

SECTION A

MULTIPLE THEORETICAL LENSES

CHAPTER 2

HYBRIDITY AND INSTITUTIONAL LOGICS

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ABSTRACT

This chapter identifies assumptions, conceptual issues and challenges in the literature on hybrid organizations that draws on the institutional logics perspective. The authors build on the existing literature reviews as well as on an analysis of the 10 most cited and 10 most recently published articles at the intersection of hybrid organizations and institutional logics. The authors further draw from the literature on theory construction and theory development and growth to strengthen our analysis of this body of work and reflect upon future theoretical developments. From this analysis, the authors highlight four challenges to current research on organizational hybridity with an institutional logics lens and develop four suggestions to inspire future research. In doing so, they aim at seeding a more nuanced use of the institutional logics perspective and thereby foster the development of innovative and cumulative theory and empirical research on organizational hybridity.

Keywords: Hybridity; hybrid organizations; institutional logics; institutional theory; institutions; theory construction

The management of complex challenges facing society, the economy, and the environment has spurred the development of hybrid organizational forms and practices (Jay, 2013). This, in turn, has encouraged organizational scholars in several social science disciplines – in particular management and public policy – to

develop both conceptual and empirical research on the phenomenon of hybrid organizations and organizational hybridity. Hybrid organizations have been defined as organizations that combine aspects of multiple organizational forms (Battilana & Lee, 2014; Haveman & Rao, 2006; Hoffman, Badiane, & Haigh, 2012). Recent research has elaborated on this definition by introducing the concept of organizational hybridity, defined as

the mixing of core organizational elements that would not conventionally belong together. The term hybridity expands the scope of analysis beyond organizational forms to consider, for example, identities and rationalities in defining an organization's goals and authority structures. (Battilana, Besharov, & Mitzinneck, 2017, p. 138)

A substantial part of the hybrid organization and hybridity research draws on the "institutional logics perspective" (Thornton, Ocasio, & Lounsbury, 2012), as both method and meta-theory to identify and frame the analysis of the institutional contexts in which hybridity occurs, as well as the causes, processes and consequences of hybridity.

In this edited volume, we have been invited to identify conceptual issues and to challenge explicit and tacit assumptions in the research on hybrid organizations that draws on the institutional logics perspective. In the positive spirit of building this research community and to fulfill our role as provocateurs, we have reexamined the existing literature reviews (Battilana et al., 2017; Battilana & Lee, 2014; Doherty, Haugh, & Lyon, 2014), as well as the 10 most cited and the 10 most recently published articles at the intersection of hybrid organizations and institutional logics as listed in the Web of Science. We have further drawn from the literature on theory construction and theory development and growth (Berger & Zelditch, 1993; Cornelissen & Durand, 2014; Edmondson & McManus, 2007; Hernes, 1998) to strengthen our analysis of this body of work and reflect upon future theoretical developments. From this analysis, we highlight four challenges to current research on organizational hybridity with an institutional logics lens and develop four suggestions to inspire future research. In doing so, our goal is to increase precision in the use of the institutional logics perspective and thereby foster new and cumulative theory and empirical research on organizational hybridity.

FOUR CHALLENGES TO RESEARCH ON HYBRIDITY WITH AN INSTITUTIONAL LOGICS LENS

Institutional logics are the "socially constructed historical patterns of material practices, assumptions, values, beliefs and rules" (Thornton & Ocasio, 1999, p. 84) that shape acceptable goals and organizing principles within a field, thus influencing organizations' priorities, strategies, and practices. More broadly, the institutional logics perspective is a powerful meta-theoretical framework to analyze the interrelationships among individuals, organizations, and institutions in social systems (Thornton et al., 2012). The perspective has been widely applied to shed light on the phenomenon of hybridity, including explaining its antecedents

(Almandoz, 2012, 2014), the strategies used to manage it (Ramus, Vaccaro, & Brusoni, 2017) as well as the consequences of hybridity for organizations (McPherson & Sauder, 2013).

The institutional logics perspective has been used to study the determinants of hybridity by theoretically characterizing the contexts in which hybridity occurs. This research has shown how hybridity can be driven by the combination of different institutional logics at the individual (McGivern, Currie, Ferlie, Fitzgerald, & Waring, 2015; Smith, Gillespie, Callan, Fitzsimmons, & Paulsen, 2017), organizational (Jay, 2013; Smith & Besharov, 2019), and field (Ansari, Wijen, & Gray, 2013) levels of analysis. Almandoz (2014), for example, showed how local banks in the United States are shaped by competing community and finance logics, carried by the banks' founding teams. Ansari et al. (2013) further examined "hybrid fields" as "made up of a variety of core institutional logics such as market, state, professions, and community." The institutional logics perspective has been used to examine the consequences of hybridity in organizations, emphasizing its impact on resource mobilization (Zhao & Lounsbury, 2016), innovation (Dalpiaz, Rindova, & Ravasi, 2016), and internal conflict (Pache, Battilana, & Spencer, 2020). Importantly, in this active research stream on both determinants and consequences of hybridity, the logics perspective has also been employed to guide research designs, for example, in providing a frame for comparative case studies (e.g. Ramus, Vaccaro, & Brusoni, 2017) and the selection of statistical modeling strategies (Jourdan, 2018). With a total of 2,183 citations for the most cited articles, and a strong consensus across existing reviews (Battilana et al., 2017; Battilana & Lee, 2014), it is clear that the institutional logics perspective has been a catalyst in the development of the hybridity literature.

Given the thoroughness and recentness of existing reviews on hybrid organizations and organizational hybridity, developing an exhaustive review of the literature at the intersection of hybridity and institutional logics did not make sense. Instead, we thought it is important to use the existing reviews not only to root our discussion but also to spark our own analysis of the characteristics and interdisciplinary reach of the most influential and recently published work. Therefore, in fulfilling our provocateur assignment, we sought to glean additional insights not only from a reread of the existing reviews but also from an exploration of our hunches from knowledge about how theory and literature grows (Berger & Zelditch, 1993). To do that, we coded the 10 most cited and the 10 most recently published papers as listed in the Web of Science platform. We searched for the most cited empirical papers using the key words "hybrid," "institution," and "logic" in their title and abstract in the management, sociology, economics, communications, and public administration disciplines, published in English language academic journals. To select the most recent papers, we searched for empirical papers using "hybrid," "institution," and "logic" in their title and abstract published in the 10 most influential journals (as ranked in the SCImago journal rankings) in the management, sociology, economics, communications, and public administration disciplines. This search protocol resulted in the sample of articles listed in Tables 2.1 and 2.2, which we subsequently discuss.

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.”

Author(s), Date	Journal	Empirical Setting	Method and Level of Analysis	Citations	Research Question	Theories and/or Concepts, Labels	Logics Used as a Meta-theory? Logics Involved	Mechanisms
Battilana and Dorado (2010)	<i>Academy of Management Journal</i>	Micro-Finance Banks	Qualitative Organization	628	How do organizations manage conflicting logics and sustain hybridity?	Old-institutional theory Blank Slate Hiring	Yes Development (state) and banking (market)	Specific hiring and socialization prac- tices foster organi- zational identity to sustain hybridity
Pache and Santos (2013a)	<i>Academy of Management Journal</i>	Work Integration Social Enterprises	Qualitative Organization	391	How do organizations respond to multiple institutional logics?	Neo-institutional theory Selective coupling	Yes Social welfare (state) and commercial (market)	Different legitimacy needs drive different approaches to selective coupling Institutional
Tracey et al. (2011)	<i>Organization Science</i>	Social Enterprise	Qualitative Organization	262	What kind of institutional work is required when institutional entrepreneurs create new organizational forms by combining existing institutional logics?	Institutional work	Yes For-profit retail (market) and non-profit homelessness support (state)	entrepreneur bridges different institutional logics to create new organizational form
Jay (2013)	<i>Academy of Management Journal</i>	Public-private partnership	Qualitative Organization	236	How do hybrid organizations innovate and change?	Paradox theory	Yes Government bureau- cracies (state), business firms (corporate), non- profit associations (community)	Logics shape sense making of paradox, which triggers organizational innovation and change
Lewis (2012)	<i>Information Communication & Society</i>	Creative Industries	Conceptual Field	226	Why is the professional logic in journalism and creative industries eroding?	Theory of professions	Yes Journalism (professions) & Open- participation (community)	Boundary negotiations between two compet- ing logics facilitate the emergence of a hybrid logic

Murray (2010)	<i>American Journal of Sociology</i>	Medical patents	Qualitative Field	136	What are the mechanisms shaping hybrid boundaries and the link between the boundary's hybrid properties and the mechanisms at work?	Conflict theory	Yes	Market & academic science (professions)	Conflict reinforces boundaries between institutional logics
Smets et al. (2015)	<i>Academy of Management Journal</i>	Lloyd's Reinsurance Trading	Qualitative Organization	90	How do people in hybrid organizations manage conflicting logics to jointly enhance organizational legitimacy and performance?	Neo-institutional theory	Yes	Community & market	Individuals balance the dynamic tension of competing logics by processes of segmenting, bridging, and demarcating
Skelcher and Smith (2015)	<i>Public Administration</i>	Public and Nonprofit organizations	Conceptual Organization	87	How do hybrid organizations arise and what form do they take?	Typology of hybrid organizational forms from plural logics	Yes	Family, community, religion, state market profession, and corporation	Five mechanisms shape hybrid forms: segmented, segregated, assimilated, blended, and blocked
McGovern et al. (2015)	<i>Public Administration</i>	British Hospitals	Qualitative Individual	65	How and why do professionals claim and use hybrid roles?	Theory of professions and identity theory	Yes	Professions, corporation	Two types of hybrid manager-professional coexist: incidental (temporary) and willing (full embrace). Willing hybrids redefined hybrids as elite within their profession
Ansari et al. (2013)	<i>Organization Science</i>	Climate change	Qualitative Field	62	What mechanisms cause actors with conflicting logics to change their frames? How do these changes lead to the emergence of a field-level hybrid commons logic?	Neo-institutional theory	Yes	Science (professions), government (state), business (corporate), and transnational NGOs (community)	Five mechanisms drive frame changes: collective theorizing, issue linkage, active learning, legitimacy seeking, catalytic amplification

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.”

Author(s), Date	Journal	Empirical Setting	Method & Level of Analysis	Research Question	Theories and/or Concepts, Labels	Logics Used as a Meta-theory? Logics Involved	Mechanisms
Smith and Besharov (2019)	<i>Administrative Science Quarterly</i>	Work integration social enterprise digital data services	Qualitative Organization	How do organizations manage and sustain hybridity over longer term?	Structured flexibility, paradoxical frames and guardrails	No	Structured flexibility can sustain hybridity in the long term by relying on paradoxical frames and guardrails
Sharma et al. (2018)	<i>Journal of Business Venturing</i>	B Corporations	Mixed Organization	How does B-corp certification change practices over successive certifications to have increased prosocial impact?	Practice shifts for prosocial impact	No	Organizations shift their practice configurations to enhance prosocial impact. These shifts are driven by affordability, interpretability, and social referents
Quelin et al. (2017)	<i>Journal of Management</i>	Public, non-profit and private collaborations	Conceptual Organization	How do hybrid, public-private and cross-sector forms of collaboration create social value?	Typology of hybrid organizations	No	Hybrid organizations differ across two dimensions: governance structure and institutional logics
Villani et al. (2017)	<i>Journal of Management</i>	Italian health care	Qualitative Organization	How can key business model characteristics moderate the challenges of institutional complexity and support value creation in hybrid public-private partnerships?	Business models	Yes	Business model is key to help hybrid PPPs manage interdependencies among organization processes, assets, and governance
Smith et al. (2017)	<i>Journal of Organizational Behavior</i>	Australian health care	Quantitative Individual	How do preexisting institutional beliefs affect organizational identification and trust?	Psychological theories, expectancy, violation, contract breach, and unmet expectations	Yes	Negative discrepancy in prior beliefs and actual experience with logics negatively influences the development of organizational identification, perceived organizational trustworthiness, and self-efficacy for newcomers in organizations

Mair et al. (2016)	<i>Academy of Management Journal</i>	Indian poverty alleviation NGO	Qualitative organization	How are NGO programs organizing tools to transform inequality in society?	Scaffolding	No	Scaffolding is a process that transforms inequalities by enabling resource mobilization, interaction stability, and goal concealment
Boone and Ozcan (2016)	<i>Organization Science</i>	Islamic banking	Mixed Organization	How do organizations navigate institutional environments balancing ideological purity and pragmatism?	Category theory	Yes	The purer the Islamic ideology, the greater the risk in straddling oppositional categories
Zhao and Lounsbury (2016)	<i>Journal of Business Venturing</i>	Micro-finance banks	Quantitative Organization	How do societal institutions affect ability of micro-finance organizations to acquire capital?	Capital acquisition	Yes	Market logic increases, conflict in religious logic decreases ability of micro-finance organizations to acquire capital
Dalpiatz et al. (2016)	<i>Administrative Science Quarterly</i>	Manufacturer of household goods Alessi Inc.	Qualitative Organization	How does combining logics enable pursuit of new market opportunities?	Theory of agency	Yes	Three strategies (compartmentalization, enrichment, synthesis) are used to combine the two logics, each enabling the pursuit of different market opportunities.
York et al. (2016)	<i>Journal of Management Studies</i>	Green energy	Qualitative Individual	Why and how do individuals engage in environmental entrepreneurship?	Identity theory	Yes	Tight coupling of founder identity with logics motivated environmental entrepreneurship
						Commercial (corporate) and ecological (professions)	

Rereading existing reviews as well as the most cited and most recently published articles enabled us to identify four recurrent claims we believe deserve further discussion. Below we elaborate on and challenge these four claims. While we recognize that this approach may over simplify arguments made in previous reviews, we nevertheless believe that there is value in spurring debate and that such discussions can motivate ideas for future research. In the second part of this article, we build on these four “challenged claims” to outline four “suggestions,” for future research with the goal to develop and deepen research at the intersection of hybridity and institutional logics.

Challenged Claim #1: “Institutional logics is one of various theories that have been used in the literature to illuminate organizational hybridity”

Existing reviews have pointed to the diversity of lenses used to study hybridity. Battilana and Lee (2014, p. 400), for instance, explain that “literatures on organizational identity, organizational forms, and institutional logics have all made theoretical contributions regarding the hybridization of multiple, disparate elements.” The review by Battilana et al. (2017, p. 129) further categorizes the hybrid literature in terms of identities, forms, and rationales, arguing that their review categorization scheme “surfaced eight distinct perspectives on hybrids, including organizational identity, transaction cost economics, network forms, categories, organizational archetypes, institutional logics, culture, and transitioning economic regimes.”

We suggest that the categorization schemes used in past reviews are problematic in generating insights for future research because they do not discriminate between theory and meta-theory and therefore do not meet typological criteria of analytical mutual exclusivity (Doty & Glick, 1994). In particular, the categorization scheme treats the institutional logic perspective as a theory, alongside other theories such as transaction cost economics or category theory. However, the institutional logics perspective is a meta-theory (Thornton et al., 2012). A theory can be defined as an attempt to explain and predict behavior in particular contexts, addressing the four essential questions of what, when, how, and why, along with the abstract concepts and measurable variables elaborating these four elements (Whetten, 1989). Theories are testable, directly or indirectly (Wagner & Berger, 1985). A meta-theory is a theory about a theory: its subject is some other theory. It is characterized by a broad set of epistemological and ontological assumptions that orient and direct the form or content of theorizing about some phenomenon (Lawler & Ford, 1993). A meta-theory does not necessarily make specific predictions about the way in which variables interact. Rather, it provides an overarching set of assumptions that can be used to further develop existing theories. It is a theory development tool that helps specify the concepts, mechanisms, and scope conditions of other theories (Thornton et al., 2012). It may be the source of a new concept that alters or sets conditions for previous theoretical predictions; it may suggest a new problem focus or variant of the theory; or it may contain an assumption that, upon reflection, leads to a new theoretical proposition (Lawler & Ford, 1993). We argue that a clearer distinction between institutional logics as a meta-theory and other theories is important to unleash

the full potential of the institutional logics perspective in promoting the development of other theories of hybridity.

The distinction between meta-theory and theory can be illustrated by the interaction between the institutional logics perspective (as meta-theory) and organizational identity (as a theory or concept). Whereas the institutional logics perspective alone may not specify testable hypotheses related to how organizations will behave relative to identity, it conditions theory on organizational identity by its assumptions that individuals and organizations embedded in different institutional logics are expected to experience identities in different ways. Institutional logics influence how organizational identities form, how they evolve over time, as well as how they may shape outcomes, such as interpersonal conflict or identification. Similarly, institutional logics have been shown to interact with attention: they condition predictions of the attention-based view of the firm by making specific problems and solutions available, accessible, and actionable, in drawing the attention of organizational leaders (Thornton & Ocasio, 1999).

Existing typologies used to review the literature on hybridity treat institutional logics as parallel to concepts or research domains, such as “culture” and “transitioning economic regimes” (Battilana et al., 2017). However, the institutional logics perspective is not parallel to these notions. As a meta-theory, it can be used to examine the interaction effects of transitioning economic regimes with different cultures, using logics to increase the precision of cultural differences. As Doty and Glick (1994) explain, classification schemes require the researcher to make assignments to mutually exclusive categories to further analytical development. As they do not entirely meet this condition, existing reviews on hybridity limit the full potential for theory construction, theory development and theory growth (Berger & Zelditch, 1993).

Battilana et al. (2017, p. 138) comment on this lack of mutual exclusivity in their review categorization scheme, as they, such as, for instance, emphasize that “organizational archetypes are often embedded in specific institutional logics.” Moreover, their review explains that “the institutional logics perspective is related to the transaction cost perspective in that economic institutions of the market are governed by a societal-level market logic, while hierarchies are associated with the corporate logic,” acknowledging that institutional logics differentially influence transaction costs and corporate organizational forms. They further recognize that institutional logics are related to organizational identities, as logics provide the “cultural materials that organizational members assemble to articulate essential identity elements” (Battilana et al., 2017, p. 138).

To explain such interactions, it is important for researchers to make it clear that the purpose of the institutional logics perspective as a meta-theoretical framework is to be paired with lower-level theories, for example, transaction cost theory. Hence, as hybridity research matures, distinguishing between concepts, theories, and meta-theories enables a more systematic accumulation of research findings and ideas for future studies. As we encourage scholars to rely on other theories to enhance our understanding of hybridity, we also encourage the use of other meta-theories to generate new insights, such as behaviorism (Cyert & March, 1963) with its focus on rationality, Marxism with its emphasis on power and conflict (Hernes, 1998), postmodernism with its conceptualization of the world as the outcome of

variegated aims, actions, interactions and conventions of humans (Westwood & Clegg, 2003), or ethnomethodology with its assumptions that social order is produced through social interaction (Garfinkel, 1967). Ethnomethodology, in particular, demonstrates the relationship between concept, theory, meta-theory with its attention to cooperation and practical reasoning in sense making in everyday-life. For example, Goffman's (1959) "theory" of deference shows how the "concepts" of presentation ritual and avoidance ritual are related to explain how social actors with different backgrounds, values, goals and identities manage to socialize with each other despite their alterity. Deference is classified under the "meta-theory" of ethnomethodology because it focuses on how people maintain orderliness and sensibility through symbolic communication in their social interactions.

Challenged Claim #2: "In current research on organizational hybridity, there is limited cross-fertilization between the institutional logics perspective, the organizational identity, and the organizational forms perspectives"

Current reviews of the hybridity literature argue that there is insufficient integration between various theoretical approaches used to explain hybridity. Battilana and Lee (2014, p. 402) for instance state that "discussions of hybridity in terms of organizational identity, organizational form, and institutional logics (...) [have] evolved in separate literatures." Battilana et al. (2017, p. 150) further argue that

different studies tend to adopt disparate theoretical lenses, examining hybridity either as the combination of multiple organizational identities, multiple organizational forms, or multiple societal rationales, with limited cross-fertilization between these three approaches.

Their insight on the lack of integration is well taken. This state of theory development is understandable given that hybridity is a general concept applicable to many disciplines, theories, levels of analysis, and substantive domains. No one study can address all facets of hybridity, and for studies that speak simultaneously to multiple literatures it may be difficult to obtain reviewer agreement in the publication process.

We are nevertheless optimistic by contending this lack of integration may be a natural outcome of how theories and literatures grow. This edited volume, by fostering interaction and debate in the scholarly community on hybridity may aid in pruning this unruly forest. Moreover, theoretical innovation by integration may result from guidance of key scholars currently underway that draws attention to inter- and trans-disciplinary work (Cornelissen & Durand, 2014). The pattern of growth of the institutional logics perspective can be instructive. Studies, for example, have explored how institutional logics conditioned resource dependence theory (Thornton, 2004), agency theory (Thornton, 2001), and contingency theory (Thornton, 2002). The institutional logics perspective was further employed to expand the scope conditions of Goffman's symbolic interaction theory of deference from individuals to organizations (Jourdan, Durand, & Thornton, 2017). In the same spirit, the logics perspective can be used to identify theoretical puzzles related to hybridity, to develop research designs, and to hypothesize and interpret research findings by providing a bridge across literatures that typically do not speak to one another. Again, we emphasize the positive benefits of pairing

meta-theory and theory to open new channels for theory development, available from a range of disciplines such as psychology, sociology, and economics.

The papers we reviewed provide interesting illustrations of the different ways in which institutional logics can be used to study hybridity. All of the most cited papers provide compelling illustrations of how the institutional logics perspective can be used as a meta-theory to enrich existing theories. The most cited paper by Battilana and Dorado (2010) used the institutional logics perspective to design and frame a comparative case study of two micro-finance banks embedded in competing development and banking logics. The authors found that a hybrid organization's sustainability was driven by its ability to develop a common organizational identity combining the two logics. Such a common identity was developed through the hiring of employees not socialized in either logic and their training on processes that emphasize means to achieve operational excellence, rather than broader goals. In this study, the institutional logics meta-theory guided the identification of the management problem, that is, organizational sustainability of organizations combining multiple logics, and the research design – a comparative case study of two organizations with different HR policies, which refined predictions related to identity and socialization theory.

Similarly, Pache and Santos (2013a), in the second most cited article, explore how hybrid work integration social enterprises operate in the midst of competing social welfare and commercial logics. They found that organizations selectively coupled intact practices from each logic, rather than blended them. They further found that organizations lacking legitimacy when entering a field may resort to a Trojan Horse strategy, predominantly borrowing practices from the dominant logic, to increase their legitimacy in the eyes of external stakeholders. In this study, institutional logics are used to characterize the context in which these hybrid organizations operate and describe the “tool kit” (Swidler, 1986; Thornton, 2004, p. 40) that these organizations can draw from to construct their strategies of action. This study refines the predictions of institutional theory, by explaining how organizations may respond to competing institutional demands from different audiences (Greenwood, Raynard, Kodeih, Micelotta, & Lounsbury, 2011; Pache & Santos, 2010). The other most cited papers also used the institutional logics perspective as a meta-theory to enrich other concepts or theories such as institutional entrepreneurship (Tracey, Phillips, & Jarvis, 2011), paradox and sense making (Jay, 2013), and conflict and identity theory (Murray, 2010). Among the most recent papers, Dalpiaz et al. (2016), showed that institutional logics can be used strategically to create and pursue new market opportunities, thereby using the institutional logics perspective to inform innovation and organizational agency theory. Similarly, Boone and Özcan (2016) show how institutional logics interact with organizational identity to drive staffing choices in the context of Islamic banks.

However, compared to the most cited papers, the most recent papers less systematically make use of institutional logics in theory development. Only 60% of them use institutional logics as a meta-theory to inform another theory. Recent papers are less precise in identifying and applying institutional logics and these papers often use logics in a descriptive rather than analytical way. For example, while Villani, Greco, and Phillips (2017) identify the institutional logics of government (state), business (corporate), and civil society (community), it is less

clear what theory these logics help inform in the context of hybrid public–private partnerships. Similarly, Sharma, Beveridge, and Haigh (2018) rely on the notion of institutional logics mainly to describe “B corporations,” that is, enterprises seeking prosocial impact. Their focus is on the external and internal factors that drive practice configurations in B corporations, but it does not really engage the institutional logics perspective.

Our review suggests that the institutional logics perspective has been used as a framework to challenge or extend existing theories, and to identify interaction effects with existing theories. In particular, it has been leveraged to refine our understanding of organizational identity, of responses to institutional pressures as well as of organizational agency. In these cases, cross-fertilization has been valuable to refine assumptions and scope conditions of the subject theories used to explain hybridity. Nevertheless, the potential for cross-fertilization remains to be fully realized, especially between the institutional logics perspective and economic and rational choice theories such as transaction cost economics or network theory where economic rationality is a variable that varies with different institutional orders. Because the institutional logics perspective operates at a high level of abstraction, it enables cross-fertilization with a wide range of theoretical perspectives and has the potential to spread across a variety of disciplines (Thornton et al., 2012). Yet, for this potential to be realized, it is important for researchers to identify the ways in which the institutional logics perspective may shed a new light on existing theories explaining organizational hybridity. Overall, the issue is perhaps not so much about the lack of cross-fertilization, but about the degree to which existing cross-fertilization is correctly and analytically identified by researchers in order to accumulate a body of relevant theoretical and practical knowledge.

Challenged Claim #3: “When used to study organizational hybridity, the institutional logics perspective operates at the macro-level of analysis”

Friedland and Alford (1991) original formulation of the institutional logics perspective drew attention to the macro-level of analysis by describing societal-level influences on organizational life and by sketching an outline of the “inter-institutional system” of western societies, composed of five societal-level orders: the capitalist market, the bureaucratic state, democracy, the nuclear family, and Christian religion. Existing reviews on hybridity emphasize that institutional logics are “defined at a societal level” (Battilana & Lee, 2014, p. 402) and that the institutional logics perspective “operates mostly at the extra-organizational level, defining hybridity as the combination of broader societal-level rationales” (Battilana et al., 2017, p. 130). Our review of the most cited articles however only partially confirms this claim. Ansari et al. (2013) study focuses on the macro-level of analysis, describing and theorizing the processes that led to the emergence of a field-level transnational hybrid logic of climate change that drew from the market, state, profession, and community logics. However, many other studies employ the institutional logics perspective at meso- or micro-level of analysis, exploring how individuals’ and organizations’ relationships to logics shapes organizational or individual behavior (McGivern et al., 2015; York, O’Neil, & Sarasvathy, 2016).

The institutional logics perspective assumes that logics operate as influences at multiple levels of analysis, in a nested fashion, with potential for cross-level interaction effects (Thornton et al., 2012). The perspective is level of analysis agnostic: it can explain the influence of society on fields, fields on organizations, and organizations on individual actors, with a recursive influence of individual actors on organizations, organizations on fields, and fields on society. This recursive nesting of levels of analysis in theory captures the influence of societal-level belief systems on the cognition and behavior of individuals, groups, organizations, and fields, and vice versa. The use of the institutional logics perspective to study hybridity requires a research design that identifies levels of analysis. Therefore, we assessed the level of analysis of the most cited and most recent articles, by coding the level of analysis of the phenomenon of interest or dependent variable to be explained (Rousseau, 1985). This coding – presented in Tables 2.3 and 2.4 – reveals that the institutional logics perspective is used to characterize phenomena at a variety of levels. At the macro-level of analysis, past research has shed light on how logics can be combined at the field level to lead to the emergence of a new hybrid logic (Ansari et al., 2013). However, it also showed how distinct logics may be combined at the level of an organization, to produce new organizational

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.

Discipline Where Published	% (n = 10)	Level of Analysis	% (n = 10)	Method of Analysis	% (n = 10)	Logics as Meta-theory	% (n = 10)
Management	60	Individual	10	Qualitative	100	Yes	100
Economics	00	Organizational	60	Quantitative	0	No	0
Sociology	10	Market	00	Mixed	0		
Psychology	00	Field	30				
Communication	10	Society	00				
Public Admin.	20						
Total Percent	100		100		100		100

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.

Discipline Where Published	% (n = 10)	Level of Analysis	% (n = 10)	Method of Analysis	% (n = 10)	Logics as Meta-theory	% (n = 10)
Management	100	Individual	20	Qualitative	80	Yes	60
Economics	000	Organizational	80	Quantitative	40	No	40
Sociology	000	Market	00	Mixed	20		
Psychology	000	Field	00				
Communication	000	Society	00				
Public Admin.	000						
Total Percent	100		100		N/A		100

practices (Dalpiaz et al., 2016; Pache & Santos, 2013a) or a new organizational form (Tracey et al., 2011). Finally, the institutional logics perspective can be a useful lens to analyze individual-level behavior in hybrid organizations (Almandoz, 2014; Smets, Jarzabkowski, Burke, & Spee, 2015), to analyze the behavior of hybrid individuals (McGivern et al., 2015), as well as to analyze the role that individuals can play in creating field-level hybrid logics (Ansari et al., 2013).

Overall, among the 10 most cited papers, 10% focus on the individual level of analysis, 60% focus on the organizational level of analysis, and only 30% focus on the macro-level. Among the most recent papers, none of them focuses on the macro-level of analysis: 20% focus on the individual level of analysis and the remaining 80% focus on the organizational level. While these percentages are only preliminary evidence because our sample is small and not necessarily representative of the larger body of work at the intersection of logics and hybridity, they suggest a trend toward a lesser use of logics to explore the macro-level of analysis, to favor meso-level as well as, increasingly, micro-level.

Challenged Claim #4: “Research on organizational hybridity has predominantly focused on social enterprises that combine social and market logics”

Historical evidence suggests that hybrid organizations have existed for decades, if not longer, in a wide range of sectors such as the health or education sectors (Battilana et al., 2017). The literature on hybrid organizations and hybridity has gained steam in the past two decades, spurred by academics’ growing interest in social enterprises, organizations that aim to achieve a social purpose through commercial activities (Dees, Emerson, & Economy, 2002; Mair & Marti, 2006). Two out of the three recent reviews on hybrid organizations focus specifically on social enterprises, either as an ideal type of hybrid organization (Battilana & Lee, 2014), or as the focus of the review (Doherty et al., 2014). The three most cited empirical papers are studying different forms of social enterprises: micro-finance banks (Battilana & Dorado, 2010) and work integration social enterprises (Pache & Santos, 2013a; Tracey et al., 2011). In their review, Battilana et al. (2017, p. 137) recognize the empirical focus on “novel types of organizations arising at the boundaries of different institutional spheres, including social enterprises that blend for-profit and nonprofit archetypes (...)” in hybridity research.

Our Web of Science literature review of the 10 most cited articles and the 10 most recently published articles at the intersection of organizational hybridity and institutional logics suggests a diversity of research settings beyond social enterprise. We found that of the 10 most cited articles, only three examined social enterprises (Battilana & Dorado, 2010; Pache & Santos, 2013a; Tracey et al., 2011). The other seven articles studied organizations as diverse as public–private partnerships (Jay, 2013), universities and biopharma companies (Murray, 2010), a reinsurance trading firm (Smets et al., 2015), hospitals (McGivern et al., 2015), and the creative industries (Lewis, 2012). A similar pattern can be observed in the most recent papers, where four of the 10 articles study social enterprises (Sharma et al., 2018; Smith & Besharov, 2019; York et al., 2016; Zhao & Lounsbury, 2016) and the rest represent a diversity of settings, such as NGOs (Mair, Wolf, & Seelos, 2016), public–private

partnerships (Quelin, Kivleniece, & Lazzarini, 2017; Villani et al., 2017), public hospitals (Smith et al., 2017), Islamic banks (Boone & Özcan, 2016), and a manufacturer of household goods (Dalpiaz et al., 2016). In sum, while social enterprises continue to be a stable context of study, our review of the most cited and most recent publications suggests that more diverse settings are explored by hybridity researchers. Any harbinger of diversity in empirical contexts is important because it illustrates the relevance of the concept of hybridity and the institutional logics perspective across industries, fields, sectors, organizational forms (public, private, and not-for-profit), and organizational missions. Moreover, this diversity of empirical contexts offers promising opportunities to explore the effect of a greater variety of institutional logics beyond social welfare (community and state) and commercial (market) logics, such as, for instance, the under-studied logic of religion.

FOUR SUGGESTIONS FOR FUTURE RESEARCH ON HYBRIDITY WITH AN INSTITUTIONAL LOGICS LENS

Our exploration of the research at the intersection of institutional logics and hybridity enabled us to question taken-for-granted claims, detect trends of interest, and generate four suggestions for future research. The most cited papers used the institutional logics perspective in interaction with various theories, developed across the disciplines of management, sociology, communications and public administration, and contributed to theory development. This supports our argument that the institutional logics perspective, as a meta-theory, is likely to spread the study of hybridity across different disciplinary areas and play a role in further developing micro- and meso-level theories. In comparing the most cited and the most recent papers, we found that research on hybridity with an institutional logics lens recently spread into the disciplines of economics and psychology and attempted to address more varied research questions. We further identified an increase in the proportion of management papers focused on micro-processes, an increase in quantitative research, a decrease in the use of the logics perspective as a meta-theory, as well as a decrease in contributions to existing theories. Overall, these trends are consistent with our argument that disassociating the institutional logics perspective from theories explaining hybridity may lead to the unintended consequence of less theory development.

While the trends discussed are based on a small sample, it is important to note that they are based on publications in leading interdisciplinary journals. Our analysis leads us to view the future of research at the intersection of institutional logics and hybridity with great promise. We develop below four suggestions that outline where we believe future work could fruitfully do so.

Suggestion #1: Future research at the intersection of organizational hybridity and institutional logics can benefit from a more rigorous analytical distinction between institutional logics as a meta-theory and the theories that the institutional logics perspective helps inform.

We argue that future research using an institutional theory lens to inform studies of hybridity can benefit from a more rigorous application of the institutional

logics perspective. In particular, it is important for researchers to specify whether institutional logics are used as a methodological tool (e.g., to characterize the definition of a hybrid organization or to characterize the problem that led to the development of organizational hybridity) or if they are used as a meta-theory (i.e., as an analytical tool to refine theoretical assumptions, predictions, and scope conditions of the theories being integrated with institutional logics). If scholars pay more attention to the different uses of the institutional logics perspective and if they are able to adapt their own use of the logics perspective with their research goals, they will be more efficient at producing and accumulating new knowledge and new theoretical contributions to explain the emergence, consequences, and strategies associated with hybridity. Delineating these distinctions will assist scholars and reviewers in recognizing the unique theoretical contribution of a study. It will reduce unnecessary proliferation of concepts and the relabeling of mechanisms already identified by prior researchers.

Integration is one of the ways in which theories grow through consolidation. Integration can focus on the relationships between a meta-theory and/or between variants and proliferants of a theory (Berger & Zelditch, 1993). For example, in instances of integration of institutional logics and other theories, the researcher is asking the question of how logics condition the effect of other theories in explaining some aspect of organizational hybridity. Jay's (2013) study is an example of how logics condition paradox theory. The study showed that paradoxes of performing, that is, the interpretation of a hybrid outcome as success or failure, is dependent upon which institutional logic is used to interpret the outcome. In a similar vein, Almandoz (2014) showed that adherence to institutional logics conditions the attitude of community bank founders' toward risk.

In these examples, the institutional logics perspective was used to enhance understanding of the different facets of hybridity by sharpening the predictions of existing theories. This approach could be expanded in future research. For example, to explain the emergence of hybrid organizations, the institutional logics perspective could be integrated with imprinting theory (Marquis & Tilcsik, 2013; Stinchcombe, 1965) and network theory (Burt, 1992; Granovetter, 1973). To explain the functioning of hybrid organizations, the integration of institutional logics with neo-institutional theory (DiMaggio & Powell, 1983; Meyer & Rowan, 1977) and category theory (Durand & Thornton, 2018; Hsu, Hannan, & Koçak, 2009) could further shed light on how hybrid organizations deal with legitimacy in the midst of institutional complexity (Greenwood et al., 2011). The integration of institutional logics with conflict theory (McGrath, 1984) could also generate valuable insights into the role of institutional logics in driving conflict in hybrids as well as how such conflict may be mitigated or made productive. To explain some of the consequences of hybridity, institutional logics can be combined with resource dependence theory (Hillman, Withers, & Collins, 2009; Pfeffer & Salancik, 1978) to explain how the institutional embeddedness of actors within hybrid organizations (such as board members or top managers) as well as the institutional embeddedness of their ecosystem may shape their ability to mobilize resources and manage critical interdependencies for survival. This list could be longer. Yet our goal is not to be exhaustive. Rather, it is to highlight

ways in which scholars may think about using the institutional logics perspective to expand existing theories to explain the determinants, management, and consequences of hybridity.

Suggestion #2: Future research at the intersection of organizational hybridity and institutional logics would benefit from more strategic cross-fertilization, building clusters of knowledge on a given theory in a more systematic fashion.

Research on hybridity can be described as a “nascent” field (Edmondson & McManus, 2007). It is largely based on case studies that often focus on developing novel theory, rather than on growing and accumulating existing theoretical knowledge. However, we contend that the time is ripe for hybridity researchers to move to the “intermediate” stage (Edmondson & McManus, 2007) and to integrate in a systematic fashion previously separate bodies of work into a more coherent whole. By “systematic fashion,” we suggest attending to how researchers’ findings affect the nature and principles of theory growth.

There is a social science to how theory grows (Berger & Zelditch, 1993). It outlines different approaches to theory growth in standard terms, including elaboration, proliferation, comparing variants, and competing theories. New findings may contribute to theory elaboration by making prior theory more comprehensive, stronger analytically and more empirically grounded. Theory elaboration builds upon the same family of theoretical concepts and principles and the same explanatory domains, but is expanding the scope of applications in those domains. New findings may contribute to theory proliferation when they advance theory beyond the original substantive domain to include new concepts and principles. Consider, for example, the studies of organizations that, in the face of competing institutional logics, attempt to keep logics in co-existence and prevent logic combination, such as studies by Dunn and Jones (2010), Murray (2010), Smets et al. (2015), and Jourdan et al. (2017). The underlying theoretical similarities of these studies enabled scholars to analyze the cumulative expansion of the scope conditions of the theoretical mechanisms identified and to explore their generalizability across different industries, such as medical education, biotechnology, reinsurance, or film.

Alternatively, findings may be an example of comparing variants when they rely on the same family of concepts and principles, but employ different mechanisms. Battilana and Dorado’s (2010) study is an interesting example of this type of theory growth as it compares two different ways to hire and socialize employees and their effect on the sustainability of hybrid micro-credit banks. This study shows that in such hybrid organizations, the recruitment of staff with prior experience with either the development or the banking logics is detrimental to the organization’s sustainability. This suggests a scope condition for research on organizational identity.

Finally, studies may help grow theory by contrasting competing theories: the goal here is to compare the ability of different theories to explain a given phenomenon. The study by Marquis and Lounsbury (2007) is a good example of such an approach, where ecological and institutional theories are used to explain how competing logics facilitate resistance to institutional change, focusing on banking professionals’ resistance to large national banks acquiring smaller local banks.

As research at the intersection of hybridity and institutional logics advances and matures, it is important that researchers engage in this kind of theoretical analysis to show how their new research contributes to accumulation of theory and theoretical concepts rather than production of only novel descriptive labels that may have been previously identified. This requires researchers to adapt their methods to this new stage of theory development by complementing rich qualitative studies, which greatly contribute to the early stages of theory development – with quantitative studies to validate or test the relationships uncovered through qualitative work (Edmondson & McManus, 2007). Qualitative studies will remain, however, very useful to explore in more depth (for instance through ethnographies) the rich experiential mechanisms at play in hybridity. Our review of the recently published studies suggests that the field is starting to move in this direction. For example, whereas 100% of the most cited papers were using qualitative methods, 40% of the most recent papers used quantitative methods and 20% used mixed methods. We look forward to seeing continued methodological advancement to strengthen hybridity research and its cumulative theoretical foundations.

Suggestion #3: Future research at the intersection of organizational hybridity and institutional logics would benefit from a more systematic focus on the individual level of analysis. This would help this research stream better take into account power and relational dynamics.

Most of the research at the intersection of hybridity and institutional logics has focused on the organizational level of analysis, exploring the antecedents and consequences of organizational hybridity. Yet, we need to know more about how individuals react – and why they react in the way that they do – when faced with hybrid contexts that expose them to multiple institutional logics (Gautier, Pache, & Santos, 2020; Pache & Santos, 2013b). We need to know more about how small-scale interactions between individuals such as conversations or group dynamics affect power and relational dynamics in hybrid organizations. Among the most cited papers, some studies leveraged individual-level data to predict organizational outcomes (Smets et al., 2015) or field-level evolutions (Ansari et al., 2013). But few have attempted to explain the dynamics of individual-level behavior in hybrid environments.

McGivern et al. (2015) is a notable exception: this study reveals that medical professionals in British hospitals respond differently to the experience of administrative encroachment into their clinical roles. While hybrid roles such as manager and clinician were embraced by some individuals, who readily adopted a new hybrid identity, other medical professionals resisted this hybrid identity and chose to stay true to their professional (medical) identity. Interestingly, these differences had unintended implications for the power and status order among professionals in a hospital: contrary to the predictions of professions theory, managers were viewed with higher status than clinicians.

Jourdan et al.'s (2017) study also explores the impact of logics at the individual level of analysis in the context of the French film industry where bankers and directors need to work together to co-produce a film. However, bankers, who operate under the market logic, are stigmatized in the eyes of film directors, who operate under a purely professional logic. Integrating Goffman's (1959) symbolic

interaction theory and the institutional logics perspective, this study shows that producers and bankers did not hybridize their identities to overcome the challenges associated with their embeddedness in conflicting institutional logics. Instead they cooperated to co-produce films by expressing deference. The bankers, for example, engaged in symbolic gestures to show reverence to the directors, such as investing in arty films, advertently not publicizing fund information on financial returns, and participating in industry award ceremonials.

The few studies exploring individuals' behavior in the context of hybridity so far suggest that individuals vary in their responses to hybridity. They may adhere to one logic only (Jourdan et al., 2017). They may compartmentalize their adherence to the different logics in space or time (Smets et al., 2015) or temporarily switch between logics (McPherson & Sauder, 2013). Alternatively, they may combine them (McGivern et al., 2015). Yet much remains to be known about why different individuals may respond in the way that they do and what factors may shape these responses. Existing research suggests that the factors at play are complex. Two recent studies, for instance, provide insights into why some individuals, when embedded in competing institutional logics, keep stable identity boundaries and avoid engaging in logic hybridization. Yet they point to different mechanisms. Murray's (2010) qualitative case study in the biotechnology industry suggested that scientists were able to maintain the stability of their academic identity despite pressures for marketization by engaging in boundary work that strengthened the distinction and competition between the academic and commercial logics, maintaining them in a productive tension. In contrast, Jourdan et al. (2017) study showed that in the French film industry where market mechanisms were introduced to a state subsidized approach to film making, film producers resorted to cooperation rather than competition, through deference to the competing logic. This enabled them to maintain the stability of their artistic identity despite pressure for marketization. Analytically, comparing these two studies makes it clear that competing theories that focus on different mechanisms, competition (Murray, 2010) and cooperation (Jourdan et al., 2017), can be used to address the same research question: why individuals did not resort to logic hybridization when exposed to conflicting institutional logics? Future research leveraging such analytical comparisons is thus needed to further understand the differences between these individual-level mechanisms and the conditions under which each of them may be active.

In sum, we believe that the institutional logics lens shows considerable promise to shed light on individual-level interaction under conditions of hybridity. Logics are carried by individuals and influence their behavior through means-end prescriptions (Binder, 2007; Hallett & Ventresca, 2006). Past research shows that individuals in similar contexts may respond differently when embedded in multiple institutional logics (Almandoz, 2012; Binder, 2007; Creed, Dejordy, & Lok, 2010; Lok, 2010). This is because they may not apprehend institutional contradictions in the same way (Voronov & Yorks, 2015) since they relate to institutional demands differently due to their unique institutional biographies (Bertels & Lawrence, 2016). To understand what is happening in hybrid contexts, it is fundamental to understand how individuals experience and respond to hybridity: how does one become hybrid, and why does one become hybrid when others, in similar

contexts, don't? Another interesting area of inquiry is the consequences of individual-level hybridity. Are hybrid individuals in a better or worse position to perform specific roles, to build specific ties or to access specific types of resources? Lewis' (2012) account of the effect of digital technologies promoting open participation and the implications for professional jurisdiction of media works suggests that this question deserves further attention. We therefore encourage future research at the intersection of institutional logics and hybridity to dive deeper into the micro-level phenomenon of hybridity.

Suggestion #4: Future research at the intersection of organizational hybridity and institutional logics would benefit from an exploration of alternative hybrid forms, including (but not limited to) cross-sector partnerships and informal collaborations.

Recent research on hybridity acknowledges that hybridity is a matter of degree, rather than type (Battilana et al., 2017), thereby recognizing that all organizations exhibit some degree of hybridity, with not-for-profit organizations becoming more commercial (Hwang & Powell, 2009), for-profit organizations becoming more socially responsible (Margolis & Walsh, 2003) and public organizations becoming more pressured to follow a market orientation (Ferlie, Fitzgerald, & Pettigrew, 1996). In line with this growing awareness, past research on hybridity has studied a wide range of contexts, including social enterprises, hospitals, banks, public-private partnerships and insurance companies. Interestingly, research on hybridity has so far mainly focused on formal organizations that exhibit a relatively high degree of hybridity.

Yet we also observe the emergence of new hybrid practices that span organizational and sectoral boundaries, to craft responses to grand societal challenges (George, Howard-Grenville, Joshi, & Tihanyi, 2016), including unemployment, poverty, public health, or global warming. These problems are of such scale and complexity that they cannot be addressed by traditional organizations in isolation, be they public institutions, not-for-profit entities, or for-profit businesses (Ferraro, Etzion, & Gehman, 2015). Hence, researchers and practitioners alike have highlighted the need for cross-sector collaborations (Ferraro et al., 2015) that leverage the skills and resources of actors from different sectors to develop sustainable and more effective solutions (Selsky & Parker, 2005). These new forms of collaboration are inherently hybrid in that they bring together actors embedded in different institutional logics, therefore potentially sharing different goals, interests, and values.

Future research on hybridity could leverage these new practices to explore what hybrid organizing means outside of the boundaries of formal organizations. A scattered and mainly descriptive body of research has started to explore the phenomenon of cross-sector partnerships (Pache, Fayard, & Galo, 2021), but few studies have done so with the goals to contribute to theory on hybridity, using an institutional logics lens. A notable exception is the recent paper by Quelin et al. (2017) which precisely lays the foundations for such work: the paper outlines a typology of different types of cross-sector collaborations and points to socially oriented cross-sector partnerships as particularly challenging because of their high degree of hybridity, both in terms of the logics involved and governance practices. These emergent forms of hybrid organizing can provide particularly fertile ground for

future research on hybridity, by exploring the governance and coordination processes required to make these partnerships work. In turn, as these forms of partnerships have proven particularly challenging, future research on this topic may contribute to valuable insights on the drivers of success of hybrid organizing.

Research at the intersection of organizational hybridity and institutional logics is a vibrant stream of research. With these four challenges and four suggestions to future research, we hope to have provided valuable food for thought for researchers interested in the phenomenon of hybridity, while also upholding meaningful theory development. The institutional logics perspective can be a powerful framework to shed light on the phenomenon of hybridity as well as a powerful meta-theory to define new and extend existing theories of hybridity. As the field continues to develop and mature, we encourage more rigor in the use of logics to shed light on hybridity. Such care and rigor will also entail deciding not to leverage the institutional logics perspective when it does not truly add to our understanding of the phenomenon of hybridity or to the development of theories of hybridity.

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