doing strategy means thinking about the use of an engagement (such as at Dieppe) for the purpose of war; paradoxically, perhaps losing at Dieppe was important for winning the war.

This focus on effects means that strategy is “ultimately about effectively exercising power” (Foster, 1996: 111): it is about using force to achieve higher level political objectives. This focus on effects also highlights strategy’s challenge: effects are difficult to control as it is part of the interaction between fighting parties to accept or refuse effect – at least to a degree. The effect of bombing North Vietnam for instance was designed to demoralize and ultimately defeat the North. The US could do as much bombing as she wanted, but the effect was the opposite of what was intended. In this and other examples the difficulty to control the effects of actions designed to achieve policy goals becomes obvious: no amount of military power helped in Vietnam to achieve long-term policy goals. Thus “battle becomes slaughter” (Friedman, 2017: 143) and supremacy in the battlefield turns into political failure – a picture we have grown accustomed to through interventions in Iraq, Afghanistan, Syria and elsewhere (Stewart and Knaus, 2011).

**Theorem 1.** *Strategy is the bridge between policy and tactics, relating action on the ground to higher level purpose. Strategy is not an action behavior but about the effect of actions and hence about the exercise of power in a game of two (or more) opponents. Like a pair of scissors, tactics and policy are the blades that have to be brought together to cut.*

### *Theorem #2: Significance of tactics as one side of the strategy bridge*

One side of the strategy bridge is anchored in the domain of tactics. Tactics is defined as conduct in the battlefield: “The word ‘tactics’ comes from the Greek word for ‘arrange’ or ‘ordered.’ Tactics is the arrangement of military forces in such a manner to defeat the enemy.” (Friedman, 2017: 16). In current war studies the notion of hybrid warfare reflects the growing scope and significance of tactics. Already Clausewitz was well aware of the fluid boundaries of war, arguing that war is “a matter of degrees” (1832/1989: 581). Hybrid warfare is characterized through shifts in the theater as well as temporality of war from actual battle to pre- and post-conflict environments. The battle – for centuries the locus of decision in war (see Nolan, 2017) – loses its dominance; indeed, the possibility of victory is being questioned as recent wars have been ended, but rarely won.

The extended scope of warfare includes focus on failed and failing states that provide ungoverned spaces for military and paramilitary groups (including terrorists) to organize themselves. Especially after 9/11 US military recognized the need to address these ungoverned spaces to prevent conflict and ensure victory after military operations. The ensuing global war on terror was based on a “nation-building” approach including supporting, and sometimes building, institutions in failing states, providing basic infrastructures, access to health care and economic opportunities, as well as ensuring the local population’s overall security. NGOs and other state agencies that usually delivered humanitarian aid were not capable of delivering these services in conflict-ridden war zones. Thus, the US Army and others started building capacity for hybrid warfare – equipping soldiers with both “sword and shovel” (Bond, 2007; MacKay and Tatham, 2011). This implied an extension of military’s capabilities to combine security and stability operations, working in a prophylactic as well as therapeutic manner. The necessity for the military to work across economic, social, political and military domains developed into a network approach to strategy (Slaughter, 2017) – a call for large-scale military-civilian cooperation (Cusumano and Corbe, 2018) that fundamentally challenged tactics, doctrine and the culture of military.

A key concern is the relationship between strategy and tactics (Heuser, 2010). As said above, the “doing” of strategy is tactics: tactics provides the “raw material” for the strategic effect. Consequently, the relation between strategy and tactics is a continuous one. Clausewitz argued that strategy has to follow tactics onto the battlefield:

[I]t follows, as a matter of course, that strategy must go with the army to the field in order to arrange particulars on the spot, and to make the modifications in the general plan which incessantly become necessary in war. Strategy can therefore never take its hand from the work for a moment. (1832/1989: 177).<sup>1</sup>

<sup>1</sup> Authors’ translation, which differs from Howard and Paret’s translation who write that “the strategist must maintain control throughout”.

Strategy, in other words, can never be just “implemented”; rather, strategy must move with the army onto the battlefield and constantly modify itself. Clausewitz goes even further by suggesting that strategy “draws near to tactics in order to receive the completed assignment from it” (1832/1989: 267). Tactics, it seems, is equal if not superior to strategy: without action, there is no base for any strategic effect; but action in the battlefield needs to be given meaning to have significance for the purpose of war. Again with Clausewitz: strategy is about the *use* of engagement for the purpose of war.

### *Military example of the significance of tactics*

General McChrystal’s account of his leadership of the Joint Operations Task Force in Iraq in 2003 provides an illustrative example of the importance and changing nature of tactics. As elite unit McChrystal and his soldiers formed an “awesome machine” distinguished through its extraordinary efficiency (McChrystal, 2015: 48). Yet the enemy – a loose network of terrorists, badly equipped, with little or no training and structure – was winning (or at least not losing) the war. According to McChrystal, the biggest “limfac” (limiting factor) for the Allied forces was “management” (McChrystal, 2015: 32): “Managerially, AQI was flanking us”: the “edge” that AQI had over the US forces was a “revolution in the mundane art of management” (2015: 52 and 284). What was AQI’s “edge”? Their actions were distributed and at the same time coherent (McChrystal, 2015: 75). He suggests that the terrorist cells were organized like a Silicon Valley start-up or a garage band – networked and non-hierarchical. The US army, on the other hand, was a hierarchy, trained for efficiency. What they needed instead was responsiveness and adaptability (2015: 20). McChrystal response was to radically rebuild his unit’s organizational structure, with the aim to resemble “an ecosystem of shared information similar to crowdsourced solutions, just like the architecture of adaptive, evolving Web sites like Wikipedia, which share massive quantities of information among all users and give individuals authority to alter the system.” (2015: 250). The underlying idea was that “*it takes a network to defeat a network*” (2015: 84 and 251). He achieved this through a “complete reversal of the conventional approach to information sharing, delineation of roles, decision-making authority, and leadership.” (2015: 131).

For instance, McChrystal opened up the Operations and Intelligence briefing. The challenge was to process information about the enemy quickly and decentralize decision-making. The formerly closed Operations and Intelligence sessions were now open to 7000 participants daily, for up to 2 h, turning them into a “neural network” in which distributed intelligence became “joint cognition” supported by a “culture of sharing” (2015: 164). These meetings brought intelligence and operation closely together, coordinating eyes and hands directly. This “nervous system” (2015: 147) manifested itself in a new “architecture” – which, paraphrasing McChrystal, had strategic implications: *the structure, not the plan, become the strategy* (2015: 103). We come full circle from Chandler’s dictum that structure follows strategy: here, architecture of intelligence gathering and decision-making become key strategic concerns (see [Jacobides, 2007](#)).

With this piece of the puzzle, the design of the strategy bridge comes into sight: on the side of tactics the bridge has multiple and distributed anchor points, allowing for distributed and collective action. Tactics include the introduction of new practices (such as the open O&I briefing sessions). These new practices are not internally oriented (as well-documented by SAPP research); rather, these practices are practices of engagement – i.e. those that have impact on the outcome of enemy engagements. The corollary of this insight is that practices of engagement are not defined as that what actors do; but as that which changes what a friend or foe does. Practices of engagement have an essentially interactionist character. They can always and only be understood in relation between two or more actors.

**Theorem 2.** *Military strategy puts strong emphasis on tactics defined as conduct on the battlefield. Tactics provide the “raw material” for the strategist who is tasked with relating it to the purpose of war. Tactics are necessarily local, and given the changing nature of warfare, increasingly decentralized. The key task of the strategist is to design a networked architecture that enables distributed agency and decentralized decision making whilst keeping an eye on policy.*

### *Theorem #3: Grand strategy as the other side of the strategy bridge*

The other side of the strategy bridge is anchored in the fields of policy or politics.<sup>2</sup> Recently the debate has extended to the notion of Grand Strategy defined as “the alignment of potentially unlimited aspirations with necessarily limited capabilities.” ([Gaddis, 2018](#): 21; [Kennedy, 1991](#)). Grand Strategy is about relating ends to means in the long run: it is “the intellectual architecture that lends structure of foreign policy; it is the logic that helps states navigate a complex and dangerous world.” ([Brands, 2014](#): 3). Grand Strategy’s purpose is to provide a set of stable ideas and practices (a “logic”) that informs policy making and more tactical action. Learning from the lively debate in the military literature, there are three key attributes that characterize Grand Strategy ([Milevski, 2014, 2016](#); [Silove, 2018](#); [Balzacq et al., 2019](#)). First and foremost, Grand Strategy is long-term in scope. It is concerned with decades, perhaps even centuries ([Kennedy, 1991](#)). Thus, Grand Strategy is not about winning specific battles, or even a war; rather, as Kennedy suggested (1991), it is about the ensuing peace. Similarly, Liddell [Hart \(1954\)](#) suggested that military strategy is focused on victory in war, whilst Grand Strategy’s horizon must be the subsequent peace.

Second, Grand Strategy is comprehensive in that it includes military, economic, and diplomatic spheres of statecraft. In this sense it is a holistic way to address the question how long-term survival can be secured. Interfaces between these different domains play a key role. For instance, [Strachan \(2013\)](#) emphasized the importance of institutionalized interfaces between military and political spheres as

<sup>2</sup> Clausewitz used the German noun *Politik* which combines both, policy (as in strategic direction) and politics (as in power).

well as concrete practices that structure their interaction. Quite often, policy making is oblivious to military concerns and shifts priorities once firm commitment on the ground would be needed. The bureaucratic apparatus of military procurement, long-term planning and budgeting as well as rivalries between different services (Smith and Gerstein, 2007) increase the already complex institutional interplay even further, undermining with their narrow focus Grand Strategy.

Third, Grand Strategy may or may not be a conscious effort, let alone articulated in a plan (Brands, 2014). Grand Strategy may be understood as set of ideas, as more emergent behavioral pattern, or the interaction between both (as Mintzberg suggested for organizational strategy). Indeed, as Brands (2014) argued, Kissinger developed a well-articulated Grand Strategy in the 1960s and 1970s. On the other hand, the Reagan administration lacked a coherently articulated Grand Strategy. Yet Reagan proved strategically immensely influential, not only in bringing the Cold War to an end but also in setting up a neo-liberal market order which has shaped the global economy. Brands concluded critically that Grand Strategy is an optimistic endeavour, combining vision and rationality with power. This attempt to bring coherence to an unruly world opens Grand Strategy to the critique of being an “inherently fraught discipline” (Brand, 2014: 190). This is certainly true for overly engineered, rational plans (as in Kissinger’s case); but if Grand Strategy is understood as stance (poise, attitude), it might be useful. Grand Strategy might not escape the tensions between the quest for coherence and the reality of complexity and chance. But like the North Star in the night sky it is invaluable to find one’s bearings and stay on track. It is a tool that provides direction and orientation, but it remains beyond implementation.

### *Military example of grand strategy*

Empirically, Grand Strategy seems to be easier to detect when absent: the US involvement in Vietnam or Germany’s war machine in both World Wars lacked Grand Strategy. Similar critique could be made in regards to more recent wars in Iraq or Afghanistan (see for the latter Stewart and Knaus, 2011). Edward Luttwak’s magisterial book on Byzantium provides an antidote (Luttwak, 2009). After the fall of Rome in 476AD the Byzantine Empire (organized around Constantinople) survived for another millennium until 1453. Its strategic situation was difficult, as it lacked natural geographic advantages, strategic depth or strengths in numbers. Military might alone would not have been enough to survive these turbulent centuries. Rather, as Luttwak shows, it was Byzantium’s Grand Strategy that made the difference. To be sure Grand Strategy was not expressed in a written document (a plan, or a constitution); rather, it has to be thought of as a stance, as posture which allowed facing uncertainty, chaos and disruption. Thus, Luttwak sometimes uses the term “strategic culture” to describe Grand Strategy.

In essence, Luttwak characterized its Grand Strategy as follows. Byzantium could draw on a formidable military power based on comprehensive training and education of its soldiers. They were skilled in using a variety of weapons and could adjust to shifting demands of battle, making them a powerful force. Yet they tried to avoid battle when and where possible, believing that the main purpose of a strong army is reducing the probability of actual fighting. If fighting was unavoidable, its aim was not necessarily to destroy the enemy, but to weaken them as they might become tomorrow’s allies (a lesson successfully applied after WW II through the Marshall plan, the NATO and the European Coal and Steel Community, paving the way to what is today the EU). Complementing military power, Byzantium engaged in diplomacy, gathering intelligence on its friends and foes. They analysed balances of power and recruited allies to tip it in their favor. They used all means available (from persuasion to gifts, deception and bribery) to undermine their opponents. Byzantine’s Grand Strategy was based on a learnt understanding of the interplay between military, diplomatic, cultural and civil means (or sources of power), how they could amplify each other, and how to deploy them for the long-term benefit of the empire. Thus, Luttwak (2009: 409) summed up that Byzantine strategy, and Grand Strategy generally, is situated at the “level at which knowledge and persuasion, or in modern terms intelligence and diplomacy, interact with military strength to determine outcomes [...]”.

**Theorem 3.** *Grand Strategy is the long-term, holistic architecture that sets goals for war and peace. It is the domain of policy, providing a North Star for actions to align and be effective. It is not implementable; its impact resides in its function to provide orientation for decision-making and handrails for action.*

### *Application of the strategy bridge to organizational strategy*

What is the equivalent of military’s strategy bridge in an organizational context? What corresponds to the notions of bridge, tactics and Grand Strategy? Hastings and Meyer’s analysis of Netflix (2020) provides a fruitful illustration of the applicability of the suggested vocabulary. They talk explicitly about the “North Star” as that which provides context for localized decision making within Netflix’s networked structure. Hastings and Meyer (2020) also discuss the importance of tactical innovation, understood as concrete actions Netflix introduced to improve operations: this includes extremely decentralized, agile, and fast decision-making; a culture of “no rules rule” (the title of the book) in which policies and rules have been successively rolled back; an almost obsessive focus on hiring (and firing); as well as providing constantly feedback to ensure learning. All these practices are tactical in that they are action behaviors, focused on winning local battles on the ground and on innovating faster than their competitors. Netflix’s strategy is not a wordy document but a continuous attempt to relate local, decentralized actions to the North Star that guides the organization. New products (such as documentaries) or new technologies (such as downloading of episodes) propel the business forward; they are tactical wins, but their exploit (use) for the purpose of the firm is what makes Netflix strategic.

There are further examples of strategic actors that use tactics (such as product-level innovation) to advance the purpose of their organization: think of Apple and how it furthered its purpose through a series of product-level successes. We see that the tactical or operational level is much more closely related to strategy work than usually assumed. Tactical success can only happen in a marketing

campaign or a well-crafted new product. Under Steve Jobs “Apple’s strategy effectively used a series of successes on the initially tactical level (i.e. iPod, iPad, iPhone) to reshape the purpose and identity of the organization.” (Kornberger and Engberg-Pedersen, 2019: 9). Jobs was deeply involved in operational decisions (down to minute product design decisions, see Isaacson, 2011), but he understood how to translate the gains on the tactical level to inform Apple’s *raison d’être*. Paraphrasing Gray, Jobs knew how to cut Apple’s cloth with his strategy scissors. Of course, these illustrative examples cannot substitute detailed empirical research; but they might be useful to trigger imaginative research designs built upon the strategy bridge.

## Discussion

While SAPP has taught us a great deal about the social, cultural and political aspects of organizational strategy work, much of this research has focused on what happens within organizations and paid little attention to external actors and engagement with them. To address this challenge, we have drawn on key insights of military strategy, a body of work that, despite shared historical roots, has been largely ignored in contemporary organizational strategy research. On this basis, our paper makes two contributions. First, our key contribution to organizational strategy in general and to strategy process and practice research in particular is to offer an alternative conceptualization of strategy that shifts the focus of strategy research from internal practices and processes towards externally oriented practices of engagement. By implication, our analysis proposes to move from the activity-based view that has characterized much of the early SAPP agenda (see Jarzabkowski and Wolf, 2010) towards an interactionist framing that highlights the interactive and engaged nature of strategy work. Second, by elaborating on the intersections of organizational and military strategy research, we seek to open up avenues for a further dialogue between military and organizational strategy.

### *From an internal to an external focus in strategy process and practice research*

We have argued that the “strategy pendulum” (Hoskisson et al., 1999) has moved from an initially external focus towards an internal focus, highlighting the importance of resources, competencies, capabilities and other micro-foundations to explain sources of sustainable competitive advantage. In many respects, strategy as process and practice research benefited from and contributed to the growth of this organizational focus (see Regné, 2008; 2015). As part of this organizational research agenda, strategy process and practice studies have focused on pinning down strategy as an activity that managers do. In this paper we have argued that this organizational focus has come at the price of losing sight of strategic actors’ engagement with the environment. Indeed, only few researchers (e.g. Luoma et al., 2020; Jarzabkowski and Bednarek, 2018; Luoma et al. (2020) Seidl and Werle, 2018; Tsoukas, 2015) have placed emphasis on maneuvering and other practices of engaging with friend or foe. Thus, in this paper we have taken steps to extend strategy process and practice research so that we may better comprehend the dynamics of strategy engagement.

We have sought inspiration from military strategy research because this body of literature has a long tradition of thinking through strategy as engagement. Military strategy has helped us to capture aspects of strategy work that are difficult to conceptualize – or even accept – in our conventional thinking about organizational strategy. Thus, as summarized in our theorems, we 1) call for a dynamic conceptualization of strategy as bridge that links policy on the one hand and tactics on the other; 2) propose focusing more attention on tactics as undert heorized “raw material” of strategy, involving multiple arenas and actors, and 3) think about Grand Strategy as defining the North Star for strategic action.

In what follows we seek to develop our insights further and relate them to extant research. First, we underscore the interactive and dynamic nature of strategy as encounter between actors. As argued above, a bad road might be a good one because the enemy does not expect us to take it; and a good road might be bad for exactly the opposite reason: because strategy is about “living forces” (Clausewitz, 1832/1989) that react to each other, it remains a dynamic and unpredictable endeavor. Any search for a formula for “good strategy” (Rumelt, 2011) or a model as guide to the future (be it the Five Forces, Blue Ocean, VRIN etc.) risks leading into a “dreary analytical labyrinth,” as Clausewitz argued (1832/1989: 183). He continues that formal strategy or any model would result in a “nightmare in which one tried in vain to bridge the gulf between this abstract basis and the facts of life. Heaven protect the theorist from such an undertaking!” (Clausewitz, 1832/1989: 183).

SAPP research has been interested in the “facts of life” and demonstrated that organizations might be less prone to follow rational plans yet show a capacity to adapt to and evolve in changing circumstances (Burgelman et al., 2018; Mintzberg, 1987; Pettigrew, 1985). This approach avoids the “dreary analytical labyrinth” of rational planning but may instead lead us to what one might call a “dreary empirical labyrinth.” For instance, in practice research, strategy is defined as the sum of activities that strategists conduct. Such a broad, inclusive reading leads inevitably to a wide definition in which the boundaries between strategic and other activities are difficult if not impossible to draw: strategic agency might even include non-human actors such as technologies (Kaplan, 2011) or societal concerns (Gond et al., 2018). This emphasis has caused critique as “flipping burgers” might or might not be a strategic practice (Mantere, 2005). Put simply, strategy process and practice research offers no Occam’s razor to tighten its vocabulary – which after an initially explorative phase might now begin to hinder its future development (Suddaby et al., 2013).

As a remedy, military strategy offers a clear definition of strategy: strategy is the bridge between policy and conduct in the battlefield. Here strategy is understood as translating and engaging in “continuous dialogues among policymakers, strategists, and operational artists-tacticians.” (Gray, 2010: 145). Paradox, disharmony, misunderstanding, even conflict, are the order of the day: in the midst of the “fog of war” (Clausewitz) *strategy is the ongoing effort to relate actions on the battlefield to overall purpose and vice versa*. This bridge implies a newly defined locus for strategy: strategy is neither policy-setting nor conduct on the battlefield but the movement between these two pillars. This definition curtails strategy – it is not about (fighting) capability, nor about big picture vision (policy); but about the effect that the former has on the latter. We think that it is potentially useful to have a precise definition of



strategy that reigns in conceptual drift and empirical sprawl.

A further key learning relates to tactics as one side of the bridge. Military strategy defines conduct on the battlefield as raw material of strategy. Mackay and Zundel (2017) extensive literature review demonstrated that strategy and tactics are couched “in terms of strategic formulation vs tactical implementation; general strategy vs local tactics; or long-term strategic vs short-term tactical horizons.” (2017: 181). A practice perspective argues that the relation between strategic thinking and tactical action (doing) can be more balanced. Here implementation is equal to formulation as one follows from the other (Mintzberg, 1987). Military strategy does not think of local action as “implementation” but as realm in and of itself. Strategy is not an action behavior, but an effect. Fighting a guerilla war in the Arab desert, Lawrence of Arabia describes his strategic input as follows: “I combined their loose showers of sparks into a firm flame: transformed their series of unrelated incidents into a conscious operation.” (1926/1997: 207). Whilst action remained distributed and decision making local, Lawrence marshalled guerrilla warfare’s “loose shower of sparks” towards a political objective (winning against the Turks and independence). We see a deep appreciation of tactics in the military literature as well as a sustained focus on how decentralized, tactical action can unfold strategic power. We feel this represents a welcome antithesis to much of business strategy and its focus on the strategy apex.

Tactics sharpens military strategy’s focus on hybrid and disruptive environments: it broadens its structural anchor points to harness distributed cognition, collective intelligence and decentralized collective action. The key here is to think about the architecture of strategy, as McChrystal put it: structure itself becomes strategy. The subject of strategy is a collective of actors within a wider ecosystem, resulting in an opening up of strategy (Whittington, 2019).

Finally, we learn about the importance of a “North Star” to align distributed collective action across tactical networks. This resonates with a renewed focus on purpose and mission-led organizations (Mayer, 2018). However, the North Star should not be confused with measurable objectives or implementable goals. The North Star is there for orientation, a shared reference point for action to coalesce; but one can never reach or implement it.

#### *Theorizing the interactive aspects of strategy engagement*

One of the key takeaways for our analysis of the military strategy literature is that tactics is the “raw material” of strategy. Strategy is an effect, a relation between a specific action and the fulfilment of a purpose or a goal. The locus of strategy is the bridge, linking tactics with policy through effect. In this view, strategy is always targeted at another actor, be they a friend, a potential ally or an enemy. Strategy is about changing another actor’s calculation of their chances to win or lose in one own’s favor. It is a dynamic engagement with an external actor, focused on influencing, changing and, if possible, overcoming, their assessment of the current situation and potential future developments. To give an example: if regime change in a given country is the overarching political objective (policy), then aerial attacks, sending in ground forces or funding rebels are tactical decisions; strategy is the art of using tactical deployments to accomplish the overall policy objectives. Or to offer an example from the business world: product innovation is a tactical endeavor; creating value for stakeholders over the long term might be the overarching purpose; strategy is concerned with how action on the ground – say a new iPhone, battery-powered cars, new digital delivery channels for music – might contribute to accomplishing policy. Steve Jobs was a formidable strategist: not because he wrote lengthy plans but because he understood how to use tactical success (iPod, iPad, iPhone) to ensure Apple’s long-term fortunes.

Our analysis of strategy puts emphasis on the ability to elicit a strategic effect from a specific action. The military strategy literature describes this effect as something that happens in the mind of the opponent (or ally). Crucially, the strategic effect is hard to pin down, and can never be manufactured. It depends on an opponent (friend or foe) to change their mindset and behavior. And they always have the option to resist. This has important implications for our theorization of strategy. Given the significance of strategy’s effect on others we can think of strategy as interactionist drama. Military strategy’s talk about the “theater of war” provides an important cue: strategy is a drama, set on a stage, with the aim to create an effect on fellow actors and audiences. Strategy’s performance (literally and theatrically) relies on its ability to change others’ assessment of the situation and their calculation of their own future options in one’s favor. Thus, effective strategy follows a dramaturgical logic: actions become symbolic, arenas turn into stages, and actor’s moves are the raw material for impression management, all aiming to change a friend or foe’s framing of a situation, in the hope to change their calculation of it in one’s favor. This strategic interaction perspective puts emphasis on persuasion and seduction: what strategy aims at is changing actors’ sensemaking, their interpretation of a specific situation in order to change their course of action. The theoretical implication is that we suggest moving away from activity theory that early on influenced the strategy practice and process agenda towards an interactionist framing in which the strategist sets up performances that impact on others’ calculations.

#### *Cross-fertilization between organizational and military strategy research*

Our engagement with military strategy proposes a different epistemological stance towards the study of strategy. In management and organization theory, strategy is sometimes defined as craft, sometimes as science, and occasionally as practice. These different modes of thinking about strategy provide answers to the questions of how theory and practice relate to each other. Military strategy has found its own, and as we believe instructive way of answering this question.

First, it implies that learning experiences in one context may not be applicable in another; for instance, if the enemy learnt the same lesson its truths would no longer be valid as, applied on both sides, they would cancel each other out (see for military strategy Fuller, 2002/2014; for organizational strategy Powell, 2001). Rather, strategy has to be more open to historical studies and re-read Chandler, the business historian and strategist: whilst specific strategic actions are contingent upon circumstances (the weather during the landing in the Normandy etc.) the central idea of the strategy bridge remains valid across contexts: ultimately, strategy is always

concerned with the effects that specific actions have on the pursuit of an overall purpose.

Second, strategy needs to be critical. As Clausewitz put it two centuries ago: “The influence of theoretical principles upon real life is produced more through criticism than through doctrine, for criticism is an application of abstract truth to real events; therefore it not only brings truth of this description nearer to life, but also accustoms reason more to such truths by the constant repetition of their application.” (1832/1989: 88). This means that strategy needs critical reflection – but not in that it is negative but in the sense of seeking out and identifying what is critical for success or failure.

Finally, Clausewitz (1832/1989: 141) suggests strategy theory “should educate the mind of the future leader in war, or rather guide him in his self-instruction, but not accompany him to the field of battle.” In other words, strategy theory is an instrument for reflection that prepares the mind of the leader for the complexities and subtleties of reality. *On War* does not offer a doctrine but rather a theory “which would teach the strategist to understand his task without entertaining any absurd claim to communicate the secret of victory.” (Aron, 1983: vii). Strategy’s pedagogy does not consist of recommending models of success or best practice; rather it is about training the strategist’s judgement, for in the “fog of war” only situational awareness and good judgment can inform action.

### *An agenda for future research*

This leads us to suggest directions for future research on the intersection of organizational and military strategy. First, there is a need and opportunity to explore the interactive nature of strategy, which means moving beyond the typical models of strategy work towards an analysis of how the various paradoxes, tensions, conflicts, unintended consequences and surprises play out (Putnam et al., 2016; Smith and Lewis, 2011). The strategy bridge offers an alternative to the long-standing debate between positioning and emergent perspectives (Gavetti et al., 2005; MacKay and Chia, 2013; Caszar and Levinthal, 2016) through relating action in the ground to the achievement of policy as strategy’s business: what matters is not whether strategy flows bottom-up or top-down, but how it enacts, and occasionally crosses, the boundaries between an actor and its environment. Positioning and emergent schools might see the strategy bridge from its two different sides. What matters, we posit, is the effect of one on the other.

Second, our paper invites SAPP to widen its repertoire to include practices of engagement. SAPP could focus on studies of crises (such as the one we are currently experiencing), changes of industry dynamics, competitor moves, and the like in circumstances calling for new kinds of strategizing, tactical plays and engagement. It would re-orient the process and practice agenda towards engagement, performance and competition – ideas that have been present in mainstream strategy research (Grimm et al., 2006) but have been sidelined as the SAPP eye turned inwards. Moreover, what engagement means in terms of competition and collaboration can be very different in different contexts, and this is a key issue for future research. For instance, ecosystems or platforms involve new kinds of configurations of actors with both competitive and collaborative ties. Here one could study how actions of a heterogenous network of actors are harnessed (appropriated, hijacked) to advance the purpose of a specific actor. One example would be Microsoft’s engagement with the open software development platform Github or how sharing economy actors such as Airbnb organize and steer millions of users on its platform.

Third, as discussed above, tactics warrant special attention in strategic management research. It seems that this concept has been almost lost in theory development, even if it can significantly complement our understanding of strategy. This does not mean defining a clear line between strategy and tactics, but seeing them as complementary part of the dynamics the nature of which can differ from one context to another (e.g. what is strategy and tactics is different for a board, corporate management, division, business unit, technology or process perspectives even in the same organization). As “raw material” of strategy tactics highlights how the power to change is created and sustained: whilst the military is organized in forces, it is ultimately about the conversion of force into power (as the application of brute force results in violence and slaughter – which is, as Hannah Arendt reminded us, the opposite of power). Strategy as the “art of creating power” (Freedman, 2013) focuses on tactics and how they are marshalled to accomplish change on the level of Grand Strategy.

Fourth, while we can learn a great deal from classics, it would be especially illuminating to compare the learnings from hybrid warfare with those of companies and other organizations engaging in various kinds of battles not only within markets but also in media. For instance, reputation, legitimacy and stigma are issues that many corporations are dealing with in our mediated society. Here, an interactionist framing could draw on past research and bring in the long tradition of interactions (Goffman, 1969; Burke, 1989). With this school of thought we suggest putting the emphasis on symbolic interaction as the material of “strategic interaction” (so the title of Goffman, 1969 book), alluding to questions of how, why and where the “theatre of war” creates strategic effects.

Last but not least, future work that straddles the shores of organizational and military strategy might find itself thrown back to the foundational question of the nature of strategy. Given that strategy is expected to hold the keys to uncertain futures and offer counsel to practice, it might be a useful exercise to revisit some key principles. Military strategy might be of invaluable help, holding up a mirror that not only critically reflects our deep-held assumptions but also offers possibilities to think anew. The strategy bridge is but one possible figure of thought that points beyond organizational strategy’s received wisdom; we welcome others that connect organizational and military strategy.

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Martin Kornberger, University of Edinburgh & WU Vienna: Martin received his PhD in Philosophy from the University of Vienna in 2002. Currently he holds a Chair in Strategy at the University of Edinburgh and is a visiting fellow at the Vienna University of Economics and Business. His research focuses on strategies for and organization of new forms of distributed and collective action. His latest book is called *Connecting the Dots: Strategies for Distributed and Collective Action* (2021, Oxford University Press).

Eero Vaara, University of Oxford: Eero’s research focuses on organizational and strategic change. He is a world leading expert in discursive and narrative perspectives. Eero’s work deals with strategy process and practice research, studies of radical change such as mergers and acquisitions, work on institutional change and legitimation, and research on multinational corporations, nationalism and globalisation. Eero combines practically relevant topics such as strategy work and management of postmerger integration with deep theoretical and methodological reflection on organizational and strategic processes and practices.