

# IS THERE A ROOM FOR FUNCTIONAL FLEXIBILITY IN ORGANIZATIONS OPERATING ON THE SELF-ORGANIZATION BASIS?

## Introduction

Modern organizations operating in highly competitive markets must be able to continually reorganize to respond to the challenges of the business environment. To run in complex markets, enterprises need innovative strategic solutions and flexibility that will ensure their competitiveness [Schreyögg and Sydow 2010]. The answer to these challenges, and at the same time a new research field in management sciences, might be self-organization. According to R.M. Grant [2016], self-organization is a promising and fresh approach to the issues of formulating and implementing strategies. Among the concepts similar to or identical with self-organization, the following can be distinguished in the literature on the subject: self-management, self-organizing teams, full participation in management, or circular organizing. On the academic side, the first publications on circular organizing appeared in the 1980s and 1990s; [Ackoff, 1989; 1999; Romme, 1996; 1997; 1998] at present, the topic is discussed by J. Buck and G. Enderburg [2012] as well as G. Romme [2016]. In 2017, his publication “The quest for professionalism: The case of management and entrepreneurship” was awarded the book of the year title by the European Academy of Management (EURAM).

In the light of the variability of the business environment, the management staff is looking for and implementing various solutions that are to simultaneously use the potential of its employees and bring benefits to the enterprises managed by them.

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These initiatives include changes to management systems that are often reflected on the side of organizational structures. These are projects of varying scale, investment level, and risk, followed by changes on the part of HRM, in accordance with the coupling of the sphere of human resources management (HRM) with the improvement of organizational structures [Stabryła, 2011: 22–23].

On the other hand, in the field of Human Resource Management (HRM), the need for changes in the area of applied practices has been indicated for over a dozen years. In 2005, Gueutal and Stone [2005] recognized hierarchical organizations and traditional work positions as those HRM practices that would give way to flat organizations and self-directed teams. In 2011, best practices in the area of human resources management included, among others: self-managing teams, ensuring that employees are authorized to make full use of their skills and knowledge, and creating jobs that support motivation, commitment, and flexibility [Armstrong 2011]. In the literature on the subject, one could find a lot of research on the organizational structure and its design, and the issue of flexibility is discussed in this context. More flexible organizational structures are visible, among others, in the design of the system, organization, and job, and, in this context, functional flexibility is mentioned as a factor of competitive advantage [Jagoda 2015]. Due to the small number of publications on functional flexibility in enterprises based on self-organization, the article attempts to answer the question of what the possibilities are in applying functional flexibility in self-organization. In order to answer such a research question, the literature and data collected during the qualitative study were analyzed. The qualitative research was carried out in Poland, in an enterprise that has implemented the approach of self-organization – Holacracy.

## 1. Self-organizing as a new organizational context for building work flexibility

### 1.1. Towards work flexibility and competitive advantage

Well-designed and adapted to the strategy management systems and organizational structures support the implementation of corporate goals. Due to the changing environment, and strategies of enterprises, the design of the organization and jobs has evolved, consisting in defining the scope of responsibilities of individual people working in a given organization [Griffin, 2017]. A stable and predictable environment allowed the approaches of Weber or Fayol, based on specialization, to be successfully functioning for a long time. The behavioral approach changed the way of looking at the division of work thanks to the attention paid to the behavior of the employee in the organizational context. A new perspective has also brought a systemic

approach, through defining organizations in terms of interconnected subsystems, as well as a learning organization concept based on knowledge, a fractal organization or a flexible one [Griffin 2017; Krupski 2008]. The literature on the subject provides various definitions of flexibility. H.I. Ansoff [1965 after: Jagoda 2015] understands it as a property of an organization that allows it to deal with changes in the environment it tries to respond to. In the same vein, flexibility is defined as an option of strategic thinking, which means the organization's ability to adapt in the unpredictable, full of changes environment that affects company results [Volbreda 1999]. There are also other features attributed to flexibility: the ability to adapt to competitive changes, global markets, without fundamental changes within the organization [Lynch 1989]. On the other hand, R. Krupski [2008] perceives flexibility as a way to deal with uncertainty, understood as the ability to respond to both predictable and unpredictable changes. The tool that helps in this process is the creation and selection of reversible options for functioning and development.

Bearing in mind the place of occurring changes to which the organization adapts, the primary type of flexibility in the literature on the subject is the internal and external flexibility of the organization. Currently, one can indicate several areas of internal organization flexibility due to the functional areas of the organization. One of them is the area of personal function and work flexibility. It aims to make better use of employees' skills, increase productivity, increase operational flexibility and reduce employment costs [Armstrong, Taylor, 2016: 181], which is associated with changes in the employment structure. As part of the organizational flexibility of work, one can indicate several forms related to the way of performing work: structural, numerical, financial and functional flexibility. Functional flexibility constitutes the subject of this article.

In the light of modern management concepts in which "employee competence potential and organizational knowledge is the main way to obtain and maintain competitive advantage" [Juchnowicz, 2007], the idea of functional flexibility of the enterprise becomes a vital research subject and serves as the basis for building the theory of a flexible [Atkinson, 1984] enterprise. **Functional flexibility** may be defined as an ability of employees to perform various tasks, depending on the needs of the organization, through job rotation and broadening the responsibilities of employees [Atkinson 1984; Gableta 2003]. It can be also characterised by the ability of the company to change the amount and type of work used within the internal labor market. This manifests itself in the possibility of quickly and smoothly assigning employees to various tasks, which is beneficial for the company. The variety of tasks carried out at one workplace helps in the development of skills and gaining experience while moving between various job positions leads to acquiring new skills, which in total makes a versatile employee [Jagoda, 2015]. Employees acquiring new skills and competences, enable faster response to the needs of the organization (changes in demand

in the labor market, changes in production dynamics, dynamic enterprise development, etc.); and it is easier to understand mutual dependencies and communicate in interdisciplinary projects. Through the diversity of tasks, functional flexibility also promotes humanization of work, reduces its monotony, and supports the creativity of employees [Desombre et al. 2006]. In order to achieve the purpose of this article i.e., identification of the possibilities of applying functional flexibility in self-organization, Jagoda's definition was adopted. To that end, possible ways of applying functional flexibility were identified and characterized in terms of its characteristics, which include **smoothness** and **quickness** in the ability to change the amount and type of work in order to assign employees to various tasks that **benefit** the company.

## 1.2. The unique approach of Self-organizing for work

An example of organizations that gain the interest of researchers and practitioners are companies that operate on the basis of self-organizing – the process of adapting to changes and creating new structures and systems without any formal authority, similar to biological and social systems [Wheatley, Kellner Rogers, 1996 after: Grant, 2016]. The main motives behind the implementation of self-organization are greater flexibility, faster decision making, allowing a more full understanding of the voice of employees, and engagement [G. Romme 2016; Biłyk 2018]. According to Romme [2016], this is an alternative to traditionally managed organizations, and one of the forms of self-organizing is circular organizing, in which work focuses on a shared, professional purpose. The values of sociocracy and engineering education underlie circular organizing. The word “sociocracy” comes from the Latin word “socius” (companion, colleague) and the Greek word “kratein” (manage). The sociocratic approach was first implemented in the organizational context in the 1970s in the Netherlands in an engineering company – Endenburg Elektrotechniek. Due to the dissatisfaction of employees and the growing number of conflicts after the implementation of the works council required by the Dutch law, the owner of the enterprise and, simultaneously, one of its engineers – Gerard Endenburg, initiated the redesign of the communication system to improve the quality of work. The result of this initiative was to combine the approach of sociocracy with tools in the field of cybernetics, which served as preliminary guidelines for several solutions that characterize circular organizing. These solutions concern: ways of making management decisions (*policy decisions*); ways of communication (*double linking*) between the units, and ways of selecting representatives of the organizational units which provide communication between these units [G. Romme and Endenburg 2006; G. Romme 2016]. While the classical scholars understood hierarchy as authority and subordination of people, in organizations where circular organizing occurs, there is another dependency. It is a hierarchy of professional purposes of particular organizational structures, which

are circles and roles. Next to the purposes, which constitute the action of teams and individual people, one of the key, organizing processes is a circular leading-operating-measuring process taking place around the joint, changing and defined by the staff, purpose of the unit or team.

## 2. Research methodology

The choice of the case study methodology is guided by two conditions [Yin, 1984 after: Czakon, 2015: 192–195]: the early stage of knowledge development in a given research area and the recognition of the phenomenon in real conditions. The first one refers to the fact of a small amount of empirical research in the field of self-organizing – circular organizing. The second condition is the fact of recognizing a new phenomenon and conducting research in its natural environment. A particular case of circular organizing is Holacracy – an approach based on a system of self-organizing circles that decide about their politics and allocate roles to individual persons [Romme, 2016: 132–134, 210]. Later in the text, terms such as self-organization, circular organizing and Holacracy will be used interchangeably.

### 2.1. Research approach and procedure

The study was conducted in an enterprise which in 2017 implemented a work organization system based on self-organizing using the circular organizing process [Holacracy]. Due to the initial stage of research and the new phenomenon, apart from literature studies, the author decided to use a qualitative approach. Its purpose is to understand new, complex phenomena and social processes [Czernek in: Czakon, 2015: 171]. To collect more expanded field material and obtain a more reliable basis for interpretation, methodological triangulation was applied through the use of various research methods [Kostera, 2013: 97–98]. We carried out research which was guided by the following procedures for conducting case studies [Czakon, 2006 after: Czakon, 2015: 199]. At stage 1, research questions were put forward; at stage 2, the case was selected. The selection was purposeful. A company was selected that for at least three months in part of its structures has been managed in a holacratic manner and wants to develop this way of work organization. An enterprise in which Holacracy is at an early stage of development is an appropriate subject of research to analyze and collect data on the formation of organizational structures and creating jobs. At stage 3, data collection tools were developed: an interview scenario and a tool for taking field notes according to the method of E. Chiseri-Strater and B. Sunstein [Kostera, 2013: 159–160]. Multiple methods of data collection were used. Due to the initial stage of the work, no quantitative research was carried out. At stage 4, field tests

were carried out; at stage 5 the qualitative data were analyzed. Due to researching a single case, no comparisons were made. Techniques of material codification and phenomena visualization in the form of similarity groups and placing them on the timeline were applied. An attempt was made to identify the pattern and analyze it. At stage 6, an effort was made to shape generalizations, and at stage 7 we confronted the obtained data with the literature on the subject, which is manifested in the discussion of results. At stage 8, concluding the research, research hypotheses were formulated.

## 2.2. Research sample

The research involved an enterprise functioning according to the circular organizing processes – Holacracy. The case selection was made on the basis of information on the implementation of the holacratic rules of organizing in the part of the organization structure. The condition for the choosing of the sample was to sign the regulations of self-organization in the form of a Constitution and to meet the following criteria:

- 1) Organizing an organizational structure or unit using circles, where smaller ones are “contained” in larger ones, and the goals of their functioning are consistent;
- 2) Organizing an organizational structure or unit with the use of roles (one employee can play more than one part in the organization if he has appropriate competences);
- 3) The use of a specific decision-making process during management and tactical (operational) meetings with the possibility of making binding decisions by the persons participating in them;
- 4) Signed Constitution of Holacracy.

## 2.3. Data analysis

We analyzed one company. At the time of the research, some employees of the company worked according to the holacratic rules for six months. The following research methods were used in the study: direct observation (two tactical (operational) meetings, two governance meetings and almost 2-days presence in the production hall and office), documents analysis (internal materials regarding safety, quality, communication, production process, organizational structures, production costs), interviews (three individual interviews, recorded; two group interviews, unrecorded). The respondents agreed to participate in the study. The study was carried out by the author of the article and was implemented as part of the research project<sup>1</sup>.

The first stage of the research was to conduct direct observations. Then, an invitation to participate in individual interviews was sent. Three employees took part in the interview, including the initiator of the change. The interviews were individual;

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<sup>1</sup> Research project KNOP/ BMN17/ 02/17

anonymity was ensured and permission for recording was granted. These were free-form, non-standardized interviews – the author used the interview questionnaire with prepared questions and at the same time “followed” the respondents’ statements. Next, the interviews were forwarded for transcription. After analyzing the quality of transcription, text and field notes were coded and analyzed for phrases and keywords.

### 3. Case study results

In order to meet the objectives of this article, an analysis of the subject literature and empirical data collected in the research project was carried out. As a result, it was pointed out how Holacracy understands the notion of role and what is the purpose of two distinctive decision-making processes. Hereinafter, an attempt was made to **present possible ways of applying functional flexibility in terms of smoothness and quickness in the ability to change the amount and type of work in order to assign employees to various tasks beneficial for the company.**

The analyzed company is an industry-related manufacturing company with Japanese capital. At the time of the research, the company employed almost seventy people and has been operating in Central and Eastern Europe for seventeen years. As part of the Holacracy, there were fifteen specialists and office employees from the upper and middle management, hereinafter referred to as company X. Company X has its organizational purpose defined. It is formulated in the form of the result that the company wants to achieve, and, at the same time, it speaks of the means of reaching it. The purpose constitutes purposes of roles. Therefore, features of the role in Holacracy are listed:

- The role resembles traditional job position.
- Every role, however, has its purpose and set of accountabilities.
- Each and every role must be embedded in organizational purpose or / and be part of the purpose of the circle within which it functions.
- The purpose of every role answers the questions: Why is there a role? What does it bring to the organization?
- Each role has accountabilities and authorizations (domain) assigned to it that support the realization of the purpose of the given role.
- The role may be filled with one or many people. One person can fill more than one role.
- Every role can be modified or removed by the employees during designated governance meeting, during which one can change the components of the role (purpose, accountability).
- Company is open to exploiting the employee’s abilities, by enabling him to perform different roles, even in a situation of a varied level of proficiency.

Company X has implemented Lean Management. Apart from solutions characteristic for that concept, while implementing Holacracy, Company X has introduced two types of meetings: tactical and governance. During governance meetings the structure and polices are built. It is possible to create, amend, or remove roles within circle, or elect circle members to fill elected roles (e.g., facilitator). On the other hand, “tactical meetings are fast-paced forums to synchronize team members for the week any issues that are limiting forward progress. They enable you to discuss operational issues, get updates on projects that other roles are working on, give updates on your projects, and ask for help when needed” [Robertson 2015, p. 94].

### 3.1. Assigning employees to various tasks in self-organization (Holacracy)

In terms of assigning employees to various tasks in Holacracy, one may identify a few ways: under own roles, under new roles, or under individual activity. People may decide and undertake various tasks as long as they are part of their roles and accountabilities. Formal taking on of new roles – and related new accountabilities and tasks – takes place during governance meetings. If there is a task, that is in other role’s accountabilities, there is a possibility to work on it without assigning to a new role, as long as there is no objection raised. Furthermore, people are encouraged to undertake various tasks especially when not taking any action may bring more harm for the purpose of the organization.

### 3.2. Quickness and smoothness in the ability to change the amount and type of work

There are many ways of applying functional flexibility in reference to quickness and smoothness in the ability to change the amount and type of work. Company X, like other companies, determined the frequency of meetings (tactical are more frequent). Needs referring to changes in the amount and type of work may be discussed individually between employees or presented during a tactical meeting, particularly if a person is not sure what to do, needs help or could not communicate with particular people for some reasons [Robertson 2015, p. 94]. It is possible to share one’s tasks and accountabilities with employees who do not perform such tasks daily, but have sufficient competences to execute it. If structural changes are necessary, they take place during a governance meeting. If time is the factor, any employee may convene a governance meeting.

Tactical and governance meetings are characterized by a decision-making process, ending with a binding structural decision with on immediate effect. This is achieved through IT system, that allows to find descriptions of each role, along with its purpose,



accountabilities, authorizations (domain), as well as current, past and future projects and tasks. Moreover, it supports the decision-making process by indicating possible accountability conflicts among existing roles. If structural changes are necessary, all processed and accepted ones are immediately (in real time) introduced into a shared IT system during a governance meeting. Assigning to various tasks without the need of structural change is also placed in the IT system that allows monitoring projects and tasks as well.

In case of a decisional conflict, the circle follows specially designed decisional process, which is aimed at integration of objections and making a step forward from the status quo. That step may be a solution or action that is believed to cause no harm to the organization and give data about results of that change. That, in turn, will bring new information and may be helpful in further work on that issue, if necessary.

It was observed that people in Company X were changing the amount and type of work assigning people to various tasks. One could observe learning of the process, hesitation, and the few cases of withdrawal. Although the facilitator encouraged the participants of the meeting and assured they are authorized to make particular changes in the structure, people had concerns. Quickness and smoothness in the ability to change the amount and type of work was better when people were referring to their own roles.

### 3.3. Identification and assessment of beneficial tasks

Employees may raise concerns about benefits or harm that the organization may incur as a result of the action being taken. In the observed company, the most concerns were raised by former managers. Being aware of the limited time and number of employees, while discussing over assigning people to tasks, every person was asked, individually or in a group, to make a review of current and potentially new tasks, and then to answer a question: "Completing which tasks is going to have the biggest impact on fulfilling your roles' and organizational purpose right now"? This question opened up discussion about project and task priorities, as well as pointed out that the organizational purpose serves as a starting point and decision criterion in identifying and assessing accomplishing which tasks are beneficial for the company. On this basis some of the actions and projects were stopped, while others were prioritized.

## 4. Limitations of conducted analysis and recommendations for further research

The study involved one company that implemented a form of self-organization, which is Holacracy. Despite the advantages of the qualitative approach and the strict discipline of research applied during the case study, the research has its limitations:

relatively short time of the company's operation in the new system (six months), and observation of a selected group of employees who declared willingness to work in the new system. Other factors that could affect the results of the study are the influence of the researcher, self-assessment of employees, and the subjectivism of the researcher's perception of data. Due to the unrepresentative nature of data, it is not possible to derive generalizations; however, it is justified to outline further directions of research.

Possibilities of applying functional flexibility are located in a specific organizational context – the company's openness to such a work organization approach that is associated with unpredictability. Collected data allow to suppose that quickness and smoothness in the ability to change the amount and type of work were better when employees were referring to their own roles. Technology solutions, organizational structure organized around of circles and roles purposes, together with the use of decision-making processes might be helpful in applying functional flexibility in terms of smoothness and quickness in the ability to the change amount and type of work in order to assign employees to various tasks beneficial for the company. It seems that the company defines what is beneficial in the purpose of the organization, its circles and roles. It was observed that people in Company X were changing the amount and type of work assigning people to various tasks during formal (governance and tactical meetings) and informal situations, although people had a few concerns.

There exists a possibility to initiate structural changes that manifest themselves in the ability of the employee to shape his accountabilities and tasks. The research showed that although Holacracy offers an opportunity to work simultaneously as part of a variety of roles, not everyone uses this opportunity. Finding a clear explanation for this behavior is difficult. From interviews and observations, one can hypothesize that some people do not take on new roles for fear of entering someone's former area of expertise, or having to make decisions and become accountable for these areas. Perhaps some employees (former managers) have difficulty in sharing decision-making rights and power [Parnell and Crandall 2003], have different propensity to undertake the specific range of responsibility and need for participation in decision making [Alutto and Belasco 1972; Alutto and Acito 1974; Kahnweiler and Thompson 2000], or maybe it is the effect of learning a new system of work after carrying out an organizational change.

Due to research limitations, this article partly answers the research question of what the possibilities are in applying functional flexibility in self-organization. Obtained results, although not allowing for generalizations, confirm the positive prognosis for flexible forms of work. The evidence from this study also leads to questions about the impact of functional flexibility in self-organization on the organization development, organizational learning or the effectiveness of the enterprise, which may be the subject of further research.

## Conclusions

Flexibility has been one of the most frequently examined constructs in organizational studies in the last years and the subject of innovative solutions that will ensure organizational competitiveness [Schreyögg and Sydow 2010]. This study provides initial evidence for possibilities of applying functional flexibility in self-organization and becomes a part of broader discussion over the nature and complexity of self-organization [Grant 2016] showing potential directions for future research.

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## IS THERE A ROOM FOR FUNCTIONAL FLEXIBILITY IN ORGANIZATIONS OPERATING ON THE SELF-ORGANIZATION BASIS?

### Abstract

Search for the answer to the question about the practical ways of modern organizations management and the emergence of new management systems became the reasons for discussing the self-organization issues in the context of organizational flexibility and job creation. Due to the increasing number of jobs related to self-organization and circular organizing, the article aimed at answering the question of what the possibilities are in applying functional flexibility in self-organization. The literature and data collected during the qualitative study were analyzed. The results indicate that quickness and smoothness in the ability to the change amount and type of work were better when people were referring to their own roles. Technology solutions, organizational structure organized around of circles and roles purposes, together with the use of decision-making processes might be helpful in applying functional flexibility in terms of smoothness and quickness in the ability to change the amount and type of work. It seems that the company defines what is beneficial in the purpose of the organization, its circles and roles.

**KEYWORDS: SELF-ORGANIZATION, CIRCULAR ORGANIZING, HOLACRACY,  
FUNCTIONAL FLEXIBILITY**

**JEL CLASSIFICATION CODE: L22**

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## CZY ISTNIEJE MIEJSCE NA FUNKCJONALNĄ ELASTYCZNOŚĆ W ORGANIZACJACH DZIAŁAJĄCYCH NA ZASADACH SAMOORGANIZACJI?

### Streszczenie

Poszukiwanie odpowiedzi na pytanie o efektywne sposoby działania współczesnych organizacji oraz pojawienie się nowych systemów zarządzania stało się powodem podjęcia problematyki samoorganizacji w kontekście elastyczności i kształtowania stanowisk pracy. Ze względu na coraz większą liczbę prac związanych z samoorganizacją i *circular organizing* za cel pracy postawiono próbę odpowiedzi na pytanie, jakie są możliwości zastosowania elastyczności funkcjonalnej w organizacjach, w których funkcjonuje samoorganizacja? W tym celu dokonano analizy literatury oraz danych zebranych podczas badania jakościowego. Wyniki wskazują, że szybkość i płynność w zmianie ilości i rodzaju pracy była lepsza, gdy ludzie odnosili się do swoich ról. Rozwiązania technologiczne, struktura organizacyjna, zorganizowana wokół celów kół (*circles*) i ról (*roles*), wraz ze wykorzystywaniem procesów decyzyjnych mogą być pomocne w stosowaniu elastyczności funkcjonalnej w zakresie płynności i szybkości zmiany ilości i rodzaju pracy, korzystnej dla firmy. To, co firma postrzega jako korzystne, jest zdefiniowane w sensie działania organizacji (*purpose*), kręgów oraz ról.

**SŁOWA KLUCZOWE: SAMOORGANIZACJA, CIRCULAR ORGANIZING,  
HOLAKRACJA, ELASTYCZNOŚĆ FUNKCJONALNA**

**KOD KLASYFIKACJI JEL: L22**