Competitive strategy and the role of narrative infrastructure: the case of Turkish contractors

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COMPETITIVE STRATEGY AND THE ROLE OF NARRATIVE INFRASTRUCTURE: THE CASE OF TURKISH CONTRACTORS

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This paper is about competitive strategy in the international construction sector. Drawing on the 'narrative turn' in organisation studies, it emphasises the temporal and discursively constructed nature of competitive strategy. Competitive strategy narratives are seen to provide a means of understanding the formation and enactment of strategy. The empirical analysis focuses on the narrative infrastructure as produced by the Turkish Contractors Association (TCA). The findings highlight the multi-actor and multi-level processes of strategy making. They further illustrate the way in which narrative building blocks that are continuously mobilized as part of the on-going progress of strategizing on the sectorial level. The nuances of the identified narrative building blocks are seen to reflect the complexity and diversity across individual accounts of strategy making.

Keywords: competitive strategy, narrative, Turkish contractors, narrative analysis

INTRODUCTION

Traditionally, strategy research has been informed by Porter's (1985) industry-level analysis of strategic positioning. More recently the emphasis shifted towards the level of the firm, initially on the basis of Barney's (1991) resource based view thereafter extending to Teece *et al*.'s (1997) concept of dynamic capabilities. A more grounded, empirical approach has since emerged under the label of strategy-as-practice (SaP) whereby the *doing* of strategy becomes the point of attention (Whittington, 2006). The current research bridges the strategy-as-practice perspective and the so-called the 'narrative turn'. The adopted narrative perspective emphasises the socially constructed, discursive and temporal nature of competitive strategy. The central argument of the narrative turn is that individuals make sense of the world by telling stories. More importantly, narratives and stories are seen to be constitutive of organisational activity rather than simply representative (Czarniawska, 2004). The current paper views competitive strategy from a narrative perspective. It is notable that the potential of narrative methods remains relatively unexplored in the context of construction management research. The study is based on the premise that competitive strategy narratives constitute the temporal realities of strategy making which play a pivotal role in shaping future organizational actions (Fenton and Langley, 2011). Drawing on the concepts of *narrative infrastructure* and *narrative building blocks* (Deuten and Rip, 2000), this paper focuses on the analysis of a formalized sectorial narrative derived from the grey literature. The analysis extends previous empirical research, which the formal

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narrative of Turkish contractors in 1970s deconstructed to its constituent elements in terms of actors, actions, events and contextual setting (Duman *et al*., 2017). The source in question is a quasi-historical account of the Turkish international contracting sector' development with the explicit stated purpose of creating a common memory and point of reference for subsequent generations (Tayanç, 2011). Entitled 'Geographies of Contractors', the text was published as an online book on the TCA's web page. The empirical value of the selected source lies in the way in which it includes narrative fragments from a combination of institutional reports, media articles and direct quotations from senior managers within Turkish firms. Such fragments are embedded within TCA's institutional over-script. The narrators of the fragments describe the details of Turkish contractors' overseas expansion from their subjective viewpoints. Such multi-level and multi-author narrative fragments highlight the essential temporality of strategy narratives even within a formalized narrative. The findings provide insights into the formulation and enactment of Turkish contractors' strategy in respect of international markets.

TURKISH CONTRACTORS IN INTERNATIONAL MARKETS

The end of Second World War saw a dramatic expansion of international contracting (Linder, 1994). The post-war period was characterized by large-scale construction activity in Europe funded through the Marshall Plan. Also important were the increasing aid programmes and development loans from international institutions to boost construction in Third World countries. The oil boom of the 1970s subsequently created a massive construction market in the Middle East and North Africa (MENA). Construction companies from the US, Europe and Japan dominated international market in this period, with the involvement of firms from emerging economies such as Turkey and Korea as sub-contractors (Raftery *et al*., 1998). However, the social, political and economic instabilities throughout MENA in the 1980s led Western contractors to withdraw from these markets and focus on relatively stable markets of the West (cf. Crosthwaite, 2000). Turkish contractors in contrast followed a different trajectory by demonstrating a high propensity for risk in post-conflict zones. They increased their turnover in MENA countries progressively throughout the 1980s. International activity of Turkish contractors reached another level in the 1990s through their successful involvement in the CIS region following the dissolution of the Soviet Union (USSR). The first two decades of international contracting was seen a learning process for Turkish contractors that they gained experience and developed their capabilities (Tayanç, 2011). Then, the 1990s were characterized by market and product differentiation, which subsequently led to market embeddedness, especially within the former republics along the southern fringe of the USSR. The favoured markets of Turkish contractors have often been characterised by continuous social, economic and political instability. In contrast to their international competitors, Turkish contractors tend to perceive such conditions as opportunities to expand their market share. The sectorial-level narrative of TCA presents the trajectory of Turkish contractors as an *epic story*, in which founder managers are depicted as *quasi-heroic* characters striving to establish their firms in emerging markets. It is argued that the story fragments presented within the sectorial-level narrative of TCA provide a rich empirical source to understand the enactment of strategies by Turkish contractors.

ACADEMIC NARRATIVES OF COMPETITIVE STRATEGY

Assumptions of Stability and Predictability

Theories of competitive strategy have changed considerably since the initial highpoint of strategic planning in the immediate aftermath of World War II. Initial models of strategy were developed in conditions of certainty with the assumption that strategies are planned

and executed through a rational, top-down and linear process (i.e. Chandler, 1962; Ansoff, 1965). The assumption of a stable world continued to dominate the mainstream literature until the latter 1980s. Porter's (1985) seminal contribution has provided the key building blocks for a series of studies of competitive strategy in construction (i.e. Oz, 2001; Ofori, 2003; Mesner and Korkmaz, 2008). The common tendency is for competitive strategy to be reified as a stable entity which can be defined, measured and (allegedly) improved. However, the increasing uncertainty initiated by the oil crises of the 1970s challenged the assumed expansion and hegemony of the pre-existing notions of strategizing. Such market uncertainties gave rise to the emergence of new perspectives, which recognise the complexities of strategy-making-in-practice (i.e. Mintzberg, 1987). These approaches highlighted the inherent political and culturally embedded nature of strategy making (Pettigrew, 1987). Organization studies started to emerge as a distinct discipline with a strong focus on the routines and resources that enabled firms to respond to external change. Barney's (1991) resource-based view and Prahalad and Hamel's (1990) core competencies approach have since become key points of reference in strategy studies. Empirical studies have hence subsequently emphasised the importance of unique resources, organizational competencies and the shaping effects of path dependency (Phua *et al*, 2006; Wethyavivorn *et al*., 2009).

Towards the Recognition of Process

The 1990s comprised a further age of disruption with the end of the geo-political certainties of the Cold War. Globalization, technology and continuous change became the new mantra of competitive strategy studies. The dynamic capabilities view was developed in recognition of such an increasingly dynamic world and promoted the requirement for firms to adapt to the constant flux in the business environment (Teece *et al*., 1997). The focal point of the competitive strategy discussion shifted to the ability of firms to transform and reconfigure their resources and operating routines. However, such studies consistently ignore the changing geo-political contexts within which organizations operate. The so-called 'process school' has emerged from this critique and emphasized the embedded nature of the strategy making process and the importance capturing 'reality in flight' (Pettigrew, 1997). Longitudinal analysis of the broader context and interaction between multiple parameters hence becomes the key focus of empirical analysis. However, the emphasis on linking the context, process and outcomes risks degrading all three to a set of variables that supposedly shapes the eventual outcome (i.e. Langley, 2007). Besides, only few empirical studies attempt to capture the reality in flight of strategy making within the context of highly unstable and unpredictable of construction sector (cf. Green *et al*., 2008).

Competitive Strategy as Practice

Developed as an extension of the above, the strategy-as-practice (SaP) approach contends that strategy is not something that is possessed but something that is practiced. Hence competiveness must be theorised as a situated socially accomplished activity (Whittington, 2006). Recent research within the SaP tradition has focused on the important role of narratives as the medium through which strategy is enacted. Löwstedt and Räisänen (2012) drew on a narrative perspective to understand 20 years of change process in a Swedish construction company. They sought to compare the formal narratives stated by company documents and individual spoken narratives of middle managers and describe the differentiation between two levels of narrative.

Narratives of Competitive Strategy

The 'narrative turn' in organisation studies sees organizations as discursive spaces within which the narratives of different actors and interest groups compete as sense-making

mechanisms (Fenton and Langley, 2011). Deuten and Rip (2000) further argue that multi-authored and heterogeneous narratives aggregate and interact over time in their social and material settings and progressively constitute a *narrative infrastructure.* The concept of a narrative infrastructure helps explain how coherent strategies can emerge from complex and contested contexts. More importantly, the narrative infrastructure is depicted as a key concept not only in informing present day decision-making, but also in generating possibilities for further strategic actions (Fenton and Langley, 2011). The construction of the narrative infrastructure is seen to follow a dynamic process of interaction with specific *narrative building blocks* (Deuten and Rip, 2000). The term *narrative building block* is used to refer to commonly accepted discursive resources that are used to give meaning to emerging occurrences. Narrative building blocks could be grand narratives such as globalization, regionalization, climate change etc. (cf. Vaara, 2002), or alternative discourses of competitive strategy such as positioning, unique resources, dynamic capabilities, etc. (cf. Green *et al*., 2008). It is important to emphasize that the processes of contestation are continuous. The narrative infrastructure is hence continuously re-constructed over time. The analysis of narrative infrastructure and the narrative building blocks from which it draws thereby provides potential insights into the ways in which competitive strategies are negotiated and enacted.

RESEARCH METHOD

The adopted approach follows the tradition of interpretive research which assumes that people create their own subjective and inter-subjective meanings as they interact with the world around them (Orlikowski and Baroudi, 1991). Narrative research is hence firmly positioned within the interpretive tradition (Rhodes and Brown, 2005). Of central importance are the multiple realities projected by individuals and the ways in which different narrative building blocks interact with the broader social context and create the narrative infrastructure. Since social reality is seen as a process of continuous construction, the search for *objective truth* is replaced by a quest to understand how *a given version of the world is constructed* (Czarniawska, 2004). Hence the research focuses on the *narrative infrastructure* relating to the competitive strategy of Turkish contractors. As a caveat, it is important to note that the international markets within which Turkish contractors operate can be characterised in part by a range of quasi-objective criteria, not least in terms of economics and geopolitics. But such criteria are of course always subject to interpretation as any series of historical events can be narrated in a plurality of ways. The empirical study started with a structural analysis of the TCA narrative entitled 'Geographies of Contractors'. The story fragments within the TCA narrative were deconstructed to their constituent elements. A coding structure based on the structural analysis models described in narrative literature (Duman *et al*., 2017). The important narrative elements were defined as actors, actions, events, time and contextual parameters that are linked by certain plot structures. By cross-referencing with relevant literature an iterative reading process enabled the identification of six common and recurring themes across narrative fragments. Such common themes are labelled as the *narrative building blocks* from which the *narrative infrastructure of TCA* is constructed. According to Greimas (1987) all narratives focus on a subject (or 'hero'), who follows a journey to reach an object (otherwise construed as an 'end-goal). Each journey routinely describes how the subject interacts with a series of characters at different stages of the process. The same characters may be presented as heroes or opponents at different times. Many narratives build particular plot lines around the tendencies of helpers to subsequently turn into opponents, and vice versa (Czarniawska, 2004). By demonstrating such temporal and dynamic connections across an extended timeline, the empirical

analysis provides a means of understanding the essential temporality associated with the negotiation and enactment of strategy.

FINDINGS AND DISCUSSION

The 'Geographies of Contractors' can be seen to comprise a narrative infrastructure that is constructed by compiling several narrative fragments derived from interviews with company managers, media documents and sectorial reports prepared by different institutions (i.e. IBRD[1], TUDIAD[2])[2]. Such narrative fragments draw temporally from alternative narrative building blocks while presenting particular interpretations of Turkish contractors' stance in international markets. However, the emergent pattern is not only about the temporality between narrative building blocks, it is also the different roles ascribed to the actors as helpers or opponents within narrative fragments. Such narrative fragments present an interpretation of the actions of supposed heroes in overcoming the barriers presented by particular markets. The analysis below presents the building blocks from which the narrative infrastructure has been created on an epic plot structure. It further discusses the changing roles ascribed to the actors, actions and events within narrative fragments.

Narrative Building Block 1: Turkey's Push

The formalized narrative of TCA highlights the recurrent political and economic instabilities in Turkey as the key reason at the starting point of the epic trajectory of Turkish contractors. The successive economic crises and the associated stagnation of construction projects are named as '*push factors*', whereby the government emerges as the initiator of the action. In the words of managers:

> As you know there has been a decrease in the domestic investments in Turkey lately, as a result, contractors speed up international contracting as previously happened in 1980s, 1970s…(Company manager, 2009)

It is important to note that such '*push factors*' have not shaped the trajectory of Turkish contractors in isolation but have interacted with several other events. Examples include high construction demand in Libya in the 1970s, in MENA more broadly in the 1980s and across the former republics of the Soviet Union in the 1990s. Several story fragments emphasise that '*it was the time that Turkey pushed, but Libya/Russia pulled us*'. Besides, some narrative building blocks emphasize the company owners' visions as being more important than Turkey's push narrative. The owners' visions tended to dominate the narrative fragments emphasized by the companies who had reached certain level technical, managerial and financial maturity. In these cases, the founder of the company is depicted as the visionary hero moving from one market to another to create an opportunity. Such story fragments serve to emphasise a temporal daily coping process in response to emergent contextual parameters as discussed in SaP. More importantly, presenting a heroic character seems to generate a point of reference and motivation for new generation of managers.

Narrative Building Block 2: Inadequate Financial Capabilities

Limited financial capabilities of Turkish contractors emerge as a key narrative building block. The problem of 'letters of guarantee' is especially highlighted as the key opponent that inhibits the success of Turkish contractors. The common tendency is to accuse the banking sector in Turkey. The narrators complained about the failure of Turkish banks to pay back the deposits during the Libyan crises of the 1980s and the '2001 Economic

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[2] [1]International Bank of Reconstruction and Development, [2]Turkish Industry and Business Association

Crises' in the domestic market. The argument made is that as Turkish banks lost their credits in international markets, Turkish contractors' lost their financial strength in the tenders of mega projects. Some narrators emphasize that the difficulties of convincing Western banks to give letters of guarantee to Turkish firms has worsened their chance to enter some tenders. In the words of managers:

> The biggest problem of Turkish firms is the letters of guarantees… If you undertake a 700 billion US $ project, you need a security deposit at least 25% to 30% of this value... It is impossible to provide these from Turkish banks, even if you managed to get it once you get nothing on the next one... (Chief executive, 2009)

The narrative fragments refer to some critical actions taken by the contractors to overcome such financial struggles. These actions can easily be labelled as 'enacted strategies'. According to the TCA's narrative, some companies have established local subsidiaries in the markets that they aim to work in. They then seek to access finance through local banks within these markets through their local subsidiaries. The other action has been underlined as working in partnership with a Western contractor and benefiting from Western finance as a joint venture (JV). Although rarely mentioned, the third action is defined as benefiting from government lobbying to get acceptance of the guarantee of letters given by Turkish banks. Lastly, setting up JVs among Turkish companies has been emphasized as the key action to increase the financial strength in different periods. Such interpretations underlie the critical importance of financial capabilities to compete in international contracting. More importantly, detailed explanations of how the heroes have found different solutions to overcome the financial difficulties create a sense of direction and inform prospective actions.

Narrative Building Block 3: Government Lobbying

Government support emerges as a key narrative building block emphasized in several narrative fragments. Official government visits to other countries with contractors, active role of ambassadors and Foreign Ministry as a network provider emerge as the key actions underlined in several story fragments. The narrative infrastructure created by TCA indicates a very close relationship between foreign diplomacy and market entry into different countries. For several narrators, especially important are the foreign country visits of government officials, in which contractors are part of the accompanying trade delegation. In such trips, the owner-managers of the contracting companies had the chance to set up government level networks which enabled them to invest not only in contracting but also in other sectors. Lobbying by the Turkish government seems to have played a very active role in activating the historical and geographical ties and facilitating Turkish contractors' entry into different markets. Another key action emerges as the sod-turning ceremonies, in which the government-level representatives of both countries meet at the construction site. Such ceremonies organized by contracting companies are highlighted as key activities to guarantee subsequent projects. Several story fragments argue that lobbying by government is a common strategic action in the agenda of other countries, France being the most frequently cited example. Most notably, winning the tender for a mega-project is routinely represented as a victory for one country over another. In such narrative fragments the subject of the narrative shifts from the role played by company leaders to that of Turkish government whereby presidents and diplomats are underlined as the key helpers. From a quotation of a Turkish newspaper in 2005 "Foreign Minister, Gul won his second victory over French President, Chirac in international tenders (Newspaper, 2005). However, such an emphasis on the role of the government changes according to the situation. For example, when the discussion comes to the financial problems that Turkish contractors face in terms of getting project credits,

letters of guarantee or inefficient auditing systems for the approval of compliance certificate of contractors, then the narrative fragments emphasize the government as the key opponent in the successful expansion of Turkish contractors. This reflects the dynamism and temporality of the roles assigned to the actors in the narrative fragments.

Narrative Building Block 4: Combining Powers

Several narrators see the failure of Turkish firms' cooperation between each other as a key problem inhibiting Turkish contractors' competitiveness as measured against their foreign competitors. More importantly, Turkish contractors are seen as the opponents of themselves as they compete with each other through low-cost tenders, especially in the 1970s Libya market. A quote from Middle East Economic Digest highlights:

> Turks turn the tenders into a nightmare: As a result of the increase in the number of contractors who bids for the decreasing number of projects in Middle East, bidding becomes a nightmare for many contractors… (Middle East Economic Digest, 1983)

The TCA's narrative highlights that the short-term JVs set up to bid for the projects in Soviet Union in late 1980s and early 1990s paved the way for the initial foothold in post-Soviet states. Such a narrative seems to give a clear message about the need to avoid needless competition between Turkish contractors. When the narrative fragments refer to the 2000s, the narrators again start mentioning successful cooperation examples. Hence it could be argued that learning to work together has taken time for the Turkish contractors despite the recognition of its benefits since 1980s. The following quotation indicates the importance of the consolidation:

> This is first time that we bring our powers together without any foreign company…We prevent unfair competition...We had a bad experience in Libya that firms compete on lowest costs (Company manager, 2009)

An alternative narrative underlies working with foreigners as a key strategic action to win tenders. Such narrative fragments emphasize the importance of the track records, or networks developed by working as project partners with foreign companies in the past as the way to set up JVs with foreign companies. Several story fragments highlight how both sides of a partnership help the other to secure significant projects:

> …It was a huge project …It is not possible for a Turkish company to take this project... (Japanese) are the giant companies working all over the world. We had a work experience with them in Turkey… They…know the experience… the capabilities of Turkish contractors and possible economic benefits that we could bring…it is very easy for a Turkish minister or a Turkish bank to talk (with the client)…understanding the client…it is almost impossible for a Japanese firm… As they thought we would bring benefit to them, as they know us, we set up a JV (Company manager, 2009)

Similarly, setting up long-term JV with US based contractors or asserting their identity as 'NATO contractors' provide alternative narrative building blocks for the purposes of breaking into the European and African markets. Considering the sustained efforts to increase market share in Europe and Africa as target markets, Turkish contractors seem to use working in partnerships as a strategic action.

Narrative Building Block 5: We Love To (Have To) Work in High-Risk Markets

Several narrators emphasise the adventurous and risk lover nature of Turkish people. However, the actual reason which emerges is that the risky markets have traditionally been the only option to create a market for Turkish international contracting given that other markets were already dominated by Western companies. But, shaping the story with assigning a heroic stance seems more helpful than describing the actual facts. More importantly, such risky markets were seen as a chance to move into new markets. Two quotations demonstrated below provides example for both perspectives:

> (i) I have no expectation that somebody will deliver a project to me in Champs Elysees, I know that I need to go tough countries (Company owner, 2001)" / (ii) "I don't expect that Western companies pay attention to Afghan market, because the conditions are very difficult…As it will be a door to open other global markets, it is very important for Turkish firms (Company owner, 2002)

It seems that developing capabilities by working in such risky markets over time builds the necessary resilience to operate successfully in hostile environments. And, as 'instability' and 'disruption' are the key mantras of today's international contracting sector, such capabilities could serve as a point of departure for Turkish contractors in seeking to enter markets dominated by others. More importantly, considering the constitutive role of narratives and creation of an account that *we love to take risks,* the contractors become active players within the success story they create.

Narrative Building Block 6: Building Brand Recognition

Several narrators emphasize the importance of creating a brand image to become embedded in different markets. Although there are slight differences within the narrative fragments, building brand recognition is linked to (i) early project completion, (ii) quality of work, and (iii) conflict adverse attitude. Such actions are seen as the way to undertake successive projects to the same client, or create market embeddedness. In the words of a company owners:

> …the Chinese were working in front of us; and the Indians were working behind us. Everyone saw that we did the most successful work; we did it very well before than the expected time… So we are recognized in India... (Company owner, 2010)

Several narrative fragments emphasize the number of days won by the early completion. It especially becomes a key point of reference in power and built-operate-transfer projects with a specific emphasis on the cost advantages gained by early start-up. Another important action related to the brand recognition is underlined as the involvement in approved contractors list of international institutions. It seems especially important to overcome the financial difficulties to win mega projects.

CONCLUSIONS

This paper has considered how the 'narrative turn' might contribute to a better understanding of competitive strategy in the international contracting sector. The empirical work comprised an analysis of the narrative infrastructure created by the Turkish Contractors Association (TCA). The TCA narrative consists of story fragments derived from key individuals and written documents. It hence provides a multi-authored and multi-level discussion on the competitive strategies applied by Turkish contractors. The analysis demonstrates the continuous reconstruction of narrative infrastructure through the mobilization of different narrative building blocks over time. Such building blocks seem to become the common point of reference for the narrators although the roles assigned to the narrative elements frequently change over time. While an actor is positioned as a key helper in one case, he/she could easily be presented as an opponent in another. The analysis of narrative fragments further illustrates the temporal connections made between the actors, the actions that they take, and the events that are initiated by external parties. The connections are presented from the perspective of the narrators for the purposes of making a particular argument. Such connections provide the basis for understanding how different actions are taken in different situations, and how they may subsequently be interpreted as strategy. The findings support the argument that strategic practices can only be understood in their embedded context and time as discussed in process studies (cf. Pettigrew, 1997). More importantly, the narrative fragments reflect the interaction of multiple realities and signify the complexity and diversity across

individual accounts of strategy making. The findings point to the requirement for a post hoc rationalization to specify and label some actions, and decisions as strategic. This proposition offers a contrary argument to the dominant thinking within mainstream competitive strategy theories, although it certainly chimes with the ideas of SaP (cf. Whittington, 2006).

In conclusion, it is argued that actors create narrative fragments. The recipients of these stories subsequently build on these fragments, or present contrasting stories. Such interactions generates a multi-voice and multi-level mosaic of stories whereby the above listed narrative building blocks emerge as common set of discursive resources. The temporal interactions and evolving aggregation of such narrative fragments and narrative building blocks constitute an evolving narrative infrastructure for the Turkish international contracting sector (cf. Deuten and Rip, 2000). Such a narrative infrastructure enables a strong point of reference for the generation of further narratives, which constitutes the actions of Turkish contractors. More importantly, portraying the Turkish contractors as heroes of international construction sector within retrospective accounts, TCA creates a narrative infrastructure for the purpose of achieving an expressed end goal, namely the increased penetration of international markets by Turkish contractors.

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