Heroes or Villains? Recasting Middle Management Roles, Processes, and Behaviours

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ABSTRACT   Middle management ranks are once again being questioned by scholars and practitioners alike. This introduction to the special issue represents a timely reference point for consolidating, reviving, and guiding the next wave of researchers seeking to engage this debate. We review the foundations and recent advances in middle management research and develop an organizing framework in terms of middle management's organizational roles, coordination processes, and agentic behaviours. We also identify how new ways of organizing, technology, and middle manager needs are changing to shape each of these themes. The collection of works we synthesize in this introduction offer theoretical advances and empirical evidence on how these changes affect middle management roles, processes, and behaviours. We conclude by mapping out promising research avenues for future research in middle management.

Keywords: middle management, roles, processes, behaviours, new forms of organizing

INTRODUCTION

Scholars and practitioners alike are seemingly bewildered by whether to commend or vilify middle management – the decision-maker cadre linking the strategic apex and operating core of organizations (Mintzberg, 1989, p. 98). On the one hand, middle management ranks are equated with unnecessary bureaucracy in organizational hierarchies – a problem to be resolved or a necessary evil at best (Ebadan and Winstanley, 1997; Littler et al., 2003; Pinsonneault and Kraemer, 1997). Consider the recent wave of restructuring in large tech firms as middle managers have been laid off or demoted (Ito, 2023). Meta's

CEO, Mark Zuckerberg, justified his firm's act to slash 'managers managing managers, managing managers, managing managers, managing the people who are doing the work' (Kelly, 2023). Google had slashed middle management positions only to reinstate them a few months later (Garvin, 2013) to slash them again recently (Constantz and Love, 2023). Some commentators have gone as far to call that it has never been a worse time to be a middle manager (Beckstrand, 2023; Michelman, 2017; Mollman, 2023).

On the other hand, middle managers are valued as key strategic actors who cultivate and champion strategic initiatives while translating strategy into concrete operational realities (Floyd and Lane, 2000; Heyden et al., 2018; Raes et al., 2011). For instance, Github – widely lauded as a flat organization – recently found itself injecting middle management layers to backbone its exponential growth (Burton et al., 2017). Despite popular notions of bossless organizations, these companies have come to realize that coordination problems can outweigh the benefits of decentralization (Foss and Klein, 2022). Perhaps this is why middle managers resurge in a wide variety of contexts (Monteiro and Adler, 2022), including volunteer organizations (Florian, 2018), communes (Chen, 2009), terrorist organizations (Shapiro, 2015), start-ups (Baron et al., 1999), and open source communities (O'Mahony and Ferraro, 2007). Accordingly, middle management roles, processes, and behaviours continue to occupy a critical place in our theories of organizations.

The debate on the merits of middle management is so fundamental that it is echoed across several academic lines of inquiry, such as strategic management (Tarakci et al., 2018), organizational behaviour (Greer et al., 2018; Raes et al., 2011), entrepreneurship (Grimpe et al., 2019), organization theory (Rouleau, 2005; Rouleau and Balogun, 2011), marketing (Heyden et al., 2020), and operations management (Giardili et al., 2023). Since widespread interest and the importance of middle management have so richly reverberated across these theoretical perspectives, disciplines and methodological traditions, this introduction represents a timely reference point for integrating, reviving, and guiding the next wave of this debate.

We organize literature on middle management along three notable research traditions, compiling the latest research to help inform some of the key debates on middle management, while revealing important directions for the future. We further highlight how our understanding of middle management is inherently tied to key changes in contemporary organizations. Our central argument is that middle managers are more present than ever, but their roles, processes, and behaviours are changing with the unique ways organizations themselves are changing. Specifically, we draw attention to the interplay between the changes that contemporary organizations are undergoing, as a backdrop for understanding if, how, and where middle management fits into new realities of organizing.

We start by revisiting the classical foundations of middle management, briefly identifying distinctive traditions in middle management research: middle management as organizational roles, middle management as a nexus of strategy processes, and as individual agentic behaviours that call for theoretical attention to this special cadre of strategic leaders. Then, we discuss notable, often unexamined, changes in contemporary organizations that affect middle management. Inspired by our core premise and the insights from the articles in this collection, we advance a tentative research agenda for guiding the next generation of middle management research.

REVISITING THE FOUNDATIONS OF MIDDLE MANAGEMENT RESEARCH

Middle management matters for the functioning and outcomes of organizations. One recent large-scale study attributes 10 per cent of the productivity gains at the Italian Social Security Agency to managers (Fenizia, 2022). Giardili et al. (2023) have estimated that middle managers explain about 30 per cent of productivity in their recent study of US automobile assembly plants. Such gains cannot be traced to mere coordination or to manufacturing. Mollick (2012) has documented middle managers in the video game industry as accounting for 22.3 per cent of the variation in video game revenue, driving a larger variation than firm- or designer-level factors. Grimpe et al. (2019) lately found in a large panel of German start-ups that having a middle management layer boosts innovations as middle managers counter the limited attention of start-up founders. These recent studies have shown what middle management can add to organizations – with research still burgeoning.

Foundationally, the impetus for casting middle management as a focal organizational concept can be traced to the seminal works of Bower (1970), Mintzberg (1973), and Burgelman (1983). This tradition was next solidified by the marquee research program developed by Floyd and Wooldridge (1992, 1994, 1997) that established what they later called 'the middle-level view' of strategy (Floyd and Wooldridge, 2000, p. 37). Yet, on reflection, this middle management view has historically represented a collection of traditions that emphasize middle management as a focal concept, rather than a unified perspective.

To help organize prior research, we delineate between middle management's organizational *roles* (e.g., tactical role; change implementor role; Floyd and Wooldridge, 1994; Heyden et al., 2017; Mantere, 2008), middle management as a nexus of *coordination processes* within and across hierarchical levels (e.g., knowledge flows; social exchanges; Dutton and Ashford, 1993; Mom et al., 2007; Raes et al., 2011), and middle managers' individual agentic *behaviours* (e.g., convergent and divergent behaviours; Tarakci et al., 2018). Roles focus on theorizing the more *formal* expectations embedded in organizations (Biddle, 1986). Coordination processes capture the informational and social exchanges through which middle managers shape organizations (Raes et al., 2011). Agentic behaviours draw attention to both individual and social psychological processes that explain both agency and variety regarding individual middle managers' attitudes and (Emirbayer and Mische, 1998). While complementary, many nuanced assumptions and theoretical conventions merit scrutiny. Below, we organize central assumptions, relevant theories, and research questions that guide these topics in middle management research.

Middle Management as Organizational Roles

One core tradition has tried to unpack the distinct roles of middle management as part of a larger organization. Here, roles refer to the 'expected behaviors of actors in a social system [and] … specif[ied] interactions, associations, and interdependencies between them' (Georgakakis et al., 2022, p. 1). Roles are generalizable organizational features that help researchers classify how middle management operates (Mintzberg, 1980).

For instance, Fayol's (1917) early work understood middle managers' roles of planning, organizing, commanding, coordinating, and controlling to ensure better team performance. Much later, Mintzberg (1973) distinguished interpersonal, informational, and decisional roles. Interpersonal roles require middle managers to forge personal relationships with employees for inspiring action when acting as figureheads, leaders and liaisons. Information roles position middle manager as loci of information within teams where they generate, monitor, integrate and disseminate information internally and externally. Finally, managers wield decision rights to resolve conflict and allocate resources.

Middle management roles have most usually been articulated as upward and downward expectations in relation to an organization's strategy (Floyd and Lane, 2000). These roles have been largely deemed a part of organizational design of systems and processes (Mintzberg, 1980; Reimer et al., 2016). For example, Floyd and Wooldridge (1992) suggested 'implementing deliberate strategy' is a downward role where middle management is expected to *execute* a strategy. In turn, 'synthesizing information' refers to an upward role where middle management is expected to *report* the progress upward to the top management team. Illustrating this role, Friebel et al. (2022) conducted a randomized control trial in a retail chain where a randomly selected sample of middle managers received a CEO's direct strategic communication to reduce personnel turnover. Managers receiving this strategic directive were able to reduce turnover rates by a fifth to a quarter without impairing the overall performance.

Over recent decades, though, scholars have focused on how the strategic roles of middle managers contribute to the renewal of strategy itself by 'championing' new strategic initiatives. Here, middle managers' *downward* role of 'facilitating adaptability' entails creating space to breed innovative initiatives within their teams. Together, roles have been particularly insightful as a starting point for understanding how middle managements contribute to organizations.

Middle Management as a Nexus of Strategy Process

Middle management is a pivotal intersection for key strategy processes (Floyd and Lane, 2000; Raes et al., 2011; Wooldridge and Floyd, 1990; Wooldridge et al., 2008). Following the pioneering studies of Burns (1954, 1957), several scholars have pointed out that the managers in this cadre occupy informal, ambiguous positions (Dalton, 1959) that markedly vary in tasks and position (Stewart, 1967). Rooted in social exchange theory (Emerson, 1962; Salancik and Pfeffer, 1974), this tradition has organizationally typecast roles as insufficient for understanding middle management's influences on strategy process also tending to occur through social and informational exchanges (Currie and Procter, 2005; Horne and Lupton, 1965). At the heart of these processes is the premise that middle managers operate as an interchange for information flows and prove central to the social fabric of organizations that accomplish their day-to-day work (Burgelman et al., 2018; Rouleau et al., 2015). In this capacity, middle managers reconcile the informal and official informational requirements of organizational processes by filtering, translating, making sense, and selling interpretations to others (Dutton and Ashford, 1993; Dutton et al., 1997; Raes et al., 2011).

Information flows are particularly crucial for intra-organizational coordination that occurs both vertically and horizontally (Mom et al., 2007; Vaz et al., 2022). Focusing

on vertical information flows, research has stressed middle managers' information exchange with top managers through *issue-selling* (Dutton and Ashford, 1993; Dutton et al., 1997, 2001; Lauche and Erez, 2023; Ling et al., 2005) and sensemaking (Balogun and Johnson, 2004; Heyden et al., 2017; Huy, 2002; Rouleau, 2005; Rouleau and Balogun, 2011). For horizontal information flows, scholars have examined how middle managers *coordinate* between units to align operational realities and construct a collective sense of strategy (Mom et al., 2007, 2009; Rouleau, 2005). Jointly, these studies have contributed to see middle managers as a nexus for informational and social interactions in organizations (Raes et al., 2011; Schuler et al., 2023), which is important for reconciling tensions of continuity versus change beyond what can be formally designed.

This stream in middle management research has also increasingly acknowledged that organizational processes are not clearly defined or objectively built. Further, Raes et al. (2011) had influentially highlighted that middle managers interact only episodically with top managers during strategic change. Middle managers now instil their own interpretations of change and steer its direction by forging new sets of shared meanings (Balogun and Rouleau, 2017; Rouleau, 2005) and by negotiating these with others (Lauche and Erez, 2023). It is here middle managers translate abstract ideas into feasible organizational practices based on their own interpretations of how to wisely introduce change. Heyden et al. (2018) have highlighted how social similarity between top and middle managers can ease the entry of non-technological innovations that tend to disrupt established information flows and social routines (see Schubert and Tavassoli, 2020). Middle management thus serves as the nexus for vertical and horizontal strategic processes via both informational and social exchanges throughout their organizations.

Middle Management as Agentic Behaviours

While roles delineate organizational expectations of middle managers, they may also act inconsistently or at odds with those expectations (Ateş et al., 2020; Guth and MacMillan, 1986). Furthermore, middle managers wield agency in how they favour or limit social and informational processes (Burgelman, 1983, 1991; Burgelman and Grove, 2007). Topics such as personalities, preferences, and incentives all take centre stage in theoretically explaining the underlying middle manager behaviours (Kanter, 1982).

Burgelman (1991) seminally documented how autonomous deviant behaviours of middle managers at Intel transformed and improved its chances of survival. Tarakci et al. (2018) lately highlighted how middle managers with high organizational identification aspire to organizational but not to their individual performance, which in turn derive their divergent strategic behaviour. Such behaviours may enlarge the menu of alternatives available to strategic decision-makers in assisting organizations to overcome organizational inertia and stimulate strategic renewal (Ahearne et al., 2014; Ren and Guo, 2011; Wooldridge et al., 2008). As Burgelman (1991, p. 258) once quipped, 'organizations may use individual-level "foolishness" to enhance organizational-level survival'.

In contrast, the demise of Nokia's mobile phone business illustrates what happens when middle managers fail to enact their convergent roles. Vuori and Huy (2016) quoted a middle manager admitting, 'We knew [the iPhone] was coming out about a year in advance. We had pretty good specifications for it. … [The CEO] forwarded [the] email to his subordinates … [and] wrote "Please take action on this"'. Yet, middle managers folded and opted to sugar-coat the stalled progress, causing Nokia to lose the competitive battle for smartphones.

Middle managers are constantly coping with, adapting to, or even resisting contradictory demands and pressures (Azambuja et al., 2022). Multiple facets highlighting how middle managers deal with complex demands have been explored over the recent decade. Huy et al. (2014) have observed that middle managers' opinions as to the legitimacy of their top managers can trigger emotional reactions that end up resisting proposed radical change. Gjerde and Alvesson (2020) later emphasized middle managers' professional identity in the adoption of *right subject position* amid changing circumstances. Toegel et al. (2022) argue that secrecy or acting behind the scenes allows middle managers to gain power and sway and to promote their own or group interests in the dynamic process of supporting or resisting change.

Still, having to deal with contradictory demands impacts middle managers' individual and subjective work (Thomas and Linstead, 2002). Bardon et al. (2017) have studied middle manager *identity* at work in pursuit of making both effective and ethical decisions in a coercive context that favours effectiveness over morality. Harding et al. (2014) earlier examined how middle managers talk among themselves about their work, remarking that middle managers are both controlled and controllers, resisted and resisters (see also Tempelaar and Rosenkranz, 2019).

Together, the three research traditions broadly capture dominant lines of assumptions and theorizing in middle management research. While we have reorganized above the foundations of middle management research, middle managers' roles, processes, and behaviours do not live in a vacuum. Shifts in business environments affect such foundations. Studying middle managers, therefore, requires co-examination of middle management with critical changes in organizational environments that fundamentally reshape middle managerial roles, processes, and agentic behaviours.

SHIFTS IN ORGANIZING, TECHNOLOGY, AND NEEDS

Organizations navigate in dynamic settings. As vicissitudes in the environment pressure organizations to evolve, middle management gets squeezed in its efforts to balance continuity with change. Several notable changes in organizations are fundamentally reshaping middle managers' roles, processes, and behaviours. Of particular interest for middle managers is the recent surge of new forms of organizing such as Holacracy (Robertson, 2015), Podularity (Gray & Van Der Wal, 2014), Teal organizations (Laloux, 2014), delayering (Ostroff, 1999), Humanocracy (Hamel and Zanini, 2020), Agile management (Darrell et al., 2016), and decentralized autonomous organizations (Santana and Albareda, 2022). These new organizational concepts often view middle managers as a cost, favouring flatter organizational hierarchies. Here, such concepts bestow authority to individuals,

emphasizing personal agency over any hierarchical structure. Those left in the middle, if any, are expected to play less critical roles.

Middle managers must lead adaptive efforts by introducing change to the organization. As new technologies emerge, rivals flood one's turf and customer preferences reposition while regulators amend the rules of the game. These shifts require rapid and effective organizational responses to adapt to an ever-changing environment. By populating layers between the CEO and frontline actors, middle managers are vital to making organizations operationally feasible as they translate ambiguous environmental shifts into concrete actions for organizational members. Despite the popularity in new ways of organizing, middle managers remain relevant.

While middle managers can be enlisted to help navigate changes, one common narrative is that middle management layers introduce additional bureaucracy that slows decision-making and incurs needless costs. Jeff Immelt's (2017), former CEO of GE, anecdote is telling here:

> 'In 2010 I was sitting in a hotel restaurant in Ghana with two great young leaders on our Africa team. They were describing a big opportunity in the power industry, but it was complicated. I was in love with their passion, but I realized that even if I spent the next month helping them, we would not get the deal approved inside GE. And I ran the place!'.

The above quote equates organizational bureaucracy with too many middle managers. When spotting an opportunity in the local market with CEO endorsement, middle managers and its resulting bureaucracy are seen as either diluting local leader ideas or taking so long that the window of opportunity is missed. The corollary here is that the fewer middle managers, the smaller organizational bureaucracy, and the faster the decision-making.

The promise of rapid, effective response to environmental turbulence has moved some organizations to reshape their structures with fewer middle managers. For example, ING faced a growing threat from both large technology firms (e.g., Apple pay and Google pay, Facebook's Libra, and Alibaba's Ant Financial) and fintech start-ups invading its financial service footprint. ING implemented Agile management, but did so by first laying off the middle managers (Kerr et al., 2018). Ironically, Heyden et al. (2018) have shown middle managers to be especially crucial to introducing new structures, processes, and practices where middle managers, remarkably, are expected to engage these very changes that will possibly render them obsolete.

Second, advances in information technology have fostered the idea that communicating and monitoring employees can be seamless and costless. For example, several technology firms offer *Objectives and Key Results* (OKR) solutions that enable organizations to communicate organizational strategies directly to employees, to cascade them into lower-level goals, and to track implementation using web-based solutions. Likewise, crowdsourcing technologies have enabled large town halls where the goal is no longer articulating strategy from top downward, but involving employees in strategy-making itself. These open strategy initiatives virtually bypass middle managers and invite diverse stakeholders directly into the strategy process (Stadler et al., 2021), exposing middle managers

to a complex mix of internal and external interfaces that they must navigate (Splitter et al., in this issue).

Additionally, robotics and generative artificial intelligence threaten the role of middle managers as decision-makers. Dixon et al. (2021) recently analysed the adoption of robots in Canada between 2000 and 2015 and found the adoption of robotics boosting overall employment at *lower* levels while undermining the need for managers and reducing employment in the managerial ranks. This observation in itself is not new, but the pace of change has accelerated, driven by advances in information technology.

Third, middle manager needs are also changing. Both organizational and technological changes have not simplified but intensified middle managers' work. Being enmeshed between demands and expectations of top- and lower-levels, middle managers experience amplified stress, anxiety, depression, hypertension, heart disease, and disrupted cognitive performance and focus (Anicich and Hirsh, 2017; Mantere, 2008). Based on a two-phase study of managerial work (2002–6 and 2015–19) in UK, USA and Japan, Hassard and Morris (2022) have observed middle managers' working extra hours inside the organization and more voluntarily outside the organization without reward and recognition. Middle managers are now seeking alternative ways to cultivate a satisfying career while preserving equilibrated work-life balance. According to Wolf (2019), the highly hierarchical model of career progression and trajectory described in earlier middle management research (Hassard et al., 2012; Newell and Dopson, 1996) seems no longer effective. We are entering an era where career orientations of middle managers are becoming much more self-directed and value-based rather than being strongly driven extrinsically (Harris and Ogbonna, 2020). Together, such unprecedented changes call for greater middle manager autonomy, flexibility, and adaptability for championing change (Ates et al., 2017; Wolf, 2019).

These key changes in the business environment and middle managers' needs highlight that mere removal of middle management is an ultra-simplistic solution to organizational woes. Indeed, middle managers are vital for effectuating the innovation outcomes required to navigate dynamic business environments (Schubert and Tavassoli, 2020). It is important that our understanding of middle management co-evolve with its changing roles, processes, and behaviours animating the business environment.

Middle Management of the Future

It should be undeniably clear that middle managers can no longer keep doing what they have been doing – nor can scholars keep theorizing as usual. We agree with the sentiment in research and practice that employees may need fewer shepherds. Consider the trends in OKR and open strategy. Now, top managers no longer need middle managers to relay the strategic communications or break down strategic priorities into unit-level goals. Online communication tools, virtual town halls, crowdsourcing platforms, and dashboards using data from enterprise resource planning software can all do that. Similarly, algorithms-enabled decision support systems take away the need for relying on higher levels for decision-making (Garicano, 2000). In fact, organizations can benefit

from prompt action without waiting for the organizational bureaucracy to churn out a decision. Figure 1 highlights that these changes will likely diminish middle managers' convergent roles, but invite more divergent ones. We argue that current changes and those on the horizon will require greater role redefinition, more elaborate relational processes, and discretionary behaviours.

One Latin adage states: 'times change, and we must change with them'. There is another option too: middle managers can change the time and create the future. As a first step, then, a middle manager's place in the organizational structure provides a unique vantage point from where both strategic direction and operational realities can be appreciated. With the ability to see both 'the forest and the trees', middle managers can scout for new ideas, seize opportunities, and integrate these. Unlike lower-level employees, they command financial resources, know-how and talented employees, which they should swiftly allocate toward the experimentation and execution of new ideas. They should next champion the successful concepts to top management. Changes in the business landscape crave fresh, strategic initiatives yielding a competitive edge for the organization. We thus argue that changes in new ways of organizing, in technology, and in middle managers' needs are likely to deemphasize their usual convergent strategic roles (i.e., synthesizing and implementing) and, instead, redefine these toward divergent strategic roles (i.e., championing and facilitating adaptability).

Second, these changes mean that middle managers' relational processes become more elaborate as they can no longer wield hierarchical position to control the work of subordinates or even sell strategic initiatives to top managers. As organizations and work processes become more flexible, agile and digital (Van Doorn et al., in this issue), middle managers are asked to act as 'connecting leaders' (Jaser, 2021) by being proactive as leaders *and* followers *at once*. The redefinition of their roles toward more divergence invites them to rely not merely on official procedures, status and rules,
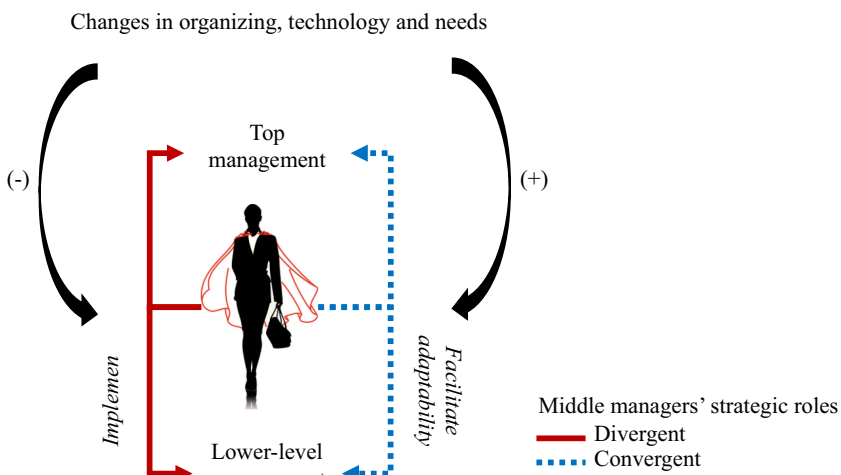

Figure 1. Contemporary changes in the business environment suppress middle managers' convergent roles but emphasize their divergent roles

but also on their practical knowledge of the rules of the game. This will force them to develop their discursive, political and relational competences (Toegel et al., 2022; Whittle et al., 2021) in order to ably give orders *and* constructive feedback, to control *and* motivate their followers often 'at a distance', and to lead their peers *and* follow their superiors.

Third, these changes are demanding more autonomy and discretion in the way middle managers play their roles (Gjerde and Alvesson, 2020). While being more autonomous reinforces middle managers' capacities to adapt and adjust to their business environments, these changes are significantly impacting their behaviours as they become more attentive to their own personal values, emotions, and success definitions (Bardon et al., 2017). Agile management has been providing a new way of working to respond to unforeseen events. However, unpredictability also prompt emotions that play a pivotal role in personal, team and organizational outcomes (Barsade and Knight, 2015; Menges and Kilduff, 2015). Agile management has long advocated the self-managing and self-organizing of teams where the role of the leader is often relegated.

Middle managers can also be replaced by algorithms, automation and AI (Van Doorn et al., in this issue). But algorithmic strength can also be a big weakness in times of crisis and remote working where team members' emotional needs and wellbeing dictate special care. Middle managers can help their teams reappraise crises more positively and serve the collective needs of the team (Renault and Tarakci, 2023). And as a counter current to middle managers' needs for increased autonomy and discretion, they must build their own career trajectories – a further source of stress and anxiety (Gerpott and Van Quaquebeke, 2023; Wolf, 2019). These changes will require an overhaul in the way organizations select, reward, and empower the next generation of middle managers.

Overall, our position is that middle managers remain crucial for organizations – perhaps more than ever! State-of-the-art contributions assembled for this special issue truly provide an important platform for future inquiry.

PAPERS IN THIS COLLECTION

The seven articles featured in this issue represent a rich selection of contributions across perspectives, methodologies, and allied phenomena to advance middle management research (Table I).

The study by Van Doorn et al. 'Opportunity or Threat? Exploring middle manager roles in the face of digital transformation' directly considers how the automated tasks of reporting and budgeting affect middle manager involvement in strategy. The authors distinguish tasks that rely on explicit knowledge from those involving tacit-knowledge cues and oversight. While the automation of the former tasks frees up middle managers' attention toward more strategic issues, automation of the latter consumes more managerial attention that otherwise might be allocated to strategy-making. Here, this study portrays a contextualized picture for this debate: is automation a threat or an opportunity for middle managers (e.g., Acemoglu and Restrepo, 2019, 2020; Bloom

Table I. Studies in this special issue

Authors	Title	Research question	Dominant tradition represented	Research design
Van Doorn, Georgakakis, Oehmichen, and Reimer	Opportunity or Threat? Exploring Middle Manager Roles in the Face of Digital Transformation	How does automation affect middle managers' strategic roles?	Roles	Four waves of surveys, and eight interviews of middle managers. Controllers and financial managers in Germany, Switzerland, Austria
Porck and Van Knippenberg	An Integrative Model of the Role of Structural, Behavioural, and Cognitive Coordination in Intergroup Effectiveness: How Middle Managers Play a Role	How do middle managers' boundary spanning roles for strategy implementation help their role of ensuring effective intergroup collaboration?	Roles	A survey of 188 intergroup dyads between 52 teams, combined with archival data.
Wilden, Lin, Hohberger, and Randhawa	Selecting Innovation Projects: Do Middle and Senior Managers Differ When It Comes to Radical Innovation?	Which project characteristics do middle managers pay attention to when selecting innovation projects?	Processes	A discrete choice experiment, where 180 senior and middle managers in Australia select between innovation projects with varying characteristics.
Greven, Kruse, Vos, Strese and Brettel	Achieving Product Ambidexterity in New Product Development: The Role of Middle Managers' Dynamic Managerial Capabilities	How do middle managers' dynamic managerial capabilities affect their organizations' ambidexterity?	Processes	Two wave surveys of middle managers in small and medium enterprises in Germany. The data were combined with patent and accounting data from various databases.

(Continues)

Table I. (Continued)

Authors	Title	Research question	Dominant tradition represented	Research design
Azambujaa, Islam and Ancelin-Bourguignon	Walling in and Walling out: Middle Managers' Boundary Work	How do middle managers practice boundary work?	Processes	A seven-month ethnographic field study of middle managers across in a Brazilian accounting firm. The data include observations, shadowing and 155 interviews.
Gerpott and Van Quaquebeke	Kiss-Up-Kick Down to Get Ahead: A Resource Perspective on How, When, Why, and With Whom Middle Managers Use Ingratiatory and Exploitative Behaviours to Advance Their Careers	How, when, why, and with whom middle managers engage to get promoted in their careers?	Behaviours	Conceptual, theory building.
Splitter, Jarzabkowski and Seidl	Middle Managers' Struggle over Their Subject Position in Open Strategy Processes	How does widened participation in strategy making affect middle managers' struggles over their subject positions as strategists?	Behaviours	A qualitative case study consisting of 125 semi-structured interviews and non-participant observations of the entire strategy process.

et al., 2014; Brynjolfsson and McAfee, 2014; Raisch and Krakowski, 2021)? The authors unveil that the answer to this question lies in the *nature* of task, where more seasoned managers react differently to the threat of digital automation than do less experienced managers.

Moving from roles to relational processes, the study 'Selecting Innovation Projects: Do Middle and Senior Managers Differ When It Comes to Radical Innovation?' by Wilden et al. highlights how middle and senior managers select radical innovation projects. Applying an experimental approach, the study shows that for radical innovation projects, middle managers focus on project *implementation*, placing more value on innovation characteristics required to complete the project, such as social capital and internal knowledge resources. In comparison, senior managers attend only to *external knowledge* resources that advance radical innovation. In the context of the changes in contemporary organizations discussed above, this knowledge is of particular interest in better selecting relevant projects and managing innovation processes.

The paper 'An Integrative Model of the Role of Structural, Behavioural, and Cognitive Coordination in Intergroup Effectiveness: How Middle Managers Play a Role' by Porck and van Knippenberg focuses on middle managers' strategy implementation role of coordinating across teams. They study the interplay among three key mechanisms of coordination: (1) relying on a formal hierarchical structure, (2) having middle managers span the boundaries between teams to 'bust silos,' and (3) creating a shared understanding of common strategic goals. Through surveys of employees and middle managers at a large service organization in Western Europe, the authors provide evidence for the role of middle management boundary-spanning. Such boundary-spanning is most critical for teams in different divisions. Organizations can ensure their boundary-spanning training not only develops managers' understanding of *how* to span the boundaries, but *when*.

The study 'Achieving product ambidexterity in new product development: The role of middle managers' dynamic managerial capabilities' by Greven et al. expands the concept of dynamic managerial capabilities to the domain of middle managers. These authors focus on middle managers in new product development functions to unpack the influence of human and social capital, plus that of cognition, on product ambidexterity. Through an insightful merger of survey and archival data on 185 middle managers with a three-year lag, they document a complex association between dynamic middle manager capabilities and product ambidexterity. Notably, while product ambidexterity is enabled through *general* human capital (*not* firm-specific human capital) and through both structural and relational dimensions of social capital, the *cognitive* dimension of social capital *negatively* correlates with product ambidexterity, and managerial cognition did not seem to exert any effect. This study further reveals important boundary conditions to dynamic middle management capability by highlighting complex patterns in the context of small and medium enterprises (SMEs), as well as in specific functions (e.g., output-oriented functions). The influence of middle managers on product ambidexterity may be particularly important for SMEs subjected to resource constraints.

'Walling in and walling out: Middle managers' boundary work' by Azambuja et al. opens our understanding of how middle managers navigate the interstices of different groups and structures within and between organizations while liaising amid actors and

their practices. Based on an ethnographic study of a Brazilian audit firm, they examine how middle managers construct, maintain and adjust boundaries during their work. They identify four distinct forms of middle manager boundary work: barricade, façade, taboo and phantom. Their study reveals how middle managers tackle the visibility and permeability of boundaries by deftly shifting from one form of boundary to another according to the context in order to achieve their goals.

The conceptual study by Gerpott and Van Quaquebeke zooms in on middle manager behaviours to get ahead in organizations. Their theorizing on 'Kiss-Up-Kick-Down to Get Ahead: A Resource Perspective on How, When, Why, and With Whom Middle Managers Use Ingratiatory and Exploitative Behaviours to Advance Their Careers' highlights the treacherous position in which middle managers may find themselves – and the rational, albeit potentially undesirable, actions taken by middle managers driven by the need to survive in organizations seeking to replace them. Developing a resource-based framework, the authors study the tandem pattern of middle managers wielding ingratiation toward superiors ('kissing up') while abusing their subordinates ('kicking down') to advance their careers. In the context of organizations that dissolve internal levels of hierarchy or replace them through technology (discussed earlier), we expect that middle managers' perceived career pressure, and its resulting Kiss-Up-Kick-Down phenomenon, may only increase. This is problematic given the negative impact on staff absorbing the kicking-down, especially in the context of elevated societal awareness of employee well-being and mental health. In tight labour markets, organizations failing to address this tendency for middle manager 'kissing-up-kicking-down' behaviours may well find themselves on the vacated side in the war for talent.

The study by Splitter, Jarzabkowski and Seidl 'Middle managers' struggle over their subject position in open strategy processes' looks at how middle managers behave when front-line workers overtake the strategic roles traditionally held by middle managers. They examine middle managers' struggles to maintain their subject position – sense of identity and social agency as strategists – in the context of open strategy processes. Based on a real, longitudinal case study of a participatory strategy-making process in a large financial company, they relate the recursive dynamics where the inclusion of frontline workers into the whole strategy process undermines who middle managers are and what they do. This paper provides a process model conceptualizing how middle managers maintain and reclaim their subject position as strategists in the face of challenges incurred by a widened participation in strategy-making.

ILLUMINATING THE ROAD AHEAD

This introduction to the special issue began by drawing attention to how middle management roles, processes, and agentic behaviours are changing with the unique ways organizations themselves are morphing. Then, we have highlighted the need for our scholarly inquiry to evolve in step with changing organizations to develop a more comprehensive update to our understanding of who middle managers are, what they do, and how they contribute to contemporary organizations. Finally, we have introduced a timely collection arguing that middle managers are more present than ever.

There is still a pressing call to engage middle management research as polarizing views linger as to if, where, and how middle managers fit into our understanding of contemporary organizations. To guide scholarship in this area, we have spotlighted three dominant traditions in middle management research that serve as a useful template to help authors organize their assumptions, theories, and levels of analyses, as well as to delineate research problems and gaps. Inspired by the work specified by the individual studies in this collection, we also highlight some notable directions. We organize these avenues along the roles, processes and behaviours already discussed, notably showcasing opportunity for integration.

First, we recognize middle managers' roles beyond organization strategy and invite a *purpose-driven* understanding of middle management. While Gerpott and Van Quaquebeke have here focused on career advancement as a key motive behind middle managers´ behaviours, they may also be purpose-driven (Gartenberg and Serafeim, 2022). In fact, Gartenberg et al. (2019) have recently shown that middle managers sensing a clear purpose often boost organizational performance. It is time also for us to recognize and advocate the fact that middle managers can no longer ignore current societal and environmental challenges: pandemics, global warming, pollution, inequality, and ongoing discrimination. With their vantage point of both seeing the strategy and sensing operational realities, they can mobilize their organizations to resolve these challenges. We know so little about how middle managers might envision, implement, change, and govern a strategy – be it deliberate or emergent – to address societal and environmental challenges. Therefore, examining how middle managers balance and strive for the dual goals of achieving sustainability and competitive advantage is a critical and urgent research direction. This is a plea for middle management research and practice to guide organizations toward creating a better future.

Second, another promising research path opens when we see middle manager in strategy process using a different, more individualistic lens. Prior research has so far typecast middle managers based on their structural position within the organizational hierarchy, viewing them as a homogenous group within that hierarchy. It is high time to see middle managers as people. These individuals occupying middle management tiers think, feel, and care with all their faults. We invite future research to look at middle managers and recognize their rich diversity to study how the aforementioned contemporary changes affect their identity. Achieving organizational-level goals is a joint task, and means no more organizational silos. Promising research paths lie in better grasping middle managers' leadership style, emotional intelligence, and processes for engaging stakeholders within and beyond the organization as work proves more digitalized, remote, and yet interdependent. Consider the organizational form of Agile Management that is designed for work environments characterized by incessant change and surprise (Renault and Tarakci, 2023). Such environments should be expected to unleash escalated emotions in teams. Still, the self-organizing nature of Agile teams hinders middle managers from enacting their convergent strategic roles. Future research can unearth how middle managers redefine their strategic roles along an affective perspective to manage emotional processes.

Third, Splitter et al. (in this issue) describe the behaviours undertaken by middle managers when side-lined in the strategy process. Prior research has crafted several

theories that apply more realistic assumptions about organizations and their employees instead of pure rationality. For example, the behavioural theory of the firm highlights that organizations and staff are not rational profit maximizers, but strive to satisfy their aspirations (Cyert and March, 1963). The attention-based view recognizes that organizational attention drives behaviour and that such limited attention is allocated firm-wide (Ocasio, 1997, 2011). Laureiro-Martínez et al. (2015) have delved in neuro-psychological processes to better grasp strategic decision-making. One natural avenue for future middle management research is to translate these insights and build new behavioural theories specific to middle managers in modern organizations. To illustrate, Ateş et al. (2020) recently scrutinized how middle managers' (visionary) leadership style can either build or ruin a shared understanding of strategy within a team. Berchicci and Tarakci (2022) have recently documented how middle managers differ in forming performance aspirations. Hence, we join others (Gavetti et al., 2007, 2012; Powell et al., 2011) and call for developing a behavioural theory of strategy from the eyes of middle managers.

Conclusion

As organizations shift and prove more complex, middle managers may be more vital than ever. These changes beckon us to rethink their roles, the mechanisms by which they crucially foster vertical and lateral organizational interactions, and how agentic behaviour is enabled or curbed in new forms of organizing. Each of these studies richly advances the overarching spirit of this special issue in catalysing middle management research in future decades. Each study uniquely contributes to our understanding of middle managers in modern organizations and collectively pave promising new avenues in middle management research and practice.

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