University of Groningen

Heterogeneity in Organizational Hybridity

Besharov, Marya; Mitzinneck, Björn

Published in:
Organizational Hybridity

DOI:
[10.1108/S0733-558X20200000069001](https://doi.org/10.1108/S0733-558X20200000069001)

IMPORTANT NOTE: You are advised to consult the publisher's version (publisher's PDF) if you wish to cite from it. Please check the document version below.

Document Version
Publisher's PDF, also known as Version of record

Publication date:
2020

[Link to publication in University of Groningen/UMCG research database](#)

Citation for published version (APA):

Besharov, M., & Mitzinneck, B. (2020). Heterogeneity in Organizational Hybridity: A Configurational, Situated, and Dynamic Approach. In M. L. Besharov, & B. C. Mitzineck (Eds.), *Organizational Hybridity: Perspectives, Processes, Promises* (pp. 3-25). (Research in the Sociology of Organizations; Vol. 69). Emerald Group Publishing Limited. <https://doi.org/10.1108/S0733-558X20200000069001>

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CHAPTER 1

HETEROGENEITY IN ORGANIZATIONAL HYBRIDITY: A CONFIGURATIONAL, SITUATED, AND DYNAMIC APPROACH

Marya L. Besharov and Bjoern C. Mitzinneck

ABSTRACT

As complex, intractable social problems continue to intensify, organizations increasingly respond with novel approaches that bridge multiple institutional spheres and combine forms, identities, and logics that would conventionally not go together, creating hybridity. Scholarly research on this phenomenon has expanded in tandem, raising questions about how the concept of organizational hybridity can maintain analytical clarity while accommodating a diverse range of empirical manifestations. Reviewing and integrating extant literature, the authors argue that to achieve both analytical rigor and real-world relevance, research must account for variation in how hybridity is organizationally configured, temporally situated, and institutionally embedded. The authors develop a framework that captures this heterogeneity and discuss three key implications for hybridity research: drawing on multiple theoretical lenses, examining varied empirical contexts, and adopting multi-level and dynamic perspectives.

Keywords: Hybridity; institutional logics; organizational identity; categories; paradox; heterogeneity

INTRODUCTION

An ever more closely connected world and complex societal problems challenge conventional organizing practices (George et al., 2016). Issues such as climate change and pressing economic inequality require collaboration between diverse stakeholders to develop effective responses (Montgomery, Dacin, & Dacin, 2012; Wijen & Ansari, 2007). They further necessitate transformation at multiple levels, from shifts in individual consumption patterns to systemic changes in transitioning industries (Ferraro, Etzion, & Gehman, 2015; van Wijk, Zietsma, Dorado, de Bakker, & Martí, 2019). In response, organizations increasingly straddle multiple institutional spheres and combine forms, identities, and logics that would conventionally not go together, creating hybridity (Battilana, Besharov, & Mitzinneck, 2017). Renewable energy cooperatives blend market, environmental, and community logics (Huybrechts & Haugh, 2018; Mitzinneck & Besharov, 2019), public-private partnerships span state and market logics (Hoffman, Badiane, & Haigh, 2012; Jay, 2013), and benefit corporations (Gehman & Grimes, 2017), microfinance organizations (Battilana & Dorado, 2010; Cobb, Wry, & Zhao, 2016; Zhao & Wry, 2016), and social enterprises (Battilana & Lee, 2014; Smith & Besharov, 2019) bring together social welfare and commercial logics, to name but a few examples.

As hybridity becomes more widespread and varied across the contemporary organizational landscape, scholarly research on this phenomenon is expanding and evolving as well (Mitzinneck & Greco, forthcoming). Studies draw on varied theoretical lenses, including early work in transaction cost economics (e.g., Williamson, 1985, 1991, 1996), network forms (e.g., Podolny & Page, 1998; Powell, 1990), and organizational identity (e.g., Albert & Whetten, 1985; Foreman & Whetten, 2002; Glynn, 2000), and more recent scholarship on institutional logics (Battilana & Dorado, 2010; Thornton, Ocasio, & Lounsbury, 2012), organizational forms (Battilana & Lee, 2014; Tracey, Phillips, & Jarvis, 2011), and social categories (e.g., Wry, Lounsbury, & Jennings, 2014). Organizational hybridity research also covers a widening array of empirical contexts. Although recent reviews characterize social enterprises as the ideal typical hybrid (Battilana & Lee, 2014), studies recognize hybridity in settings ranging from manufacturing (Greenwood, Raynard, Kodeih, Micelotta, & Lounsbury, 2011) and professional or financial services (Smets, Jarzabkowski, Burke, & Spee, 2015; Smets, Morris, & Greenwood, 2012) to higher education (Albert & Whetten, 1985), cooperatives (Foreman & Whetten, 2002), health care (Reay & Hinings, 2009), the arts (Glynn, 2000), and the non-profit sector more generally (Skelcher & Smith, 2015). Indeed, research on hybridity has reached the point that skeptics might question the concept's analytical value, as a multitude of organizations can be characterized as hybrid.

In this introductory chapter, we take stock of recent developments in the literature and explore how the concept of organizational hybridity can remain analytically useful while accommodating a diverse range of empirical manifestations. Our central argument is that to achieve both analytical rigor and real-world relevance, research must account for variation in how hybridity is organizationally configured, temporally situated, and institutionally embedded. The first section of

the chapter develops a framework that captures these aspects of heterogeneity and explains their relevance for understanding the nature and consequences of organizational hybridity. The second section considers the implications for how scholars study hybridity and highlights three key approaches: drawing on multiple theoretical lenses, examining varied empirical contexts, and adopting multi-level, dynamic perspectives. We show how the chapters in this volume exemplify these approaches, contributing to a research agenda for unpacking hybrid heterogeneity.

HETEROGENEITY OF HYBRIDITY

Early research on hybridity tended to treat it as binary and somewhat ephemeral, characterizing organizations as either hybrid or not (e.g., Albert & Whetten, 1985) and treating hybridity as a phase through which organizations passed (e.g., Haveman & Rao, 1997). As research on hybridity evolved, however, scholars developed more nuanced conceptions. Recent studies suggest multiple dimensions along which the configuration of organizational hybridity can vary (e.g., Battilana et al., 2017; Besharov & Smith, 2014). Studies have also started to explore more varied temporal and contextual patterns, showing how organizational hybridity can persist yet evolve over time (e.g., Dalpiaz, Rindova, & Ravasi, 2016; Ramus, Vaccaro, & Brusoni, 2017; Smith & Besharov, 2019; Teelken, 2015) and how it both shapes and is shaped by the institutional environment (e.g., Litrico & Besharov, 2019; Reay & Hinings, 2009; Wry & Zhao, 2018; Zhao & Wry, 2016). In this section, we develop a framework for capturing this heterogeneity and understanding its implications. Fig. 1.1 provides a summary.

Variation in Hybrid Configurations

Accounting for the heterogeneous nature of organizational hybridity requires considering multiple dimensions along which hybrid configurations vary. A first dimension of variation concerns the compatibility of a hybrid's constituent elements (see Besharov & Smith, 2014; Raynard, 2016). That is, to what extent do they entail consistent versus contradictory cognitions and actions? Initial conceptualizations of compatibility treated it as static, yet more recent work shows how this dimension may vary over time (e.g., Ramus et al., 2017). Moreover, even at a single point in time the same elements may be both compatible and incompatible. This possibility is evident in Smith and Besharov (2019) study of Digital Divide Data (DDD), a social enterprise that seeks to provide low-income youth a path out of poverty through employment in an IT services business. Pursuing DDD's social mission through a business provided more useful work experience for target beneficiaries, indicating compatibility, yet it also created higher training costs for the business, creating incompatibility.

In addition to varying in compatibility, organizational hybridity varies in "centrality," defined as the extent to which constituent elements are regarded as equally important versus one element being dominant with the other(s) playing a peripheral role (Besharov & Smith, 2014). As with compatibility, scholars initially described

Fig. 1.1. A Configurational, Situated, and Dynamic Framework of Organizational Hybridity.

centrality in relatively static terms, but recent research considers how it may vary over time (e.g., Ramus et al., 2017).

Furthermore, there is variation in the number of constituent elements included in hybrid arrangements. As past reviews of hybridity research have noted (Battilana et al., 2017), most studies tend to focus on hybridity involving two constituent elements, typically a market or commercial element combined with some “other” element that is at least distinct from, if not at odds with, the market. This market-other dichotomy is evident in social enterprises (Battilana & Lee, 2014), the commercialization of non-profits (Cooney, 2006) and public sector reform (Fossestøl, Breit, Andreassen, & Klemsdal, 2015; Waring, 2015). Yet, hybridity can also bring together three or more conventionally distinct elements, as when community, religious, professional, and/or social and environmental logics are combined with a market or commercial logic (e.g., Capellaro, Tracey, & Greenwood, 2020; Greenwood, Díaz, Li, & Lorente, 2010; Mitzinneck & Besharov, 2019).

A fourth dimension of variation involves how the constituent elements of hybridity are structured. Much extant research has distinguished between integrated and differentiated hybrid structures (Albert & Whetten, 1985; Battilana

et al., 2017; Besharov, Smith, & Darabi, 2019; Greenwood et al., 2011). In the former, individuals and sub-groups, as well as organizational practices and divisions, combine and blend the elements of hybridity, whereas in the latter they carry and enact just one element or another (see Ebrahim, Battilana, & Mair, 2014 for an illustration of both types). Recent research notes that organizations can also combine integrated and differentiated structures. For example, Smith and Besharov (2019) describe how DDD exhibited integration in that leaders adopted cognitive frames that combined social welfare and commercial orientations, and differentiation through distinct organizational goals, metrics, and roles for the social welfare and commercial sides of its mission. Indeed, research suggests organizations may relatively flexibly combine and re-combine integration and differentiation in the structures they develop (Battilana et al., 2015; Ramus et al., 2017).

Attending to these four dimensions is not just a matter of precision in characterizing the configuration of hybridity; it also has implications for understanding the consequences of hybridity. Compatibility, for instance, can influence whether hybridity generates tensions between constituent elements or offers opportunities for synergy. The lower the compatibility of constituent elements, the more likely that tensions emerge between them. Centrality, meanwhile, can influence the “stickiness” of hybridity as well as the speed and difficulty of change. For example, high centrality may make it difficult for leaders to rapidly shift strategic direction or de-prioritize any particular element. In contrast, when centrality is low and a single element dominates, organizations are more likely to have a unique guide for action and may therefore be able to make strategic decisions more rapidly, all else equal.

The implications of multiplicity are less well understood. On the one hand, a higher number of constituent elements may provide more choice and flexibility when making strategic decisions or justifying proposed courses of action (e.g., McPherson & Sauder, 2013). Multiple elements also affect one another and may lead to different outcomes jointly than they would in isolation (Greenwood et al., 2010). With increased multiplicity, organizational actions may thus become more adaptive but also more difficult to predict. On the other hand, the presence of more than two constituent elements can create instability and prove difficult to manage (Capellaro et al., 2020).

Finally, structure can have implications for the risk of conflict and mission drift in hybrids. Fault-lines may be more likely to emerge in differentiated structures, heightening the potential for conflict between units or sub-groups of members (e.g., Glynn, 2000). At the same time, differentiation may allow for focus and ensure attention to each element of the hybrid (Binder, 2007). Integrated structures may be less susceptible to conflict, because shared responsibility for and routine engagement with the multiple elements of the hybrid motivates organizational members to find ways of working together (e.g., McPherson & Sauder, 2013; Smets et al., 2012). Yet due to the absence of dedicated units or individuals representing and advocating for any single element of the hybrid, integrated structures may be more susceptible to prioritizing one element over others, resulting in low centrality for the deprioritized elements and potentially the demise of any

meaningful form of hybridity. Work by Pache and Santos (2010) and Battilana and Dorado (2010) note such a risk in the context of microfinance organizations. Taking stock of existing work on the structure of hybridity in the context of social enterprises, Besharov et al. (2019) argue that combinations of integration and differentiation can help organizations to overcome these challenges of each “pure type.”

Interdependencies in Hybrid Configurations

In addition to their individual implications, the dimensions delineated above interact and condition one another, jointly influencing the configuration and consequences of organizational hybridity. Extant research has focused mainly on interactions between compatibility and centrality. In particular, Besharov and Smith (2014) theorized that the combination of low compatibility and high centrality at the organizational level is associated with the highest level of internal conflict, followed by low compatibility with low centrality, high compatibility with high centrality, and finally high compatibility with low centrality.

Interrelationships among other dimensions are also likely to be important yet to date remain less explored. First, multiplicity may further condition or augment how centrality and compatibility play out. For example, hybridity with three or more constituent elements creates the possibility for hierarchies in centrality, not just balanced or central–peripheral dichotomies. This can complicate conflict mitigation as supporters of the various elements may disagree not just along one fault-line but multiple. Higher levels of multiplicity also have implications for compatibility, as the demands of hybrid elements may vary not only in how consistent they are with one another but also in how easily they can be combined and jointly addressed (Mitzinneck & Besharov, 2019). This in turn influences the possibility of coalitions or truces among supporters of distinct elements, as well as the ease of managing tensions between elements.

Second, differences in the structure of hybridity likely have implications for compatibility and centrality as well. For example, differentiated structures may be more commonly found when compatibility and centrality are low, as structural separation can facilitate differential allocations of resources and attention and allow organizations to avoid directly confronting inconsistencies between hybrid elements. Yet this tendency may further exacerbate the potential for conflict to emerge, as representatives of each element vie for control (Battilana & Dorado, 2010; Glynn, 2000). In contrast, integrated structures may help ensure attention and resources to all elements, suggesting a possible association with high centrality. Still, the combination of integration and high centrality leaves organizations with no dedicated representatives of each element nor a clear guide for decision-making when the elements of hybridity imply divergent courses of action, potentially leading to shifts in centrality if just one element is consistently favored.

Finally, multiplicity and structure themselves may interact. Differentiated and integrated structures are relatively straightforward when they involve just two elements, and these have been the focus of past organizational hybridity research. However, both types may be more challenging to manage when multiplicity is

higher. For example, Capellaro et al. (2020) depict instability and ultimately failure of the “tribrid” structure in an Italian hospital. Research on individuals with multiple identities (e.g., Ramarajan, 2014) and fields with more than two logics (e.g., Jones, Maoret, Massa, & Svejenova, 2012; Jones & Thornton, 2005) addresses similar issues at other levels of analysis and may offer a starting point for unpacking these possibilities.

Embeddedness of Hybrid Configurations

Understanding the nature and consequences of organizational hybridity depends not only on accounting for the multiple dimensions along which it is configured, but also on understanding its history and legacy, as well as the institutional context in which it is situated. Extant research at the organizational level has tended to focus on novel forms of hybridity and the early life-stages of hybrid organizations, while more established hybrids remain less studied (Glynn, Hood, & Innis, this volume). Yet, organizations that are founded as hybrids or have a long history of combining multiple elements, such as family businesses (Whetten, Foreman, & Dyer, 2014) or religious universities (Albert & Whetten, 1985), likely face different challenges and opportunities than those in which hybridity is still emerging and not yet well-established, such as charities launching commercial ventures (Litrico & Besharov, 2019) or public sector organizations instituting managerialism (Teelken, 2015).

In particular, when hybridity is still emerging in an organization, this may facilitate greater openness to change and willingness or ability to experiment with how multiple elements are combined, allowing for learning and adaptation over time (e.g., Smith & Besharov, 2019). However, emergent hybridity may also be accompanied by conflict over the appropriateness of bringing together conventionally distinct elements. The shorter the legacy of hybridity, the fewer the opportunities for developing consensus on how to structure and prioritize multiple elements and for finding means of managing tensions between them. In contrast, having a longer history of hybridity affords greater legitimacy among stakeholders and may help organizations develop internal mechanisms and routines to mitigate tensions and enable synergies from multiple elements (cf. Smets et al., 2015). For example, household goods manufacturer Alessi hybridized industrial manufacturing and cultural production over three decades, gaining a unique reputation among collectors and sustaining its competitive advantage (Dalpiaz et al., 2016; Rindova, Dalpiaz, & Ravasi, 2011). Similarly, as the combination of innovation and care logics becomes more established within modern research hospitals, it may fuel treatment improvements (Miller & French, 2016). Yet having a long history of hybridity could also make an organization more resistant to change in how hybridity is configured (Hannan & Freeman, 1984), inhibiting experimentation and adaptation.

Institutional contexts also differ in ways that have implications for hybrid configurations and their consequences. Extant work has noted a number of dimensions along which organizational fields vary in general (Greenwood et al., 2011; Zietsma, Groenewegen, Logue, & Hinings, 2017), including fragmentation, centralization, maturity, and the extent of institutional infrastructure. Differences across fields

in how multiple institutional elements are prioritized and structured, and in the extent to which such multiplicity is settled and well-established versus unsettled and contested, are likely to be particularly relevant for understanding organizational hybridity (Raynard, 2016). There are also relevant differences within fields over time, including shifts in the number and prioritization of multiple elements and in the extent to which these elements are settled versus unsettled. For example, in the wind energy field in North America, initial conflicts between economizing and ecologizing logics eventually settled and gave rise to a new blended logic (York, Hargrave, & Pacheco, 2016). Moreover, shifts within fields can be cyclical not just linear (Dunn & Jones, 2010; Goodrick & Reay, 2011). The pharmacy field, for example, has oscillated between phases of conflict, characterized by heightened contestation over the compatibility and prioritization of multiple logics, and phases of relative stability, characterized by truces among representatives of each logic (Nicolini et al., 2016).

Attending to these differences within and across fields can help to unpack the nature and implications of organizational hybridity. For example, when hybridity is emergent or novel at the field level, it may be associated with more contention (Raynard, 2016), and organizations may experience an illegitimacy discount or lower quality perceptions in the eyes of stakeholders (Hsu, 2006; Zuckerman, 1999). As hybridity becomes more established such challenges are likely to diminish (Glynn et al.; Wry & Durand, this volume). These dynamics are evident in the fields of social enterprise and microfinance, where the combination of market and social welfare logics has become relatively well-established over time (Smith & Besharov, 2019; Wry & Durand, this volume). The frequency of particular configurations may also change as hybridity becomes more settled at the field level (Litrico & Besharov, 2019). In the field of renewable energy, for instance, integrated cooperative structures became increasingly common in Europe as network organizations convened field participants and consolidated views (Huybrechts & Haugh, 2018).

These temporal and institutional differences in how hybridity is embedded underscore that the configuration of hybridity is not just heterogenous but also malleable. At some points in time and in some institutional contexts, hybridity may be particularly amendable to influence, affording organizational leaders greater discretion over the number, prioritization, and enactment of elements and associated activities. Such choices can influence not just the configuration of hybridity but also its implications, as leaders interpret and manage tensions between multiple elements or harness synergies to improve innovation and impact (Ashforth & Reinge, 2014; Battilana & Dorado, 2010; Besharov, 2014; Glynn, 2000; Jay, 2013; Smith & Besharov, 2019).

STUDYING HYBRID HETEROGENIETY: THREE KEY APPROACHES

Accounting for the heterogeneity of hybridity depicted in our framework has implications for research design and analysis. Most fundamentally, it raises

questions about how to select and bound a “case” for inquiry (Ragin & Becker, 1992) and which theoretical lenses to draw on when analyzing the case. Particular lenses may be well suited for understanding some dimensions of hybridity more so than others. Likewise, different contexts may be more or less relevant for illuminating particular dimensions and configurations of hybridity. Moreover, investigating the interplay between different dimensions of hybrid configurations, as well as their institutional embeddedness, may require spanning levels of analysis and temporal periods. In this section, we explore how hybridity research can address these issues by drawing on multiple theoretical lenses, examining varied empirical contexts, and adopting multi-level and dynamic perspectives. We illustrate each approach with examples from chapters in the rest of this volume and provide a summary in Table 1.1.

Drawing on Multiple Theoretical Lenses

Although contemporary hybridity research is commonly associated with the institutional logics perspective (Thornton et al., 2012), a number of other theoretical lenses emerge as relevant when one considers hybridity research across sociology, organizational theory, and neighboring disciplines such as public administration (Battilana et al., 2017). For example, some older research draws on organizational forms (Powell, 1990) and identity (Albert & Whetten, 1985), and several more recent studies adopt paradox (Smith & Lewis, 2011) and social categories (Durand, Granqvist, & Tyllström, 2017) lenses. Different theoretical lenses offer complementary strengths in illuminating the heterogeneity of hybridity. The organizational forms perspective, for instance, lends itself to considerations of hybrid structures, whereas an institutional logics lens is well positioned to accommodate higher levels of multiplicity. An identity lens, with its focus on meaning construction, may especially befit investigations of centrality in hybrids, whereas paradox theory offers useful conceptual tools for exploring compatibility.

The chapters in Section A of this volume illustrate these possibilities in greater detail and invite us to take a new look at some of the core theoretical lenses in hybridity research. Collectively, they call for more integration between (and sometimes also within) theoretical lenses in order to foster continued development of new conceptual insights. Focusing on institutional logics, Pache and Thornton explain how this dominant lens can continue to propel research on hybridity but also warn of overuse. They offer four provocations and four suggestions for future research. First, they remind us that institutional logics is itself a meta-theory, meaning that it conditions other theories rather than operating alone. As such, it can be combined with and used to further specify lower-level theories such as categories, identity, or paradox to robustly explain hybrid phenomena. Second, Pache and Thornton urge us to consider such theoretical cross-fertilization carefully so as to consolidate insights and accumulate knowledge as research on hybridity moves from a nascent to an intermediate stage of development (Edmondson & Mcmanus, 2007). Third, they show how the institutional logics meta-theory can traverse levels of analysis and has considerable potential for research at the individual level of analysis. Fourth, they observe and encourage

Table 1.1. Summary of Chapters and Research Approaches in this Volume.

Chapter	Synopsis	Theoretical Lens(es)	Empirical Context(s)	Level(s) of Analysis	Shifts Over Time
2	<p><i>Core argument:</i> Analytical power of logics perspective for studying hybridity but also risk of overuse/misuse</p> <p><i>New insights and contributions:</i></p> <ul style="list-style-type: none">• How to use logics as a meta-theory and tool for cumulative theoretical advancement• How this meta-theory enables scholars to traverse levels of analysis	Institutional logics	NA	Individual, organization, field	
3	<p><i>Core argument:</i> Institutionalization of hybrid identities can shift internal experience of tensions and external devaluation of hybrid entities over time</p> <p><i>New insights and contributions:</i></p> <ul style="list-style-type: none">• Framework of cognitive, normative, and regulatory routes to hybrid identity institutionalization• Value of considering hybridity at different “life-stages” of the hybrid entity	Organizational identity (with institutional logics, categories)	NA	Organization, field	✓
4	<p><i>Core argument:</i> Audiences may have multidimensional value preferences and can thus appreciate categorical hybridity</p> <p><i>New insights and contributions:</i></p> <ul style="list-style-type: none">• External audiences likely to rely on heuristics to assess hybridity• Variation in the heuristics used by external audiences can shape the landscape of available competitive positions for hybrid organizations in a field	Categories; judgment and decision-making (heuristics)	Microfinance and impact investing globally	Individual, organization, field (social category)	✓
5	<p><i>Core argument:</i> Combining dynamic equilibrium and permanent dialectics approaches to paradox is valuable for studying hybridity</p> <p><i>New insights and contributions:</i></p> <ul style="list-style-type: none">• How a paradox lens calls attention to the role of dynamic processes, conflict, and power in hybridity• Benefits of combining approaches within a theoretical lens	Paradox	NA	Organization	✓

Chapter	Synopsis	Theoretical Lens(es)	Empirical Context(s)	Level(s) of Analysis	Shifts Over Time
6	<p><i>Core argument:</i></p> <p>Four types of hybridity in business sustainability based on variation in the integration and autonomy of sustainability relative to business issues</p> <p><i>New insights and contributions:</i></p> <ul style="list-style-type: none">• Meaning of hybrid configurations, as well as their benefits and challenges, depend on the context• Integration of multiple elements may end up preserving just one element as primary, while differentiation may allow each element to be fully valued and more autonomous	Organizational forms; paradox	Business sustainability globally	Organization	✓
7	<p><i>Core argument:</i></p> <p>Formation of hybrid (vs. pure type) social ventures influenced by work experience of the founder and their parents</p> <p><i>New insights and contributions:</i></p> <ul style="list-style-type: none">• Role of individual life histories, not just institutional and contextual factors, in the emergence of hybridity• Value of building novel quantitative datasets to study new hybrid fields	Organizational forms; imprinting	New social ventures in the United States	Individual, organization	✓
8	<p><i>Core argument:</i></p> <p>Hybrids can manage the liability of novelty through practices that balance stability and change both internally and externally</p> <p><i>New insights and contributions:</i></p> <ul style="list-style-type: none">• Distinct from the liability of newness, liability of novelty involves challenges of being neither understood nor accepted• It is institutionally and temporally dependent and may be heightened when both the substance of the mission and the form of organizing involve novel combinations	Organizational forms; institutional logics	Religious social incubator in Germany	Organization	
9	<p><i>Core argument:</i></p> <p>To fully understand social enterprises as hybrids, need to consider their institutional setting, which differs across social problem domains and national contexts</p> <p><i>New insights and contributions:</i></p> <ul style="list-style-type: none">• Opportunities and challenges of organizational hybridity vary across problem domains• Responses to these varied challenges and opportunities manifest in different governance arrangements at the organization and field levels	Organizational forms; institutional logics	Social enterprises across three European countries and problem domains	Organization, field (problem domain)	

Table 1.1. (Continued)

Chapter	Synopsis	Theoretical Lens(es)	Empirical Context(s)	Level(s) of Analysis	Shifts Over Time
10	<p><i>Core argument:</i> Configuration of organizational hybridity can shift toward greater integration to deal with increased environmental complexity</p> <p><i>New insights and contributions:</i></p> <ul style="list-style-type: none">• How structural changes involving vertical shifts in authority and horizontal shifts in tasks can reduce complexity and facilitate integration• Shifts in power are both drivers and consequences of hybrid evolution over time	Institutional logics	Italian fiscal police	Organization, field	✓
11	<p><i>Core argument:</i> Four mechanisms of “hybrid agency” enable organizations to advance logic combinations that deviate from field norms and regulatory frameworks</p> <p><i>New insights and contributions:</i></p> <ul style="list-style-type: none">• How field-level normative and regulatory changes create challenges and opportunities for hybrids• How hybrids use various forms of agency to respond to these changes and maintain their legitimacy to operate	Institutional logics; organizational forms	Sheltered workshops in the United States	Organization, field	✓
12	<p><i>Core argument:</i> Powerful actors can shape field settlements which constrain organizational choices for managing hybridity</p> <p><i>New insights and contributions:</i></p> <ul style="list-style-type: none">• Field actors influence organizational hybridity through resource control and logic (de) legitimization as well as discourse control and evaluation standards• Front-line workers can engage in counter-action by manipulating dimensions of organizational hybridity	Institutional logics; power and politics	Addiction services in Alberta, Canada	Organization, field	✓
13	<p><i>Core argument:</i> Field conditions influence legitimacy of organizational hybridity</p> <p><i>New insights and contributions:</i></p> <ul style="list-style-type: none">• Mechanisms linking field maturity and prevalence of hybridity with organizational legitimacy perceptions• Field conditions can have both negative and positive effects on organizational legitimacy (possibly simultaneously)	Institutional logics; legitimacy	Social enterprise, impact investing, and microfinance globally	Organization, field	✓

studies in more varied settings, highlighting in particular the promise of exploring alternative hybrid forms, such as cross-sector partnerships and informal collaborations. Taken as a whole, their chapter challenges common preconceptions about institutional logics research on hybridity and identifies multiple avenues for further development.

Reflecting on categories research, Wry and Durand observe that hybridity considerations have been an animating focus for scholars in this domain. Challenging us to re-examine implicit assumptions about how audiences categorize organizations, they suggest integrating research on heuristics into the categories literature to build more robust explanations of hybrid categorization processes. Audiences may value hybridity insofar as they appreciate multiple dimensions of value or multiple types of utility, such as commercial as well as social or environmental impact. However, in contrast to internal organizational members, external audiences such as investors are unlikely to engage in the cognitively taxing task of working through the tensions inherent in hybridity. Instead, they likely rely on heuristics to classify and assess hybridity. Building on this insight, Wry and Durand show how prior research on satisficing, lexicographic preferences, and elimination by aspects can be integrated into categories research to advance theories of hybrid categorization processes. In doing so, they show how concepts not previously linked to hybridity (e.g., forms of heuristic decision-making), can help to strengthen existing theoretical traditions (e.g., categories) and better capture dimensions of hybrid heterogeneity. The chapter also illuminates the implications of multiplicity for categorization processes, by noting that audiences may be simultaneously embedded in multiple logics and showing how this complicates their categorization of organizations that seek multidimensional value generation. In this way, the chapter offers a compelling demonstration of how the institutional logics lens can serve as a conditioning meta-theory for lower-level theories such as categories (cf. Pache & Thornton, this volume).

Starting from a review of research on identity and hybridity, Glynn et al. incorporate considerations of institutionalization to offer new insights and future research directions for hybridity research from an organizational identity lens. While an identity lens was foundational to organizational hybridity research, scholars have backgrounded this lens in more recent years. Rather than lamenting this trend, Glynn et al. highlight the value of combining identity with other theoretical lenses, especially institutional logics, to inform research on underexplored aspects of hybridity. In particular, their review shows that existing research offers little insight into hybridity in the later stages of the organizational life cycle. While hybridity may initially involve conflicting identity elements whose combination appears unconventional, Glynn et al. explain how processes of legitimation may enable hybridity to become accepted and institutionalized over time. As institutional spheres come in contact, they argue, certain combinations of identity elements drawn from a complex institutional environment become taken-for-granted despite their conflict potential, due to cognitive, normative, and/or regulatory institutionalization processes that modulate internal tensions and external evaluations. Their chapter demonstrates how theoretical integration between identity and institutional lenses can help to contextualize hybridity and surface new research directions.

Finally, the chapter by Smith and Pina e Cunha shows how a paradox lens can offer new insight into several aspects of organizational hybridity. Reviewing the evolution of paradox theory, they distinguish two approaches, dynamic equilibrium and permanent dialectics, which when combined provide useful conceptual tools for hybridity research. A dynamic equilibrium approach emphasizes oscillation and balancing of relatively permanent poles (e.g., commercial vs. social impact). In contrast, a permanent dialectics approach emphasizes the tendency of an action to seed a reaction, creating ongoing and generative conflict which may morph poles over time (e.g., a social enterprise trying to increase margin, triggering consideration of price fairness to suppliers, resulting in (re)evaluation of criteria in price setting). Smith and Pina e Cunha argue that integrating these two approaches can bring attention to aspects of hybridity which are relatively underexplored and not well-explained by other theoretical lenses. In particular, they encourage us to consider interdependence, not just contradiction, between constituent elements of hybridity, the potentially permanent nature of tensions between constituent elements, the value of long-term approaches to embrace rather than “solve” these tensions, and the possibility of constituent elements morphing over time rather than remaining stable. They thus offer a new perspective on what we refer to above as the dimension of compatibility. Taken as a whole, their chapter demonstrates the value of applying a more dynamic perspective to hybridity and sensitizes scholars to processes, power, and (productive) conflict in organizational hybridity.

Examining Varied Empirical Contexts

Given the heterogeneity in how hybridity is organizationally configured as well as temporally and institutionally embedded, a range of empirical settings have the potential to shed light on its nature and consequences. Refocused investigation of well-studied contexts, combined with research on previously unexamined contexts, can contribute to a more comprehensive understanding of the heterogeneous manifestations of hybridity. For example, corporate social responsibility initiatives in large firms may help illuminate low centrality, while organizations that pursue not just dual missions but also alternative forms of organizing, such as renewable energy cooperatives (Mitzinneck & Besharov, 2019), can shed light on higher degrees of multiplicity. Examining longstanding hybrids such as health care (Pratt & Rafaeli, 1997; Reay & Hinings, 2009), arts (Glynn, 2000; Maitlis, 2005; Townley, 2002), and higher education (Bertels & Lawrence, 2016; Kraatz, Ventresca, & Deng, 2010) organizations may help to unpack dynamics that arise when hybridity is well-established both organizationally and institutionally. In contrast, studying charities launching commercial activities (Litrico & Besharov, 2019) or public sector organizations incorporating market logics (Denis, Ferlie, & Van Gestel, 2017; Polzer, Meyer, Hollerer, & Seiwald, 2016) can shed light on the challenges and opportunities of nascent hybridity. As these examples imply, the opportunities for new insight development are not necessarily based on the substantive activity of an organization, industry, or field (e.g., social enterprise, professional services, family business, health care, and biotechnology). Rather,

they depend on the particular configuration of hybridity in terms of compatibility, centrality, multiplicity, and structure, as well as on aspects of its temporal and institutional embeddedness.

The four chapters in Section B illustrate the value of examining hybridity across varied empirical contexts. First, Hahn shows how considering hybridity in the context of business sustainability can offer new insights for research in both domains. When firms simultaneously address economic, ecological, and social issues, they bring together different identities, logics, and forms of organizing, thereby creating hybridity. Yet, there are differences in how firms implement business sustainability, which Hahn captures with two dimensions: “Integration,” which refers to the extent to which sustainability is incorporated into the organizational core and structurally integrated with business activities, capturing aspects of the centrality and configuration dimensions introduced above, and “autonomy,” which refers to whether sustainability is valued and pursued as an end in itself or only to the extent that it enhances business objectives. Considering these two dimensions together yields four types of hybridity in business sustainability – ceremonial, contingent, peripheral, and full. Several interesting implications follow from this typology. For example, in the context of business sustainability, ceremonial hybridity may enhance legitimacy, whereas existing research has generally treated hybridity as detracting from organizational legitimacy. In addition, the case of business sustainability offers a more complex account of the nature and benefits of hybrid configurations. For example, integration of multiple elements may be partial and selective, preserving one element as primary (to the detriment of others), while differentiation may allow for more autonomy such that each element is fully valued and unconstrained in how it is pursued. More generally, the chapter shows how the meanings of particular hybrid configurations, as well as their benefits and challenges, depend on the context. It also expands the terrain for business sustainability research by unpacking multiple ways that firms can incorporate sustainability concerns, beyond just the business case for sustainability.

Other chapters in this section show how research on social enterprises can continue to offer new insight into the nature and implications of hybrid heterogeneity. They do so by selecting settings and using research approaches that allow for investigation of particular dimensions of hybridity or aspects of its temporal and institutional context that are not yet well understood. Lee and Battilana use a unique dataset on nascent social ventures and their founders to examine the role of individuals’ life histories and prior experiences in the emergence of hybridity. They develop and test hypotheses about the effects of founders’ prior for-profit work experience and their parents’ for-profit work experience in choices to start hybrid social ventures. Their analysis shows that founders are more likely to start hybrid social ventures when at least one parent has for-profit work experience and when they themselves have for-profit work experience. Also as hypothesized, the marginal effects of the founder’s commercial work experience decrease as that experience lengthens, a finding that may be explained by the relatively stronger anchoring effects of initial work socialization. This chapter offers new insights into the emergence of organizational hybridity, highlighting

the role of individual life histories, not just institutional and contextual factors (cf., Defourny & Nyssens, 2006; Kerlin, 2006; Litrico & Besharov, 2019; Maier, Meyer, & Steinbereithner, 2016). The authors are able to do so by considering the relationship between factors at the individual and organizational levels, drawing on an additional theoretical lens (i.e., imprinting) to explain the relationship between these levels, and leveraging a novel quantitative dataset that captures life history information in addition to organizational characteristics, allowing for inferences about the dynamics of hybridity. All three of these features represent valuable approaches for generating new insights about hybridity even in a well-studied hybrid configuration.

The chapter by Gümüşay and Smets illuminates how the social enterprise setting can help us understand hybridity at higher levels of multiplicity and in contexts where the legitimacy of hybrid forms is not well-established. Based on an in-depth case study of “Incubate,” a Muslim social incubator in Germany, the authors propose that a “liability of novelty” emerges when hybridity is not just organizationally but also institutionally new within a given temporal and socio-cultural context. As Gümüşay and Smets argue, the liability of novelty creates both descriptive and evaluative challenges, due to a lack of cognitive understanding and a lack of normative acceptance, respectively. These challenges are heightened, moreover, when hybridity occurs in both an organization’s substantive goals and in the form of organizing through which it pursues these goals. Incubate, for example, adopted a mission bridging three logics – religious, community, and market – and to pursue this mission it combined digital and analog modes of organizing. Gümüşay and Smets further use the Incubate case to show how organizations can manage challenges associated with the liability of novelty through practices that balance stability and change both internally and externally. Incubate, for example, sought to foster internal coherence and external conformity, creating stability, while also working to align internal structures and practices as well as external expectations and relationships with its hybrid mission and organizational form. Taken as a whole, this chapter offers a compelling illustration of the context dependence of hybrid configurations and their consequences, particularly when hybridity involves high multiplicity and spans organizational form and substance.

Finally, the chapter by Mair and Rathert examines the role of institutional context in shaping the challenges and opportunities facing social enterprises as well as the strategies and practices they adopt in response. As organizations that use market mechanisms to address social issues, social enterprises operate in markets for public purpose – arenas of exchange which include a range of “private and public efforts to address social problems of public interest” (Mair, 2020, p. 340). Mair and Rathert argue that the nature of these markets, and correspondingly of social enterprises’ governance and organizing practices, depends on the social problem domain involved – including the types of beneficiaries served, the nature of public discourse on the problem, and the extent to which it is accepted as a problem, as well as the types of organizations and governance mechanisms used to address it. To illustrate how social problem domains may influence social enterprises’ governance and organizing practices, Mair and

Rather draw on survey data from Germany, the UK, and Sweden, gathered as part of the “Social Entrepreneurship as a Force for more Inclusive and Innovative Societies” (SEFORIS) project. Exploratory analyses point to differences in social enterprises’ perceived opportunities and challenges, as well as their chosen legal form, across countries and problem domains that vary in their level and type of competition and in the concentration and dominance of particular legal forms. In addition to showing how the nature and consequences of hybrid configurations depend on the context in which they are embedded, this chapter offers a problem-centered approach grounded in the social issues that social enterprises seek to address.

Adopting Multi-level and Dynamic Perspectives

Complex societal problems demand multi-level responses (Ferraro et al., 2015; van Wijk et al., 2019), and it is therefore not surprising that hybridity manifests at multiple levels. Individuals blend identities, roles, and logics (McGivern, Currie, Ferlie, Fitzgerald, & Waring, 2015; McPherson & Sauder, 2013; Pache & Santos, 2013b; Smets et al., 2015), organizations mix conventionally distinct forms and identities (Battilana & Dorado, 2010; Besharov & Smith, 2014; Gümüşay, Smets, & Morris, 2020; Jay, 2013; Pache & Santos, 2010, 2013; Smith & Besharov, 2019), and fields combine multiple institutional logics (Greenwood et al., 2011; Lounsbury, 2007; Reay & Hinings, 2009). Moreover, hybridity at these levels is interrelated, creating mutual influence between individuals and organizations (e.g., McPherson & Sauder, 2013; Pache & Santos, 2013), individuals and fields (e.g., Ansari, Wijen, & Gray, 2013; Tracey et al., 2011), and organizations and fields (e.g., Wry & Zhao, 2018; Zhao & Wry, 2016). Both within and across levels, hybridity also shifts over time as individuals, organizations, and fields evolve (e.g., Albert & Whetten, 1985; Haveman & Rao, 1997; Litrico & Besharov, 2019; Rao, Monin, & Durand, 2003). Multi-level and dynamic perspectives can offer insight into these processes and relationships, contributing to a more complete understanding of how organizational hybridity emerges and evolves over time as well as how it is embedded in particular institutional contexts.

The four chapters in Section C illustrate this potential. First, Ramus, Vaccaro, Brusoni, and Versari examine the evolution of hybridity within the Italian fiscal police (GdF) since its founding in 1862, showing how hybrid configurations at the organizational level shift in response to mounting environmental complexity. The GdF, which combines a public fiscal logic with a military logic, initially had a differentiated configuration among senior leaders, with military officials and civil servants in compartmentalized roles. Yet it had an integrated configuration at lower levels, as operational tasks were handled by staff called *Finanzieri* who blended the two logics. Over its 150-plus year history, the GdF evolved toward an integrated structure throughout the entire organization, with the *Finanzieri* gaining power both vertically and horizontally. Ramus et al. identify four mechanisms of internal structural change that contributed to this shift – upward vertical integration, downward vertical integration, horizontal integrated task extension, and horizontal integrated competency extension – and show how these mechanisms

operated across four historical phases. Building on their rich historical analysis, the authors propose a model depicting how the multiplicity and structure of organizational hybridity shift in response to increasing environmental complexity. Their analysis also reveals the political dynamics of hybridity, including not just pressure to accommodate external demands but also efforts from lower level organizational members to enhance their autonomy and authority.

The chapter by Dorado similarly focuses on the relationship between the organizational configuration of hybridity and shifting field conditions. Dorado's empirical setting is sheltered workshops – hybrids that combine social and commercial logics to provide employment to people with disabilities – and the normative and regulatory context in which they evolved over a 180-year period in the United States. Her study highlights four types of agency through which hybrids establish and seek to maintain unconventional combinations of logics: upstream agency, in which hybrids leverage founders' visions to deviate from dominant organizing practices but within the constraints of existing regulatory frameworks; midstream agency, in which managers take advantage of environmental flux to adapt hybrid organizational activities and influence regulatory frameworks; downstream agency, involving continued adaptation and expansion of hybrid organizational activities amidst a supportive regulatory environment with few controls; and crosscurrent agency, in which hybrids seek to maintain legitimacy and continue operations in the face of normative and regulatory challenges. By showing how these various forms of agency manifest within sheltered workshops over different time periods, Dorado's analysis demonstrates how historical field contingencies condition the nature and evolution of organizational hybridity. It also identifies skills and capabilities that can enable leaders of hybrids to effectively navigate different environments. In doing so, the chapter moves beyond the existing literature's focus on skills for dealing with paradox (e.g., Gao & Bansal, 2013; Smith & Besharov, 2019) to call our attention to management and advocacy skills for gaining resources, legitimacy, and other forms of support that allow organizations to deviate from dominant practices and forms of organizing.

Investigating the impact of field-level regime changes on organizational hybridity, Reay, Goodrick, and Lu illustrate the importance of considering multiple levels of analysis conjointly to understand why the configuration of hybridity unfolds in specific ways over time. Drawing on primary research about supervised consumption sites in Alberta, Canada, they unpack how abrupt changes in field-level logic constellations can constrain the configuration of hybridity at the organizational level. In particular, they show that waxing and waning support for increased multiplicity of logics at the field level had consequences for how central different elements became within organizations. For example, when a new provincial government legitimized a harm reduction logic alongside existing logics of treatment, care, and prevention, this provided an opening for supervised consumption sites to shift their activities toward saving the lives of those suffering from opioid addiction, thereby altering the centrality of this element of the hybrid. When a subsequent change in government

de-legitimated the harm reduction logic in favor of prior logics, this led to another shift in centrality, as organizations moved away from a focus on saving lives and re-emphasized other activities to maintain access to resources. Reay et al.'s analysis of these shifts contributes new insights into the role of field-level political settlements in shaping the configuration of organization-level hybridity. They reveal two main mechanisms through which this cross-level influence can occur and illustrate how individuals on the frontlines of affected hybrid organizations respond with counter-actions in an effort to preserve particular types of activities. Taken as a whole, the analysis demonstrates the theoretical purchase to be gained by applying a multi-level approach to the study of hybridity.

The chapter by Casasnovas and Chliova also attends to the interplay of field and organizational levels of analysis, focusing in particular on how field characteristics shape legitimacy prospects for organizational hybrids. Their core argument is that the implications for legitimacy at the organizational level vary across fields that are emergent versus mature and in which hybridity is more versus less prevalent. They illustrate this argument by drawing on examples from the emergent field of impact investing, as well as the more mature fields of microfinance (characterized by relatively lower centrality) and social enterprise (characterized by relatively higher centrality). Taken together, their conceptual framework and empirical illustrations underscore the value of a multi-level and dynamic approach to hybridity. For example, as the microfinance field matures and its constituent commercial institutional logic becomes more dominant relative to the logic of social support for the poor, cognitive legitimacy of organizational hybrids may increase due to converging expectations about what a microfinance organization is expected to do. Yet moral legitimacy may decrease as some (original) social aims become coopted. Casasnovas and Chliova offer a set of propositions and suggest a number of ways future work could build on their framework to advance research on hybrid legitimacy by adopting multi-level and dynamic perspectives.

CONCLUSION

Complex, intractable social problems continue to intensify, demanding organizing approaches that span multiple institutional spheres, varied organizational forms, and divergent individual identities and values. In this context, research on organizational hybridity is increasingly critical, and it requires both analytical precision and empirical breadth. The framework and research approaches developed in this chapter and further elaborated in the rest of the volume are intended to serve as a foundation for these efforts. We hope they offer new inspiration and useful analytical tools for developing timely and relevant insights into organizational hybridity and its potential to address pressing social problems of our time.

ACKNOWLEDGMENTS

We would like to thank series editor Mike Lounsbury for his support and developmental feedback. We thank Marc Ventresca for his keen observations and thought-provoking questions on an earlier version of this chapter.

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