

Open climate in organizations – insights from a pilot study

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Abstract

Purpose. The purpose of this paper is twofold. First, we present links between organizational climate and open strategy, integrating existing scholarship to show that a specific type of climate supports open strategy. Second, we offer the initial conceptualization of an “open climate” and define a ground for future research on the topic.

Design/methodology/approach. To collect more comprehensive, valuable, and diversified data, we applied a combination of individual in-depth interviews (IDI), dyad and FGI with technological startup managers.

Findings. Based on the pilot study, we obtained insights into both the initial conceptualization of an open climate and research design suggestions for future substantive studies on open climate in organizations that can facilitate further advancements.

Originality/value. The main theoretical contributions and originality of our work are twofold. First, we offer an initial conceptualization of an open climate and its dimensions. Second, we provide several methodological insights for further open climate studies.

Keywords

open strategy, organizational climate, practices, praxis, practitioners, transparency, inclusiveness, openness, technological startups

Introduction

Open initiatives have recently attracted increasing attention from strategy scholars (Adobor, 2021; Belmondo and Sargis-Roussel, 2022; Splitter et al., 2021) with the growing interest in injecting openness into strategy (Hautz et al., 2017). Open strategy is defined as a strategy that is based on transparency and inclusiveness of both internal and external stakeholders in strategic decision-making (Whittington et al., 2011). Open strategizing and open strategy can be perceived as part of a broader societal trend toward increased openness in various domains of social life, such as open innovation (Appleyard and Chesbrough, 2017; Najar and Dhaouadi, 2020), open science (Vicente-Saez and Martinez-Fuentes, 2018), or open-data government (Gao et al., 2021). Despite the growing interest of scholars, research on open strategy is still emerging (Seidl et al., 2019) and remains under-theorized because of its complex nature (Splitter et al., 2023). Thus, further studies are needed to bring some light on the nature, antecedents, and context of open strategy (Stadler et al., 2021; Radomska et al., 2023).

We respond to these calls by providing in-depth insights into the factors shaping open strategy rooted in the organizational climate. By doing so, we aim to fill the research gap and provide a better and more accurate conceptualization of an open climate supportive of open strategy. Significantly, the importance of two core values, transparency and inclusiveness, is stressed (Heracleous et al., 2018). However, what must be noted is that most existing studies provide a partial image of links between dimensions of organizational climate and open strategy.

We also try to understand this issue by reviewing organizational climate discourse. In previous studies, the concept has been associated with the perception that employees share about the organization's goals and core values (Butcher, 1994), policies, practices, procedures, and reward systems (Ehrhart et al., 2014; Ehrhart and Schneider, 2016). We are particularly interested in what shapes the organizational climate to give rise to open strategy.

The purpose of this paper is twofold. First, we attempt to present links between organizational climate and open strategy. We integrate existing scholarship to show how a specific type of climate supports open strategy. Second, we offer an initial conceptualization of an open climate and define some grounds for future research.

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Our paper contributes to both open strategy and organizational climate literature. Firstly, our study contributes to elaborating methods of investigating factors shaping open strategy and the perception of it in organizations. Secondly, we show that organizational climate is not a homogenous concept and we elaborate on the open climate conceptualized as multidimensional. We offer an initial set of dimensions, but the notion of open climate needs further investigation.

The paper is structured as follows. We present the theoretical background, which concerns the organizational climate for open strategy. In this part, we analyze the idea of open strategy and then show its connections to organizational climate. We conclude this part of the paper with a presentation of research challenges, as well as a description of the conceptual framework of open climate, presenting its major dimensions.

In the next part of the paper, we discuss theoretical framing of our study, followed by the design of a qualitative pilot study with a detailed explanation of the data collection and analysis methods. In the subsequent part of the paper, we provide our thoughts and reflections based on the pilot study findings. These reflections refer to different aspects of our research methods, such as sample selection or the adequacy of the dimensions used in our conceptual framework. In the final part, we derive the most important conclusions, and underline the implications and challenges for further research.

Theoretical framing: organizational climate and open strategy

Open strategy

The open strategy concept has recently received much scholars' attention, mainly due to rising technological developments and social expectations (Heracleous, 2019; Morton et al., 2019; Sailer et al., 2018; Seidl et al., 2019). This concept is rooted in the notion of the necessity of injecting greater transparency and inclusiveness into the strategizing process by involving internal and external stakeholders (Whittington et al., 2011). Scholars have investigated open strategy, applying various views (Tavakoli et al., 2017), including open strategy as an entity (e.g., Golsorkhi et al., 2010; Hutter et al., 2017), open strategy as a process (Malhotra et al., 2017) and open strategy as a practice (Tavakoli et al., 2017). Several studies applying the lens of practice view to open strategy have emerged in recent years (Tavakoli et al., 2017). This approach allows us to unfold more complex phenomena and their inseparable aspects (Whittington, 2006), such as organizational values or norms, and how they bundle with open strategy practices. As Tavakoli et al. (2017) outline, the practice approach allows focusing on the "internal life" of open strategy practices. Therefore, it builds the ground for investigating the norms and values underpinning open strategy (Tavakoli et al., 2017).

As scholars commonly confirm that inclusiveness and transparency are vital values characterizing open strategy (Baptista et al., 2017; Hautz et al., 2017; Heracleous et al., 2018; Nobre and Grandclaude, 2021; Sailer et al., 2018; Xu and Alexy, 2019), these values can serve as both guiding principles for creating open strategy and as building blocks of a framework for investigating how other elements of practices intertwine with these principles. For example, Tavakoli et al. (2017) identified an Idealtypus (Weber, 1904) of open strategy characterized by inclusiveness and transparency values: transparent discourse, co-creation, and democratic decision-making. Previous studies have also shown that open strategy practices may take the form of partial or radical openness (Luedicke et al., 2017). However, the fundamental values (transparency and inclusiveness) seem the same in both forms.

Thus, the question arises why companies employ different openness practices if the underpinning set of values is the same. We investigate this topic beginning with the broad notion of an organizational climate. Previous research investigated the open strategy enablers with a primary focus on the IT context (Tavakoli et al. 2017, Morton et al., 2019), but more context-specific, distinctive procedures and norms have also been outlined as important factors enhancing or hindering openness practices (Splitter et al., 2019).

Organizational climate

Organizational climate can be defined as the replicating patterns of attitudes, feelings and behaviors of employees towards and within their workplace environment (Zwikaël and Meredith, 2019; Punwathkar and Verghese, 2018). It has a widespread effect on an organization as a whole, from leadership behavior, through policies and practices, to safety, creativity, innovation and incentives (Zwikaël and Meredith, 2019; Hannevik et al., 2014).

The concept of organizational climate has been outlined as multidimensional (Coda et al., 2015). Various dimensions have been used for measuring organizational climate. For example, Patterson et al. (2005) listed 17 climate dimensions, categorized within four core areas: human relations, internal processes, open systems, and rational goals. Some of these dimensions bear the hallmarks of openness, especially dimensions such as *involvement*, *communication*, *integration*, *supervisory support*,

flexibility, and *reflexivity*. In turn, Kangis et al., (2000) based on Newman's concept of a Perceived Work Environment (Newman, 1977), enumerated six organizational climate dimensions, with one of them appearing to have particular relevance for openness: *supervisory style*.

Similar dimensions of organizational climate appear in the work of Rožman and Štrukelj (2020). These scholars examined the impact of organizational climate on employees' work engagement using five organizational climate essentials: *leadership*, *employee relations*, *employee commitment*, *employee satisfaction*, and *employee motivation*. We can observe that some of these listed components are related to openness. In particular, these are the elements pertaining to open, supportive, and transparent relations between managers and employees, and between employees. There are also factors related to autonomy and flexibility at work, cooperation among employees, and involvement in work, which fit the concept of openness.

That is why we believe it is worth investigating the possible relations between organizational climate and open strategy, and what particular type of organizational climate fosters openness. Although many studies have explored the topics of organizational climate and strategy separately, only a few scholars have paid attention to the need to investigate the interrelationships between these concepts, suggesting that a firm's strategy either aligns with organizational climate or fits it (Burton et al., 2004).

Organizational climate and open strategy

We believe that organizational climate should be blended with the investigation of open strategy to fully cover the essence of openness (understood here as transparency and inclusiveness, with internal and external perspectives employed). It is vital to integrate the views of diverse stakeholders with the overlapping values representing various types of climate (Brawley Newlin and Pury, 2020).

As we mentioned in the previous section, the open strategy concept is based on two core values (transparency and inclusiveness) employed in the strategy-making process (Heracleous et al., 2018). Yet, they are introduced either selectively or entirely (Luedicke et al., 2017). The underpinnings of those two approaches may be rooted in the characteristics of organizational climate as a scope of values that shape strategic choices (Friend et al., 2020). Moreover, perceptions of organizational climate affect responses toward work and shape the attitudes of employees (Al Damoe et al., 2017, Najar and Dhaouadi, 2020).

Thus, on the one hand, organizational climate impacts the sense-making processes and organizational ability to build the shared meaning attached to the workplace (Ehrhart et al., 2014). On the other hand, it defines typical behavioral patterns that exist regardless of individual perceptions (Isaksen, 2017). Both functions of organizational climate are crucial while attempting to enhance openness by increasing the visibility of the strategic information (Yakis-Douglas et al., 2017) and including the internal and external knowledge sources (stakeholders) in the strategy-making process (von Krogh and Geilinger, 2019).

As already mentioned, the conceptualization of organizational climate is challenging, as various dimensions have been considered, some of which have been replicated, replaced, or recreated in studies performed by different scholars. From the open strategy standpoint, we can observe that a more focused concept of creative climate has been introduced to outline conditions necessary to stimulate creativity in organizations. Malikeh and Forough (2012, p. 106) suggest that a creative climate *"encourages people to generate new ideas and helps the organization to grow and increase its efficiency, and at the same time, it enables members to generate and implement creative ideas more effectively"*. The works of Ekvall (1996) and Amabile et al. (1996) are the best-known examples of creative climate conceptualizations. After investigating Ekvall's model of creative climate (Ekvall, 1996), we may suggest that six out of ten creative climate dimensions also allude to openness: *idea time*, *idea support*, *risk-taking*, *freedom*, *conflicts*, *debates*, and *trust/openness*. Comparing the organizational climate and creative climate dimensions, we will notice that some are repeated (conflicts, risk, trust, freedom/autonomy). In this study, we assume that opening up the strategizing process requires a specific organizational climate, where transparency and inclusiveness are supported.

Research challenges

We assume that a particular type of organizational climate may be related to open strategy practices. This type can be labeled as "open climate". Current open strategy studies lack established conceptualizations of an open climate, and thus there are no validated research tools and instruments that allow for assessing a company's climate of openness. We opted for a pilot study to test identified dimensions. Pilot studies have been widely applied by quantitative researchers (Bryman, 2016), but qualitative researchers also highlight the benefits of using pilots in multiple phases of research design. Examples may include interview protocols (Silverman, 2010), testing transcriptions and analysis processes (Guest and MacQueen, 2008) or increasing the research quality in general (Malmqvist et al., 2019).

As Sampson (2004, p. 400) outlines, pilots introduce researchers to "unknown worlds". Such "unknowns" can be the result of a lack of published work or a theory to guide research design (Claudio Bosio et al., 2012). A pilot study such as ours can then

serve to plan a better-designed qualitative study and be the first step in developing measurement tools. Several scholars in the field have called for broader discussion and sharing of both pilots' findings and procedures, as such issues are important to research quality (Lees et al., 2022; Malmqvist et al., 2019; Pritchard et al., 1999; van Teijlingen and Hundley, 2002). That is the path we follow in this study.

Research design

Our qualitative pilot study was inspired by the results of our three-year research project on open strategy-related practices. While analyzing the complex research findings, we realized that the open strategizing enablers are not fully recognized. Thus, we have decided to conduct a pilot study because there are no existing tools and methods to investigate those enablers developed so far.

In this paper, we aim to offer empirical and methodological insights that would allow scholars to advance the knowledge of open strategy's triggers. Besides reporting the empirical findings on the open climate dimensions that emerge from our study, we also focus on identifying the aspects where questions or other research procedures need to be revised to allow researchers to obtain richer data (Malmqvist et al., 2019).

Following the approach proposed by Malmqvist et al. (2019), our pilot study focused on three aspects: (1) findings indicating how well the semi-structured interview approaches worked regarding the interview format (individual in-depth interviews, dyad, and FGI); (2) findings about the interviewers' way of conducting the study, which required analyzing the transcripts and conducting analytical discussions about the process of data collection held after each semi-structured interview; and (3) empirical findings allowing us to refine our proposal of the open climate dimensions.

The study focuses on individual perceptions that technological firms' managers from creative industries (CI) have of open strategy, as well as their experiences with regard to organizational climate. We opted for an in-depth qualitative inquiry, as this approach is particularly useful when existing theories do not sufficiently explain the phenomenon of interest (Graebner et al., 2012). Our research procedure is presented in Figure 1.

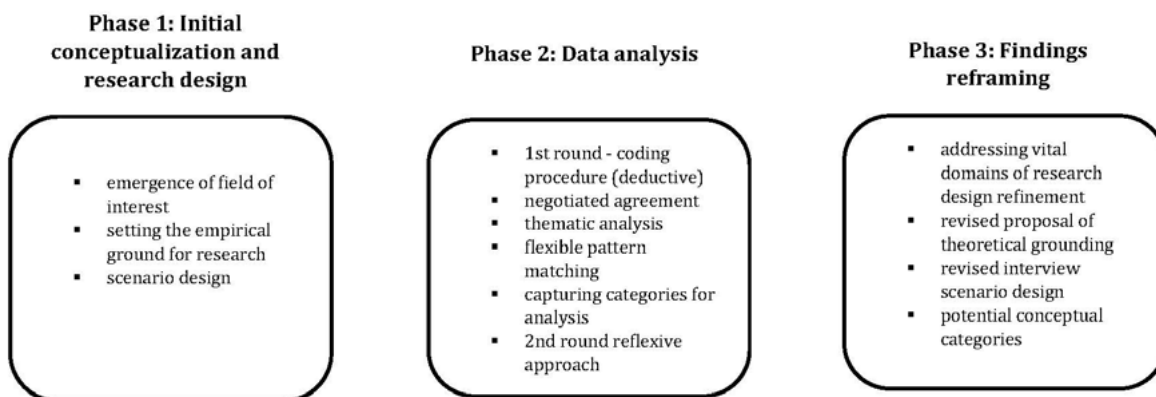


Figure 1. Research design

Source: Authors

Sample and data collection

In our study, we follow Suri's (2011) suggestion for exploratory research with purposive sampling. We decided to choose technological firms from the CI. Our choice of the CI as a context for this research is justified because previous studies have identified several features of these industries that can be associated with openness. Among these features are knowledge creation and absorption, and as found by Pittz et al. (2019), open-up strategizing supports the process of creating and absorbing knowledge. In turn, the use of the organization's absorptive capacity is achieved through inter-organizational learning (Vaisz et al., 2021). The structure of the CI may contribute to the intensification of this inter-organizational learning, because it turns out that CI are composed mainly of micro-enterprises, which often exist in various types of network configurations (Hesmondhalgh, 2013). These qualities, in turn, require more openness from the organizations, which results from the specific organizational climate that we want to identify.

Our study was conducted among technological firms from CI located in Poland. We chose Poland as a geographical context for our research for several reasons. First, according to a report provided by UNCTAD (2022), Poland occupies the 7th position among the top 10 creative goods exporters. Second, the country has been classified as an economy to be watched as a “rising star” in the CI (UNCTAD, 2018). Third, the industry’s structure largely reflects world trends, as most creative entities (99.2%) are microenterprises (Main Statistical Office, 2023). Fourth, Poland is an interesting context in which to study open strategizing, not only from an economic standpoint, but also due to its cultural characteristics; in Polish society, there has been an apparent cultural shift from the domination of individualist values, as Hofstede (1997) found in research conducted in Central and Eastern European countries in the 1990s, to more collectivist values that have emerged amongst Poles in recent times (Damen et al., 2019). We believe this shift in values, being faced with the necessity of including others in decision-making processes, as well as being transparent about key issues, may bring interesting, counter-intuitive findings in open strategizing.

We have selected technological firms from the CI, as previous studies showed that technology-intensive enterprises often engage in open innovation (Henttonen and Lehtimäki, 2017) and are embedded in various ecosystems that foster open initiatives (Berman et al., 2022).

We applied purposeful sampling (Suri, 2011), meaning that we have intentionally selected informants that we believe would reveal insights relevant to the scope of our study. We chose eight managers of firms that met the following criteria: operating in a technological industry, having experience with launching an innovative product, and showing strong growth dynamics. We selected four incumbents and four challengers for our research group to identify shared patterns of open strategy, and related climate understanding among the managers, and potential cross-case differences.

To collect more comprehensive, valuable, and diversified data (Graebner et al., 2012), we opted for a series of semi-structured interviews (Adams and Cox, 2008). Following a triangulation (Wilson and Hutchinson, 1991), we applied a combination of individual in-depth interviews (IDI), dyads, and FGI (see Table 1).

Table 1. Sample characteristics

Code	Informant's role	Market position	Firm's description	Type of interview
I	CEO	Incumbent	The company, operating in the gaming industry, specializes in developing mobile games, desktops, and some consoles, mainly targeting women.	IDI
D1	CMO	Challenger	Fintech offering technical support in payments	Dyad
D1	CEO	Challenger	The company offers a platform for gamification used in companies from various industries	
D2	Co-owner	Challenger	The company offers software for the travel industry	Dyad
D2	CEO	Challenger	The company operates in the gaming industry as a game developer	
F	CEO	Incumbent	The company offers audience-data analysis to support key business decisions for companies creating high-budget film productions.	FGI
F	CEO	Incumbent	A software company is developing a software product for sales department scheduling that offers a combination of optimization algorithms used in an attractive graphical form.	
F	Co-owner	Incumbent	A software house operating in the automotive and media industry.	

Source: own work

The interview scenario was designed with a reflexive focus (Arsel, 2017) on exploring the dimensions of open climate as a factor that may enhance or reduce barriers to the open strategizing process. The scenario consisted of topics related to the perception of open strategy, professional experiences with applying such strategy, the antecedents required for open strategizing, and the perceived role and particular dimensions of an organizational climate that may foster open strategizing. The research scenario is presented in Appendix 1.

Data analysis

All the recordings were transcribed and various types of data analysis were used, specifically: deductive coding (Charmaz, 2006), thematic analysis (Braun and Clarke, 2006), and flexible pattern matching (Bouncken et al., 2021). The unitization strategy focused on units of meaning rather than sentences or paragraphs (Campbell et al., 2013). To increase the findings’ coherence and trustworthiness, we applied two approaches: triangulation of coders (Archibald, 2015) and an iterative coding procedure (Nowell et al., 2017). The coding process was manual, and interview transcripts were reviewed by separate researchers multiple times. After several rounds of coding and discussion, the researchers reached a negotiated agreement

(Campbell et al., 2013) and followed it with further thematic analyses. Example statements are presented in Appendix 2. As this was a pilot study, we also discussed the empirical findings, as well as the methodological revisions required in further steps of the inquiry related to our research design and procedure.

In the next section, we present the main findings concerning methodological insights and the dimensions of an open climate that have emerged at this initial stage of our research.

Research Findings

Our goal was to verify the research design and procedure to either ensure relevance or enable the researchers to obtain nuanced data when exploring the open climate concept. In this section, we present a set of insights and reflections derived from our pilot study. We have followed the description of findings structure proposed by Malmqvist et al. (2019) in order to better address all the vital domains.

Participants of the study

A purposeful sampling of technological firms revealed that one should not assume radical openness *a priori* based on industry specifics. We found various levels of openness among our informants. We still find technological firms to be a favorable environment in which to discuss openness. In the main study, however, our purposeful sampling will focus on investigating the broader ecosystems in which such companies are embedded, rather than just individual firms. We believe such refocus will allow for identifying firms with a more open approach and exploring openness practices from the perspective of various ecosystem actors.

During the pilot study, we faced some problems with recruitment procedures. The recruitment process turned out to be long-running due to the time constraints of our informants. Other scholars have also reported similar challenges in the recruitment process (Natow, 2020). Initially, we hoped to gather the data via focus group interviews; however, arranging a meeting between all our informants at once was impossible. That was why we turned to IDIs, dyads, and FGI.

The mistake we, as researchers, made was the assumption that our informants would be more available and present a higher willingness to participate in a study. We conclude that time constraints are a common issue for business managers (Ma et al., 2021) and that this should be considered while designing research. That is why a research design should include various and meaningful incentives to increase informants' willingness to participate in a study despite their time constraints. In the main study, we will try to create a more meaningful interview experience by, for instance, ensuring extra time for networking or private conversations between the informants and highlighting these benefits in the study invitation, as Ma and Seidl (2018) suggest.

The usefulness of the data collection procedures and instruments

Interviews as a data collection method were useful for comprehensive insights on the differences between participants' declarations and their practices. However, the usefulness of the planned interview scenarios turned out to be limited. The main limitations were the high generalization level and the lack of detail in instructions and understanding. Moreover, as we were eager to receive some confirmation of opinions reflected in actual managerial actions, we imposed high *ad hoc* pressure to recall the examples. We recognize that there is room for improvement in this area, as it was an incidental rather than general approach to interviewing.

We framed the questions in the interview scenario around three research queries as we tried to reveal the open climate's dimensions and their impact on the open strategizing process. Finally, we pointed out those crucial for opening the strategizing process. Mistakes we as researchers made were rooted in imposing the wrong approach to designing the scenarios, which should have been more precise and modified according to a frame provided by strategy-as-practice theory, thus investigating practices, praxis, and practitioners. Such an approach would allow us to study the roots and interpretations of open strategizing practices and related dimensions of the open climate (see Table 3). Therefore, we propose a new scenario with a new research perspective (see Table 2).

We concluded that instead of investigating the categories drawn from the literature, we should apply the strategy-as-practice approach focusing more on examples and confirmations. To increase the data's usefulness, however, the questions should be revealed in advance, and our informants should be allotted more time to recall the examples of practices to illustrate their answers.

In subsequent studies, more emphasis should be put on understanding how companies *practice* open strategy. Based on the patterns seen here, more open or closed strategizing processes can be delineated, and practices that demonstrate open climate can be revealed and explained.

Table 2. New interview scenario

Practices	What are the values or principles that you try to follow when strategizing? How is that value reflected in your organizational routines? Please provide examples.
	How are these values supported by existing tools/infrastructure (spaces, software)? Please provide examples. How are these values related to organizational structure? Please provide examples. How and if these values are embedded in the communication process design (form, channels, tools, frequency)? Please provide examples.
	What skills do you try to employ in following these values while strategizing? How do you assemble and manage people with the necessary skills (recruitment process, training, etc.)? Please provide examples.
Praxis	What is the flow of activities that people employ while strategizing?
	What are the actions of various groups and individuals while strategizing? Please provide examples. What are the interactions between leaders and employees while strategizing? Please provide examples.
	How do leaders react to organizational failures? How do employees act when something goes wrong?
Practitioners	Who contributes to strategizing? (From an internal and external perspective) Who is formally involved in strategizing? (From an internal and external perspective) Who is informally involved in strategizing? (From an internal and external perspective) Who is formally excluded from strategizing? (From an internal and external perspective) Who is informally excluded from strategizing? (From an internal and external perspective)

Source: own work

The interviewers' way of conducting the study

Based on the pilot study, we may state that the interviewing style should be more precise – in particular, in situations where informants needed clarification of complex or difficult to comprehend issues. In these situations, we learned that it is necessary to offer more detailed guidelines and deliver clear definitions of unintelligible terms and concepts.

The interviewer should maintain control over the interview process and the involvement of individual participants throughout the interview. We are referring here to the situations mentioned by Charmaz (2006). According to this author during an interview, participants may take charge, turn the interview questions to address topics on their own terms, or recite public relations rhetoric rather than reveal their personal views.

During the interviews conducted in the form of dyads and FGI, there were also situations where the interviewer favored one of the participants and seemed to neglect the others. This situation caused the perspective of the dominant participant to prevail in the discussion.

These critiques have led us to conclude that more time and care should have been given to the preparation phase of the study. Particularly, the opening of the interviews should be addressed to better set the stage and climate appropriate for sharing information. We did not clearly explain to informants the definitions of certain terms and concepts addressed in the interview. Thus, it was necessary to prepare a more detailed interview scenario and greater sensitize interviewers to stimulate discussion among all participants and encourage them to share their practices rather than just their opinions.

We also made overly optimistic assumptions regarding participants' willingness to reveal the information in front of a group. It turned out that participants were not very eager to share information about their companies and their open strategy practices. As a result, we did not achieve in-depth insight into open strategy practices. One the reason for this is that, when preparing the research, we assumed that the interviews would be conducted in FGI. However, due to problems attracting participants, we opted for mixed techniques, including FGI, IDI, and dyads. Analyzing the interviews, we conclude that to obtain more detailed information regarding open strategy practices, we should have opted for IDIs.

We conclude that if there is no openness among the participants of an interview, then projective techniques (Clarke et al., 2019) should also be considered, as they can provide opportunities for an in-depth analysis in which the respondents reveal their opinions and attitudes. In addition, when deciding whether to use dyads or FGIs, it is advisable to apply them within the selected company to find out the opinions and attitudes of a wider group of representatives of the organization.

In future studies, various representatives from the same company should be included, and the selection of participants should take into account different organizational structure levels. A combination of dyads, FGIs, and IDIs should be applied. Also, interviewers should focus more on revealing information about open strategy practices, rather than opinions about organizational climate.

The content of the informants' answers - empirical findings ahead of the main study

In our pilot study, we assumed that opening up the strategizing process is linked to the company's specific organizational climate, which we named an "open climate". In search of open climate components, we then investigated issues related to

organizational climate. Our data analysis allowed us to identify 18 codes that we classified as dimensions of open climate. Data from our informants covered the following open climate dimensions: *reflexivity*, *flexibility*, *freedom/autonomy of thought and speech*, *integration*, *involvement*, *sincerity/lack of double standards*, *failure-tolerant mindset*, *communication*, *initiative*, *cooperation*, and *trust*. The informants recognized the last item in particular as a crucial factor in building a climate of openness. Our data also covered other dimensions with some reservations. Three of these were *supportive management style*, *interpersonal relationships*, and *idea time*. In some cases, however, this dimension was connected with the risk of spending too much time on discussion about ideas/concepts. Another dimension was *including stakeholders in decision making* – but informants related inclusiveness to internal stakeholders; external ones were usually not taken into consideration. Our data also partially covered the *debates* dimension. Some informants indicate that *debates* could be treated as an element of an open climate only if they result in any discernible outcome or benefit.

The analysis of the research material made it possible to identify additional dimensions of open climate that should be considered during the realization of the main study. Our informants suggested that *responsiveness*, understood as a real-time response, would be worth studying further. Informants also highlighted *co-creation* as an open climate dimension, but only in relation to employees or customers. Moreover, the theme of *proactivity*, consisting of anticipation, acting in advance, taking matters into one's own hands, and intentionally influencing the environment, resonated very strongly as part of the climate of openness. Finally, in the context of open climate components, the dimension of *openness*, understood as openness to changes, various points of view, and minorities, was also mentioned.

We conclude that informants' answers were more cognitive and perceptual than behavioral practices and experiences. Thus, in the main study, we will put a particular focus on how practices relate to the dimensions of the open climate. Such an approach would place our future study in the strategy-as-practice theory (SAP) stream of research. It will be necessary to redesign the scenario to correspond to the main theoretical categories within the SAP frame, as proposed in Table 2, and to determine whether the newly proposed interview scenario would still correspond to the conceptual categories of organizational climate derived from our data, as presented in Table 3.

Table 3. Potential conceptual categories intertwined in the revised interview scenario

		Potential OC categories
Practices	What are the values or principles that you try to follow when strategizing? How is that value reflected in your organizational routines? Please provide examples.	freedom/autonomy of thought and speech; sincerity/lack of double standards; trust
	How are these values supported by existing tools/infrastructure (spaces, software)? Please provide examples. How are these values related to the organizational structure? Please provide examples. How and if these values are embedded in the communication process design (form, channels, tools, frequency)? Please provide examples.	communication
	What skills do you try to employ in following these values while strategizing? How do you assemble and manage people with necessary skills (recruitment process, training, etc.)? Please provide examples.	flexibility; idea time
Praxis	What flow of activities do people employ while strategizing?	flexibility; integration; debates
	What are the actions of various groups and individuals while strategizing? Please provide examples. What are the interactions between leaders and employees while strategizing? Please provide examples.	initiative; cooperation; communication; involvement; supportive management style
	How do leaders react to organizational failures? How do employees act when something goes wrong?	reflexivity; failure-tolerant mindset
Practitioners	Who contributes to strategizing? (From an internal and external perspective) Who is formally involved in strategizing? (From an internal and external perspective) Who is informally involved in strategizing? (From an internal and external perspective) Who is formally excluded from strategizing? (From an internal and external perspective) Who is informally excluded from strategizing? (From an internal and external perspective)	involvement; interpersonal relationships; including stakeholders in decision making

Source: own work

Discussion and conclusions

Open strategy is a concept based on openness expressed through transparency and inclusiveness (Hautz et al., 2017; Whittington et al., 2011). Building such openness in a company requires a relevant organizational climate. In this paper, we sought answers to the question of what type of climate this is, and how it can be characterized. To accomplish this, we conducted a literature review in the organizational climate field, which led us to delineate and define “open climate” as a specific organizational climate that is particularly supportive of open strategy. To refine our initial assumptions, we conducted a qualitative pilot study, which also provided insights into how we would redesign the research procedure to investigate this phenomenon more effectively. Our pilot study enabled us to both improve the research design and modify our instruments for the main study with regard to specifically addressing open climate and its link to open strategy.

A few different perspectives can be applied to investigating open strategy: conceptual, where the understanding and origins of a concept are addressed; processual, where the processes of applying inclusion and transparency are discussed; and strategy as a practice, where the practices of open strategizing are investigated (Tavakoli et al., 2017). We chose to use the last of these perspectives – open strategy as a practice. This choice allowed us to focus on the nature of open strategy practices and provided the most promising theoretical perspective to investigate norms and values underpinning open strategy (Tavakoli et al., 2017). We believe that an investigation of organizational climate should also be intertwined with open strategy to fully cover the essence of this phenomenon and its influencing factors (Brawley Newlin and Pury, 2020).

Theoretical contribution

The major contribution of our study is differentiating the open climate concept from the broader organizational climate concept, as well as from the creative climate concept. We indicate how these entities are different and why this differentiation matters (MacInnis, 2011), and highlight what novel insights can be compiled from such differentiation. Due to the exploratory nature of our study and the formative stage of the open climate concept, we also offer some methodological insights into designing future research on an open climate.

The theoretical contribution of our paper is twofold. First, we bring insights to the open strategy stream of research as we expand the list of open strategy enablers that have already been identified, mainly in the IT context (Morton et al., 2019; Mount et al., 2020). We redirect scholars' attention to the subjective perceptions of specific organizational climate dimensions among organizations' top managers, which enables opening up the strategizing process. We notice differences between this type of climate and a broader concept of organizational climate, as well the concept of a creative climate. We term this kind of climate an “open climate”, and by delineating its dimensions, we contribute to the existing body of knowledge concerning organizational culture, especially open culture, and organizational climate.

Ehrhart and Schneider claim that organizational culture is a broader construct than organizational climate and is closely aligned with the values and beliefs that manifest themselves in almost all aspects of organizational life (2016, p.7). Furthermore, according to Li et al., open culture includes the open vision, values, mindset, and cultural atmosphere that enterprises need to build in order to move from closed innovation model to open innovation model (2022, p.3). We argue that our concept of open climate enriches the discourse on open culture issues by proposing the dimensions for an open strategizing process. Organizational climate reflects subjective perceptions of an organization, and our research presents managers' subjective perceptions of those dimensions, enabling greater openness in the organization during the strategizing process.

Second, we differentiate open climate from the organizational climate categories, conceptualizing it using insights from the open strategy field of research. Most dimensions of organizational climate related to openness that have been previously studied are internally oriented (Bertels et al., 2011; Gold et al., 2014; Phudphad et al., 2017; Smith et al., 2005). Our data suggest that some open climate dimensions are also externally oriented.

Through our pilot study, we were able to ascertain that trust is a crucial factor in building a climate of openness, which is in line with the previous work of Ekvall (1996) and Bertels et al. (2011). We found that a climate of openness is built on reflexivity, flexibility, involvement, communication, and integration, which are all in line with the findings of Patterson et al. (2005), Bertels et al. (2011), and Phudphad et al. (2017). The following dimensions of open climate are cooperation, freedom/autonomy of thought and speech, sincerity and a lack of double standards, a failure-tolerant mindset, and initiative, which correspond with the dimensions of organizational climate studied by Kangis et al., (2000), Rožman and Štrukelj (2020), Phudphad et al. (2017), and Gold et al. (2014). Detailed differences between organizational, creative and open climate are presented in Table 4.

Table 4. Organizational, creative and open climate dimensions.

Dimensions	Organizational climate	Creative climate	Open climate
Reflexivity	X		X
Flexibility	X		X
Supportive management style	X		X
Freedom / Autonomy of thought and speech	X	X	X
Integration	X		X
Involvement	X		X
Sincerity / lack of double standards	X		X
Idea time		X	X
Failure-tolerant mindset			X
Communication	X		X
Debates		X	X
Initiative			X
Interpersonal relationships			X
Including stakeholders in decision making			X
Cooperation	X		X
Trust		X	X
Conflicts		X	
Risk taking		X	
New dimension: Responsiveness – real-time response			X
New dimension: Co-creation			X
New dimension: Proactivity			X
New dimension: Openness			X

Source: own work

Our study also provides some methodological insights as we proved the usefulness of qualitative studies in investigating a concept in the initial phases of its development. This step will allow us to design tools for further qualitative and quantitative studies of open climate that reflect the complexity of this concept. Our study can also serve as a preliminary step in the process of open climate scale development.

Limitations and future research

Our pilot study was a first step towards designing a research procedure to investigate the open climate phenomenon and its links with an open strategy. We treat it as a small-scale exploratory study with several limitations, particularly its limited scope and small sample size. Thus, it can be considered a preliminary work.

Our study is contextual, as we have investigated only Polish companies. Thus, some country-specific factors may influence our data on open climate development and its operationalization. Indeed, other studies have confirmed that national culture has an impact on transparency (Grimmelikhuijsen et al., 2013) and inclusiveness (Stoermer et al., 2016), and needs to be considered in investigating openness (Adobor, 2021).

One factor that needs to be considered is the level of social trust. In a recent study in Poland, only the minority (19%) indicated willingness to trust other people, while 77% believed that “cautiousness is needed in relations with others” (CBOS, 2022). This view has changed only slightly over the past 20 years and thus may be treated as a general social feature (*Ibid*). As for trust in a business context, opinions are mixed, with 34% declaring that being trustful pays off and 35% being cautious (*Ibid*). Further investigation and comparison of the impact of social trust in other countries may yield insight into potential contextual influences on this study's findings.

Despite its preliminary nature, we believe our pilot study can be instructive and helpful for scholars wishing to advance future studies on the relationship between open climate and an open strategy. Based on our findings, we suggest scholars should consider the challenging pragmatics of a recruitment process among managers and offer more personalized and valuable incentives to increase managers' willingness to participate in a study. We also suggest changing the units of analysis - future studies on open strategy should search for openness practices among ecosystems of firms, not just among individual managers. One way this could be done is using the SAP framework and identify practices that enhance openness.

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APPENDIX 1: Initial research scenario

Research goal	Research questions	Research scenario
To explore the dimensions of open climate as a factor that may enhance or reduce the barriers to the open strategizing process.	What are the dimensions of an open climate?	What do you associate with the term "open strategy"? What does such a strategy consist of? What benefits are associated with this approach to strategy? What are the risks? Why? (<i>After the discussion, the moderator reads and posts the definition of open strategy</i>) What is your experience with open strategy? Can you say that this kind of strategy is implemented in your companies? Is such a strategy specific to your industry? Can you give any examples? Stories from the life of your company? From your industry? What do you think is needed in a company to make an open strategy possible? What enables its creation and implementation? And what limits or even prevents it? Why? What do you associate with the term "open climate"? How would you define such a term? What are the elements of such a climate? What factors are involved? (<i>write on flipchart</i>) Why?
	What is their impact on the open strategizing process?	How do you think open climate relates to open strategy? Why? What does this open climate look like in your company? To what extent does it occur? What does it consist of? What proves it? Or what demonstrates its absence? How do you know it is or is not present? What comes first, and what comes after? Is it the climate that makes an open strategy possible? Or is it the open strategy that creates this climate? What do these relationships and dependencies look like? Why?
	Which dimensions are crucial for opening the strategizing process?	Now, let's go back to the factors you said to make up the open climate. How could we group these factors? Based on what dimensions? Criteria? What would we call each group of factors? And how could we rank these factors/groups of factor – from the most important, having the most significant impact on creating an open strategy, to the least important? See the list of proposed factors (<i>the moderator presents the list</i>). Which factors would you like to add to your list, if any? Why? Where? And which ones should disappear from this list? Why? Looking at this list of factors, which ones do you see in your companies? Which ones are missing? Why? What does this depend on? How do you think such an open climate is created? What would have to happen in your companies to have it? What would facilitate its emergence and what would make it more difficult?

Source: own work

APPENDIX 2: Exemplary statements

Open climate dimensions	Exemplary statements
Reflexivity	We also ask them for their opinion, (...) they then feel appreciated (...) they can express their opinion, and this opinion is often very interesting, because we can have some established pattern on some topic, and they can see something that we do not see; [D1] Reflexivity meaning these questions "how?", "why?", such curiosity; [D1] We have such an atmosphere that we question, that we turn sideways, we don't go against the flow or with the flow, we just turn sideways, we find our own solutions and implement our own ideas in full openness (...) If you have three people and each looks from a different perspective then we have a different picture of it, by combining these perspectives we see what the object actually looks like; [D1] If you search, reach out to various sources, you may come up with a better idea, I don't want to impact you with an idea in advance. This is how non-standard approaches and non-standard solutions are created. If we look for different information and ask ourselves "how?", "why?", "what for?", that is, we are curious all the time, we are scrambling. It is such a climate, and the company must be conducive to such an atmosphere, that such questions are generated. [D1]
Flexibility	(...) with flexibility and with adjusting strategies to situations that happen now, that is, such flexible management; [D2] (...) with a certain flexibility, with the fact that actually we today have to very often, especially if we manage such small or medium size organizations, we have to be open, we have to be cautious, we have to try to look for these market gaps. [T]
Freedom/autonomy of thought and speech	But at the moment, absolutely every employee, no matter if he is a manager or director, has a total equal voice in the discussion and is not limited; [D1] with a sense that speaking openly about what one thinks will not be met with some sort of harassment, that someone will be judged on this basis. That a climate of openness in general also requires a climate of tolerance for the beliefs of everyone on the team [I]
Integration	We have this climate somewhere injected and followed according to what it tells us; [D1] (...) so that employees are not alienated from their work [D2]
Involvement	[This climate] is the ability to raise synergy squared by maximizing diversity; [D1] Involving employees, or even (...) whole network within your work, also contractors in the processes of a common vision that is shared (...) absorptivity to new ideas and ideas coming from the bottom; [D2] When it comes to subcontractors, we even use them a little bit as a fresh perspective on projects. We ask them what they think as they are not inside. [I]
Sincerity/lack of double standards	We all know our thoughts. We know a little more our personal goals too. It's like we don't have that sense that there are people who are doing something, but somewhere they have a hidden agenda, that they would like to do something else; [I] In our company there is such a climate of honesty and we have a policy of not sweeping it under the rug, that is, if someone cares about something, someone doesn't like something, we say it right away and frankly to avoid the emergence of any problems or insinuations. [D1]
Failure-tolerant mindset	In an open strategy, it is this approach that makes us not treat these things as failures or big stumbling blocks. Rather, we try to look at such stumbling blocks, or what fate will bring us, as opportunities and what we can really get out of them; [D1] Maybe testing some ideas that we are not sure are the best. [I]
Communication	We are also very strongly oriented to receive feedback from our partners, i.e. suppliers; [D2] We all, despite the fact that we are not on equal positions, have very open communication. Maybe those are characteristics of the industry. [D2]
Initiative	A climate of openness is the creation of a space for work or cooperation, in which it is possible to freely exchange ideas and concepts, create projects together; [D2] [At our company] there is still an atmosphere of such fun and curiosity. The point is that we play with these topics and we also try to ask "how?", because this creates interesting ideas. That is, we don't block ourselves, because everyone can have an interesting example. [D1]
Cooperation	We live more project-based, and I think this project-based attitude definitely fosters responsibility and building this mindset, fosters co-creation; [D1] At our company, all the time this design thinking is vivid, (...) we have a creative meeting, where we decide on some strategic things, we invite the girl who is at our administrative office, who theoretically makes coffee, but we know that she studied something there, so she has a completely different view; [D1]
Trust	I see it as related to a sense of being able to talk back to any person in the organization potentially about any topic, without thinking about what the potential repercussions are. So (...) it's related to this trust, to communication, to reflexivity; [T] The atmosphere of the rat race can also be such a demotivator here to build an atmosphere of trust, a common goal, a common vision. Maybe still lack of transparency, immoral behavior, unethical behavior towards other companies (...). It seems to me that this can somehow destroy the atmosphere of trust and feeling of having a common goal and doing something good through work, such work ethic; [D2] I think that naturally sooner or later the trust appears (...) in an open environment, there is also a greater chance for involvement, for initiative of all kinds. There is a chance to develop stronger relationships, or the current ones can intensify; [T] I think that trust is the basis, probably, both to build this climate of openness, and to sustain it afterwards [T]

Supportive management style	<i>The approach of management to all employees, whether they are able to create an atmosphere of trust towards these people towards each other, whether they are able to create confidence in these people to come talk about their ideas and concepts; [D2] It's hard for me to separate management from employees, because the mood, the atmosphere, how they feel to a large extent, mainly depends on this management. [D2]</i>
Interpersonal relationships	<i>I think that here at our place it is also the case that we are more like a family; [D1] Tolerance for minorities and the non-discriminatory nature of the work environment [D2]</i>
Idea time	<i>Creating a space for people to share their ideas, willing to participate in building the strategy; without creating opportunities and spaces for this, it is impossible to do such an open strategy; [D2] Giving yourself time for ideas. This is indeed sometimes lacking. That is, simply this approach: and does anyone have ideas? No one has, then we move on. Let's write ideas, we'll meet tomorrow to discuss it tomorrow. [I]</i>
Including stakeholders in decision making	<i>Every working person is important and can participate in the creation of the company. The product, the voices of each of these people are important and are taken into account. And it is not that there is a boss who has his vision and all the rest have to do what he imposes and there is no room for discussion; [D2] It's not that people are assigned tasks, but people choose for themselves what they are going to do, so they actually make the decision themselves. Of course, despite the fact that sometimes they get these things, it's not that everyone willingly takes the tasks, because some are easier, some are more difficult. Some, no one feels like taking at all. But that moment when an employee says "well, I'll take care of it" is nevertheless his decision, not a decision that someone imposed on him saying "you're the one to take care of it". And I think even the psychological effect is quite different. [I]</i>
Debates	<i>I personally care that all employees feel that we take their opinion into account; [T] If we want to remain effective and make decisions – on the one hand, and on the other hand – to discuss them quite extensively, it is hard to do other than in organized meetings, well organized discussions. [T]</i>
Responsiveness	<i>It's more about that kind of "real time response," that kind of responsiveness; [D1] This is a broader view (of open strategy), for the reason that as we look and react to what the market is doing and try to adapt to it, to notice new opportunities, what is really our goal is to take into account these internal and external stakeholders, because after all, we are not adapting to the market, we are not looking for new customers or new markets just for ourselves. [D1]</i>
Co-creation	<i>While designing apps, we made a decision that first we send a survey to consumers for them to make a dream app, a contest, and do the so-called co-creation with consumers; [D1] Co-creation – it is very, very important. Just the fact that the whole team feels this responsibility and gets involved, no matter what they do. Sometimes when it comes to the people who write the code, we also ask them for their opinion, we show them the marketing offer – they then feel appreciated – that's one thing. Secondly they can express their opinion, and this opinion is often very interesting, because we may have a set pattern, and they may see something we don't see. [D1]</i>
Proactivity	<i>This is the kind of atmosphere in the company that fosters, constantly questioning the status quo. We are constantly reflecting on what's going on in the world, what's going on at our company, and we try to be proactive, we try to find solutions, not hide; [D1] This climate should be created spontaneously, because otherwise it will be so artificial. Well, on the other hand – I think that without some such active actions of managers it will not appear on its own. [T]</i>

Source: own work