
1. Introduction to the *Handbook on Hybrid Organisations*

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1.1 BEYOND THE COMFORT ZONE

The title of this section of our Introduction is intended to reflect our contention that we are writing in a fascinating period for organisational studies during which the rise of hybrid organisations (HOs) is causing us to reconsider the way we understand the world of organisations. The ‘new kids on the block’ are turning out to be not so young, nor so few in numbers, nor so inconsequential as is sometimes assumed. The growing excitement and fascination of these times is sometimes tempered by a sense of discomfort and uncertainty. Are HOs making a positive contribution to our society? Or are their problems causing too many difficulties? Should we keep well away from them?

Before responding to these questions, we first provide the background for and scope of the book, and in so doing note some of the new theories that will most likely provide both excitement and constructive discomfort. We then begin to introduce two crucial issues: the contribution of HOs and their potential problems. Section 1.2 provides a systematic summary of all the chapters, and section 1.3 briefly speculates on the past, present and future of the study of HOs.

1.1.1 The Background and Scope of the Book

The academic background to this book is a period in which the study of hybrid organisations and their number, scope and importance have begun to be fully appreciated. It is becoming increasingly evident that they are distinctive organisations that play a unique role in their responses to human problems. The impressive number and wide variety of HOs, their potential longevity and their global coverage are increasingly recognised. What is now also under way is both the identification of historic HOs and the creation of new ones. After centuries of invisibility we can now say with confidence that the HO genes have slipped out of many of their bottles. As far as we can judge, this is a process which appears to have begun more systematically in the last quarter of the 20th century when academics began to explore these seemingly new organisational phenomena.

So what are these hybrid organisations? For the moment, we describe them as formal organisations that utilise the distinctly different principles of more than one of the three sectors (private, public and third). Although not yet a complete working definition it immediately points to what has become the main challenge in the study of HOs: the clash of organisational principles which, while it provides them with the flexibility that is the basis of their unique contribution, can also be the cause of their unique problems.

There are multiple objectives of this *Handbook*. The broad ambition is to advance our understanding of these comparatively new players in the study of organisations.

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Importantly, and in contrast to other studies of HOs, we have approached the study of hybrid organisations as a global multi-sector phenomenon of formal organisations. However, our intention is even more ambitious. It is to increase the range and broaden the boundaries of the study of hybrid organisations themselves by beginning to drill downward into the history of HOs; by bringing the role of volunteers out of the cold and into the study of hybridity; and by analysing and including non-formal organisations and family businesses into the study of formal organisations. The end result is a new map of the range of hybrid organisations, and the need to rethink existing organisational approaches.

The increasing range of HOs is demonstrated in the following 28 chapters by 53 contributors from 13 countries, which break new ground in the diversity of their content and perspectives. Different kinds of hybrid organisations are arranged by sector and discuss specific types such as government-sponsored enterprises, social enterprises, public-private partnerships, and many more. A variety of fields in which HOs operate are covered; examples include health, housing, religion and higher education. Numerous organisational issues are addressed, including governance, strategic planning, social impact and mission. We have also been successful in the geographical coverage of the *Handbook*, which discusses issues faced by HOs in countries from different areas: Western Europe, Eastern Europe, North America, Africa and Australia. The range of academic disciplines and fields is no less extensive, including public administration, social policy, organisational theory, management studies, history, law and economics.

More radical organisational territory is also explored in Chapter 27 which highlights the importance of volunteers and voluntarism, not only in their primary role in the third sector but also in their contributions to the work of government organisations. The final part of the *Handbook* also contains a new theory that brings the non-formal or 'personal-organisation' (not to be confused with informal organisations) into the family of organisations. Indeed, the concluding chapter (Chapter 29) contends that HOs play a pivotal role in a groundbreaking new approach: the New Organisational Reality.

When planning the organisation of the book, we considered a number of possibilities but finally concluded that the best choice was to base it on sectors. This decision emerged from the contention that the three sectors (public, private and third) play a key role in the development of HO research. This is demonstrated by the many contributors to our *Handbook* who either clearly utilise the terminology of sectors or utilise language that is similar to the sectoral division. We have in mind, as one example, the chapters that discuss 'social enterprise', which is in essence a hybrid between the third sector (or one of its alternative names) and the private sector. Other contributors have also been drawn to the utility of the sector concept, or some close alternative name, as a powerful boundary concept. There is another important reason for our choice. This use of sectors makes sense in the arenas of practice and public policy where the broad notion of sectors remains influential. The choice of the sector in the analysis of HOs thus seemed a sensible organising principle.

Below, we discuss the two questions that reverberate throughout the chapters: what is the essential contribution of HOs? Then we explore the other side of the coin, the problems of HOs. If the discussions are to be useful, a working definition is required and we have followed the sector-driven organisation of the book by utilising the approach that covers all three sectors (Chapter 24). Briefly, based on the criticality of formal organisations in

responding to human problems, it recognises their historic adherence to the distinctive principles of one sector, but argues that this ideal sector model is unrealistic. It is therefore replaced by the authentic sector model which includes HOs and reflects organisational reality. The continued strength of the principles of the three sectors led to the definition of HOs as organisations that retain their prime adherence to the principles of one of the three sectors, but have absorbed some of the principles of one or both of the other sectors.

In conclusion, despite their problems, we have personally long taken an optimistic approach to the importance of HOs. It is an approach based on the contention that HOs are a distinct form of organisation that is inexorably being recognised as such. With recognition comes the realisation that our understanding of the world of organisations is changing. We are moving beyond the organisational comfort zone.

1.1.2 The Distinctive Contribution of Hybrid Organisations

The organisational comfort zone is so well known that it is not usually recognised as such. Dominated by formal organisations, it is a taken-for-granted essential part of everyday life in most developed countries. The situation differs from country to country and in different periods, but there is widespread awareness that, put crudely, for some things we can turn for support to government agencies, for other needs we have choices and pay for ourselves; for yet other issues we can become members of third sector organisations that we support with contributions, fees and voluntary work.

The reality is that the taken-for-granted assumptions about formal organisations have, as we shall shortly demonstrate, been incomplete for centuries. The strength of the three sectors of formal organisations will continue, possibly for more centuries. They are not going anywhere soon. Nonetheless, the steady unveiling of hybrid organisations and the greater complexity of the organisational world present a major challenge for organisational studies. The complexities of this new organisational reality are an intrinsic part of the *Handbook*.

The main objective of the remainder of this part of the chapter is to provide an introduction to the two key aspects of hybrid organisation: the distinctive character of their contribution, and the distinctive problems that they face. Section 1.2 will provide summaries of key aspects of all the chapters. In contrast, we draw on the contributions of contributors and external sources more specifically in order to illustrate these two key aspects.

Despite the increased recognition in the academic world of the existence of hybrid organisations there is some way to go before we fully understand the real range of their positive contributions. We begin therefore by noting their general intrinsic contribution: it is their potential to solve problems that cannot be resolved solely by traditional non-hybrid organisations. Their ability to utilise the principles of several sectors can enable them to obtain additional resources in order for them to maintain, change and survive in their objective of responding to human problems.

In this section we draw attention to the value of HOs by noting, perforce only fleetingly, the work of several contributors and other commentators. We begin by drawing attention to two case studies that remind us of the longevity and success of HOs, their historic and continuing contribution and, not least, the importance of organisational roots. This last point is especially relevant for the stability of HOs in which roots – the reasons for their existence and their organisational DNA – can be confused.

The value of roots

The importance of roots is demonstrated by two chapters that present historic case studies of hybrids. The first of these is Thomasson's study of the Swedish corporate model (Chapter 8) that can be traced back to the late 19th century. In the 1960s and 1970s the model was more widely utilised with the expansion of the public sector and the development of the social welfare state, and it experienced a further boost in the middle of the 1980s resulting from the influence of the New Public Management ((NPM). A strong message is reserved for the end of the chapter, where Thomasson declares that without understanding its history it would be easy, but erroneous, to assume that the Swedish corporate model was a result of the strong impact of NPM on the development of public services and their hybrid character. On the contrary, what we see today results from the influence that the public as well as the private sector logics have had on the model during that period: '[it] teaches us not to forget our history'. This provides a salutary warning for HO researchers in an exciting and rapidly increasing field (see section 1.3 of the chapter).

Roots and interdependence

There are older hybrid organisations that have been identified as existing many hundreds of years ago. This is illustrated in the pioneering case study of the rise of the Dutch East India Company founded in 1602 (Vermeulen and van Lint, Chapter 11). It is a detailed and fascinating study which examines the enduring conflicting demands, and mutual dependence between the company and the state. The authors utilise the work of Gelderblom et al. (2010, p. 16) whose work highlights the character of the company 'as a private commercial company with superimposed public responsibilities'. While the state officially kept the final authority to itself, the company received the public power to make decisions in the name of the States General. The authors suggest that this was the first hybrid organisation combining state and commercial logics. The company lasted until 1799 without a master plan in mind. Instead its hybrid strategy unfolded by actions and responses along the way. It was certainly an impressive achievement and the particular lessons to be learned are the enduring importance of its enacted hybrid roots and the key role of mutual dependence. It is a success story which is only slightly modified by its eventual failure.

Both these cases may help us to understand and learn from this additional historical dimension of hybrid organisations. Other hybrid centenarians and some even older are also to be found as societal pillars in many countries; these include universities, cathedrals, mosques, museums, theatres, learned societies, leisure and sports organisations, and political parties. Indeed, Chapter 26 by Johan Gärde, whose objective is to better understand the hybrid arrangements that have arisen from the interaction between church and faith-based organisations in the three sectors, is introduced by an account of a conference in the Vatican with its 2000-year history.

Hybrid research institutes: innovation and interdependence

Another important lesson is provided by an example in which the private sector stakeholders' principles of the market are interwoven with public sector research principles in the search for innovation. The possibility of developing new innovative approaches to problems is an attractive prospect for stakeholders. In Chapter 7, for example, Gulbrandsen and Thune analyse research institutes as organisations that have research

and development as a main activity, whose funding is most often predominantly public, and which are not part of the higher education system. They suggest that an important driver of these structures is the assumption that the creativity and radical solutions, associated with public research organisations, can be implemented in private firms. Overall, effective hybrid arrangements tend to be realised only through repeated collaborative and integrative efforts over a long period of time. In this collaboration, it seems that both sides can, but do not always, achieve the objective of melding the competing principles of public research with those of private sector implementation.

1.1.3 The Contribution of Hybrid Organisation Research to Society

As demonstrated in this *Handbook* the development of interest in HOs and its associated theories has resulted in the development of new research insights and the deeper understanding of organisations in all three sectors. Inevitably, new insights bring with them new problems. Although we discuss some of these in the following section, one of these is so important that we raise it now. The perspective which clearly differentiates non-hybrids from hybrids necessitates reappraising how we determine organisational failure and success. To what extent does hybridity contribute to either of these situations? The potential implications of successfully using a theory of hybridity are at this stage seemingly limitless. Even at the current stage of research it is possible to ask searching questions before any proposed creation of a hybrid organisation. The tools and methodology are in place to clarify accountability for decision-making ownership, governance and operational priorities.

The value of a theory of hybrid organisations may be particularly helpful in the case of HOs such as social enterprises, family businesses and housing organisations that have attracted their own body of dedicated researchers and associated journals and research events. They all have in common the need to understand organisations that have been steadily recognised as HOs (see Cornforth, Chapter 13; Blessing and Mullins, Chapter 16; Milligan and Hulse, Chapter 21). Together, these three areas of hybrid organisations make a critical contribution in their different ways to the economy and to the response to social problems. They also share the problem, in varying degrees of intensity, of uncertainty about their boundaries.

Social enterprises are an interesting example of chronic boundary confusion. In an upcoming international conference devoted to social enterprises (EMES, 2019) one of the major themes contains the call for contributors to respond to the questions: What do we think social enterprise is, and what could it be? The conference organisers point out that for the last 20 years different scholars have sought to define the approaches to social enterprise (SE). What are the boundaries? In an authoritative article in *Public Policy and Administration*, Simon Teasdale answered similar questions by arguing that the definition of SE was deliberately kept loose by policy-makers, 'to allow for the inclusion of almost any organisation claiming to be a social enterprise. This allowed them to amalgamate the positive characteristics of the different organisational forms, and so claim to be addressing a wide range of social problems using social enterprise as a policy tool' (Teasdale, 2011, p. 99).

The recognition that SEs are hybrid organisations is an important first step in deconstructing the hodgepodge of organisations that benefit from the warm glow that is

emitted from the SE brand. At some point in the history of SEs it is likely that they will be required to clear up the confusion and clarify the boundary. Failure will lead to an uncertain long-term future for SEs, which are likely to remain susceptible to the malign influence of others, beyond government, that accidentally or deliberately improperly utilise the SE 'brand'.

HO research and government

Whether, or to what degree, this analysis is applicable at an international level it nonetheless appears plausible in the United Kingdom (UK) situation. It may be out of fashion, but it also raises issues about the morality of governments that claim credit when none is due. The issue of morality is inescapably attached to the consequences of its failure. This of course is hardly a new phenomenon. Nonetheless, confusion over conceptual boundaries provides a golden opportunity, an almost irresistible temptation, for governments to exploit the territory. In the case of SEs the practical consequences might be comparatively modest but the unintentional implementation of public policy, even with the best of intentions, but based on confused concepts, is highly likely to be inefficient and expensive; and the deliberate implementation of such concepts may be both costly and morally questionable. Confused public policy is often critically analysed by a number of disciplines. However, scholarly analysis may now need to take into consideration the possibility that the target of the analysis might be a hybrid organisation with its own distinctive organisational characteristics.

The contribution of research for government policy

We have previously fleetingly noted the relevance of hybridity theory for government, with its huge expenditures. We now delve a little deeper into an area in which HO research and the better understanding of hybridity can make a major contribution.

The path to hybrid organisations is attractive for governments. Often this is a result of the pressure to meet political manifestoes and public commitments, combined with the constant need to avoid additional taxes. UK governments have been prone to create structures which involve eye-watering expenditure (seemingly without appreciating the uniqueness of hybrids). A popular but controversial approach is the practice in which private companies provide public services and infrastructure. This public-private partnership model that involves private firms taking on the risk of delivering projects in exchange for payments from the state has been developed over several decades. It has created what has been called in Chapter 24, an 'entrenched hybrid'. The model has recently come under severe criticism from the UK Treasury as being 'inflexible and overly complex' (Davies, 2018). A few months earlier, a governmental enquiry was informed by the most senior official from the Cabinet Office that, 'the entire PFI [private finance initiative] structure is to keep the debt off the public balance sheet. That is where we start.' The enquiry committee declared this to be a 'shocking' admission from the government (Wearden, 2018). To paraphrase Laurel and Hardy, 'here's another nice mess you've gotten us into, Minister'. It is not essential to be an optimist in order to believe that a valuable contribution could be made to the public purse by better understanding the nature of hybrid organisations.

1.1.4 Problems of Hybrid Organisations: Emerging from the Comfort Zone

All organisations face problems, and to claim otherwise is to be ‘economical with the truth’. Although we have so far focused on the potential positive contribution of HOs, we are acutely aware of the problems arising from the conflict of principles present in all hybrid organisations. In this section we have attempted to explore some of the major problems that are distinctive for HOs. Foremost amongst them are those caused by lack of clarity about ownership, combined with the concomitant confusion of accountability. These twin characteristics reflect the essence of the DNA of hybrid organisations. Many, perhaps most, cases of significant organisational problems in HOs are likely to be traceable back to confusion surrounding the roles of these twins. They are also the driving forces behind disturbances in the comfort zone.

As reflected in section 1.1, the study of HOs is approached from many different vantage points and levels of problem. We have consequently focused on the principle of ownership and, sometimes by implication, its related problem of accountability.

Ownership and accountability

The previous section concentrated on the advantages of HOs for stakeholders, but it also concluded with a salutary reminder of their possible disasters. The most compelling example was the spectacular collapse of the outsourcer Carillion in early January 2018, which cost the taxpayers £150 million and had a devastating impact on 43 000 employees. In the immediate aftermath of the disaster the overwhelming reaction of the majority of serious observers was to blame poor management and technical failures. One exception was the contribution by Chris Blackhurst (2018) who argued, in summary, that the real problem was the mismatch between private and public when a private company was asked to perform a public service, as is the case with the private–public partnership. This was nowhere near a meeting of equals; there was no match of like minds and values, not in terms of how a company is charged and assessed, nor how it is run, nor in operations. One side is for growing profits and producing dividends for shareholders; the other is about getting something for as little as possible (*ibid.*). A blunt assessment, but one that gets to the heart of the nature of hybridity, the problems of different principles, and the consequence of the absence of shared and transparent knowledge by both sides of their competing principles.

Similar issues are discussed by Boardman and Moore in Chapter 4 where they analyse three forms of local government mixed enterprises. It is the public–private partnership (PPP) form in which government uses the private sector to carry out public purposes that is most relevant. The authors point out that, as a result of the structure in which managers directed by the private sector owners are without direction from public sector officials, there are two sets of owners and severe conflict can arise between them. Their analysis identifies what is seen as a key problem: ‘that despite being described as “partnerships”, the private sector and public sector owners generally have fundamentally different goals’. This analysis has much in common with the three-sector theory of Billis in Chapter 24 which suggests that HOs have severe difficulties in functioning with decision-making owners from two different sectors. Vining and Weimer in Chapter 6 explore similar territory using a property rights approach that reaches similar conclusions. They remind us that the first and most fundamental dimension of property rights is the degree of

ownership fragmentation, and that with a single owner there is no potential for conflict among owners. They conclude by offering advice to organisational designers: be wary of hybrid designs that fractionalise property rights across the public and private sectors. This insight corresponds to the general direction of Chapters 4 and 24.

At first glance, the connection between Chapter 10 by Winter and Bolden and the discussion in the previous paragraph may seem rather distant. For example, their approach is based on a social constructionist perspective (Berger and Luckmann, 1967 [1971]) in which different individuals and occupational groups interpret the central work of the organisation at a particular time and in a given cultural context. Ownership and accountability do not appear to be central to their analysis. But closer examination reveals, despite its different theoretical approach and area of concern, a contribution that is considering the same problems of owners with fundamentally different goals and the presence of ownership fragmentation. Their contribution is powerful and may be (painfully) familiar to most academics. The authors are discussing hybridity in higher education institutions, and the heavy weight of their evidence provides a powerful confirmation of the internal conflicts and contradictions in these hybrid organisations. Their focus is on problems such as divided loyalties, contradictory expectations, values and assumptions, cultures and beliefs. But all these are set within the overarching problem of the clashes of principles and approaches of: (1) the academic collegiate mission and its emphasis on intellectual rigour and scholarship; with (2) the market and hierarchical structures; and (3) the vagaries of government policy.

Chapter 14 by Doherty, Haugh and Lyon explores the strategic management tensions encountered when seeking to balance the commercial, social and environmental objectives of SE. Given that they define the aim of strategic management as the creation of a shared plan of action for the organisation, it is to be expected that such a high-level decision will inevitably rise to the top of all pyramids and be the concern of the decision-makers in all organisations. However, the authors persuasively lay out the case that the distinctive features of hybrid organisation warrant further research into the nature of their appropriate strategic management. We surmise that without such research the accountable owners and many more staff will be destined to share their space with the permanent presence of the infamous ‘elephant in the room’. Other important contributions are made by authors who also consider potential problems that can reach the highest level of decision-making. Thus Huybrechts, Rijpens, Soetens and Haugh (Chapter 23) reflect on their research into the ways in which newly established social enterprise hybrids have, with modest success, endeavoured to build legitimacy. Kreutzer and Jacobs in Chapter 22 tackle the difficult problem of mission drift and present the development of a framework that responds to these problems.

Earlier, we briefly referred to the ‘unfashionable’ consideration of the possible lack of morality in the actions of governments with respect to the SE approach. In a thoughtful and extensive contribution that also discusses social enterprise, Curtis Child (Chapter 12) has produced a diplomatic but nonetheless powerful critique about the morality of social enterprises. His concern about their morality is ‘that the pursuit of social value could be limited by the tools of the market upon which, by definition, social enterprises rely’. He suggests that it is easy to think that using them towards moral ends can only turn out well. ‘But it is possible – some say likely – that efforts to address social problems are not best governed by the tools of capitalism, and that efforts to make them do moral things might

have an adverse effect.’ He concludes that it would be ‘appropriate for social enterprise scholars to think more deeply about the moral consequences of social enterprise’, suggesting that ‘it is constructive to reflect critically on whether encouraging social enterprise is ultimately a worthy pursuit’. We might say that he has (constructively) put the ‘cat amongst the pigeons’; a British idiom with several alternative unsavoury origins but whose general meaning is fairly obvious. A more delicate approach is to suggest that it might take many of us out of our comfort zones, which returns us to the main theme of this section and our own conclusions.

1.1.5 Summary of Section 1.1

The chapter began by laying out in the opening subsection 1.1.1 the background and scope of the book, the rationale behind the choice of presentation of the chapters, and a definition of hybrid organisations. We decided that the following subsections should provide a limited introduction to the most crucial questions confronting the existence and continued development of HOs: what are their distinctive potential advantages? And what are their inherent problems? In response to these questions section 1.1.2 discusses the advantages of hybrid organisations and section 1.1.3 contains some reflections on the contribution of HO research.

Section 1.1.2 begins by explaining what we mean by the organisational ‘comfort zone’: the taken-for-granted assumptions about formal organisations. Following this, it moves rapidly into the main discussion about the distinctive contribution of HOs. It lists many of the areas in which their ability to utilise the principle of sectors and solve problems that cannot be resolved solely by traditional non-hybrid organisations has proved valuable. From this point onwards a number of examples are provided and begin by discussing the value of organisational roots and the proven longevity of HOs which can survive, at least, for several centuries (Chapters 8, 11 and 26). They also point to the importance of interdependence, an advantage which is also noted by Gulbrandsen and Thune in the context of research institutes in Chapter 7.

Section 1.1.3 moves beyond the contribution of HOs and considers the contribution of HO research to society, firstly with respect to groups of HOs, using the example of social enterprise; and secondly, discussing the contribution for government policy. But since HO research is primarily undertaken in universities which are themselves hybrid organisations (see Chapter 10) that are dependent, for example, on fees, donations, legacies and, most importantly, the collegium of academics, the end products of the university are themselves making significant contributions to society. In addition to work with individual organisations, an important contribution to groups of HOs such as SEs is to utilise hybridity theory to help clarify the potentially existential problem of their confused boundary. The second more specific, but still potential, contribution is to clarify the presence and nature of hybrid organisations before governments establish them without understanding their complexity.

Section 1.1.4 illustrates the other side of the coin: the distinctive problems of hybridity. It concentrates on the two most serious issues: those of unclear accountability and ownership. It illustrates the major disaster of a national private–public partnership, Carillion, and the conflicts resulting from mixed private and public sector ownership of local government mixed enterprises (a form of PPP). We return to two forms of organisation

whose advantages have already been noted: universities and social enterprises. The study of universities confirms that they are indeed HOs, with severe internal conflicts over issues such as divided loyalties, values and cultures, but these are all played out within the overarching problem of competition between the academic collegiate mission, the market and government policy.

There are two very different studies of SEs that remind us of broader considerations. The study of strategic management tensions, although it begins by discussing the problems, is firmly balanced by the later presentation of responses and solutions. The broader point is that the division into advantages and disadvantages of HOs is rather artificial and, as will be evident from this section, and the chapters themselves, many chapters address both problems and solutions. That said, the second broader consideration, also about SEs, adopts one of the most valuable academic approaches by raising difficult questions, in this instance about their morality. With this contribution we have returned to the theme of moving beyond our comfort zone.

1.2 CONTENTS OF THE HANDBOOK

In the 28 chapters that follow this Introduction we have assembled a rich variety of insights into the nature of hybrid organisations and the challenges they pose. The material is divided into four parts. The first nine chapters focus on public sector hybrids. Part II consists of six chapters which look at hybrid organisations rooted in the private sector. In Part III we turn our attention to the seven chapters that examine third sector hybrids. And the six remaining chapters that make up the Part IV of the *Handbook* provide insights into all three of the sectors and their boundaries.

1.2.1 Part I: Public Sector Hybrids

The first two chapters after this Introduction provide some theoretical guidance to the complexities and tensions involved in public–private sector hybrids. In Chapter 2, Philip Marcel Karré sets out a conceptual model which maps hybridity across ten dimensions where the private and the public mix and can be used to identify an organisation's hybrid thumbprint. He defines the ten dimensions as: (1) legal form; (2) ownership; (3) activities; (4) funding; (5) market environment; (6) value orientation; (7) strategic orientation; (8) relationship with public principal; (9) managerial autonomy; and (10) executive autonomy. He suggests that the organisational thumbprint derived from their analysis can be used to highlight areas of tension; to facilitate discussion about the organisation's strategic course; and to identify the dimensions on which these organisations can be beneficial or hazardous.

Chapter 3, by Nicolette van Gestel, Jean-Louis Denis and Ewan Ferlie, discusses four theoretical frameworks that, according to the authors, make sense of hybrid organisations, drawing on recent empirical works to help understand how public service organisations deal with hybridity in strategy and practice. The four frameworks are: governance theory and the emergence of mixed forms; institutional logics where the focus is on organisational change; Actor Network Theory focusing on the process of organising; and the identity framework which explores how individuals and organisations experience

hybridity in public organisations. The authors conclude that: 'All four of the frameworks we explored were found to capture some, but not all, facets of the answer.' The chapter provided 'a rich variety of alternative theoretical perspectives which can be used to inform further empirical studies of hybridisation in the public services'.

Chapter 4 focuses on some of the legal issues involved in public–private organisations and the implications of them for their performance. Anthony E. Boardman and Mark A. Moore distinguish between different kinds of local government mixed enterprises: the classic form where a local government directly or indirectly owns some of the common shares in an organisation and private investors also owns some of them; the public–private partnership, a long-term contract between the private sector and a government agency which goes beyond the contracting-out of a government service; and the complex form, involving a variety of public arrangements and contractual solutions for engaging the private sector. The authors identify different ways in which these MEs perform. Some of them provide 'the best of both worlds' and maximise the provision of social welfare; others are hamstrung by conflicts between public and private values; while a third offers 'the worst of both worlds' where public and private owners maximise profit at the expense of consumers.

In Chapter 5, Ross Millar, Kelly Hall and Robin Miller present a case study of social enterprises established under the 'Right to Request' programme that formed new organisations into which public services could be 'spun out' from the National Health Service (NHS) in England. Drawing on elements of the four 'theoretical prisms' set out by van Gestel and her colleagues in Chapter 3 of this *Handbook*, Miller et al. identify some approaches that have offered ways of resolving some of the contradictions and multiple logics of social enterprises within the context of public sector delivery. In particular, insights gleaned from Actor Network Theory has clarified the need for greater financial support from the government while identify theory helped to create a better understanding of the need to adapt to different audiences. These findings provide useful insights into the sustainability of hybrid organisations.

Aidan R. Vining and David L. Weimer, in Chapter 6, use six dimensions of property rights to explore the differences between different kinds of public–private hybrid organisations and some aspects of their performance. The different dimensions are: (1) the degree of fragmentation of ownership; (2) 'the extent to which various dimensions of property rights are comprehensively and unambiguously assigned and specified among owners and other claimants'; (3) 'the ease with which current property rights can be reallocated'; (4) security from trespass or 'the extent to which either duty-bearers or third parties respect property rights claims'; (5) 'the expectation that the current allocation of rights will exist over time'; and (6) the extent to which owners and managers have autonomy within the system. The authors apply these dimensions to empirical evidence about the performance of different public–private organisational forms and conclude that, while all of them risked some goal conflict, the challenge was likely to be greatest for public–private partnerships and government-sponsored enterprises and less severe in mixed enterprises.

Chapter 7, by Magnus Gulbrandsen and Taran Thune, addresses an accelerating trend to hybridisation in universities and research institutes through the development of new organisational arrangements that combine research with innovation and/or commercialisation. These not only bring together aspects of the public and private sectors but also combine the goals of furthering scientific understanding with the commercial exploitation

of this knowledge. The chapter reviews three different types of organisational set-up for achieving integration between private and public goals before concluding that hybridity in research is particularly complex, entailing not just the combination of public and private sector forms but also two different perspectives on science. Research-based hybrids may not resemble hybrids in other fields and require significant and patient investment.

In Chapter 8, Anna Thomasson reviews the experience of the Swedish corporate model, the hybrid organisational form of the corporations owned by Swedish municipalities and developed long before the introduction of New Public Management. She suggests that the growth in the numbers of these corporations has been fuelled by their perceived advantages: greater clarity about the relationship between performance and income through the separation of the corporation's budget and increased managerial autonomy leading to greater efficiency and effectiveness. On the other hand, managerial autonomy has increasingly been seen to risk eroding accountability to the municipality, and there was a danger of mission drift as public sector values were overshadowed by the values of the market. Historically the model has been seen to work because of the honesty of politicians and faith in the democratic system but the impact of NPM and some recent corruption scandals have brought the boards and managers of the corporations – and the model itself – under scrutiny.

The main purpose of Chapter 9 by Lars Fuglsang and Jørn Kjøseth Møller is to develop a framework for understanding how hybridity can lead to innovation. The first part of this approach is through adopting the logic of servitisation, which introduces a market-like approach to public services where citizens are treated more as if they were individual customers. The second part uses the ideas of boundary concepts, skills and hybrid regions to explain how actors can develop 'a new idea that gives meaning to and pulls together diverse supporters around a shared meaning' for innovation; how they can use the skills and identify the materials needed to develop new ideas; and how they can work within a 'hybrid region' that provides the autonomy to connect and integrate the elements of experimental practice through overlapping principles.

In Chapter 10, Richard Winter and Richard Bolden look at the ways in which higher education institutes are made up of competing professional and managerial beliefs and value systems. The professional or normative value system emphasises public service, professional autonomy, collegial practice and tradition, while the managerial or utilitarian alternative is characterised by profit-making, corporate management, customer service and change. The chapter discusses different approaches to synthesising, bridging and reconciling differences in logic and values. These include considering universities as 'dual identity' organisations and regarding academic leaders as managers with an alternate professional identity. The key challenge remained how to devise governance structures and leadership processes for orienting academic work around change and enterprise ideals whilst simultaneously enabling academics and professional staff to retain their professional identities.

1.2.2 Part II: Private Sector Hybrids

Chapter 11 focuses on one of the oldest hybrids of them all: the Dutch East India Company, founded in 1602 as a national trading company with a state monopoly of trade with the East and using investments from shareholders. Patrick A.M. Vermeulen

and Arlette Cindy van Lint review the history of the company and its attempts to secure the support it needed from different internal and external parties: the directors of the company, the shareholders and the States General. The conceptual basis of the chapter is the competition between two central logics – the commercial and the state – and the ways in which organisations respond to conflicting institutional pressures. It examines three key stages of the development of the company: an attempt to combine both logics; a second phase eventually resolved by the application of commercial logic; and a third phase that led to the bankruptcy when the hybrid character that had made the company so powerful also caused its downfall.

In Chapter 12, Curtis Child introduces the discussion of social enterprises by identifying three ‘classes of concerns’ that they need to address as hybrid organisations. He suggests that the first of these – issues of consonance involved in trying to reconcile the very different logics of the market and social welfare – can be addressed by appropriate structures for accountability and governance. The second concern is trustworthiness – to what extent can external actors trust the organisation’s claims? – to which the response can take the form of new legal forms of organisation and certification. For the third set of moral concerns, which deals with the ethical consequences of merging commercial and social goal and values, Child offers no simple responses but suggests that scholars need ‘to think more deeply’ about these issues.

Chris Cornforth focuses on governance structures in Chapter 13. He identifies two main approaches for social enterprises in managing the pressure to maintain their social goals in the face of commercial pressures in the form of strategies that either integrate or compartmentalise competing institutional logics. He lists four kinds of integrative strategies: developing legal structures such as the new community interest company; adopting external accreditation of standards; defining the membership of the organisation and the composition of its board; and developing control mechanisms that manage both social and financial performance. Strategies for compartmentalisation are of two kinds: either segregation – separating social and commercial activities into legally distinct but connected organisations; or segmentation – separating parts of the organisation with different logics within the same organisation.

In Chapter 14, Bob Doherty, Helen Haugh and Fergus Lyon explore the strategic management tensions involved in balancing commercial, social and environmental objectives in social enterprises, and discuss how they can be managed. They highlight three ways in which organisations can respond to the tensions involved: by prioritising one of the conflicting demands at the expense of the others; by separating the customers and the beneficiaries of social enterprises into different stakeholder groups; or by striving to develop an integrated model in which all business functions support the achievement of the dual mission of ‘pursuing viable commercial markets at the same time as generating social and environmental value’. They bring these elements together into a conceptual framework that provides a guide to the alternative strategic options available to social enterprise hybrids.

Chapter 15 by Elena Dowin Kennedy, Erynn Beaton and Nardia Haigh looks at how the corporate governance practices of both traditional firms and social enterprises might use them to increase their social impact. It assesses them against the six corporate governance principles developed by the Organisation for Economic Co-operation and Development (OECD): ensuring the basis for an effective corporate governance framework; protecting

the rights and equitable treatment of shareholders; addressing the responsibilities of institutional investors; understanding the role of stakeholders in corporate governance; ensuring the need for disclosure and transparency; and addressing the responsibilities of the board. The authors conclude that traditional firms were likely to increase their social impact if they were to adopt the governance practices of social enterprises, and that both traditional firms and social enterprises would increase their social impact if they adhered more strictly to OECD corporate governance principles.

Finally in this section, we turn to Chapter 16 in which Anita Blessing and David Mullins, drawing on the experience of the United States (US) and using the lens of organisational hybridity, look at ways in which profit-oriented investors respond to state and civic governance mechanisms for encouraging societally beneficial investments in affordable rental housing. They discuss a pair of mechanisms that can be seen as working in tandem to develop an affordable rental housing industry. The 'carrot' of Low Income Housing Tax Credit which provided tax exemptions for organisations with tax liabilities was combined with the 'stick' of the Community Reinvestment Act of 1977 which obliged banks to meet the credit needs of the communities in which they operate. These measures have been implemented by hybrid organisations through community development corporations and community development financial institutions. The authors conclude that these measures have had an impact on the provision of local affordable housing and also provided a significant effect on the development of inter-organisational hybridity.

1.2.3 Part III: Third Sector Hybrids

In Chapter 17, Adalbert Evers argues that third sector organisations experience two very different kinds of hybridity that point in very different directions for research and practice. The first of these – inter-sectoral hybridity – involves the 'intertwining of usually separated institutional logics and organisational fields'. The second – multipurpose hybridity – refers to 'organisational forms that combine distinct purposes, such as service provision and advocacy, value change and mutual help'. Evers feels that the inter-sectoral approach needs to be complemented by multi-purpose hybridity so that 'a richer variety of organisations comes into focus and service provision will not be the most important feature'. He calls for research based on this dual approach that addresses 'issues that concern the vitality of civil society, the third sector and the rich variety of its organisations'.

Chapter 18 from Victor Pestoff provides us with an important context for research and action on third sector organisations. He suggests that the elements that comprise different kinds of public administration regimes (PARs) have clear implications for hybridity, co-production and the third sector, and argues that changes in public administration regimes will determine the focus of the leaders of third sector organisations. The four PARs he identifies are traditional public administration based on the provision of public goods delivered by public servants guided by bureaucratic norms; New Public Management where the market replaces the state as the main mechanism for governing citizens' preferences; New Public Governance where citizens play a more active role as co-producers; and communitarianism which involves radical budget cuts for public services and the expectation that families, communities and the third sector will fill the vacuum.

In Chapter 19, Sergej Ljubownikow and Jo Crotty look at the impact of the system of 'managed democracy' on non-profit organisations (NPOs) in the Russian Federation.

Their case studies focus on NPOs engaged in health and education on the one hand, and those involved in environmental issues on the other. In both cases, they argue, NPOs have become hybrids – agents of the state as well as agents of the non-profit sector – but for different reasons. Those engaged in health and education have encountered state-led committees or roundtables which have provided a means of developing an overlap between the roles and responsibilities of individuals active in the NPOs and those working within the agencies of the state. This has blurred the line between the responsibilities of the state and the work of NPOs. In the case of environmental NPOs, dependency on state funding has meant that their concerns have been restricted to activities that were acceptable to the state.

Chapter 20 looks at the growing pains of civil society organisations and, in particular, social enterprises in the transitional economy of the Czech Republic. Gabriela Vaceková, Hana Lipovská and Jana Soukopová argue that, despite the deep transformation of the Czech economy as it moves from a state-controlled economic system to one that is driven by the market, the development of social enterprises has been hindered by the legacy of communism. Czechs have found it difficult to adjust to the loss of state monopoly of public services and are suspicious of the association of businesses with a social dimension with socialism. Legal structures and the security of property rights are underdeveloped. In the absence of legislation and a more secure funding base, social enterprises remain vulnerable and make a only a limited contribution to the economy.

The case study presented in Chapter 21 by Vivienne Milligan and Kath Hulse reviews the recent development of housing third sector organisations (HTSOs) in Australia. The majority of the 40 or so larger organisations that dominate the sector are enacted hybrids rooted in government initiatives in specialist housing provision, with a limited pool of members and increasingly financed by major financial organisations. They are increasingly market-driven due to ‘capricious government behaviour’ and ‘bureaucratic inertia’; the influence of powerful land developers and banks; and the weakness of their connections with the third sector. In the process HTSOs have moved from their original status of state–third sector hybridity to one which involves the state, the third sector and the market.

In Chapter 22, Karin Kreutzer and Claus Jacobs also use a case study of the United Nations Children’s Fund (UNICEF) Germany as a worked example of a tool they have developed to address the key issue of mission drift in hybrid organisations. Their framework, the hybridity tensions positioning protocol (HTPP), can be used to identify, surface and specify four generic organisational tensions as a means of reaching decisions about how to develop the organisation’s mission. The HTPP charts social and commercial logics across the four kinds of organisational tension to provide a map of the organisation’s current positioning. This enables it to discuss and agree how to address its future needs and any necessary revisions to its mission statement. As well as contributing to a transformation of potential conflict into productive tensions, Kreutzer and Jacobs claim that the protocol can also provide an organisation with aspects of a strategic capability.

Another case study is presented by Benjamin Huybrechts, Julie Rijpens, Aurelie Soetens and Helen Haugh in Chapter 23. Their focus is on a federation of community-owned renewable energy co-operatives which explored ways of building legitimacy in these social enterprise hybrids which suffered from the liability of newness. The REScoop.eu federation adopted four kinds of discourse in order to build legitimacy

in its member organisations: developing a critique of the dominant logic of policy-makers and corporations; promoting a new model in the form of a social enterprise; engaging in advocacy of the new kind of organisation; and using a wide range of activities to spread knowledge about the new hybrid model. The authors conclude that these activities have had some success, but have not yet fully engaged the support of stakeholders.

1.2.4 Part IV: The Three Sectors and Their Boundaries

The driving force of Chapter 24 by David Billis is his concern about a lack of understanding about the contribution made by hybrid formal organisations to responding to human problems, and his primary objective is to identify a greater clarity of accountable ownership. The chapter outlines the author's theoretical approach before presenting two models. The first of these analyses the three sectors in which each of them consists of individual formal organisations with common principles of organisation. The second model builds on this to present an 'authentic sector model' which contains both ideal-typical organisations and their hybrids. This section of the chapter also uses a suite of concepts to identify different kinds of hybridity. The chapter goes on to present three case studies – of global disaster, national uncertainty and local disturbance – that demonstrate the ways in which the new concepts help to clarify the problems of confused ownership. It ends by looking ahead to the continued development of this theory of the New Organisational Reality and discussing the need to rethink the changing role of organisational theory.

The objectives of Chapter 25 by David Littlewood and Diane Holt are: to examine the state of research on hybrid organisations in sub-Saharan Africa; to explore the types of hybrid organisation found there; and to identify challenges facing them. The authors point out the complexities associated with sub-Saharan African contexts. The private sector is distinguished by the prevalence of the informal and subsistence economy and the importance of multinational enterprises. The public sector is 'characterised by limited resources and capacity, regulatory voids, and also challenges of corruption, excessive bureaucracy and a lack of accountability'. And the third sector 'has been heavily influenced by international dynamics and actors', its organisations tend to be informal and they are also less able to hold governments to account. The chapter identifies some key challenges and strategies for third sector, public sector and private sector hybrids in sub-Saharan Africa and outlines some insights for research, theory and practice.

The purpose of Chapter 26 by Johan Gärde is to better understand the hybrid arrangements that have arisen from the interaction between churches, faith-based organisations and other sectors. This is approached by exploring drivers for and against the development of hybridity and by developing a rough draft of some of the new hybrid relationships between churches and faith-based organisations and the other sectors. Faith-based organisations face diminishing congregations and have responded by interactions with public, private and other civil society organisations, some of which have led to hybrid types. The author also suggests that faith communities and their organisations are striving to resolve not only the problem of declining membership but also the challenge of wider humanitarian tragedy.

Colin Rochester, Angela Ellis Paine and Matt Hill set out in Chapter 27 to assess the extent to which the involvement of volunteers can be seen as a way of defining the hybrid character of organisations across all three sectors. The chapter begins by mapping the

geography of hybrid organisations developed by Billis in Chapter 24 in order to identify the organisational settings where volunteers might be found. The chapter then takes a close look at the ideal type of third sector organisation – the association – which is used as a kind of template for volunteer involvement in other organisations. It discusses the role of volunteers in third sector hybrids, before looking at the status and roles of volunteers in the other two: public and private. Finally, it seeks to identify the part played by volunteers in each sector and the extent to which they can be seen as contributing to the hybrid nature of organisations.

In Chapter 28, Börje Boers and Mattias Nordqvist explore the nature of family businesses as hybrid organisations by examining two case studies of companies that were family-owned and had been listed on the stock exchange. Both organisations exhibited high levels of potential conflict due to the centrality of their competing logics, but there were clear differences between them. In one of them the logic of family ownership remained paramount. In the other, tensions between family members – the majority – and other members of the board led to the development of ‘a hybrid professional family firm’ with a non-family chief executive officer (CEO) and chair; the family, while remaining active and interested owners, no longer controlled the organisation.

Finally, Chapter 29 by David Billis builds on the analysis of the three sectors – public, private and third – presented in Chapter 24 and argues that the exclusive focus of that chapter on formal organisations failed to take into account the ‘personal world’ of individuals, families, friends and neighbours. Chapter 29 therefore sets out to explore the overlapping territory between formal organisations and the personal world. The chapter discusses some key items of relevant literature; presents a case study of 15 book clubs; uses the case study to introduce and presents a model of a new form called the ‘personal-organisation’ (PO) which differentiates its principles from those of formal organisations; distinguishes between different kinds of PO including the distinctive type of the ‘family personal-organisation’; and speculates on the different ways in which hybrid organisations could arise from the personal world, and how principles of the personal world can be adopted by formal organisations.

1.3 REFLECTIONS AND SPECULATIONS ON THE PAST, PRESENT AND FUTURE OF THE STUDY OF HYBRID ORGANISATIONS

1.3.1 Introduction: The Purpose and the Journey

Our purpose

The first section of this chapter presented the background and scope of the *Handbook* and argued that the advances in the study of hybrid organisations are leading us to move beyond our organisational comfort zone. Section 1.2 deepened the understanding of the contents of the book by providing a systematic summary of all the chapters and their contribution to the advances of our understanding of HOs. This section is rather different. It does not focus on the book itself but explores the academic journey of the study of HOs. Where did the journey begin? Where has it arrived? And where is the next likely destination?

This approach came up against a number of limitations: data identification and collection, and limited resources, being at the top of the list. In the preparation of this final section it also became evident that answering the three questions would require a mixture of different approaches. In response to the first, historical question, we decided to utilise Google Scholar (GS) to track the growth of HO publications over a period of 58 years in order to get a sense of the broad development of the academic engagement with HOs. Several academic reviews were consulted about its suitability before using GS (see Harzing, 2018). This proved to be a useful exercise indicating that GS would be appropriate for the task of mapping the development of interest in hybrid organisations.

In our response to the first question (which we set out in section 1.3.2 below, on the pioneering period) the number of publications identified by GS was manageable enough to permit extracts from those that were considered to make important contributions. The second question (which we discuss in section 1.3.3, on the interregnum) addressed, as its name implies, a period that signalled the approach of a new period of HO research. Here again, in this period, it was possible to continue using the publications approach. In section 1.3.4, however, both the current position and the possible future for the study of HOs have been included in the same section as a result of the pace of development revealed in the publications exercise. An exhilarating period of research had arrived in which traditional organisational approaches were being challenged. The interregnum was left behind, and the book is written in the third period: that of recognition. During this period our reflections and speculations are confronted by an accelerating body of publications that is now increasing at more than 1000 a month. The publications exercise served its main purpose for this book and provided us with enough material which, together with our own personal experiences, could be blended into this final section.

Our journey

Before responding to the three questions, our starting point is to consider the growth of publications about HOs; an exercise which we hope will provide an indication of the general direction. The following time-boundaries and data should therefore be treated as broad indicators of the growth of research interest.

Utilising Google Scholar we decided that, although there were occasional earlier mentions of the early use of hybrid organisations, it would make sense to begin our search in 1960, when there were ten publications. The number then meandered along until 1990 by which time scholars had 170 publications at their disposal. It seemed a snail-like pace and yet it represented steady progress each decade. These three decades might be considered as the pioneering period during which researchers became increasingly concerned about the blurred and confusing overlap between the sectors.

The following period – from 1990 to 2000 – can be thought of as the interregnum, since by the end of the decade the total number of publications had grown to 677. It was a period in which research interest began to solidify and lay the foundations for the leap into what we might now call the period of recognition from 2000 onwards. We decided on this title since the increase of publications in the following period is so considerable and consistent that it is difficult to escape the conclusion that a wide range of academics had begun to recognise the existence and importance of hybrid organisations. The chapter now moves on to discuss these three periods.

1.3.2 Where Were We? The Pioneering Period: Blurring (1960–1990)

Our reflections draw on a deep involvement with third sector research and their hybrid organisations, which began in 1978 with the establishment at Brunel University of the first centre for the systematic postgraduate teaching and study of the third sector, which later transferred to the London School of Economics (LSE) in 1987. One of the chronic problems facing both the third and the public sector, as Lan and Rainey (1992, p. 7) pointed out, was that social scientists have been exploring blurring on the boundaries between public and private organisations ‘for decades’. Both sectors were worried about their boundaries. However, if the concern of the public sector was mainly about elements of the boundary between the public and the private sector, the third sector had more substantial problems. It was preoccupied with its overall boundary, and the lack of recognition of its true societal contribution. This anxiety about boundaries led many third sector scholars, amongst numerous others, to describe them as ‘messy’ and ‘blurred’ (e.g., Lohmann, 1992; Van Til, 1988). In 1987 the *Journal of Voluntary Action Research* published a two-volume special edition devoted to the blurring of the sectors in which one of the guest editors, Susan Ostrander, declared: ‘the papers in this collection take this principle of blurred boundaries as a premise’ (Ostrander, 1987, p. 7). They were not alone since, as noted by Lan and Rainey, blurring was the default response to the problem of sector boundaries. In time, it became clearer that utilising words such as ‘blurring’ and ‘messy’ was inadequate to describe the boundaries between the sectors. It stood in the way of developing anything that might resemble an explanatory theory.

The use of ‘blurring’ as a description of the boundary problems between sectors slowly decreased, but is still used; for example, there is an interesting defence of the continuing utility of ‘blurring’ to be found in Bromley and Meyer (2017). In our own research it had become increasingly clear that without a theoretical explanation it would be impossible to understand the boundary phenomenon. In the late 1980s, David Billis encountered the work of the distinguished anthropologist Edmund Leach, and his short book *Culture and Communication* (Leach, 1976). His work on boundaries and his use of a Venn diagram to depict what he called the ‘ambiguity’ of the overlap between them (*ibid.*, pp. 34–35) was to prove invaluable. His concept of ambiguity and the Venn diagram were rapidly transported to the different field of formal organisations and were employed for lectures and publications about the third sector. Within two years, ‘blurring’ was replaced by ‘ambiguity’, and this, in turn, was replaced by the beginnings of a theory of hybrid organisations that has been continually tested and developed until its latest presentation in this *Handbook*.

These reflections are not intended to be a comprehensive history of HOs. Nonetheless, it is possible to get a strong sense that, by the end of the pioneering period, the notion of hybrid arrangements and organisations was beginning to take grip. Admirers of the advantages of the private sector found support in the influential book by Savas (1987), *Privatization: The Key to Better Government*, whose title did not do justice to the contents of a book that, whilst it made a strong case for the virtues of the private sector, went well beyond crude boosterism. Considerable space was also given to the thoughtful analysis of ‘alternative arrangements for providing goods and services’ (*ibid.*, pp. 58–115). Amongst these was the suggestion that ‘hybrid arrangements’ might be one of the ways of overcoming the problems of human services contracting (*ibid.*, p. 83). Although they are only

briefly mentioned and not fully defined, his book is packed with detailed examples of numerous organisations that would now be regarded as hybrid organisations.

In an intriguing contrast, public administration writers were already making a very different case some years earlier. Musolf and Seidman (1980), for example, were concerned about the increasing ‘vesting of responsibility for the performance of important government activities in “quasi-government” or “quasi-private” [agencies] . . . The burgeoning use of these and other hybrid organisations . . . raises serious questions of appropriateness’ (ibid., p. 124). Musolf and Seidman do not refer to hybrid organisations again, but the essence of their argument is that these hybrids have led to the blurred boundaries of public administration and unclear lines of accountability which are undesirable in a constitutional democracy. To support their case they provide 23 high-profile examples (ibid., pp. 129–130).

This work was drawn upon by Bozeman who, also writing from a public administration approach, produced a seminal book in 1987: *All Organizations Are Public: Bridging Public and Private Organizational Theories* (Bozeman, 1987). Bozeman is wrestling with problems similar to those raised by Musolf and Seidman, and other authors in the pioneering period – and well beyond – to come to grips with the vexed issues of boundaries, blurring and accountability. Also utilising numerous examples, he considers that these problems are the result of ‘government and business organisations becoming more and more similar in respect to their functions, management approaches, and public visibility’ (ibid., p. 5). But he goes well beyond Musolf and Seidman in that he defines and utilises the concept of hybrid organisations in all three sectors throughout the book. And he suggests (as an almost incidental definition) that they add an additional element of complexity which comes from ‘this growth of “hybrid” (partly government, partly private) organizations and “third-sector” nonprofit organisations’ (ibid.).

We chose these three examples because they are all concerned with the enduring issues but approach them from the different perspectives of private and public sector research. Furthermore, they indicate how the idea of hybrid organisations had begun to appear. Undoubtedly there were other scholars on a similar path, and still others for whom blurring remained and still remains an acceptable explanation. Our own experience, bolstered by the scan through the literature, is that it was also a period of development in the study of HOs in which the issues of boundaries, blurring and nascent ideas of hybridity were mainly limited to a discourse between scholars from the same sectoral interests and disciplinary approaches. It was also a period during which researchers had begun to understand the unique nature and problems of hybrid organisations. By the end of the pioneering period in 1990 there had been 170 publications.

1.3.3 Interregnum (1990–2000)

So far, we have been primarily interested in gaining a broad sense of the increase of scholarly interest in HOs by noting how the number of publications had grown. In the period of the interregnum – from 1990 to 2000 – the number of reported publications reached 677.

Before moving on to review the interregnum period, however, it might be helpful to briefly digress and explore a little deeper to see whether the idea of the three different periods of development might also be reflected in differences in the importance that

authors gave to hybrid organisations. If this could be achieved it would provide another useful indicator for the present and future health of the study of HOs.

We again reviewed the publications, but this time the objective was to find how many of the publication had the words ‘hybrid organisation’ or ‘hybridisation’ in their title. The title of a paper by authors is not chosen lightly; it usually reflects the main area of interest and purpose of their contribution. Google helpfully lists publications in order of relevance, beginning with those that have ‘hybrid organisation’, or something close to that, in the title. We found that in the 30 years of the pioneering period there were six such publications, whereas eight titles were produced in just the ten years of the interregnum. Many of these publications appeared towards the end of the period; one sign that the interregnum was coming to an end. More importantly, in the decade of the interregnum the number of publications rose from 170 to 677 publications.

What stands out from the comparison between the pioneering and interregnum periods is not only that there were more publications and titled publications in the shorter period of time; there were also hints of things to come. In brief, scholars from different backgrounds were now writing papers titled with ‘hybrid organisation’ or similar. The public sector provided three of the titles, but the rest were spread amongst business, management, third sector, economics and organisational journals. It seems that a wider range of disciplines were entering the discussions. And academics who had been working in the pioneering period were continuing to focus on HOs while new ideas were beginning to flourish.

An interregnum scholar: some reflections

In order to illustrate several of the characteristics of this period described above we briefly discuss an important work of the distinguished scholar Claude Ménard. We are not qualified to discuss his detailed economic analysis, and this is not the reason why we are offering a profile of a few of his publications. More important for our purposes are the insights that he provides into the internal conflicts amongst economists regarding different approaches to hybrid organisations. He is very much an interregnum scholar whose work on HOs spans all three of the periods and, as an organisational economist, adds a valuable approach to the study of HOs.

His first publication that acknowledges the presence of HOs appears in 1996: ‘On Clusters, Hybrids and Other Strange Forms’ (Ménard, 1996). But a draft of his most relevant and influential paper, ‘The Economics of Hybrid Organizations’ was delivered as his Presidential Address for the International Society for New Institutional Economics in 2002. He begins by criticising one of his colleagues for raising questions about the need for considering HOs in economics, and counters this by predicting that it is highly likely that their considerable role ‘will generate a growing flow of theoretical models and empirical studies. And I expect new institutional economists to take a significant share of these researches’ (Ménard, 2002, pp. 1–2). His address is helpful in appreciating the opposition that could be faced by HO scholars, not only from within the society of economists. More generally it alerts us to the conflicts that can arise from new theoretical theories that question entrenched approaches. In a later passage, he reinforces his views by contrasting the negative approach of his colleagues to HOs, and what he implies is the more enlightened approach of other disciplines. He declares that: ‘to my knowledge, there is no extensive survey of the literature on hybrid organisations in economics. But at least

two relatively extensive surveys on papers published in sociology or management journals are available' (ibid., p. 6).

By the time we have reached the end of the paper it becomes increasingly evident that Ménard is deeply concerned that there are significant groups of economists who do not regard HOs as an important area of study. In his conclusions he is careful to present a list of issues and problems to explore, and also acknowledges the contribution of managerial sciences, marketing and sociology to their identification. However, it seems that these issues are also presented in order to ask the rhetorical question: is the study of HOs worth the effort? His answer again emphasises that the argument that hybrid organisations have characteristics of their own, and that they deserve extensive study, has been challenged. His parting words are crystal clear:

In short, discrete hybrid organisations exist. We must explain why and what makes them viable substitutes to alternative modes of governance. I agree with Coase that hybrids are not 'strange forms'. Rather, they are a major if not predominant mode of organising transactions and, therefore, economic activities. But these forms are highly complex, which makes their study challenging. Challenging, and stimulating. (ibid., p. 25)

This contribution reflects what appeared to be a fundamental debate surrounding the approach to hybrid organisations in an earlier era. Whilst this contributes to an understanding of intellectual debates in the interregnum, it also has implications for the current situation. Another interpretation of the two sides of what Ménard refers to as 'the fence' is that it was a clash between theories based in a hybrid-free world and those who recognised the critical, perhaps even predominant, role of hybrids. The dilemma for the former, traditional view was therefore what to do about the pesky hybrid newcomers. In other words, can they just be integrated into the existing dominant approach? No disrespect is intended towards our colleagues, but we shall call this the 'economists' dilemma' despite its widespread presence in many disciplines. Almost two decades later we shall suggest that, in a more modern form, this question and the dilemma still require answers. For us, as with Ménard, this is also a rhetorical question, albeit a rather different one.

The 1990s was the decade in which the study of HOs became of increased interest and segued into the wider recognition of HOs that we know today. In the next subsection we will go on to discuss the current period but, at this stage, we would suggest that our tripartite division may be a reasonable reflection of the stages in the development of HOs.

1.3.4 Where Are We Now? And What Is the Future? Recognition (2000 and Beyond)

The introduction to this section of the chapter proposed that the history of research into hybrid organisations might be usefully divided into three periods. Having now completed part of the publications exercise it seems that it will provide a useful contribution to the understanding of HO history. One thing is evident: notwithstanding the growth of publications since 2000, the foundations for today's developments began around 1960, and by the beginning of the period of recognition in 2000 publication numbers had reached 677. From then on the history of the study of hybrid organisations changes dramatically. By 2010 the number of publications had grown to 3850, and in the period until 2018 it had increased to 12800.

We do not wish to drown the narrative in statistics and we conclude by noting that in every year in the period 2000–2018 the percentage of publications has steadily increased. In the year 2010/11 there were 620 additional publications and in the year 2017/18 the number had leapt to 1600. The number of publications is far more than we had envisaged and it was equally surprising to observe the scale and consistency of the increase year by year.

The first speculation: drivers of growth

Moving briefly outside the bubble of the academic study of HOs and what is sometimes negatively described as the ‘ivory tower’, the world at large can be seen as chaotic and unpredictable; it would be presumptuous to venture any speculations about future economic, political and environmental conditions that might drive or slow down the future of HO research. The good news is that, even in a period of often uncomfortable changes in higher education (see Chapter 10 by Winter and Bolden in this *Handbook*), academics – as is evident throughout this *Handbook* – are increasingly seeking new and innovative ways of understanding the HO phenomenon. Yet, academic inquisitiveness and enthusiasm, whilst essential, are only part of the story of the path to publication.

Underpinning the growth of HO publications is a web of forces. A few processes that come to mind are interacting influences such as a higher public profile for HOs, or a group of them, as a result of severe problems – such as the recent crisis in non-governmental organisations (NGOs), particularly in Oxfam concerning claims of sexual misconduct by aid workers – that may attract academic and/or government interest. There are many other less complex drivers. For example, funding for research at all levels from individual academics to research centres may continue to be provided by government, foundations and wealthy individuals seeking new ways to respond to societal problems.

A powerful driver in the development of research has been the increasing recognition of entire categories of organisations as HOs. A prominent example of this is the widely acknowledged understanding of social enterprises as HOs, which has led to the rapid development of a body of literature. Other HO categories are housing associations (Chapters 16 and 21 in this *Handbook*), state-owned enterprises (Bruton et al., 2015) and societally important categories of hybrid organisations such as faith-based organisations (Chapter 26 in this *Handbook*) and the newest and very important group, family businesses (Chapter 28 in this *Handbook*).

In addition to the recognition of specific organisational categories as hybrids, growth has been driven by the knowledge that many of the areas of growth that were noted in the initial stages of HO development are still in their infancy. The geographical coverage of HOs has steadily increased but global coverage is patchy, as is the range of organisational types that were considered in the early days of the study of hybrids and which is still the case today. The study of the history of HOs, with a few ground-breaking exceptions, remains an unexplored area. And the territory of (non-formal) personal-organisations is also hardly explored.

More traditional ways of increasing interest for particular academic approaches and problems, and publications, are the development of initiatives such as presentations at broader-based conferences, entire conferences dedicated to HO studies, and special editions of journals. Looking at the present situation, several of these have already occurred and played their part in driving the development of publications about HOs. These

types of initiatives will naturally increase as the scope of HOs and their full impact and contributions are more fully appreciated. To summarise, then, our first speculation based on the discussion in this subsection of some of the numerous current drivers of growth, and potentially many more, is that it is highly likely that the future of HO studies will continue to grow and advance.

The second speculation: the academic condition

Although publications have served as a useful indicator of growth and change in the study of HOs, there are additional considerations to be taken into account when reflecting on the future. An important element is to attempt to understand the present state of HO research: the academic condition.

First, we return to the description of the current period as one of recognition, a word that requires some explanation. The intention was to indicate this that this is a period in which, although hybrids are increasingly recognised as distinctive types of organisational forms, there are different approaches towards understanding them. The wide range of different approaches to the study of HOs is illustrated in the various chapters in this *Handbook*. For example, approaches may include different theories or suite of theories, specialisation in a specific field of interest such as health, different geographic territories and organisational levels. And all these and other approaches can be combined together for more precise descriptions of an area of study. A bewildering number of combinations can emerge. Given the complexity of approaches, comments have been restricted to just two of the broad developments that we speculate will be significant players in the future scenario of HOs. The first speculation, in the previous subsection, discussed the drivers for the growth of HO research that will continue to grow. The second speculation concerns the present and future state of the academic condition.

The second speculation flows from the first. It involves a consideration of the consequences for academic approaches of the continued growth of a New Organisational Reality (NOR) resulting from the inexorable uncovering of the essential role of hybrid organisations. The NOR is already in progress, with the consequence that traditional approaches – defined as those based on the ‘pure’ ideal model of formal organisations that belong to one of the three sectors – are being revisited. Academic approaches are increasingly compelled to adjust to the fact that their bedrock is changing and now increasingly contains hybrid organisations. This is the developing academic condition, the state of cautious engagement with HOs.

This engagement is manifested in a number of different responses. In the beginning these were of lack of interest, or of dismissal. This was understandable in light of the low profile of HOs, and the continuing power of the traditional approach based on the importance of the historic and current roles of pure formal organisations. It is an approach with strong roots in academia, where it underpins many disciplines, departments and courses, with numerous journals that are similarly divided.

But the situation has now become a challenge for traditional approaches that is likely to intensify if the developments of personal-organisations and their role in hybridity, presented in Chapter 29 of this *Handbook*, gain acceptance. The rethinking that is required to include these types of HOs in organisational studies has already begun. An example is the studies of family businesses, that are increasingly being analysed as hybrid organisations positioned between the private sector and POs.¹ The realisation of the increasing

complexity of the organisational world has led to more constructive responses than the original attitude of 'dismissal'. Valuable research has been undertaken, utilising and expanding a variety of traditional approaches to respond to and analyse real problems and contribute to the body of knowledge.

But it might be prudent to be cautious when the theory in question is defined so broadly that it has no boundaries and just about any conflict of principles at any level can be included, and squeezed into the theoretical sphere of influence. We have in mind the institutional logics perspective, which is defined as 'the socially constructed, historical patterns of cultural symbols and material practices, assumptions, values, and beliefs by which individuals produce and reproduce their material subsistence, organise time and space, and provide meaning to their daily activity' (Thornton and Ocasio, 1999, p.804). Not surprisingly, therefore, this perspective, which can be defined at different levels of analysis including world systems, societies and organisations (*ibid.*), is regarded as important. But what does the study of HOs most require at its current stage of development?

We shall reflect on this question in the following subsection. For the moment, however, summarising both sets of speculations, our conclusion is that the drivers of growth bode well for the health of HO research. Existing drivers are likely to maintain their relevance and, in the light of the expansion of the field itself and the prospect of new responses to problems, they may well increase. Overwhelmingly, the state of the academic condition of the study of HOs is therefore healthy.

1.3.5 Theory and the Challenge of a New Organisational Reality

This section of the Introduction has focused on the academic journey of the study of hybrid organisations. It has provided a sense of a history that is substantially more long-standing, rich and fast-developing than might have previously been envisaged, even by the pioneers in this field. In the journey since 1960 we have argued that the study of HOs has reached the period of recognition. These concluding reflections discuss the relationship between the study of hybrid organisations and their presence in a New Organisational Reality (NOR).

The balance: is there a gap between theory and reality?

After previously laying out in some detail the substantial progress that has been made so rapidly, it sounds churlish even to ask the question. The existing abundance of available research on HOs seems an answer in itself. Nonetheless, we suggest that there is in fact a gap that is made wider by the reality of the New Organisational Reality. The relationship between theory and reality will be regarded as two interacting processes in motion: on the one hand their study, and on the other, their reality.

It is dubious whether this has ever been a balanced interaction, and this may well be the case with most similar types of interaction. Hybrid organisations have been around for centuries but it is only comparatively recently that they have begun to be recognised and understood. It is not surprising therefore that most of the research and literature of organisations is hybrid-free. Whilst it has had its full measure of debate and fierce disagreement, research has mainly operated within an organisational comfort zone that has not significantly challenged the theoretical dominance of the pure formal organisation.

In the meantime, when faced with the reality of societal problems, stakeholders have been busy – both accidentally and deliberately – establishing new HOs. Governments around the world have been particularly involved in this activity, sometimes on a monumental scale, as is the case of state-owned enterprises (Bruton et al., 2015). And John Kay, the distinguished British economist and a newcomer to HO research, has laid bare an impressive list of new governmental hybrids. Intriguingly, his title is ‘Hybrid Organisations: The Ambiguous Boundary between Public and Private Activity’ (Kay, 2018), the subtitle of which takes us back to earlier periods of the study of HOs. This is by no means a criticism of a fascinating article which has much to offer. The contributions from Bruton and his colleagues and Kay remind us that many additional HOs may await analysis and, in the case of the latter, how HO research would benefit from additional and more structured ways of the dissemination and discussion of ideas amongst the relevant academic communities. The growth of the reality of hybrid organisations on a global scale will require such new initiatives if the gap between theory and reality is not to grow wider. This more general theme of responding to the challenge of the NOR will be elaborated next.

The challenge of the New Organisational Reality

Realistically, it is now possible to say with confidence that HOs exist on a global scale and comprise a complex collection of different types and combinations of activities, geography and scale. In response to the challenge of this complexity, HO research can offer a large body of ideas. Despite this, there are two areas of possible concern. The first is whether these theoretical responses are capable of reducing the gap between the theory and the reality of today’s global coverage. It is probable that the current focus on individual HOs and groups of them will continue to illuminate the field, possibly for decades. But are some approaches constrained by the hybrid-free foundations of their theoretical approach, and possibly also from an absence of interest in the structural reality of organisations? Arguably, such constraints might weaken the analysis of HOs and limit their utility in the study of hybrid organisations.

The second area of concern, which may also include the first, is whether existing theoretical approaches will meet the additional complexity presented by the NOR. This new reality brings with it the inclusion of hybrid organisations that will transform the nature of organisational studies. It will do this by expanding the definition of an organisation, a transformation of organisational reality that has already begun by recognising family businesses as hybrids. These are not HOs that utilise the principles of more than one formal organisation; but despite this they are hybrids, because they draw on the principles not only of formal organisations but also of personal-organisations such as family businesses and many others (see Chapters 28 and 29 in this *Handbook*). All in all, it is a daunting challenge for HO theory.

Helpfully, we encountered a chapter by Haveman and Gualtierig, who while surveying institutional logics (IL) proposed, unduly modestly, ‘three gentle corrections . . . to guide future research’ (Haveman and Gualtierig, 2017, p. 1). More relevantly for these reflections, they provide examples of some of the problems facing IL that might assist HO theory in responding to the challenge of the New Organisational Reality. Severely summarising part of their detailed argument, Havemen and Gualtierig declare that logics are not material constructs such as organisational structures. On the contrary,

institutional logics are ‘fundamentally, cultural phenomena’ that most previous research has inappropriately taken to be ‘purely rational constructs’ (ibid., p. 22). In essence they argue that putting the two interpretations together is a mess; they should be kept separate. More elegantly: putting them together results in an ‘ontologically heterogeneous, concept’ (ibid.).

They continue by complaining that the proliferation of research about IL ‘on ever-more-specialised topics has not made any appreciable accumulation of knowledge, either within topic or overall’, even though this is the main purpose of social scientists (ibid., p. 23). This is the beginning of a devastating critique of the current IL situation which begins by declaring that: ‘We cannot make progress by simply adding more studies to the pile . . . we are in danger of making IL nothing more than an empty buzzword’. On the following page they make the damning criticism that the current state of research makes it difficult to develop theory (ibid., p. 24). This will be expanded in the following subsection and is an important relevant observation.

Obviously, the main message is for those utilising IL, for whom the final pages of Haveman and Gualtierig’s argument will not make easy reading. Nevertheless, as students of hybrid organisations, it would be sensible to look carefully at some of their criticisms of the current state of IL. The ‘standout’ problems of IL, the most worrying ones, are those that have arisen from a confused and contradictory definition that result in scattered propositions, some of which are contradictory and others loosely connected, and together make it extremely difficult to develop a theory of IL (ibid., pp. 24–25). We do not suggest that HO research shares the worrying situation that they are describing; but we propose an initial ‘health check’ that will be increasingly essential as we enter the period of the global complex reality of the New Organisational Reality.

1.3.6 A Healthy HO Theory: A Constructive Challenge for Organisational Theory

We conclude these personal reflections with the contention that the totality of contributions in this *Handbook* present a body of research that does justice to the exciting development of organisational reality. It is healthy because it demonstrates constructive criticism, the development of new theories, the advance into new territories both geographical and sectoral, and the continuation and development of theoretical approaches by our contributors who include some of the notable pioneers in the field such as Adelbert Evers and Victor Pestoff.

Most importantly, our personal evaluation is that the pivotal problem of avoiding confused definitions and their consequences have been well addressed in Chapters 24 and 29. To say otherwise would be inappropriately coy and contradict the lessons of the 40 years of continuous testing of the numerous stages of painstaking development. This, together with the more recent work on volunteering in hybrid organisations in Chapter 27, present a suite of concepts and an overarching theory that present a constructive challenge of the existing organisational theory. This was achieved by reconceptualising the nature and role of formal organisations in a number of stages, involving:

1. Developing a theory of their roots and strengths arising from three competing and distinct distinctive and unambiguously organisational principles of responding to human problems.

2. Developing a bottom-up theory of the 'pure' three sectors based on the accumulation of individual organisations with their three different principles.
3. Developing a theory of HOs as major forms of formal organisations that retain their main prime accountability to one of the three distinctive sectors, but absorb to different degrees one or both of the other sector principle.
4. Developing a map illustrating the overlapping of the three sectors and the existence of nine different combinations of HOs.
5. Demonstrating the interacting and interdependent nature of the three sectors.
6. Developing a range of concepts that enable the analysis of HOs at individual, group and societal levels.
7. Reconceptualising the nature of organisations by researching, analysing and defining personal-organisations and demonstrating that they are extensive and serious contributors in the response to social problems; have their own organisational language and distinctive principles; and consist of seven new types of hybridity with formal organisations.
8. Developing an embryonic theory of family organisations as hybrid organisations.
9. Analysing the role of volunteers and their role in hybrid organisations.

The New Organisational Reality

Together, these glimpses of the theoretical contributions of Chapters 24 and 29 reflect a research-based overarching theory which not only expands the boundaries of hybrid organisations but also challenges the very foundations of organisational theory. It achieves this by identifying a more realistic world consisting of an interdependent body of organisations comprising: traditional formal organisations and those that are hybrids; and personal-organisations and their hybrids with formal organisations, and vice versa. It is not only personal-organisations that should be seen as part of the realistic world; as Chapter 27 demonstrates, the role of volunteers is also an intrinsic part of the New Organisational Reality.

The NOR is far more than just another stage in the development of approaches to hybrid organisations since, as has been noted above, it presents an alternative basis for organisational theory itself. We believe, as we have tried to demonstrate, that an overarching theory of hybrid organisations is critical. It provides the precondition for understanding the reality of the radical New Organisational Reality that we are entering.

NOTE

1. See Chapter 29 in this *Handbook* for further discussion.

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