

ORGANIZATIONAL HYBRIDITY

Perspectives, Processes, Promises

Edited by Marya L. Besharov
and Bjoern C. Mitzinneck

RESEARCH IN THE
SOCIOLOGY OF ORGANIZATIONS

VOLUME 69

ORGANIZATIONAL HYBRIDITY

RESEARCH IN THE SOCIOLOGY OF ORGANIZATIONS

Series Editor: Michael Lounsbury

- Volume 41: Religion and Organization Theory
- Volume 42: Organizational Transformation and Scientific Change: The Impact of Institutional Restructuring on Universities and Intellectual Innovation
- Volume 43: Elites on Trial
- Volume 44: Institutions and Ideals: Philip Selznick's Legacy for Organizational Studies
- Volume 45: Towards a Comparative Institutionalism: Forms, Dynamics and Logics Across the Organizational Fields of Health and Higher Education
- Volume 46: The University Under Pressure
- Volume 47: The Structuring of Work in Organizations
- Volume 48A: How Institutions Matter!
- Volume 48B: How Institutions Matter!
- Volume 49: Multinational Corporations and Organization Theory: Post Millennium Perspectives
- Volume 50: Emergence
- Volume 51: Categories, Categorization and Categorizing: Category Studies in Sociology, Organizations and Strategy at the Crossroads
- Volume 52: Justification, Evaluation and Critique in the Study of Organizations: Contributions from French Pragmatist Sociology
- Volume 53: Structure, Content and Meaning of Organizational Networks: Extending Network Thinking
- Volume 54A: Multimodality, Meaning, and Institutions
- Volume 54B: Multimodality, Meaning, and Institutions
- Volume 55: Social Movements, Stakeholders and Non-Market Strategy
- Volume 56: Social Movements, Stakeholders and Non-Market Strategy
- Volume 57: Toward Permeable Boundaries of Organizations?
- Volume 58: Agents, Actors, Actorhood: Institutional Perspectives on the Nature of Agency, Action, and Authority
- Volume 59: The Production of Managerial Knowledge and Organizational Theory: New Approaches to Writing, Producing and Consuming Theory
- Volume 60: Race, Organizations, and the Organizing Process
- Volume 61: Routine Dynamics in Action
- Volume 62: Thinking Infrastructures
- Volume 63: The Contested Moralities of Markets
- Volume 64: Managing Inter-Organizational Collaborations: Process Views
- Volume 65A: Microfoundations of Institutions
- Volume 65B: Microfoundations of Institutions
- Volume 66: Theorizing the Sharing Economy: Variety and Trajectories of New Forms of Organizing
- Volume 67: Tensions and Paradoxes in Temporary Organizing
- Volume 68: Macrofoundations: Exploring the Institutionally Situated Nature of Activity

RESEARCH IN THE SOCIOLOGY OF
ORGANIZATIONS VOLUME 69

ORGANIZATIONAL HYBRIDITY: PERSPECTIVES, PROCESSES, PROMISES

EDITED BY

MARYA L. BESHAROV

University of Oxford, United Kingdom

BJOERN C. MITZINNECK

University of Groningen, Netherlands



United Kingdom – North America – Japan
India – Malaysia – China

Emerald Publishing Limited
Howard House, Wagon Lane, Bingley BD16 1WA, UK

First edition 2021

Copyright © 2021 Emerald Publishing Limited.



Open access contract; Chapter 3 'Taking Hybridity for Granted:

Institutionalization and Hybrid Identification' © 2021 Mary Ann Glynn, Elizabeth A. Hood and Benjamin D. Innis. Published by Emerald Publishing Limited. This chapter is published under the Creative Commons Attribution

(CC BY 4.0) licence. Anyone may reproduce, distribute, translate and create derivative works of this article (for both commercial & non-commercial purposes), subject to full attribution to the original publication and authors. The full terms of this licence may be seen at <http://creativecommons.org/licenses/by/4.0/legalcode>.

Open access contract; Chapter 8 'New hybrid forms and their liability of novelty' © 2021 Ali Aslan Gümüşay and Michael Smets. Published by Emerald Publishing Limited. This chapter is published under the Creative Commons Attribution (CC BY 4.0) licence.

Anyone may reproduce, distribute, translate and create derivative works of this article (for both commercial & non-commercial purposes), subject to full attribution to the original publication and authors. The full terms of this licence may be seen at <http://creativecommons.org/licenses/by/4.0/legalcode>



Reprints and permissions service

Contact: permissions@emeraldinsight.com

No part of this book may be reproduced, stored in a retrieval system, transmitted in any form or by any means electronic, mechanical, photocopying, recording or otherwise without either the prior written permission of the publisher or a licence permitting restricted copying issued in the UK by The Copyright Licensing Agency and in the USA by The Copyright Clearance Center. Any opinions expressed in the chapters are those of the authors. Whilst Emerald makes every effort to ensure the quality and accuracy of its content, Emerald makes no representation implied or otherwise, as to the chapters' suitability and application and disclaims any warranties, express or implied, to their use.

British Library Cataloguing in Publication Data

A catalogue record for this book is available from the British Library

ISBN: 978-1-83909-355-5 (Print)

ISBN: 978-1-83909-354-8 (Online)

ISBN: 978-1-83909-356-2 (Epub)

ISSN: 0733-558X (Series)



ISOQAR certified
Management System,
awarded to Emerald
for adherence to
Environmental
standard
ISO 14001:2004.

Certificate Number 1985
ISO 14001



INVESTOR IN PEOPLE

CONTENTS

List of Tables and Figures vii

Contributor Biographies xi

INTRODUCTION

**Chapter 1 Heterogeneity in Organizational Hybridity:
A Configurational, Situated, and Dynamic Approach**
Marya L. Besharov and Bjoern C. Mitzinneck 3

SECTION A: MULTIPLE THEORETICAL LENSES

Chapter 2 Hybridity and Institutional Logics
Anne-Claire Pache and Patricia H. Thornton 29

**Chapter 3 Taking Hybridity for Granted: Institutionalization
and Hybrid Identification**
Mary Ann Glynn, Elizabeth A. Hood and Benjamin D. Innis 53

**Chapter 4 Reasoning with Heuristics: A New Approach to
Categories Theory and the Evaluation of Hybrids**
Tyler Wry and Rodolphe Durand 73

**Chapter 5 A Paradoxical Approach to Hybridity: Integrating
Dynamic Equilibrium and Disequilibrium Perspectives**
Wendy K. Smith and Miguel Pina e Cunha 93

SECTION B: VARIED EMPIRICAL CONTEXTS

**Chapter 6 Business Sustainability as a Context for Studying
Hybridity**
Tobias Hahn 115

Chapter 7 How the Zebra Got Its Stripes: Individual Founder Imprinting and Hybrid Social Ventures	
<i>Matthew Lee and Julie Battilana</i>	139
Chapter 8 New Hybrid Forms and Their Liability of Novelty	
<i>Ali Aslan Gümüşay and Michael Smets</i>	167
Chapter 9 Let's Talk About Problems: Advancing Research on Hybrid Organizing, Social Enterprises, and Institutional Context	
<i>Johanna Mair and Nikolas Rathert</i>	189
SECTION C: MULTILEVEL AND DYNAMIC APPROACHES	
Chapter 10 Shift in Hybridity in Response to Environmental Complexity: The Transformation of the Italian Guardia di Finanza	
<i>Tommaso Ramus, Antonino Vaccaro, Pietro Versari and Stefano Brusoni</i>	211
Chapter 11 Hybrid Agency: Sheltered Workshops (1941–2019)	
<i>Silvia Dorado</i>	237
Chapter 12 Institutional Settlements and Organizational Hybridity: The Rise and Fall of Supervised Consumption Sites	
<i>Trish Reay, Elizabeth Goodrick and Chang Lu</i>	271
Chapter 13 Legitimacy Trade-Offs in Hybrid Fields: An Illustration Through Microfinance, Impact Investing and Social Entrepreneurship	
<i>Guillermo Casanovas and Myrto Chliova</i>	291
<i>Index</i>	313

LIST OF TABLES AND FIGURES

LIST OF TABLES

Table 1.1	Summary of Chapters and Research Approaches in this Volume	12
Table 2.1	Characteristics of 10 Most Cited Papers as of May 2019 in the Web of Science with Key Words “Hybrid,” “Institution,” and “Logic”	32
Table 2.2	Characteristics of 10 Most Recent Papers as of May 2019 in the Web of Science with Key Words “Hybrid,” “Institution,” and “Logic”	34
Table 2.3	Attributes of 10 Most Cited Papers for Key Words “Organizational Hybridity” and “Institutional Logics,” Web of Science 2019, Discipline, Level, and Methods of Analysis	41
Table 2.4	Attributes of 10 Most Recent Papers for Key Words “Organizational Hybridity” and “Institutional Logics,” Web of Science 2019, Discipline, Level, and Methods of Analysis	41
Table 5.1	The Logics of Dynamic Equilibrium and Permanent Dialectics	96
Table 5.2	How a Paradox Perspective Attunes Scholars with Specific Aspects of Hybridity	104
Table 7.1	Commercialization Factor Analysis	149
Table 7.2	Descriptive Statistics for Models Predicting Social Venture Commercialization	153
Table 7.3	Models Predicting Social Venture Commercialization	155
Table 7.4	Models Predicting Social Venture Commercialization (Alternative Factor-based Commercialization Measure)	156
Table 8.1	Data Overview	175
Table 9.1	Most Common Type of Competition in Three Social Problem Domains and Three Countries	200
Table 9.2	Likelihood That Organizations Competing with Social Enterprises in a Social Problem Domain Share the Same Legal Form, Across Three Countries and Social Problem Domains	201

Table 10.1	Indicators of GdF Performance	217
Table 10.2	Data Collected	219
Table 10.3	GdF's Structural Changes Over Time	221
Table 11.1	Co-evolution of Sheltered Workshops (1841–2017)	243
Table A11.1	Exemplary Texts	264
Table A11.2	Digital Repositories	266
Table A11.3	Pioneering Sheltered Workshops	267
Table A11.4	Regulations Framing the Operations of Sheltered Workshops in the United States	269
Table A11.5	Selected Associations and Advocacy Groups	270

LIST OF FIGURES

Fig. 1.1	A Configurational, Situated, and Dynamic Framework of Organizational Hybridity	6
Fig. 3.1	Number of Hybridity Articles by Year	58
Fig. 3.2	External Evaluation of Hybrid Identities Through Phases of Institutionalization	63
Fig. 4.1	Satisficing (Financial Prioritized)	81
Fig. 4.2	Satisficing (Social Prioritized)	82
Fig. 4.3	Lexicographic (Financial First)	83
Fig. 4.4	Lexicographic (Social First)	83
Fig. 4.5	Elimination by Aspects (Financial First)	84
Fig. 4.6	Elimination by Aspects (Social First)	84
Fig. 6.1	Different Forms of Hybridity for Business Sustainability	121
Fig. 7.1	Distribution of Commercialization	150
Fig. 8.1	Engaging with Novelty of Hybrid Forms	176
Fig. 9.1	Perceptions of Growth Opportunities in the Social Services Domain Across Three Countries	197
Fig. 9.2	Perceptions of Growth Opportunities Within One Country (Germany) and Across Three Domains	198
Fig. 9.3	Perceptions of Institutional Challenges in the Social Services Domain Across Three Countries	198
Fig. 9.4	Reported Barriers for Growth and Innovation in the Social Services Domain Across Three Countries	199
Fig. 9.5	Scatterplot of Legal Form Concentration Among Social Enterprises and Competing Organizations in a Social Problem Domain	202

Fig. 9.6	Scatterplot of Legal Form Concentration of Competing Organizations in a Domain, and Operating Mode Diversity of Social Enterprises	203
Fig. 10.1	Process Model of the Integration of Logics Within Hybrid Organizations	232
Fig. 11.1	The Evolution of Sheltered Workshops	242
Fig. 13.1	The Effects of Field Hybridity on Organizational Legitimacy	296

This page intentionally left blank

CONTRIBUTOR BIOGRAPHIES

Julie Battilana, Harvard University, United States. Julie is the Joseph C. Wilson Professor of Business Administration at Harvard Business School and the Alan L. Gleitsman Professor of Social Innovation at Harvard Kennedy School. She is the founder and academic director of the Social Innovation and Change Initiative (SICI). Her research examines hybrid organizations that pursue a social mission while engaging in commercial activities to sustain their operations.

Marya L. Besharov, University of Oxford, United Kingdom. Marya is a Professor of Organisations and Impact at Saïd Business School, University of Oxford. She studies how organizations and leaders navigate competing goals. Her work has been published in leading journals such as *Administrative Science Quarterly*, *Academy of Management Journal*, and *Academy of Management Review*, among other outlets.

Stefano Brusoni, ETH Zurich, Switzerland. Stefano is a Professor of Technology and Innovation Management at ETH Zurich. He studies innovation and learning processes in individuals and organizations; in the field and in the lab. He has published on several journals, including *Organization Science*, *Administrative Science Quarterly*, *Strategic Management Journal*, *Academy of Management Journal*, and *Research Policy*.

Guillermo Casanovas, Esade Business School, Spain. Guillermo is a Postdoctoral Fellow at Esade Business School and holds a PhD from the University of Oxford, Saïd Business School. His research is focused on the early moments of new markets and fields, with special emphasis on empirical contexts at the intersection of social, business, and public sectors.

Myrto Chliova, Aalto University School of Business, Finland. Myrto is an Assistant Professor of Entrepreneurship at Aalto University School of Business. She received her PhD from Esade Business School. Her research falls at the intersection of organization studies and entrepreneurship, with a focus on the ways that emergent organizations attempt to tackle grand challenges such as poverty, inequality and refugee crises.

Miguel Pina e Cunha, Nova School of Business and Economics, Universidade Nova de Lisboa, Lisbon, Portugal. Miguel is the Amélia de Mello Foundation Professor of Leadership at Nova School of Business and Economics, Universidade Nova de Lisboa, Lisbon, Portugal. His research deals with organization as process

and paradox. He has published his work in journals such as the *Academy of Management Review*, *Journal of Management*, *Journal of Management Studies*, and *Organization Studies and Strategic Organization*. He recently co-authored *Positive Organizational Behavior* (Routledge, forthcoming) and co-edited *Management, Organizations, and Contemporary Social Theory* (Routledge, 2019). He received his PhD from Tilburg University.

Silvia Dorado, University of Massachusetts, United States. Silvia is an Associate Professor at the University of Massachusetts, Boston. She conducts research on social innovation and social ventures. Her work has been published in top management journals including the *Academy of Management Journal*, *Business and Society*, *Journal of Business Venturing*, *Nonprofit and Voluntary Sector Quarterly*, and *Organization Studies*.

Rodolphe Durand, HEC Paris, France. Rodolphe is the Joly Family Professor of Purposeful Leadership at HEC-Paris and the Academic Director of the Society and Organizations Institute, which he launched in 2009. His research focuses on the normative and cognitive dimensions of firms' performance, especially in the context of major environmental and social challenges.

Mary Ann Glynn, Boston College, Carroll School of Management, United States. Mary Ann is the Joseph F. Cotter Professor of Management & Organization at Boston College. She investigates micro-level cognitive processes (learning and creativity) and macro-level cultural influences (social norms and institutional arrangements) as well as their interaction. She is a Fellow and Past President of the Academy of Management.

Elizabeth Goodrick, Florida Atlantic University College of Business, United States. Elizabeth is a Professor and Dean's Distinguished Research Fellow at Florida Atlantic University. She studies health care professionals and organizations from an institutional perspective. Her work focused on the institutional context of professional practices and role identity has been published in both organizational and health care journals.

Ali Aslan Gümüşay, University of Hamburg, Germany. Ali is a Postdoctoral Researcher at the University of Hamburg and Head of Research Group at the Humboldt Institute for Internet & Society. His research consists of four streams: values, meaning & hybridity in entrepreneurial settings; grand challenges, innovation & new forms of organizing; societal complexity & engaged scholarship; and digitalization, AI & the future of work/leadership.

Tobias Hahn, Universidad Ramon Llull, ESADE Business School, Barcelona, Spain. Tobias is a Full Professor at ESADE Business School in Barcelona, Spain. He holds a PhD in Economic and Social Sciences and a Master in Environmental Sciences. His main research areas are tensions and paradoxes in business sustainability and CSR, sustainability performance, and sustainability strategies.

His work has been published in, among others, *the Academy of Management Review*, *Organization Studies*, *Ecological Economics*, *Journal of Business Ethics*, and *Business & Society*.

Elizabeth A. Hood, Boston College, Carroll School of Management, United States. Elizabeth is a PhD student at Boston College. Her research explores the impact and evolution of regulations in the business environment. She focuses on the interaction between emerging products and changing regulations.

Benjamin D. Innis, Boston College, Carroll School of Management, United States. Benjamin is a PhD candidate at Boston College. His research explores how innovative and/or disruptive ideas and practices diffuse through, are legitimated into, and affect existing systems of meaning. Drawing on practice theory and institutional theory, he studies empirical phenomena such as categorization and institutionalization in fields of cultural production.

Matthew Lee, New York University, United States. Matthew is an Assistant Professor of Management & Organizations at the New York University Stern School of Business. His research focuses on organizational hybridity, and in particular how businesses organize to pursue social welfare and environmental sustainability goals alongside commercial performance.

Chang Lu, University of British Columbia, Canada. Chang is a Postdoctoral Research Fellow at Blockchain@UBC. His research focuses on field-level change, nascent technology adoption and social innovation. He has studied these topics in contexts such as addiction treatment, indigenous gambling, and Blockchain adoption in healthcare. He received his PhD from the University of Alberta.

Johanna Mair, Hertie School, Germany. Johanna is a Professor for Organization, Strategy and Leadership at the Hertie School and a Distinguished Fellow at the Stanford Center on Philanthropy and Civil Society. Her research on organizations, institutions and societal challenges is published in, among others, the *Academy of Management Annals*, *Academy of Management Journal*, *Organizations Studies*, *Journal of Business Venturing*, and *Socio-Economic Review*.

Bjoern C. Mitzinneck, University of Groningen, Netherlands. Bjoern is an Assistant Professor of Change Management and Sustainability at the University of Groningen. His research focuses on sustainability transitions in sectors of primary importance to human needs, such as food and energy. He examines novel organizing models facilitating such change processes and resistance to change pressures in existing organizations.

Anne-Claire Pache, ESSEC Business School, France. Anne-Claire is a Professor of social innovation at ESSEC Business School in France, holder of ESSEC's Chair in Philanthropy and Associate Dean for Strategy and Sustainability. Her research lies at the intersection of organizational theory and social innovation, with a particular emphasis on pluralistic environments, hybrid organizations, and

scaling-up processes. She received her doctorate in organizational behavior from INSEAD.

Tommaso Ramus, Católica Lisbon School of Business and Economics (CLSBE), Portugal. Tommaso is an Associate Professor and Fundação Amélia de Mello Faculty Fellow in Social Innovation at CLSBE. He adopts an inductive, qualitative approach to investigate how hybrid organizations transform the challenges they face in opportunities for learning, change and (social) innovation. His work has appeared in the *Academy of Management Journal*, *Organization Studies*, *Business Ethics Quarterly*, and *Journal of Business Ethics*.

Nikolas Rathert, Tilburg University, Netherlands. Nikolas is an Assistant Professor for Organization Studies at Tilburg University. In his research, he studies how organizations integrate social goals and how these organizing efforts differ across institutional contexts. His research is published in, among others, the *Journal of International Business Studies*, *Socio-Economic Review*, and *Research in the Sociology of Organizations*.

Trish Reay, University of Alberta School of Business, Canada. Trish is a Professor and Associate Dean, PhD Program & Research at the University of Alberta School of Business. She holds the TELUS Chair in Management. Her research focuses on institutional and organizational change with attention to professional identity. She has studied these topics in healthcare and family business empirical settings.

Michael Smets, University of Oxford, United Kingdom. Michael is a Professor of Management at Saïd Business School. His research focuses on how organizations engage competing societal demands through hybrid organizing and paradoxical leadership. He studies these phenomena in professional service firms, financial institutions and public value organizations.

Wendy K. Smith, Lerner College of Business, University of Delaware, United States. Wendy is the Deutsch Family Professor of Management in the Lerner College of Business and Economics, University of Delaware and Research Fellow with the Centre for Social Innovation at the Judge School of Business, Cambridge University. Her research explores how leaders and their organizations manage strategic paradoxes, including tensions between exploration and exploitation, social mission and financial performance, and global integration and local demands. She has published her research in journals such as the *Academy of Management Review*, *Academy of Management Journal*, *Academy of Management Annals*, *Organization Science* and *Harvard Business Review*. She received her PhD from Harvard Business School.

Patricia H. Thornton, Texas A&M University, United States. Patricia is Visiting Distinguished Professor, HEC Paris and Grand Challenge Initiative Faculty and Professor of Sociology and Entrepreneurship at Texas A&M University.

Her research focuses on organization and management theory in particular on innovation and entrepreneurship and how institutions affect attention and strategy in the context of grand challenges. She received her PhD at Stanford University in 1993.

Antonino Vaccaro, IESE Business School, Spain. Antonino is a Professor at IESE Business School and the Academic Director of the Center for Business in Society. His area of specialization are hybrid organizations, social enterprises and social innovation. He has publications in leading scientific journals such as the *Academy of Management Journal*, *Journal of Management Studies*, *Research Policy*, etc.

Pietro Versari, Rotterdam School of Management, Erasmus University (RSM), Netherlands. Pietro is an Assistant Professor of Social Entrepreneurship in the Business-Society Management Department at the Rotterdam School of Management, Erasmus University. His research focuses on business models for social enterprises, the collaboration between for profit and nonprofit sectors, and the management of hybrid organizations.

Tyler Wry, The Wharton School, United States. Tyler is an Associate Professor of Management at the Wharton school, University of Pennsylvania. His research seeks to understand how and when business can be a force for social good, as well as the challenges associated with this pursuit. He holds a PhD from the University of Alberta.