The strategic roles of middle management in contemporary organizations: A systematic review of the literature

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Abstract

Purpose of the study: To investigate the roles of middle management in the strategy process and its results, which support performance in dimensions beyond the economic sphere in a context of contemporary organizations. To update the framework proposed by Wooldridge et al. (2008) to adapt the strategic roles of middle management in the face of multiple demands for results from different stakeholders.

Methodology / approach: To assess the impact of Wooldridge et al. (2008), through a bibliometric analysis, including performance analysis (Web of Science) and scientific mapping (VOSviewer), triangulating with a systematic literature review (RSL), in a mixed methods approach (quantitative and qualitative), to analyze future currents of research in the field.

Originality / relevance: Organizations have become increasingly oriented towards customers and other stakeholders, making middle management responsible for balancing ambiguous demands for results. Wooldridge et al. (2008) consolidated a comprehensive framework involving antecedents, processes, and results from the perspective of middle management in strategy processes, however, in the results dimension, the framework is limited to intermediate results and economic performance and requires updating.

Key findings: Three important clusters were identified in the scientific mapping as new research opportunities. Middle management was challenged to evolve in their roles, and, with light on role theory and the perspective of strategy as process and practice, two new categories of results are proposed in the original framework: operational effectiveness and stakeholder satisfaction.

Theoretical / methodological contributions: In carrying out its roles (facilitator, implementer, defender, and synthesizer) middle management can generate results at an operational level that generate satisfaction results for stakeholders, in addition to merely economic results.

Social / management contributions: the study revealed middle management as an important player in generating satisfaction results for stakeholders.

Keywords: middle management, stakeholders, VOSviewer, bibliometric analysis, framework de Wooldridge et al.(2008)

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Resumo

Papéis estratégicos da média gerência nas organizações contemporâneas: Uma revisão sistemática da literatura

Objetivo do estudo: Investigar os papéis da média gerência no processo de estratégia e seus resultados, que favoreçam o desempenho em dimensões além da esfera econômica em um contexto de organizações contemporâneas. Atualizar o *framework* proposto por Wooldridge et al. (2008) para adaptar os papéis estratégicos da média gerência frente à múltiplas demandas por resultados de diferentes *stakeholders*.

Metodologia/abordagem: Investigar o impacto da publicação de Wooldridge et al. (2008), por meio de uma análise bibliométrica, incluindo análise de desempenho (Web of Science) e mapeamento científico (*VOSviewer*), triangulando com uma revisão sistemática da literatura (RSL), numa abordagem de métodos mistos (quantitativo e qualitativos), para análise de correntes futuras de pesquisas no campo.

Originalidade / Relevância: As organizações têm se tornado cada vez mais orientadas a clientes e a outros *stakeholders*, fazendo com que a média gerência seja responsável pelo equilíbrio entre demandas ambíguas de resultados. Wooldridge et al. (2008) consolidaram um *framework* abrangente envolvendo antecedentes, processos e resultados da perspectiva da média gerência em processos de estratégia, contudo, na dimensão de resultados, o *framework* fica limitado a resultados intermediários e desempenho econômico, carecendo de atualização.

Principais resultados: três principais *clusters* foram identificados, no mapeamento científico, como novas oportunidades de pesquisas. A média gerência foi desafiada a evoluir em seus papéis e, com luz na teoria dos papéis e na perspectiva da estratégia como processo e prática, duas novas categorias de resultados são propostas no *framework* original: efetividade operacional e satisfação dos *stakeholders*.

Contribuições teóricas / metodológicas: na execução de seus papéis (facilitador, implementador, defensor e sintetizador) a média gerência é capaz de gerar resultados operacionais que geram resultados de satisfação aos *stakeholders*, além de meramente resultados econômicos.

Contribuições sociais / para a gestão: o estudo revelou a média gerência como um importante ator na geração de resultados de satisfação aos *stakeholders*.

Palavras-chave: média gerência, *stakeholders*, *VOSviewer*, análise bibliométrica, *framework* de Wooldridge *et al.*(2008)

Resumén

Roles estratégicos de los mandos medios en las organizaciones contemporáneas: Una revisión sistemática de la literatura

Propósito del estudio: Investigar los roles de los mandos intermedios en el proceso estratégico y sus resultados, que sustentan el desempeño en dimensiones más allá de la esfera económica en un contexto de organizaciones contemporáneas. Actualizar como el marco propuesto por Wooldridge et al. (2008) pueden adaptar los roles estratégicos de los mandos intermedios frente a múltiples demandas de resultados de diferentes *stakeholders*.

Metodología/enfoque: Investigar el impacto de la publicación de Wooldridge et al. (2008), a través de un análisis bibliométrico, que incluye análisis de desempeño (Web of Science) y mapeo científico (VOSviewer), triangulando con una revisión sistemática de la literatura (RSL), en un enfoque de métodos mixtos (cuantitativos y cualitativos), para el análisis de futuras investigaciones. corrientes en el campo.

Originalidad / Relevancia: Las organizaciones se han orientado cada vez más hacia los clientes y otros *stakeholders*, haciendo que los mandos intermedios sean responsables de equilibrar las demandas ambiguas de resultados. Wooldridge et al. (2008) consolidaron un marco integral que involucra antecedentes, procesos y resultados desde la perspectiva de los mandos intermedios en los procesos estratégicos, sin embargo, en la dimensión de resultados, el marco se limita a resultados intermedios y desempeño económico y requiere actualización.

Principales resultados: En el mapeo científico se identificaron tres conglomerados mas importantes con nuevas oportunidades de investigación. Los mandos medios fueron desafiados a evolucionar en sus roles y con luz sobre la teoría de roles y la perspectiva de la estrategia como proceso y práctica, se proponen dos nuevas categorías de resultados en el marco original: efectividad operativa y satisfacción de los *stakeholders*.

Aportes teóricos / metodológicos: En el desempeño de sus roles (facilitador, implementador, defensor y sintetizador) los mandos intermedios son capaces de generar resultados a nivel operativo que generen resultados de satisfacción para los *stakeholders*, además de resultados meramente económicos.

Aportes sociales / de gestión: el estudio reveló que los mandos intermedios son un actor importante en la generación de resultados de satisfacción para los *stakeholders*.

Palabras clave: mandos intermedios, stakeholders, VOSviewer, análisis bibliométrico, marco de Wooldridge et al. (2008)

Introduction

Middle management constitutes a group of individuals who is also known as middle managers. Many different conceptions of middle management have been proposed and some authors base their descriptions on actual positions occupied in organisational charts: "any manager below the CEO and one level above line professionals and workers" (Huy, 2001: 72); "managers who operate under an organisational hierarchy" (Floyd & Wooldridge, 1992: 157); others describe it based on operating functions: "they manage a group of team leaders" (Osterman, 2008: 5). According to Wooldridge, Schmid and Floyd (2008), middle management's distinctive characteristic is not their position in organisational charts: rather, what makes middle management unique is the access they have to Top Management Teams (TMT), combined with their knowledge of operations. This combination enables them to function as mediators between organisation's strategy and daily activities (Nonaka, 1994).

Middle managers are regarded as essential and strategic players, in that they take part in the conception and in the execution of a strategy (Hutzschenreuter & Kleindienst, 2006). They operate as an interface between the company and its environment; they simultaneously occupy a unique position in the network, connecting executives and supervisors, reconciling ascending and descending demands within organisations (Heyden, Wilden, & Wise, 2020). Their roles are multiple and complex: they have to possess creative and innovative skills; they are directly

responsible for increases in productivity; problem solving; operating results; communication among the many hierarchical levels; bringing satisfaction to employees (Zimmermann, 2023). They know what motivates employees and what enable employees to improve effectiveness of any attempt to introduce a change (Currie & Procter, 2005; Floyd & Wooldridge, 1992, 1997; Moss Kanter, 1982).

Middle management is attracting increased attention in surveys on strategy since the 1990s (Dutton & Ashford, 1993; Nonaka, 1991; Westley, 1990;). Along the years 2000, interest in the subject grew following the publication of work by Wooldridge et al. (2008), who presented state-of-the-art research on middle management from the strategic point of view, taking into consideration antecedents, processes and outcomes, and suggesting lines for future research. Since then, the body of knowledge on middle management proliferated. Recent articles continue to discuss roles of middle management, such as involvement with the top administration (Heyden, Sidhu, & Volberda, 2018), diverging strategic behaviours (Tarakci, Ateş, Floyd, Ahn, & Wooldridge, 2018; Vaz, Raes, & Heyden, 2022); management of crises (Heyden, Wilden, & Wise, 2020); ambiguity and conflict (Splitter, Jarzabkowski, & Seidl, 2021); corporate entrepreneurship and performance from a stakeholders' approach (Mair, 2017); responsibility for sustainability (Pelster & Schaltegger, 2021).

However, although Wooldridge et al. (2008) have contributed to a broader understanding of change and strategy formulation in complex organisational environments, from the point of view of middle management, their model does not fully explain the relationship to results. On the contrary, the results suggested by the model are merely intermediary and refer to economic performance. In other words, they emphasise results focusing exclusively on shareholders, while organisations become increasingly concerned with all stakeholders. It is clear now that organisations are becoming more and more client-oriented (Rouleau, Balogun, & Floyd, 2015) and middle management, in its daily activities, has to find out ways of accommodating the control logic of organisations to the operational flexibility necessary in such contexts (Sharma & Good 2013). Middle management is promoting a balance between ambiguous demands for results coming both from major corporate centres and from operational "peripheries" (Regnér, 2003), therefore it needs to find different ways of accommodating environmental, social and economic results. Such practice is inherent in the concept of "salience", based on the "level of priority managers assign to conflicting demands from stakeholders" (Mitchell, Agle, & Wood,1997, page 854).

In addition, both academics and professionals have had doubts as for praising or criticising middle management (Tarakci et al., 2023). Much have been already discussed

whether middle management is "a dynamo or a dinosaur" (Floyd & Wooldridge, 1994) and, more recently, whether they are "heroes or villains" (Tarakci et al., 2023). Middle management positions are, on the one hand, regarded as unnecessary bureaucracy within organisational hierarchies by the recent wave of restructuring in large technology companies such as Meta and Google (Tarakci et al., 2023). On the other hand, as demonstrated by Github, a largely praised flat organisation, intermediate management layers have been introduced to sustain its exponential growth (Burton et al., 2017).

In fact, over the last decades, the role of middle management changed, because the constant reengineering waves sweeping companies, the increase in the automation of tasks and the impact of information technology (IT) drastically reduced the number of middle managers in many organisations (Hermkens, 2021). There are, therefore, many reasons to concentrate attention on the strategic role of middle management in contemporary organisations, which are now facing a complex set of new issues and are often required to make more using less resources (Balogun 2007; Rouleau et al., 2015). Finally, despite popular belief in no-boss organisations, some companies noticed that coordination problems may overcome the benefits of decentralisation (Foss & Klein, 2022). Maybe this is the reason middle management is re-emerging in a wide variety of contexts (Monteiro & Adler, 2022), including in voluntary organisations (Florian, 2018), communes (Chen, 2009), terrorist organisations (Shapiro, 2015), start-ups (Baron et al., 1999) and open-code communities (O'Mahony & Ferraro, 2007). Thus, middle management roles, processes and behaviours continue to occupy a critical place in theories of organisations (Tarakci et al., 2023).

These questions suggest opportunities for new approaches to the subject, since the roles of middle management have been evolving vis-à-vis the demands of society and the increase in the complexity of organisations. This research was then led to face another question: how can the framework proposed by Wooldridge et al. (2008) adapt the strategic roles of middle management in the face of multiple demands for results coming from different stakeholders?

To answer this question, this article analyses the impact of the publication of the work by Wooldridge et al. (2008) over the period from 2008 to 2022, adopting a mixed-methods research strategy. The research began by a bibliometric analysis (Donthu et al., 2021), which is a variation of systematic reviews of literature (Lim et al., 2022) involving the application of quantitative and statistic techniques (for instance, descriptive statistic analysis or performance analysis, and cluster analysis or scientific mapping) to bibliographic data, such as publications and quotations (Donthu et al., 2021; Mukherjee et al., 2022). In this exploratory work, data were collected from the Web of Science (WoS) data base and the VOSviewer software

application was selected to objectively manipulate, organise, analyse and report bibliometric data. The analysis was completed by means of a manually-conducted systematic review of the literature (SRL) performed on a refined base containing less data, in an attempt to qualitatively investigate the roles of middle management in the strategic process and its results, which facilitate the performance beyond the economic realm.

In order to more accurately lay the foundations of this research, an explanatory text is provided on the theory of roles, especially with regard to its application to contexts where middle managers are active in strategic practices and processes. Subsequently, methodological procedures for the systematic review of the literature are described, as well as the results of the analysis of the final reference database used. Contributions to the academic field and to practitioners working for organisations are presented at the end, together with limitations and suggestions for further research.

Contexts and consequences of middle management strategic roles

A role is a set of behavioural expectations that people hold with regard to other individuals in a given context (Katz & Kahn, 1978; Floyd & Lane, 2000). Expectations may be openly declared in terms of demands and assessment of specific formally-described behaviours (Biddle, 1979; 1986), or may assume the form of secretly-kept prescriptive norms, descriptive beliefs and priorities. Expectations regarding a given role do not come out of the blue, but rather evolve in the context of other interdependent behaviours and expectations that make up a social system (Floyd & Lane, 2000). The observable behaviours of any given role reflect the underlying conceptual structure of such social system (Biddle, 1979), and its mindset and dominant logic (Prahalad & Bettis, 1986). Individuals play several roles in many contexts, but the roles that emerge within organisations are different from those emerging in other social systems (Katz & Kahn, 1978), especially because they are profit-oriented (Floyd & Lane, 2000).

The strategic roles of middle managers and their behaviours continue to attract interest because they are important agents of change, and involve ascending (superiors), descending (supervisors) and lateral (peers|) activities. They are at the centre of strategic renewal (Floyd & Lane, 2000; Wooldridge & Floyd, 1990; Wooldridge et al., 2008), bring leadership to the strategic process and look for new initiatives beyond the limits of current strategies, in what is known as diverging strategic behaviour (Floyd & Lane, 2000; Mirabeau & Maguire, 2014; Tarakci et al. 2018).

According to Floyd and Wooldridge (1992), middle management may influence organisational performance by playing four strategic roles. Firstly, that of "champions",

supporting alternatives, when middle management engages in persistent and persuasive communication of proposals that provide top management with new capabilities, or enable it to use existing capabilities in different ways. Secondly, that of "facilitators", stimulating solution of multifunctional problems, experimentation and generation of ideas, and creating arrangements that increase organisational flexibility. Thirdly, that of "synthesisers", finding out the meaning of events, connecting ideas to strategic issues and proposing questions to TMTs and other people in the organisation. Finally, that of "implementers", aligning unit activities with the selected strategy. These four roles provide "a structure that combines ascending and descending influences with behaviours that, on the one hand, integrate and support strategies and, on the other hand, diverge from the official strategy" (Floyd & Wooldridge 1996, p. 42).

Van Rensburg, Davis and Venter (2014) added to middle management the new roles of "advocacy" and "improvement of operational performance", in addition to the conventional elements of strategy implementation, and the roles of "performance management" and "stimulating conformity" to the role of descending influence.

However, the roles of middle management may involve ambiguity and conflict, due to contradictory expectations of major stakeholders concerning their behaviour (Kahn et al., 1964). According to Floyd and Lane (2000), market demands are a natural mechanism that regulates such role conflicts, leading middle managers to champion alternatives, when the market requires the creation of competences, or to implement strategies or even to replicate current competences.   For instance, in market-crisis situations, the TMT may benefit from allowing for radical change initiatives conducted by middle management (Heyden et al., 2020). However, other researches contradict this "functionalist" approach of roles, drawing attention to the importance of internal contexts. Currie and Procter (2005), for instance, state that there are limiting factors to a more strategic role of middle managers, related to the context of professional bureaucracies. Similarly, Mantere (2008) demonstrates that the relational context close to TMT may function as a factor that limits or enables the strategic agency of middle management. Based on the considerations above, it may be said that the role expectations and conflicts related to the middle management must incorporate elements from both the internal and external contexts of organisations.

In particular, the strategic roles of champions and facilitators diverge from the formal expectations of TMTs, enabling middle managers to act as "brokers" that go beyond organisational limits and link internal and external stakeholders (Shi, Markoczy & Dess, 2009; Pappas & Wooldridge, 2007). In this respect, Elliott, Day and Lichtenstein (2020) studied how middle management and external stakeholders influence the strategic planning process of the

United Kingdom police. They unveiled an indirect influence of the strategic planning process on the performance, mediated by the diverging activity of middle management and by the relevance of external stakeholders. This "salience" provides a means of evaluating how middle managers decide, demand, conciliate and prioritise the needs of different stakeholders (Mitchell, Agle and Wood, 1997).

The narrative review of the literature conducted by Wooldridge et al. (2008) had already recognised the many antecedents of middle management's strategic roles, external both to organisations and to individuals, groups and the whole internal context of the organisation. But the model proposed by the authors proved limited over the years, because it contemplated only abstract intermediate outcomes that result from processes in which the strategic roles of middle management already take part, such as, for instance, the understanding of and commitment of people to the strategy, to the conduction of changes, to organisational learning and to the development of skills (Wooldridge et al. (2008). In the long run, these factors would eventually interfere with economic performance, as illustrated by Figure 1.

Figure 1

Middle Management's Perspective of Strategy Processes
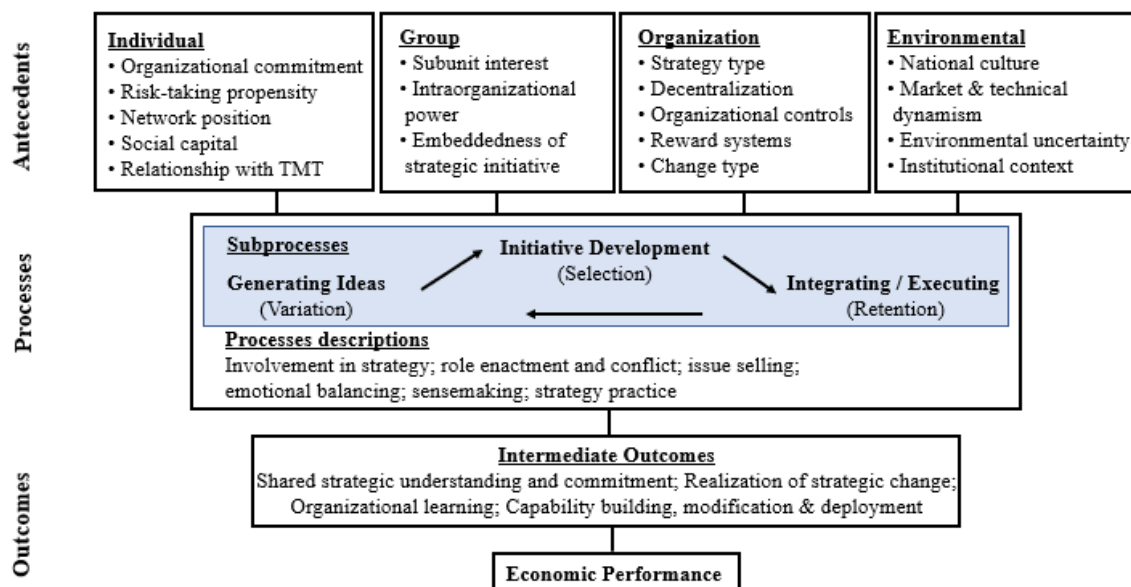
Source: Wooldridge el al. (2008), original in Portuguese translated by authors (2024)

Mair (2017) states that few studies explored the strategic role of middle management and its implications for the many dimensions of performance, and adopts, in her article on the roles of middle management in corporate entrepreneurship, a stakeholders' approach that included dimensions such as client and employee satisfaction. Ghlichlee and Bayat (2021), on the other hand, studied the engagement of collaborators with the idea of client-orientation, although they have not measured client satisfaction. Similarly, Olsen and Solstad (2020) stated that employee satisfaction is another duty of middle management, which has to deal with unsatisfied employees and solve problems, while rewarding employees devoted to keep their motivation. Pelster and Schaltegger (2021) say that middle management is responsible for putting into practice the decisions made by the TMT in matters related to social and environmental activities within organisations.

Based on the concept of "salience" associated with the attempt to reconcile multiple outcome expectations from different stakeholders, it is possible to infer the potential incorporation of two categories of results into the model introduced by Wooldridge et al. (2008), namely "stakeholder satisfaction" and "operational effectiveness". The former would allows us to evaluate middle management's ability to mediate different, potentially contradictory, institutional demands, while the latter would be linked to the "ability to achieve the results expected" by these stakeholders (Sharma, Sharma, & Agarwal, 2016), such as employee

morale, productivity, quality of production and delivery performance (García-bernal & Ramírez-alesón, 2017; Kakkar, Dash, Vohra, & Saha, 2020; Samson & Terziovski, 1999; Shafiq, Lasrado, & Hafeez., 2017), that may contribute to a multidimensional viewpoint of operational processes within an organisation. These opportunities for advancement in the organisation of the literature on middle management and strategy have guided the systematic review herein reported.

Methodological Procedures

Bibliometric survey is a variation of systematic reviews of literature (Lim et al., 2022) that involves the application of quantitative and statistic techniques (for instance, descriptive statistic analysis or performance analysis, and cluster analysis or scientific mapping) to bibliographic data, such as publications and quotations (Donthu et al., 2021; Mukherjee et al., 2022). Differently from other variations of literature review, which are conducted manually (for instance, thematic reviews) and, therefore, may be more subjective and less encompassing (for instance, dozens of articles), reviews that apply bibliometric techniques benefit from the use of quantitative and statistic data (hundreds of articles) and technology, such as databases and software applications boosted by big data and artificial intelligence (Mukherjee et al., 2022).

According to Donthu et al. (2021), bibliometric analyses became very popular in the area of business research over the last years. This popularity may be attributed to the advance, availability and accessibility of bibliometric software, such as Gephi, Leximancer and *VOSviewe* and of scientific data bases such as Scopus and Web of Science, and to interdisciplinary influence from information technology applied to business research science.

Still more important, the popularity of bibliometric analysis in business research is not a passing trend, but rather an indication of its ability to deal with large volumes of scientific data and to produce high impact on research.

The methodological procedures herein defined involve bibliographic analysis (Donthu et al., 2021), with performance analysis and science mapping. This is next complemented by a systematic review of the literature (SRL) followed by data interpretation using sense-making techniques (Lim & Kumar, 2024) to transform merely descriptive data into proactive insights that supply information to future researches targeted at field practice and theory (Mukherjee et al. 2022). Thus, a mixed method is adopted (quantitative and qualitative) to incorporate qualitative analyses into the research, thus enabling a deeper understanding of contexts and underlying meanings of quantitative data, resulting in a more holistic and robust view of phenomena under study. Figure 2 presents an overview of the methodological path.

The bibliographic analysis herein developed followed recommendation of authors Donthu et al. (2021) and goes along 4 steps, presented and schematically pictured in Figure 2. These 4 steps are explained below:

Step 1: Definition of objective and scope of the bibliometric study

The objective of this work is to study an event (Mukherjee et al., 2022), the impact of publication of an article by Wooldridge et al. (2008) over the years 2008 through 2022, to be able to answer the following research question: how does the framework proposed by Wooldridge et al. (2008) adapt the strategic roles of middle managers in the face of multiple demands for results coming from different stakeholders? The objectives of the bibliometric study are related to a retrospective approach of the performance (authors, institutions, countries, periodical) and the science of strategy processes. As for the scope of the study, the appropriate number of articles to ensure adequate bibliometric analysis was defined as above 300, as recommended by Donthu et al. (2021). Based on these selection criteria, the initial sample of 335 quotations of Wooldridge et al. (2008) was considered appropriate to proceed with the bibliometric analysis, including performance analysis and scientific mapping.

### Step 2: Selection of bibliometric analysis techniques

The selection of bibliometric analysis techniques consisted in a review of the past, present and future strategic roles of middle managers in the face of multiple demands coming from different stakeholders. To reach this objective, the plan included an analysis of co-quotation (past), bibliographic coupling (present) and analysis of co-words – for instance, words that are outstanding in potential implications and guidelines for future study of complete texts (future). To unveil themes in general, and during specific periods, the latter (that is,, analysis of co-words) was used in combination with key words defined by the author to enrich the analysis of the two former ones (that is, analysis of co-quotation and bibliographic coupling). A performance analysis (total number of publications and quotations, authors, journals and impact factor) of the selected articles was also planned, a technique that enables identification of both impact and productivity. Later, this performance analysis will be descriptively (for instance, what it is) and analytically (for instance, what it means) reported.

Step 3: Collection of data for bibliometric analysis

The third step is to collect data as planned in step 2.

Figure 2

The methodological path adopted
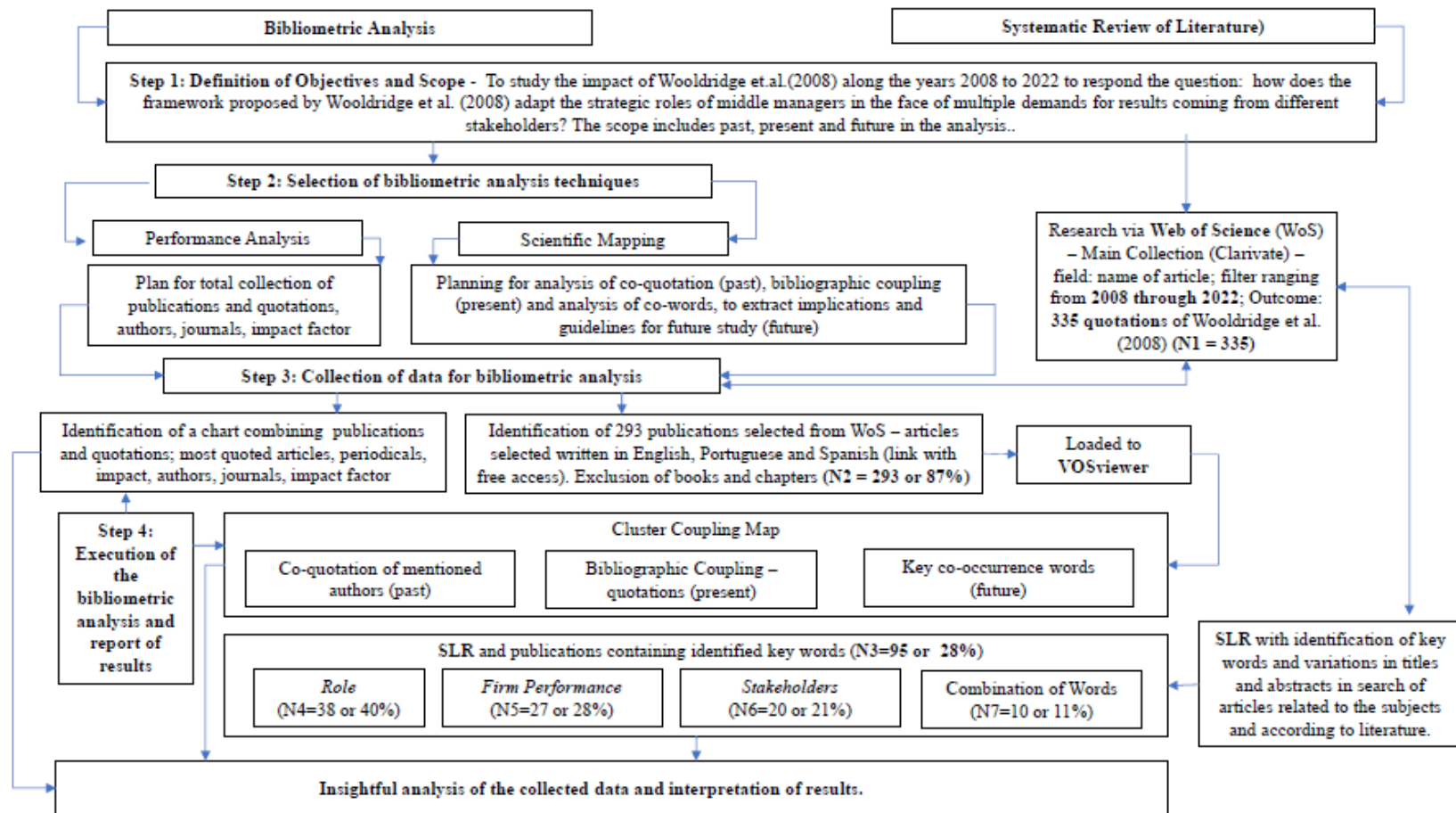
Source: prepared by the authors (2024)

The data collection was chosen according to recommendation from Donthu et al. (2021), namely that of using one single data base to make consolidation easier and therefore reduce risk of human error by duplication of files when loading the software. The collection of data started by a search in the opening screen of WoS (document tab, field: All Fields, typing the title of the article: "The middle management perspective on strategy process: Contributions, synthesis, and future research"). After finding the quotes related to the article, a scanning process was launched starting in 2008 (the year Wooldridge et al. launched the publication) and ending in 2022 (query made on 25 February 2023). Initially, an Excel spreadsheet was created using information extracted from WoS (titles, authors, journal, year, DOI, total quotations, yearly average) and performance indicators formulated based on WoS data base with 335 quotations. This file was exported using a table-limited file (all selections) for later load into the software and also exported via Excel spreadsheet.

Initially, were identified the periodicals that published the largest number of articles that quoted Wooldridge et al. (2008), the authors who have mostly quoted the work of Wooldridge et al. (2008), and the total publications in the last few years. The behaviour of the publications along the last few years and how many times these articles have been mentioned have also been observed. In the articles who quoted Wooldridge et al. (2008), we also observed the category or nature of the journals who published them. Next, the articles that quoted the work of Wooldridge et al. (2008) whose repercussion on the scientific community was significant were analysed according to the criterion of choosing up to 100 quotes, as shown in Table 1.

A data base including all articles that quote Wooldridge et al. (2008) was then created (free access in the CAFE portal), and links are available. This was made recovering the publications listed in the main collection of Web of Science in the English, Portuguese or Spanish languages (easier languages for the authors) and excluding books and book chapters. Next, the data base was purged by the authors and full files of these quotations, key words and abstracts were obtained.

Based on these selection criteria, the initial sample of 335 quotations of Wooldridge et al. (2008) was reduced to 293 articles (87%). This number lies on the limit recommended by Donthu et al. (2021) but, considering the initial number of quotations, the authors decided that the initial number meets the proposed criterion (more than 300 quotations) and proceeded with the bibliometric analysis.

The final data base of 293 articles was then loaded into the VOSviewer software for a bibliographic coupling analysis (Donthu et al., 2021; Peixe & Pinto, 2022) and development of this article, using: titles, name of authors, affiliation, institution, countries, quotations,

periodicals, DOI, references, index, key words, abstracts, full texts. The VOSviewer software creates maps for bibliometric network analysis based on data extracted from data bases such as the WoS. The next stage was the extraction of a map with the clusters (identified by different colours) taking into consideration all 293 articles loaded to VOSviewer.

Step 4: Execution of the bibliometric analysis and report of results

Later, VOSviewer produced a map of co-quotations of the mentioned authors, the bibliographic coupling – of authors inside each cluster -, and also the map of co-words with colour identification in each cluster. This ended the data collection for the bibliometric analysis, and the authors considered the data as sufficient for performance analysis (obtained from the WoS data base) and for scientific mapping (coupling maps) extracted from VOSviewer.

An additional step was the conduction of a SLR in a classical and manual way, which was useful also as a third reference relative to the software and the objectives of the study. The data base constructed with information from the WoS relevant for this research, according to the literature and objectives of this research, was then analysed.

In this data base we tried to identify all articles containing the word 'role' in their titles in order to detect whether the roles of middle management continue to be researched. Subsequently, we looked for the expression "firm performance", to observe performance of the business and its variations, because middle managers are being increased challenged to obtain results in different contexts. In order to widen the search for articles even more, the authors opened the search for terms that had any relation to the performance of a company and to the activities of middle managers, such as "organisational performance"; "manufacturing"; "productivity"; "outcomes"; "lean manufacturing". Lastly, the search targeted at the word 'stakeholders' and any variations that might have any relation to stakeholders such as "sustainability"; "corporate social responsibility" ("CSR"); "customer"; "employee"; "environmental"; "ESG – environmental, social and governance", according to the authors.

Afterwards, simultaneous occurrences of these words in the key words mentioned and in abstracts were analysed to detect articles that addressed the themes, although not explicitly in their titles. The search identified 95 articles from the initial 335 (28%), whose abstracts were read to substantiate the discussion of results. All these surveys provided information useful for answering this research's question: how does the framework proposed by Wooldridge et al. (2008) adapt the strategic roles of middle managers in the face of multiple demands for results coming from different stakeholders? In the face of this question, this article analyses, using bibliometric analysis and systematic review of the literature (SRL), the impact of the publication of Wooldridge el al. (2008), in an attempt to investigate the roles of middle

managers in the strategic process and its results, roles that facilitate performance in dimensions beyond the economic realm.

After the stage of data collection, we launched the analysis of the collected data, presented and discussed below. To advance our understanding of the bibliometric analysis results and the SLR, we added a sense-making approach to our interpretation (Lim & Kumar, 2024). By making it, we delineated an encompassing and differentiated methodology that transcends the conventional description of results, thus promoting a deeper involvement with the complexity inherent in bibliometric data. In addition, we have also identified and elaborated the strengths and limitations of the bibliometric analysis based on sense making, in order to stimulate academic debate and innovation in the field.

Results And Discussion

Bibliometric analysis and systematic review of the literature (SRL)

The results of the bibliometric analysis and the systematic review of the literature (SRL) indicate that interest in the theme of middle management is contemporary and growing. Of the 335 articles identified, 180 publications occurred in the years 2018 through 2022. That is to say that 54% of all articles are relatively recent. Figure 3, automatically created in the WoS, demonstrates this growth in publications (left axis) and quotations (right axis).

Figure 3

Publications and Quotations from Wooldridge et al. (2008)

Publications   Publications   Quotations   Quotations
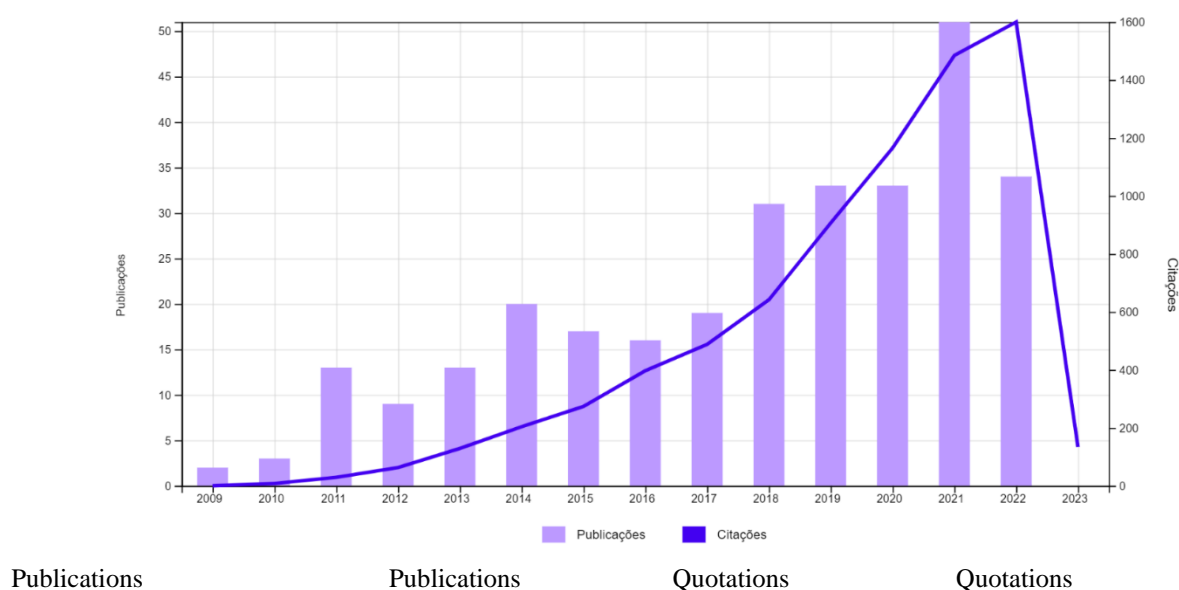
Source: WoS – query made by the authors on 25 February 2023 (does not include 2023)

Articles that mentioned the work of Wooldridge et al. (2008) and that had wider repercussion in terms of later quotations are presented in Table 1. Articles that exhibited up to 100 quotations (query made on 25 February 2023) were given higher priority.

Table 1 depicts the diversity of themes and indicates an opening to research on the interface between middle management and top administration along the strategy process (for instance: Raes, Heijltjes, Glunk, & Roe, 2011) and to communities that regard strategy as practice (strategy-as-practice – SAP, such as, for example: Jarzabkowski & Balogun, 2009; Rouleau & Balogun, 2011). There were also articles that, in recent years, have become prominent for combining strategy processes with SAP (such as, for example, Mirabeau & Maguire, 2014; Vaara & Lamberg, 2016; Burgelman et al., 2018). With regard to said combination, Burgelman et al. (2018) state that this is a particularly appropriate moment to explore practical intersections (SAP) and strategy processes, combining them in a flow of joint research known as "strategy as process and practices" – SAPP. In 2018, a call was issued for publications adopting this viewpoint.

The most quoted articles also present different approaches regarding strategies. Some articles focus more intensely on the execution of deliberate strategies (for instance: Sirmon, Hitt, Ireland, & Gilbert, 2011; Chadwick, Super, & Kwon, 2015; Wolf & Floyd, 2017). Others address processes and practices that presuppose both emerging and "ephemeral" strategies (for instance, Mirabeau & Maguire, 2014). This demonstrates how the approach to middle management may widely and diversely contribute to the literature on strategy. These topics will be more deeply discussed below in the presentation of scientific mappings.

Figure 3 and Table 1 present the performance analysis planned in step 2 of the methodological path of the bibliometric study, highlighting a view of the productivity and the impact of the publications (Donthu et al., 2021) that quoted Wooldridge el al. (2008).

The results of the mapping obtained from the 293 articles processed by VOSviewer are presented in figures 4 to 6. Each node of the network represents an entity; for example, article, author, country, institution, key word, periodical etc. The size of the node indicates the occurrence of the entity (that is to say, how many times the entity occurred).

Table 1

Articles that quoted Wooldridge et al. (2008) with larger numbers of quotes (WoS)

Title	Authors	Journal	Impact Factor SJR 2022	Year	Quotations	Abstract
Resource Orchestration to Create Competitive Advantage: Breadth, Depth, and Life Cycle Effects	Sirmon, D. G.; Hitt, M. A.; Ireland, R. D.; Gilbert, B. A.	Journal of Management	7.21	2011	820	Authors debate how an emerging stream of researches, known as resource orchestration, has the potential to broaden the understanding of the theory based on resources (RBV), explicitly addressing the role of managers in the structuring, grouping and leveraging of the resources of a company.
Middle Managers, Strategic Sensemaking, and Discursive Competence	Rouleau, L.; Balogun, J.	Journal of Management Studies	4.49	2011	264	It examines the strategic roles of middle management to attract people from different organisational levels to change, using language, symbols and contextualisation.
Resource Orchestration in Practice: CEO Emphasis on SHRM, Commitment-based HR systems, and Firm Performance	Chadwick, C; Super, J. F.; Kwon, K.	Strategic Management Journal	8.5	2015	223	Empirical research conducted with 190 Korean companies highlights the importance of middle management in the implementation of the strategic emphasis of top management, empirically supporting a fundamental principle of arguments in favour of resource orchestration.
The Interface of the Top Management Team and Middle Managers: a process model	Raes, A. M. L.; Heijltjes, M. G.; Glunk, U.; Roe, R. A.	Academy of Management Review	10.69	2011	188	The exchange of information and the mutual influence are proposed as key mechanisms in the TMT / middle management interface, which are important for quality of strategic decisions and commitment to implementation.
Functional Top Management Team Members: A Review, Synthesis, and Research Agenda	Menz, M.	Journal of Management	7.21	2012	171	Based on literature review, the author discusses deficiencies and gaps and presents an agenda for future researches that contributes to our understanding of functional members of the TMT.
Managing Strategic Change: The Duality of CEO Personality	Herrmann, P.; Nadkarni, S.	Strategic Management Journal	8.5	2014	141	Research based on data on 120 small- and average-sized companies in Ecuador. Using a five-factor model (FFM) of personality, two distinct roles of a CEO's personality in the management of strategic change have been delineated: launching the strategic change and determining the effects of performance on the implementation of the strategic change.

| Title	Authors	Journal	Impact Factor SJR 2022	Year	Quotations	Abstract
Reversal of Strategic Change	Mantere, S.; Schildt, H. A.; Sillince, J. A. A.	Academy of Management Journal	10.91	2012	124	Longitudinal case study that addresses the phenomenon of reversion of strategic change. It points to the historical continuity of "construction of meaning" and suggests caution with the popular view that managers must destroy the organisational meaning to facilitate the conduction of strategic change.
Employee Judgments of and Behaviours Toward Corporate Social Responsibility: A Multi-Study Investigation of Direct, Cascading, and Moderating Effects	Vlachos, P. A.; Panagopoulos, N. G.; Rapp, A. A.	Journal of Organizational Behavior	3.8	2014	123	Study, based on the involvement of middle management and on leadership theories, shows that leadership styles and involvement of managers in the implementation of a defined strategy may strengthen or weaken these cascade effects. This highlights the important role of middle management as "linking points" in the process of implementation of the CSR strategy.
From Autonomous Strategic Behaviour to Emergent Strategy	Mirabeau, L.; Maguire, S.	Strategic Management Journal	8.5	2014	122	This theoretical study analyses the role of "strategic articulation practices" in the formation of emergent strategies and explains why some autonomous strategic behaviours become "ephemeral" and disappear instead of enduring to become emergent strategies.
Behaviour of Internal Stakeholders in Project Portfolio Management and its Impact on Success	Beringer, C.; Jonas, D.; Kock, A.	International Journal of Project Management	2.33	2013	119	Empirical study on 197 project portfolios that investigates the effect of engagement intensity (IoE) of portfolio internal stakeholders o9n the success of the project portfolio.
Cross-cultural Differences in Compensation Level and Inequality across Occupations: A Set-theoretic Analysis	Greckhamer, T.	Organization Studies	4.54	2011	109	Configurations of cultural, development and welfare state dimensions are sufficient for a high level of remuneration and inequality of remuneration among four professions comparatively analysed in 44 countries.
Time in Strategic Change Research	Kunisch, S.; Bartunek, J. M.; Mueller, J; Huy, Q. N.	Academy of Management Annals	15.63	2017	107	The study critically reviews the existing body of knowledge on strategic change adopting a temporal perspective, and proposes six paths for the advance of future researches: (1) temporality, (2) players, (3) emotionality, (4) tools and practices, (5) complexity and (6) tensions.
Taking Historical Embeddedness Seriously: Three Historical Approaches to	Vaara, E.; Lamberg, J-A.	Academy of Management Review	10.69	2016	106	The article demonstrates how, in its specific forms, approaches and historical methods may contribute to our understanding of different forms and variations of

Title	Authors	Journal	Impact Factor SJR 2022	Year	Quotations	Abstract
Advance Strategy Process and Practice Research						strategic processes and practices, of the historical construction of organisational strategies and of historically-constructed strategic agency.
The Practice and Process of Delivering Integration through Strategic Planning	Jarzabkowski, P.; Balogun, J.	Journal of Management Studies	4.49	2009	104	The article is based on a strategic planning case in a multinational company trying to develop higher strategic integration throughout Europe and concludes that integration emerges from active negotiations and commitment by the parties.
Strategic Planning Research: Toward a Theory-Driven Agenda	Wolf, C.; Floyd, S. W.	Journal of Management	7.21	2017	102	Based on a set of data including 51 observations of meetings, the article examines how strategic meetings are involved with the stabilisation of existing strategic guidelines or with the proposal of variations that cumulatively generate changes to strategic guidelines.
Strategy processes and practices: Dialogues and intersections	Burgelman, R.A.; Floyd, S. W.; Laamanen, T.; Mantere, S.; Vaara, E.; Whittington, R.	Strategic Management Journal	8.5	2018	100	The authors developed a combinatory structure to understand strategic processes and practices (SAPP) for future researches on (a) temporality, (b) players and agency, (c) cognition and emotionality, (d) materiality and tools, (e) structures and systems, and (f) language and meaning.

Source: Research Data – Prepared by the authors (2024)

A link between nodes represents co-occurrence of the entity (for example, key words that co-occur or occur together). The thickness of the link indicates the existence of co-occurrences between entities (for instance, how many times the key words co-occurred or occurred together). Note that the bigger the node, the higher the occurrence of the entity, and the thicker the link between nodes, the more frequent are co-occurrences of the entity. The analysis of co-quotation of the mentioned authors is presented in Figure 4, which offers a perspective of the past (Donthu et al., 2021).

Figure 4

Mapping of themes associated with Wooldridge et al. (2008) – Co-quotation of the mentioned authors
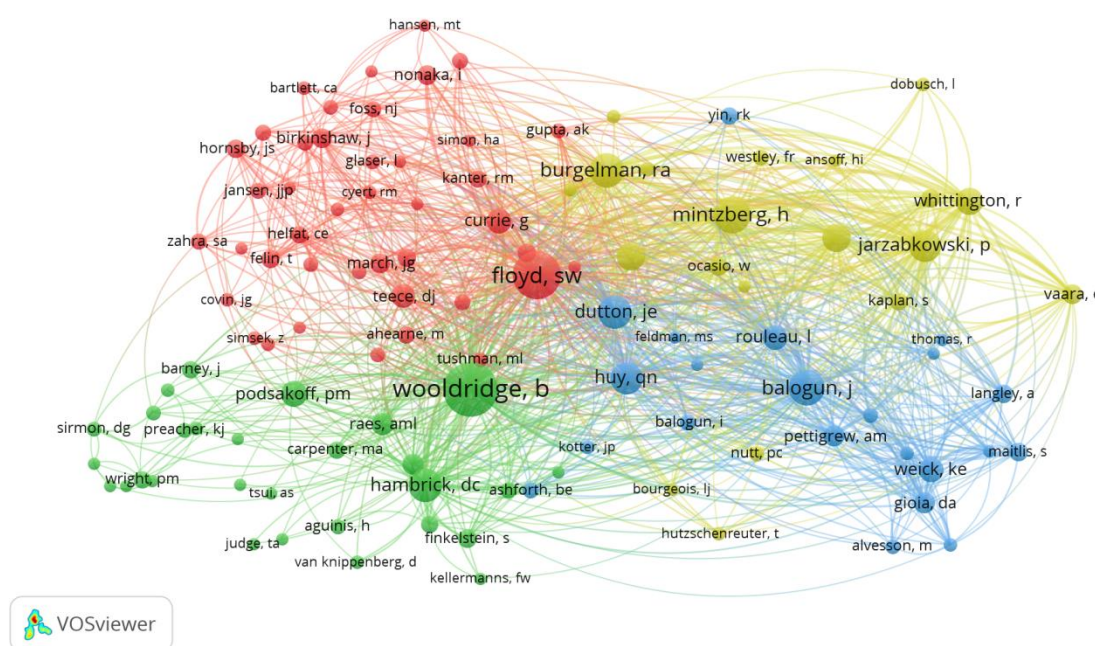
Source: research data – *VOSviewer* – Prepared by the authors (2024)

The analysis suggests four groups of co-quotation among the authors mentioned in regard to Wooldridge et al., (2008). In the first group, studies dedicated to investigate the theory of top management stood out, being more oriented to understanding how the composition and changes in members of the top management impact organisational performance and decisions. In the second group, red, are included researches that explore the way middle management uses new and / or existing knowledge to promote organisational innovation and adaptation. In the third group, yellow, an interest for understanding the discursive, political and socio-material

activity of middle management predominates, as well as the implications of growing transparency and inclusion of such players in strategic work. In the fourth group, blue, the attempt is to investigate the way middle management deals with emotions and creates meaning for the strategy, directing people's attentions to issues considered to be important.

The results of scientific mapping, which offer a perspective of the present (Donthu et al., 2021), are depicted in Figure 5, together with the bibliographic coupling of authors who published articles quoting Wooldridge et al. (2008). Note the similarity to the data presented in Table 1, though synthesised in form of nodes and links.

Figure 5

Mapping of themes associated with Wooldridge et al. (2008) – bibliographic coupling of authors who quoted Wooldridge et al. (2008)
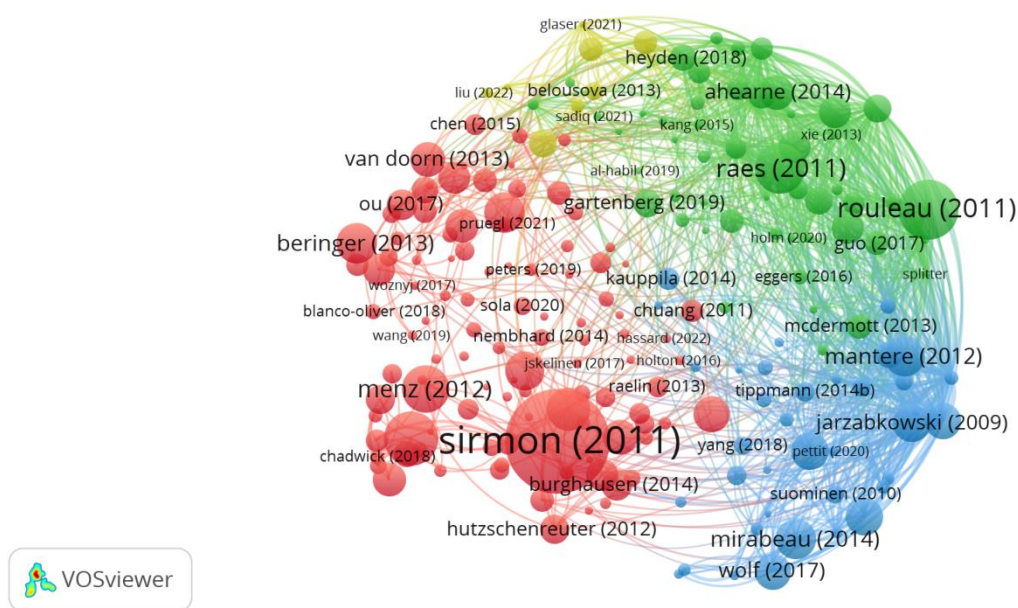
Source: research data – *VOSviewer* – Prepared by the authors (2024)

There are three main groups that quoted the seminal work by Wooldridge et al. (2008). The first, highlighted in red, suggests the concept of "resource orchestration", being an approach intended to expand the understanding of the theory based on resources (RBV). It addresses explicitly the role played by managers' actions in efficaciously structuring, grouping and leveraging the company's resources. The second, italicised and green, explores the way action applied between middle management and top administration impacts organisational

performance. The third group, in blue, tries to achieve greater clarity about the roles of middle management, especially with regard to planning activities or even strategy inversion.

The comparison between co-quotation groups based on previous works used in the review of Wooldridge et al. (2008), together with groupings of later articles that quoted it, enabled the drawing of interesting conclusions. Although the literature review based on different theoretical approaches to propose an encompassing model of the activities of middle management related to strategy, the investigation areas derived from the study adopted more specific extracts. Possibly, at that time, middle management still represented an empirical context for the investigation of broader themes. From Wooldridge et al. (2008) on, the viewpoint of middle management has gradually gained its own identity, enabling its own legitimisation as literature to be applied to theories and subjects of particular investigation.

The co-occurrence of key words took into consideration the key words used by authors in the 293 articles that were fed into VOSviewer. The results of the scientific mapping that offer a view of the future (Donthu et al., 2021) are presented in Figure 6, that depicts the mapping of the network of co-words (co-occurrence of key words) using VOSviewer. Each colour represents one thematic cluster, and these clusters' nodes and links may be used to explain the coverage of topics (nodes) of the theme (cluster), and the relationship (links) between the topics (nodes) present in this theme (cluster).

Figure 6

Mapping of themes associated with Wooldridge et al. (2008) – Co-occurrence of key words

Source: research data – *VOSviewer* – Prepared by the authors (2024)

The analysis of co-occurrence of key words maps the conceptual structure of a subject applying co-occurrence of words to a bibliographic collection. This map stimulates researchers to highlight the connection between the dominant theme and sub-fields emerging from a study (Koseoglu & Parnell, 2020). The clusters are highlighted in colours, with the dominant theme and the emerging sub-fields. Of the six identified, the three main study groups are: (i) red – ambidexterity and its impact on innovation and performance, (ii) dark blue – transformational leadership and its impact on people and organisational performance, and (iii) green – leadership and corporate entrepreneurship and their impacts on strategic renewal.

The word 'performance' exerts the greatest influence on the first group, red, being related to aspects such as innovation and organisational ambidexterity. This group includes researches that privilege quantitative analyses, as may be concluded from the recurrent appearance of the words 'mediator' and 'moderator', usually associated with testing using different statistical models. Therefore, this line of study targets at explaining and describing the direct and / or indirect impact of middle management on organisational performance, ambidexterity and innovation.

Although 'performance' also appears frequently in the second group, dark blue, other factors, such as satisfaction, turnover and organisational identification, are also mentioned. Curiously, the "transformational leadership" theme appears here, indicating that the review of Wooldridge et al. (2008) exerted an influence on the literature that reaches beyond strategy to incorporate management of people. This group, therefore, encompasses the transformative leadership of middle management as an important component of people management, facilitating not only organisational performance, but also that of individuals and teams, who are, in essence, internal stakeholders.

Finally, the third group, green, although also addressing the leadership theme, is different from the previous groups in that it does not pay great attention to the consequences of performance. To the contrary, it explores dynamics such as conflicts and clarity of managerial roles that guide corporate entrepreneurship, very important to the renewal of organisational strategy and competences.

If, on the one hand, such groupings suggest that the research on middle management exhibits strong orientation towards understanding its impact on organisational performance, on the other hand, the action of these managers is increasingly more perceived beyond their work on strategy, with consequences for various factors in multiple levels of analysis.

Emerging research themes resulting from observations made along the research

An additional step to the impact assessment was the SRL in the WoS data base on themes of interest for this research, namely the updating of the framework proposed by Wooldridge et al. (2008) and the key question of the research. The 335 articles of WoS data base were scanned for key words in their titles and abstracts, as shown by Table 2.

Table 2

*Identification of research key words in titles and abstracts of articles in WoS data base,
associated to Wooldridge et al. (2008)*

Key words and variations	Title (number of times)	Abstract (number of times)
Role	**52**	**252**
Firm performance	**12**	**33**
Organizational Performance	5	11
Manufacturing	3	30
Productivity	4	11
Outcomes	5	40
Stakeholder	**5**	**39**
Corporate Social Responsibility	2	6
CSR	2	21
Sustainability	4	20
Customer	3	31
Employee	15	150
Environmental	7	47

Source: research data – Prepared by the authors (2024)

Table 2 demonstrates that key words have impact in terms of recurrence in researches.
The theme, related to the roles of middle managers, attracted great interest in recent studies.
These results confirm that the roles of middle managers in strategy continue to attract increasing
attention (Tarakci et al. 2018; Heyden et al., 2020; Hermkens, 2021; Splitter et al., 2021; Vaz
et al., 2022).

Table 2 demonstrates that the key word related to firm performance and its variations
("organisational performance"; "manufacturing"; "productivity"; "outcomes") had high impact
in terms of occurrence in studies. We may also notice the coherence between Table 2 and results
found via VOSviewer (Figure 6); they highlight aspects associated with the performance of the
company. It is interesting to observe that some articles discuss the roles of middle management
with regard to increases in productivity, solutions to problems, operating efficiency (Van
Rensburg et al. 2014) and communication among the various hierarchic levels. In addition,
there are satisfaction of employees and other important aspects of continuous improvement,
such as client satisfaction, efficiency, quality, safety in workplace and climate in workplace
(Delizonna, 2017; Nguyen, 2018; Sreedharan & Sunder, 2018; Hermkens, 2021).

Finally, we investigated the key word 'stakeholders' and its variations or themes related
to stakeholders' demands ("sustainability"; "corporate social responsibility"; "CSR";
"customer"; "employee"; "environmental"), as shown in Table 2, and as understood by the
authors. Like with other key words, we also observe here coherence between Table 2 and results
found via VOSviewer (Figure 6), be it in what refers to organisational performance or strategy

process. Some articles already discuss performance beyond its economic aspects, taking into consideration words such as satisfaction at work and employee satisfaction. All this suggests that middle management is acting to contemplate the needs of distinct stakeholders in the process of strategy, and performing implementation jobs that add multiple results.

The results of our research confirm the studies carried out by Mair (2017), which highlighted the existence of a significant lack in the literature on the strategic role of middle management and how this fact affected different aspects of organisational performance. Mair emphasised the importance of taking into consideration the satisfaction of clients and employees, adopting an approach targeted at stakeholders. Similarly, the findings are in line with research conducted by Ghlichlee and Bayat (2021), Olsen and Solstad (2020), and supported by Pelster and Schaltegger (2021), who noticed that it is middle management's duty to implement strategic decisions made by Top Management Teams (TMTs) by means of concrete actions, linked to social and environmental responsibility, within organisations.

Our results suggest that studies derived from the research conducted by Wooldridge et al., (2008) point to a complex relationship between the strategic functions of middle management and organisational performance, an issue that deserves attention. Although we are in tune with observations made by Rouleau, Balogun and Floyd (2015) about the evolution of middle management in response to organisational transformation, we acknowledge that our contribution is one voice amid many other voices that take part in this permanent dialogue. Our study indicates that, in business environments characterised by quick change and innovation, middle management may play an integrative role, acting as a bridge between the strategic view and its implementation. However, it is very important to regard these findings as parts of a bigger picture, which includes diversity of organisational contexts and variability of managerial dynamics.

After examining the influence of middle management on organisational performance, our review of the literature supports the idea that their active involvement with strategies may be associated with positive organisational results, including adaptation and innovation. This observation is in line with previously mentioned studies by Wooldridge and Floyd (1990), as well as by Floyd and Wooldridge (1997), but is also useful to highlight how complex this relationship is. We recognise that our study does not cover the whole theme and that the exact effect of middle management's social capital on these results, as discussed by Ahearne, Lam and Kraus (2014), still requires deeper exploration.

With regard to the positive impact of middle management on other dimensions of performance, other than the financial, we echo, though cautiously, the preliminary findings of

Mair (2017). We suggest that these beneficial effects, though promising, be interpreted as areas for future investigation, rather than as final conclusions. Such precaution is justified by the complexity inherent in measurements of non-financial performance and in the need for a deeper understanding of how these contributions manifest in different organisational contexts.

Our research suggests that operational effectiveness appears as an emerging construct, thus reflecting the variety of performance dimensions and consequences discussed in the literature. This is an aspect that enriches the model proposed by Wooldridge et al. (2008), in that it introduces a new category of results that encompasses both traditional metrics and more contemporary considerations of performance. Remarkably, emphasis on operational effectiveness has been promoted by approaches such as continuous improvement (CI) and lean manufacturing (LM), which are attempts to optimise organisational efficiency and efficacy. Recent researches highlight the vital role played by middle management in sustaining these efficiency programmes, emphasising their significant contribution not only to maintain but also to innovate operational practices (Holmemo & Ingvaldsen, 2016; Hermkens, 2021).

The benefits of such initiatives include generation of value for clients by eliminating wastes, and promotion of a business model that is, at the same time, efficient, efficacious and sustainable, potentiating higher long-term flexibility and profitability. However, as indicated by researchers investigating quality (García-bernal & Ramírez-alesón, 2017; Duckworth, 2015), management models focused on CI have a potential to realign corporate strategies so as to benefit all stakeholders. This approach highlights middle management's urgent need to balance organisational control requirements with operational flexibility, an essential dynamics for a sustainable success of continuous improvement practices, as proposed by Sharma and Good (2013).

Effectiveness, defined by Sharma, Sharma, and Agarwal (2016) as "the ability to achieve wished results ", becomes a pillar for the analysis of operational performance. In this context, results that indicate operational effectiveness, derived from LM studies, include performance indicators that reach beyond financial metric to incorporate client satisfaction, morale of employees, productivity, production quality and performance in delivering (García-bernal & Ramírez-alesón, 2017; Kakkar, Dash, Vohra, & Saha, 2020; Samson & Terziovski, 1999; Shafiq, Lasrado, & Hafeez, 2017). Thus, taking into consideration operational effectiveness results propitiates a more holistic view of industrial performance, in that it incorporates critical elements such as delivery, quality, cost, morale and safety.

By publishing our study, we are proposing that the analysis of operational effectiveness, applied with renewed emphasis to the strategic role of middle managers, might offer significant

contributions both for theory and for practice. For theoreticians, this approach suggests new lines of research that might explore, using a wider range of indicators, the interaction between continuous improvement practices and organisational performance. For professionals, the approach emphasises the importance of middle leadership for an efficacious implementation of operating strategies, suggesting that the development of managerial skills at that level may be a crucial factor for long-term feasibility and success of an organisation.

The results of our research indicate that stakeholder satisfaction emerges as a valuable theme and is a promising addition to the model of Wooldridge et al., (2008). The notion that organisational performance includes both financial and non-financial indicators is reaffirmed by Venkatraman & Ramanujam (1986). Analysis by Mair (2017) deepens this discussion examining the strategic role of middle management in several dimensions of performance, including client and employee satisfaction. This approach leads us to consider a wider range of results when assessing the impact of middle management on organisations.

The engagement of employees is crucial for the performance of an organisation, in line with an approach centred on clients, employees and corporate social responsibility. Committed employees, according to Gupta, Sharma & Sunder (2016), are essential for success. Corporate Social Responsibility (CSR) initiatives, as pointed by Sharma and Good (2013), offer strategic opportunities to respond to stakeholders' expectations, with middle managers playing a crucial role in this balance between social and profitable objectives.

Finally, inclusion of continuous improvement practices and focus on quality, as seen through the lenses of stakeholders (García-bernal & Ramírez-alesón, 2017), together with Duckworth's recommendation (2015) that research on quality must take into consideration factors and results related to CSR, point to the interconnected nature and complexity of organisational performance. This panorama suggests that our research may contribute, though cautiously, to the understanding of these dynamics. We hope that, illuminating the strategic role of middle managers in satisfying different demands from stakeholders and in implementing CSR practices, we are offering a new perspective that balances financial and non-financial goals, thus inspiring future investigators to deepen these preliminary insights.

We believe that the findings of the SLR show that there is room for deeper studies on middle management and its contribution to dimensions of results that are not emphasised in the original framework proposed by Wooldridge et al (2008), such as "results for operational effectiveness" and "results for stakeholder satisfaction", introduced in the theoretical section of this article. Considering all these arguments, this research contributes to update the framework proposed by Wooldridge et al. (2008), as illustrated by Figure 7.
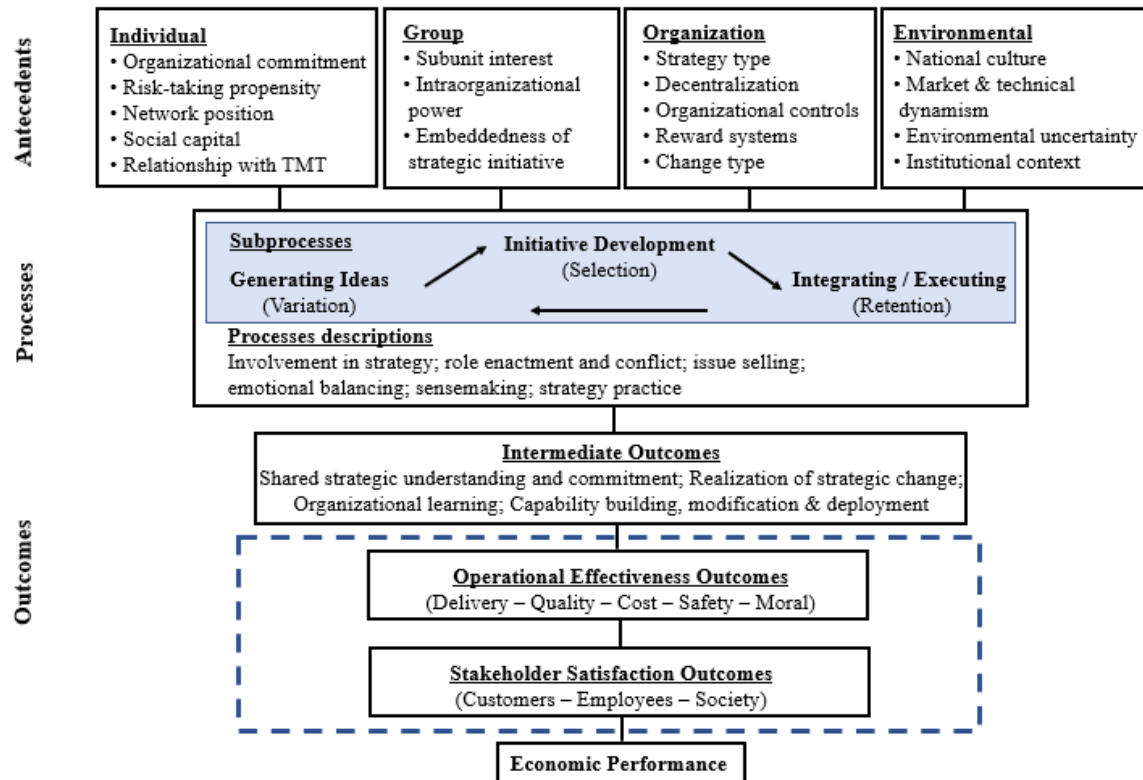
The updated framework of Wooldridge et al. (2008) considers the current context, demands from contemporary organisations and roles of the middle management, as originally proposed, and this appears explicitly in 'antecedents' and 'processes'. However, two new categories of results have been included, namely operational effectiveness (for instance, for industrial unit: delivery, quality, cost, morale and safety) and stakeholder satisfaction (such as clients, employees and society), which highlight performance in dimensions different from the economic.

Figure 7

Model proposed by Wooldridge et al. (2008) (re)designed by Zimmermann, Fernandes and Vaz (2023)

Source: Wooldridge et al. (2008), modified by the authors (2024)

Updating the framework by Wooldridge et al. (2008) responds to the questions previously mentioned and fills a gap, because the relationship between intermediate results and economic performance was not satisfactorily explained in the original model (Zimmermann, Fernandes & Vaz, 2023). Organisational performance is often described as a multidimensional model (Venkatraman & Ramanujam, 1986), but the initial approach of the framework of Wooldridge et al. (2008) focused only on economic performance.

Conclusion

The large number of articles that quote Wooldridge et al. (2008) and other researches on the participation of middle management in the field of strategy provide future opportunities for the advance of research. This finding is not a surprise, because the strategic roles of middle management individuals and their behaviours continue to attract attention due to the fact that they are agents of change, developing ascending (superiors), descending (supervisors) and lateral (peers) activities. They bring leadership to strategic processes, and search for new

initiatives beyond the current strategy (Floyd & Lane, 2000; Mirabeau & Maguire, 2014; Tarakci et al. 2018); they are at the centre of strategic renewal (Floyd & Lane, 2000; Wooldridge & Floyd, 1990; Wooldridge et al., 2008).

Organisations are facing very complex issues, in new contexts, and resource limitations, and they have to become more client- and stakeholder-oriented. Middle management must find distinct ways of combining the control logic with operational flexibility, and evolve together with organisations.

The objective of the study was to investigate the roles of middle management in the process of strategy and results that facilitate performance in dimensions beyond the economic realm, in the context of contemporary organisations. It also responds the question of how the framework proposed by Wooldridge et al. (2008) might adapt the strategic roles of middle management in the face of multiple demands for results coming from different stakeholders.

To achieve that, we analysed the impact the publication of Wooldridge et al. (2008) had on international literature and on the database of Web of Science in the period from 2008 to 2022, using the software application VOSviewer. According to the methodology developed, the bibliometric analysis identified theoretical trends, its researchers and emerging themes for future studies in the field. The bibliometric analysis and the use of the software application VOSviewer made the capture and classification of information extracted from the articles very much easier. The use of WoS as the single data base, though following recommendation made by Donthu et al, (2021), is a limitation of this study and the use of another base, like Scopus, is suggested for future researches.

The co-occurrence analysis of key words scientifically mapped the conceptual structure of the theme. This map stimulates researchers to highlight the connection between the dominant theme and the subfields emerging from the study. The identified groupings (clusters) helped unveil aspects regarding which middle management is being studied (past) in its relationship with strategy, such as relationship with TMT, influence on innovation, their discursive activities, management of emotions and sense-making. When addressing the "present" (bibliographic coupling), several themes stood out, such as the roles of middle management in orchestrating resources, relationship with TMT and organisational performance, middle management, planned and emerging strategies. Analyses of present and past demonstrate how the subject middle management moved from an empirical context to a new theory that has its own identity. Finally, observing the "future" (co-occurrence of key words), other themes emerged such as the relationship between middle management and ambidexterity and

innovation; transformational leadership and management of people; leadership and corporate entrepreneurship.

Recurrent and underlying most themes appears organisational performance, demanding more attention than that given in the original proposal by Wooldridge et al (2008), that focused only on economic results. This article highlighted this aspect and suggested the increase in the range of contributions of middle management to the strategic process. It also incorporated two new categories of results: operational effectiveness (for instance, for industrial units: delivery, quality, cost, morale and safety) and stakeholder satisfaction (such as clients; employees= and society) that support performance in dimensions beyond the economic.

Hermkens (2021) stated that over the last decades the role of middle management changed, forced by movements such as reengineering, automation, impact of IT etc., leading middle management to play more strategic roles. The context has changed, but the execution of middle management roles (facilitator, implementer, defender and synthesiser), those added by Van Rensburg et al. (2014), namely from "advocacy" and "improvement of operational performance" to conventional elements of strategy implementation, and the roles of "performance management", they all continue to gain importance. However, new ways of acting and new functions and abilities are required, because middle management must be able to generate results at the operational level, paying attention to stakeholder satisfaction results, all this in addition to merely economic results.

Many opportunities for new studies on the contribution of middle management to the strategic process were unveiled by the above-presented ideas. Among them, we suggest the development of longitudinal studies on the roles of middle management in the various stages of strategic renewal, linked to the "variation – selection – retention" (VSR) structure of the intra-organisational ecology theory (Burgelman,1991) and its reflections in results, such as in operational effectiveness and stakeholder satisfaction. Few studies on middle management in strategic processes have been developed using this perspective, as pointed by Hautz (2017) and Heyden et al. (2020); they have not adopted the longitudinal perspective either. Weiser, Jarzabkowski, & Laamanen (2020) suggested that evolutionary theories have not been widely used in researches on the implementation of strategies.

It is also possible to elaborate a case study or multiple case studies analysing the strategic practices of middle management, in an attempt to understand how does integration between research on strategy processes and strategy as praxis take place (for example, Jarzabkowski, Seidl & Balogun, 2022; Kouamé & Langley, 2018; Langley et al., 2013; Langley

& Tsoukas, 2010), in line with a proposal by Burgelman et al. (2018) of a new research field currently known as SAPP (strategy as process and practice).

In addition, we suggest assessment of strategic practices and analysis of how middle management negotiates in group and articulates resource-allocation processes, such as in initiatives to implement continuous improvement and lean manufacturing, and how this influences operational effectiveness and stakeholders satisfaction indicators.

Finally, researchers may study the involvement of middle management, together with TMT, in empirical studies, considering roles, behaviours (Vaz & Bulgacov, 2018; Tarakci et al., 2018) and why some middle managers are more influent (Floyd & Wooldridge, 2017) observing negotiation of priorities in contemporary organisations. Advances in the research agenda herein proposed will contribute to a better understanding of the participation of middle managers in strategic processes.

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