

Transformational Hybridity: Shape, Shake, and Shift Up for Societal Grand Challenges

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ABSTRACT There is wide agreement about the potential for hybridity – the combination of plural organizational forms – to address complex societal grand challenges. Unfortunately, advancements in this area have been unduly constrained by the fragmentation of research along the organizational unit of analysis. This Special Issue advances research by offering a framework that bridges hybridity research across the organizational, inter-organizational, and societal levels of analysis. We introduce a framework of transformational hybridity based on three interlinked mechanisms that drive societal transformation across different levels – *Shape up!*, *Shake up!*, and *Shift up!* *Shape up!* involves changes in organizational and inter-organizational hybridity practices. In turn, *Shake up!* involves changes in hybridity boundaries through organizational and inter-organizational arrangements. Through interplay, these two mechanisms may bring about *Shift up!*, a societal transformation that addresses a grand challenge. Taken together, this Special Issue paves the road for novel research directions and equips scholars and practitioners alike with a multi-level lens for tackling societal grand challenges through transformational hybridity.

Keywords: hybridity, multi-level, societal grand challenges, transformation

INTRODUCTION

Organization and entrepreneurship scholars have long recognized the potential of hybridity to address complex societal challenges. These challenges – such as food

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insecurity, poverty, inequality, and climate change – demand creative, cross-sector solutions (Brown, 1991; George et al., 2016; Markman et al., 2019; Stadler et al., 2024). The combining and bridging of plural organizational forms favours these innovations (Dougherty, 1992; Douglas, 1986).

Interestingly, while early research drew a link between hybridity and the tackling of complex social and environmental problems, for the last 20 years, hybridity research has narrowed and focused on the organizational level of analysis,^[1] addressing topics associated with social enterprise business models and design (Davies and Doherty, 2019; Santos et al., 2015), organizational identity (Battilana and Dorado, 2010; Cornelissen et al., 2020; Gümüşay et al., 2020; Nason et al., 2018), resource management (Ciambotti and Pedrini, 2021), and governance (Bacq and Aguilera, 2022; Ebrahim et al., 2014; Grimes et al., 2019). Such research has surfaced many of the difficulties in fulfilling the promise of hybrid elements for creativity and resource coalescence, highlighting difficulties and risks (Battilana and Dorado, 2010; Doherty et al., 2014; Gümüşay et al., 2020; Smith and Besharov, 2019) but remains largely constrained within organizational boundaries. Yet, we know from prior research that positive societal changes mainly happen beyond organizational boundaries, such as in communities (Doh et al., 2019; Lumpkin et al., 2018). As a result, there is an urgent need for research that considers and reconciles the benefits of hybridity at the organizational level with the challenges found outside the boundaries of a single organization.

In the spirit of leveraging hybridity's potential beyond the organizational level, we introduce a novel framework which connects hybridity across organizational, inter-organizational, and societal levels, providing theoretical insights and empirical evidence into how hybridity drives societal transformation. We frame transformational hybridity through three interlinked mechanisms that escalate in scope and impact: *Shape up!* – where practices evolve; *Shake up!* – where boundaries are redrawn; and *Shift up!* – where societal systems transform. Together, these mechanisms illustrate how hybridity evolves from organizational and inter-organizational adaptations (*Shape up!*) to cross-sector boundary reconfigurations (*Shake up!*), and ultimately to large-scale systemic impact (*Shift up!*) to address societal grand challenges.

We advance the 'Beyond Hybridity' research agenda by building on the eight papers in this Special Issue, which foreground these matters. The editorial team selected these papers from 43 submissions, of which 18 submissions were selected for review. The review process involved close collaboration between the members of the guest co-editorial team, and included a PDW hosted by the University of York (UK) in April 2023. The eight papers explore the link between hybridity and societal grand challenges: all the papers focus on practices, boundaries and impact, and leverage hybridity across these transformational mechanisms. Four papers focus on changes in practices – 'shared routines of behavior' (Whittington, 2006, p. 619) – and social boundaries – 'the distinctions among people and groups' (Zietsma and Lawrence, 2010, p. 191), spanning organizational (Curran and Ozcan, 2025; Grabski-Walls and Ambos, 2025; Logue et al., 2025) and inter-organizational changes in practices and arrangements (Bruder and Sydow, 2025; Weber et al., 2025). Four other papers discuss the impact of hybridity at the societal level (Grabski-Walls and Ambos, 2025; Mair and Rather, 2025; Polychronopoulos et al., 2025; Reinecke and Wrona, 2025).

This introduction bridges these three elements (practices, boundaries, and impact) to further our understanding of the role of hybridity in bringing about the societal transformation shown to be crucial for addressing societal grand challenges (Dorado et al., 2025; Ferraro et al., 2015; van Wijk et al., 2019). Our framework foments a research agenda by revealing novel paths for knowledge advancement in theoretical and empirical explorations of hybridity across different levels of analysis.

TRANSFORMATIONAL HYBRIDITY

Addressing societal grand challenges requires transformations – changes in the underlying structures, systems, and power relations, as well as in beliefs, values, mindsets, paradigms, and worldviews (Buckton et al., 2024; Dorado et al., 2025; Fazey and Colvin, 2023; Fazey et al., 2018). This is demonstrated in prior research, which has shown how a combination of public, not-for-profit, and for-profit actors is fundamental to tackling some of the world's most pressing societal grand challenges (Brown, 1991; Mair et al., 2016; Pache et al., 2024).

The eight papers in this Special Issue discuss the potential for hybridity to bring about these transformations. From our review of these papers, and building on research on hybridity and societal change, we derive a framework that associates transformation with two main mechanisms – *Shape up!* and *Shake up!* – which together can lead to societal transformation via a third mechanism – *Shift up!*

Shape up! focuses on how organizations and inter-organizational collaborations adopt hybridity practices to drive societal change. We understand practices as shared routines in organizations (Whittington, 2006), which underlie all human activity (Schatzki, 2019). Practices are not simply what people do: for an individual or group activity to be recognizable by others as an instance of a practice, it must conform to certain social expectations (Nicolini, 2012; Schatzki, 2019; Zietsma and Lawrence, 2010). In organizations, practices are the organized actions conducted by members in the course of their work, for example, practices of management (White et al., 2021), or decision-making (Nutt, 2006). In inter-organizational arrangements, practices define the extent of integration between the collaborating parties as well as other factors, such as participation, inclusivity, and relative power (Gray and Purdy, 2018).

Our framework considers four characteristics of practices that are pertinent to the *Shape up!* potential of hybridity. The first characteristic relates to their susceptibility to impermanence. While practices are persistent, providing continuity, they may also generate systems change, that is, social entrepreneurs facilitate systemic social change through rhetorical practices in an industry (Waldron et al., 2016) or they produce political changes through micro-practices of stakeholder engagement (Tello-Rozas et al., 2015). Second, practices are inherently collective, distinct from individual activities, elevating the level of analysis to emphasize that practices are shared. Hence, practices are subject to hybridity changes following changes in the individuals involved, depending on the ‘thought worlds’ they bring to bear. Third, practices may cut across organizational boundaries (Santos and Eisenhardt, 2005) by involving

groups of individuals from across organizations, such as when corporate sustainability officers collaborate with other organizations to address complex social and environmental problems collectively (Grabski-Walls and Ambos, 2025). And fourth, as practices are grouped into bundles or constellations, changing a practice has the potential to affect other practices either directly or indirectly (Schatzki, 2019). While prior research has investigated a wide range of management practices (White et al., 2021), the focus of our framework is on organizational and inter-organizational hybridity practices that lay the ground for *Shake up!* This mechanism with the potential to bring the transformation required to address societal grand challenges. We conceive organizational and inter-organizational hybridity practices as interdependent, meaning that they may lead to shape up practices adopted in inter-organizational collaborations, and vice versa.

Shake up! explains how hybridity transforms social boundaries that both cluster and divide individuals within and across organizations and sectors (Santos and Eisenhardt, 2005; Zietsma and Lawrence, 2010). Boundaries both insulate and connect people: they derive from the plural sources involved in engendering a sense of cognitive identification because of past or ongoing organizational affiliations (Elsbach and Kramer, 1996; Golden-Biddle and Rao, 1997; Scott and Lane, 2000), as well as involvement in the arrangement as stakeholders (Nason et al., 2018) and clients (Aaker, 1996). Boundaries may also follow from a history of repeated engagements that develop what originally may have been weak transitory exchange ties into long-lasting trust-based relationships (Anthony, 2005; Uzzi, 1997).

Hybridity boundaries emerge from the clustering of individuals seemingly at odds, and are facilitated by organizational – for example, matrix structures, centralization, division of labour, autonomy – or inter-organizational arrangements – for example, partnerships, consortia, joint ventures, collaborative networks – that frame the development of the sources of social boundaries (shared identity and/or trust). These arrangements within organizations and between organizations typically share a common intent of addressing one or more societal grand challenges, and they can be transformative or mitigative interventions (Stadtler et al., 2024). Organizational arrangements that facilitate hybridity boundaries include social spaces that favour communication and close relations among people with different trainings, experiences, and job priorities (Battilana et al., 2015; Ometto et al., 2019). Inter-organizational arrangements may follow from inclusionary governance processes (Bacq and Aguilera, 2022) and favouring direct relationships between businesses and communities, thereby promoting interaction and improving intergroup cohesion (Ciambotti and Pedrini, 2021; Joseph et al., 2024). They can also follow from partnerships between actors at different levels (international, national, regional, and local) who are united around a common goal (Kolk and Lenfant, 2015). Such arrangements are based on the evidence that addressing societal grand challenges requires systemic, coordinated approaches (Ostrom, 1990): for example, tackling climate change and other forms of environmental degradation ‘requires the participation of scientists, local communities, consumers of resources, and other vested populations’ (Ferraro et al., 2015, p. 374). Therefore, similarly to hybridity practices, organizational arrangements are interdependent with inter-organizational arrangements, suggesting that internal boundaries (e.g., founders team, governance bodies, internal groups) are

interrelated with external boundaries (e.g., stakeholders, partners, communities, and networks of beneficiaries).

Taken together, practices and boundaries are connected in ‘recursive configurations’ and underpin cycles of ‘innovation, conflict, stability, and restabilization’ (Zietsma and Lawrence, 2010, p. 189; Reinecke and Wrona, 2025). Hybridity practices can form the basis of *Shape up!* that engenders hybridity boundaries. Similarly, hybridity boundaries can form *Shake up!* that produces hybridity practices. Oliver and Montgomery (2000) offer an example of *Shape up!* in their examination of a case of hybrid firms in biotechnology (combining science and market logics). The paper shows how hybridity practices (such as personnel selection in research and business, work assignments, and trainings) defined by internal labour processes select the features seen as advantageous for different missions and modify those that could raise incompatibilities among different organizational missions. Such hybridity practices (*Shape up!*) resulted in the organization embracing both the scientific norm of collaboration and the economic goals of the biotech hybrid organization. In other words, this set of hybrid practices led to new hybrid boundaries (*Shake up!*) with greater trust, motivation and effectiveness that facilitated ‘inter-organizational scientific collaborations to produce the knowledge needed for the firm’ (Oliver and Montgomery, 2000, p. 46).

The inverse effect with hybridity boundaries engendering hybridity practices is also possible. In this Special Issue, Bruder and Sydow (2025) provide an illustration when they discuss how the hybrid boundaries rooted in the sharing of a normative ‘purpose-before-profit’ aspiration favoured reciprocity relationships with partners. These boundaries were shaken up by inter-organizational arrangements and influenced the partners to adopt the hybridity practice of ‘purpose borrowing’, which ‘involves actions espousing the social enterprise’s purpose even if they go against business common sense’ (p. 2).

Such recursive interaction between *Shape up!* and *Shake up!* may lead to a *Shift up!* – a transformation of regulatory, cultural, and cognitive structures needed to address societal grand challenges. For example, Joseph et al. (2024, p. 14) argued how organizations, that is, a combination of practices and boundaries visibly associated as separate social entity, ‘can shape societal norms toward peaceful ends, acting as a ‘voice of peace’ that provides legitimacy for peace-oriented initiatives’, offering a fruitful example of transformational institutional disruption and advocacy for the public good (i.e., *Shift up!*).

Figure 1 illustrates how the interplay of *Shape up!* (hybridity practices) and *Shake up!* (hybridity boundaries) at organizational and inter-organizational levels can engender *Shift up!*, that is, societal transformation.

In the next section, we discuss the framework and illustrate the *Shape up!*, *Shake up!*, and *Shift up!* dynamics drawing from the papers in the Special Issue.

Shape Up!

Shape up! includes hybridity practices at the organizational and inter-organizational levels. Implemented purposefully to enable hybridity as a powerful force for transformation, such practices lay the foundations for societal transformation.

Organizational hybridity practices. Practices intertwine individual action with collective and shared ways of doing. In this regard, we theorize hybridity practices at the organizational

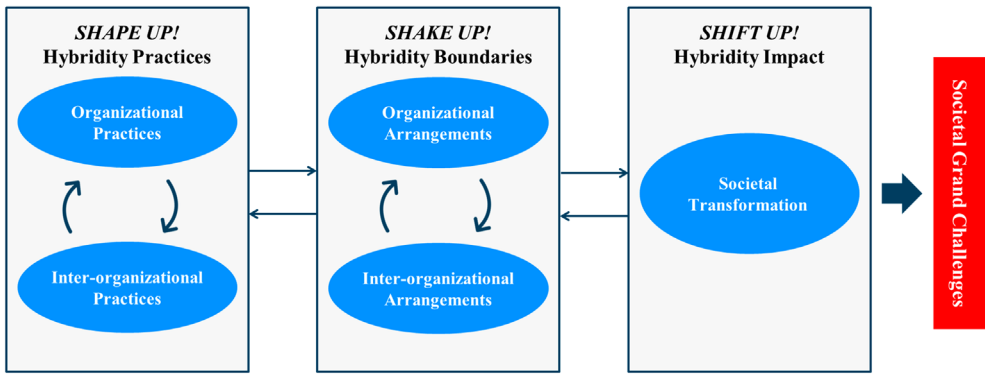


Figure 1. Framework for transformational hybridity

level, namely shared by people associated with the same organization, such as founders, employees, and trustees. Organizational hybridity practices are implemented to turn hybridity from a problematic condition, towards a transformational organizational level force; thus, in essence, these practices infuse change and novelty in the organization. For example, Dalpiaz et al. stressed how hybridity practices can enhance the capacity of firms to ‘envison new possibilities for value creation and to enact them through innovation’ in products and services (Dalpiaz et al., 2016, p. 347). In this Special Issue, Curran and Ozcan (2025) explain strategic hybridity as a set of practices for managing hybrid tensions successfully, by addressing the longstanding issue of how charities respond to decreases in traditional funding sources, prompting the need for new business model practices. Their careful analysis of 18 UK charities finds that adopting such practices can help charities improve their financial security and impact. Their research explains the role of socialization of board members into commercial and social logics, changing trustees’ role expectations, and functionally infusing hybrid roles. All these practices interrelate the board members with other members of the organization.

Inter-organizational hybridity practices. Practices not only intertwine the individuals at the organizational level but also are adopted between organizations in their collaborative efforts (DiDomenico et al., 2009; Pache et al., 2022). Considering hybridity practices between organizations, three papers in this Special Issue investigate hybridity practices created by and shared between collaborating organizations. First, Bruder and Sydow (2025) find that social enterprises can enhance their social impact by influencing collaborating businesses to adopt their social and environmental mission through the novel hybridity practices of ‘purpose work’ and ‘purpose borrowing’. Purpose work involves communicating the social enterprise’s mission to collaboration partners, and purpose borrowing is when collaborating partners proactively advance the social enterprise’s purpose even if this goes against its own immediate economic interests. In turn, Weber et al. (2025) specify the role of the hybridity practice of managing collaboration in overcoming cross-sector collaboration obstacles due to divergent institutional logics of business, government, and civil society. By recognizing the need of dynamic adaptive partnership practices to address institutional complexity, their research zooms in on the micro-practices actors engage in for successful cross-sector

partnerships. The authors show that micro-practices evolve over time, and highlight a cyclical dynamic oscillating between collaboration motivation and fatigue, as a way to balance conflicting yet complementary practices. Because collaborating partners experience motivation and fatigue cycles, they develop practices for coping with institutional tensions and conflict. Finally, Logue et al. (2025) elucidate intrapreneurship practices when they introduce the idea of a coordinated system approach to navigate hybridity in multi-organizational settings, that is, creating a social enterprise (called Hope Café) as an internal subsidiary that functions alongside, but independently from, a charity parent (an NGO named Sanctuary). Notably, the organizations (Hope and Sanctuary) adopted hybridity practices of ‘mission agility’, ‘strategic openness’, and a shared ‘strategic reframing’, which moved hybridity ‘beyond being conceptualized and managed as a persistent structural tension, to being considered as a strategy to develop organizational capability and capacity to generate social value in new ways’ (p. 16).

Shake Up!

Shake up! directs our attention to organizational and inter-organizational arrangements that define hybridity boundaries. Together with *Shape up!* practices, these transformational hybridity mechanisms are conducive of societal-level impact. Research has presented ‘how boundaries may be mobilized, accommodated or overcome through various means in order to enhance collaboration and get work done’, where those means take the form of organizational and inter-organizational (collaborative) arrangements (Langley et al., 2019, p. 719). Importantly, these hybridity boundaries are not just collaborative efforts or alignment mechanisms towards a shared goal, they are also a transformational mechanism, namely, ‘a tool to allow other things to happen because of their capacity to separate or bring together particular people, objects and ideas into new configurations’ (Langley et al., 2019, p. 725). In regard to the concept of hybridity boundaries, ‘the value [...] is not merely in connecting interested parties but, rather, in their ability to’ shake up, that is, to substantially influence the arrangements adopted by people in specific problem domains (Koschmann et al., 2012, p. 333). In this section, we next illustrate the transformational role of organizational and inter-organizational arrangements in hybridity boundaries.

Organizational arrangements. Previous management research has noted organizational arrangements, such as social spaces that support integration among stakeholders from different ‘thought collectives’ or ‘thought worlds’, specifically a ‘community of persons engaged in a certain domain of activity who have a shared understanding about that activity’ (Dougherty, 1992, p. 182; Douglas, 1986). Mair et al. (2016) discuss how hybridity boundaries can follow from the development of formal or informal multi-layered governance structures that embed representation of different expectations in decision-making. They underline the impact of hybridity practices on governance by supporting the organization in mobilizing resources, stabilizing stakeholder reactions, and identifying concealed goals. Organizational arrangements, then, have the potential of a *Shake up!* effect by reconfiguring such boundaries of internal

teams or informal groups within the organization. In their study of an Islamic bank, Gümüşay et al. (2020) offer evidence of changes in the hybridity boundaries (*Shake up!* mechanism) documenting organizational arrangement ‘capable of institutionally bending without organizationally breaking and thus enable individuals to practice more of their personal convictions at work while still experiencing a sense of shared organizational purpose’ (p. 124). This organizational arrangement forges new hybridity boundaries which ‘reduce conflict and make organizations more resilient against demise, fragmentation or paralysis’ (p. 126). By contrast, others have documented how organizations can design cross-sector business models which leverage internal boundary changes and inter-organizational arrangements to better fuel sustainable transformation (Pedersen et al., 2021). Several papers in this Special Issue focus on such inter-organizational arrangements.

Inter-organizational arrangements. The *Shake up!* mechanism also relates to the creative and innovative changes in the formation of hybridity boundaries that involve separate organizations. In this case, hybridity pushes organizations to collaborate to address complex societal grand challenges collectively (Markman et al., 2019). *Shake up!* means bridging actors in a coordinated way, leveraging boundary forming elements, such as identity, trust and shared values. Alinaghian and Razmdoost (2021), focusing on a social enterprise, discussed a change in hybridity boundaries through inter-organizational arrangements in defining the business relationships. They identified four broad steps to achieve the arrangements: initiation, through which they identify and access potential business partners with whom they eventually form relationships; persuasion, which requires social enterprises to influence and encourage other businesses to form relationships; conflict resolution, to address the conflicts of logic that potentially exist in forming relationships with businesses; and value creation, by which they achieve their objectives through the relationships formed with businesses. Other scholars have implicitly illustrated how hybrid organizations shake themselves up with inter-organizational arrangements, such as via cross-sector partnerships (Koschmann et al., 2012), participatory architectures (Ferraro et al., 2015) or other forms of collective action (DiDomenico et al., 2009; Markman et al., 2019). For example, civic wealth creation has been discussed as a powerful framework to shake up hybridity boundaries, when key actors – community, regimes of support, and enterprise – purposefully collaborate towards societal grand challenges (Lumpkin and Bacq, 2019). Such inter-organizational arrangements leverage interdisciplinary and creativity, in what has been also called ‘boundary work’, that is, mobilizing boundaries to establish some kind of advantage, aligning boundaries to enable collaboration and configuring patterns of differentiation and integration among groups to ensure that certain activities are brought together (Langley et al., 2019). The evidence of such a *Shake up!* effect, that is made possible when hybridity is leveraged in redefining the social boundaries, is also present in multiple papers in this Special Issue. For example, Bruder and Sydow (2025) show how relational governance influenced collaborating businesses to adopt their social and environmental mission (‘purpose borrowing’). Similarly, Logue, Edwards, and McAllister (2025) introduce the idea of a coordinated system approach in multi-organizational settings, and Weber et al. uncover the *Shake up!* effect of dynamic collaborations.

Shift Up!

Shift up! is the mechanisms that relates hybridity to the societal transformation required to tackle a societal grand challenge (Mair et al., 2016; van Wijk et al., 2019; in this Special Issue, Grabski-Walls and Ambos, Mair and Rather, Reinecke and Wrona, and Polychronopoulos et al.). *Shift up!* builds on theories of institutional transformation (van Wijk et al., 2019; Zietsma and Lawrence, 2010) to explain how hybridity restructures organizations and drives broader shifts in societal norms, regulatory frameworks, and economic models. By integrating hybridity with systems change perspectives (Ferraro et al., 2015; Mair et al., 2016; Williams et al., 2024), this framework provides a new lens on how multi-level actors collaboratively tackle societal grand challenges. Previously organization and entrepreneurship scholars have documented how ‘the spread and diffusion of institutional change starts with the actions of the agent for change but through the diffusion and enrolment of such practices to a wider network, broader change is brought about over time’ (Kalantaridis and Fletcher, 2012, p. 205), thereby highlighting how societal transformation emerges from the recursive interplay between hybridity practices and hybridity boundaries, emphasizing the close link between practices, boundaries, and impact.

Shift up!, while building on prior evidence about tackling societal grand challenges through systems change (Ferraro et al., 2015; Teasdale et al., 2023) and collective action (Markman et al., 2019; Ostrom, 1990), also offers the unique opportunity of integrating hybridity practices and boundaries at multiple levels to foster such societal transformation. Such interconnections among the three transformational mechanisms of *Shape up!*, *Shake up!*, and *Shift up!* is implicit in some previous works, such as in Dowin Kennedy et al. (2021, p. 816) who showed that ‘community entrepreneurs successfully leveraged their relationships to develop a shared vision and invest complementary assets [*Shake up!*] to re-build a defunct cotton mill and form an entrepreneurial community around it to create civic wealth through the creation of opportunities of others and curation of the space [*Shift up!*]’. Similarly, Weber (2009, p. 319) described how many stakeholders decided to ‘search for more effective ways of governing the Blackfoot watershed’, and developed new arrangements for property rights. This, in turn, ‘open[ed] the door to additional environmental restoration and water conservation projects’, in other words, societal transformation. Our framework synthesizes how societal transformation unfolds through the interplay of *Shape up!* and *Shake up!*, which we now illustrate with the papers included in the Special Issue.

Reinecke and Wrona (2025) show how the hybridity practices introduced by a social enterprise redefine the hybridity boundaries of the waste management dynamics of reusable containers for takeaway food and beverages. Specifically, the social enterprise facilitated collaborations among fragmented actors and became a reference point for other social enterprises (*Shake up!*). Their paper proposes a process of hybridization that involves the temporary coupling of actors with the social enterprise referent (a local reference point to which actors can connect their activities and collaborate with). The newly created boundary brought diverse actors ‘to develop a shared system of meaning and engaging in hybrid forms of organizing’ (p. 15). This *Shift up!* includes environmental organizations, politicians, and municipal waste authorities aligning on administrative and ecological goals with the social enterprise referent, providing a basis for the establishment of a reusable cup system in the market.

Grabski-Walls and Ambos (2025) investigate how the redefinition of boundaries in a problem domain shifts up the impact on the companies listed on a stock exchange, thereby fostering the integration of sustainability- and profit-oriented value creation in their agenda. This study encompasses practices, boundaries, and impact: using an orchestration lens, the authors highlight the role of a stock exchange as a central organization in facilitating the collective adoption of sustainability and profit logics through activities of catalysing, brokering, and building. Moreover, the stock exchange transformed the boundaries of capital markets by initiating collective changes so that actors started to adopt hybrid value creation practices. For instance, the stock exchange pulled together diverse capital market participants, connected actors together around a common logic (sustainability) and built capacities of the actors involved in the boundary (companies participating in the stock exchange) – all examples of arrangements which shake up hybridity boundaries (*Shake up!*). Then, the stock exchange adopted collective tension management practices towards other members (*Shape up!*) removing the need to prioritize one logic over the other. Lastly, their findings show that the stock exchange enabled social boundaries that favoured the adoption of hybridity practices towards a *Shift up!*, that is promoting the collective adoption of sustainability into value creation strategies equipping companies to combat climate change and other societal grand challenges (such as poverty and inequalities) by balancing profit and sustainability objectives.

Mair and Rathert (2025) highlight the societal change role of hybrid organizations that collaboratively engage in socio-cultural advocacy and endeavour to instigate policy changes. They explore governance practices of social enterprises (*Shape up!*) together with definitional elements of hybridity boundaries, such as organizational legal form, income sources, and collaboration levels (*Shake up!*). As a result of these choices, *Shift up!* manifests as changes in the social and political systems, aiming to address societal problems.

Finally, Polychronopoulos and colleagues (2025) study of 49 social ventures reveal how social enterprises navigate barriers to solving complex social and environmental problems, illustrating the dynamic interplay between multiple outcome dimensions and the importance of multi-objective organizing – beyond hybrid organizing – in addressing complex societal issues. Multi-objective organizing also means that social and environmental goals co-exist and enables scholarship to move towards addressing questions on how to see and pursue conjunctions of impact when scaling their organizations. For instance, in a prior study, Ciambotti et al. (2023) illustrated how differentiated hybrid organizations, such as Work Integration and Fair Trade Producer social enterprises, dynamically adopted multi-objective scaling strategies to address other social and environmental problems or targeting broader beneficiaries in the society. These examples of *Shift up!* highlight how ‘the development of sustained applications and solutions that collectively address grand challenges to make the world better’, requires multi-level impact (*Shift up!*) which concretely ‘advance public policies, and protect the common good’ (Markman et al., 2019, pp. 372–381).

Our novel framework encapsulates the recursive interplay of both hybridity practices and boundaries as interconnected mechanisms with the potential to *shift up!* societal impact. This change in how we conceptualize and frame the potential impact of hybridity on tackling societal grand challenges is made possible by moving beyond the dichotomous focus of commercial vs. social/environmental tensions that have characterized

prior organizational level hybridity research. It connects with research on hybridity at the inter-organizational level to leverage its transformative power, thereby illuminating the intrinsic connections with practices both at the organizational and inter-organizational levels.

CONTRIBUTIONS AND FUTURE RESEARCH

As showcased by our framework, this exciting set of studies deepens and extends our knowledge on the role and mechanisms of transformational hybridity to tackle complex social and environmental problems. Our *Shape up!*, *Shake up!*, and *Shift up!* framework is grounded in connections and interdependencies between practices, boundaries, and impact across multiple levels (i.e., organizational, inter-organizational, and societal), suggesting transformation as a leading mechanism to address societal grand challenges. Our novel framework creates opportunities for research on hybridity to challenge, complement, and/or create knowledge for organization, management, and entrepreneurship scholars. We present three areas of further research.

Deepening Transformational Hybridity at Individual Level

Our framework and the papers included in this Special Issue underscore the value of clarifying the connections and interdependencies between the intra- and inter-organizational levels of analysis. Yet, there is a need for future research to consider the individual level of analysis, which falls beyond the scope of our study because of our focus on practices (which are collective by their very nature). Two topics are particularly relevant. First, research that explores more deeply the impact of an individual's 'hybrid mindset' would advance knowledge on hybridity practices and boundaries. A hybrid mindset captures an individual's ability to combine different and opposite ways of thinking. Becker and Smith (2018) illustrate this 'hybrid mindset' as one holding different perspectives, insights, and experience from working in different sectors. The authors mention how 'the capacity to be an effective cross sector leader is not merely the result of moving between sectors or a collection of traits to be hired for, but is the product of a series of mind-sets and skills that can be effectively developed' (p. 2). Studies have explored the hybrid mindset of leaders and its importance in sustaining hybridity practices (Smith and Besharov, 2019), but the question of how to acquire the skills necessary to work with different mindsets and maintain transformational intent both of organizational and inter-organizational arrangements remains unanswered. Such a question calls for longitudinal and processual studies that investigate and theorize the temporal evolution of a hybrid mindset in leaders (e.g., directors, managers, and founders) and also in relation to organizational members and partners (e.g., investors, other institutional supporters). Future research may also explore paradoxical (both/and) thinking (Smith and Lewis, 2022) that is capable of embracing social and commercial goals as interdependent and interrelated over time rather than in contrast. Similarly, a hybrid mindset may create fertile conditions for hybridity practices and boundaries and thereby for the interplay between the *Shape up!* and *Shake up!* mechanisms. For instance, Wry and York (2017) investigated social

entrepreneurs' identities and found that 'balanced entrepreneurs', despite perceiving the inherent tensions in the dual logics, fostered 'integration efforts focus on social and financial aims' with an 'ability to spot more – and more nuanced – points of intersection between social and financial aims' (p. 445). Ultimately, these studies theorize how hybridity mindsets are better oriented towards 'efforts to pursue institutional changes that support new models' (p. 445), but further research is needed to explain bridging across multiple levels of analysis.

Future research topics may include exploring the role of hybrid mindsets in connection with hybridity boundaries, such as in cross-sector partnerships. This topic connects to and broadens earlier research on conveners (Brown and Ashman, 1996; Dorado and Vaz, 2003). At the centre of research on conveners are issues associated with the structural factors that define hybridity boundaries, particularly power differentials. Following Becker and Smith (2018), we draw attention to investigating how a hybrid mindset may favour the integration of hybridity practices in and across organizations (Schön, 1983). Individuals with a hybrid mindset have learned the rules of the game and the know-how beyond one sector, and are fluent in multiple sector 'languages' and ways of doing. Consequently, they can build better relationships across the private, public, profit, and non-profit sectors. How does a hybrid mindset facilitate convening and orchestrating hitherto disconnected resources (tangible and intangible) necessary to address social and environmental problems? When does a hybrid mindset hinder practices, boundaries and ultimately neglect the potential to *Shift up!?*

Second, diving deeper into the individual level of analysis, little is known about the role of emotions in hybridity practices and boundaries. Prior research has discussed emotions, such as compassion in the founding of hybrid organizations (André and Pache, 2016; Miller et al., 2012). For example, Lüthy (2024) illustrated the role of affective practices in shaping actions and relationalities around organizational goals. In their study of long-term public art project, the author theorizes four *affective practices* – enticing, envisioning, attending, and asserting – and discusses how they are pivotal to sustaining a process of voluntary organizing. Similarly, André and Pache (2016) suggested that care impacts social enterprise scaling while retaining their dual commercial and social goals. Overall, emotions and affective practices (e.g., fascination, enthusiasm, care, discomfort) 'instigate participation, support, acceptance and compliance' from parties with diverse perspectives (Lüthy, 2024, p. 1555). Future studies can explore individual antecedents to hybridity practices and boundaries by investigating emotions and affective practices. For instance, how do passion, grit, hustle or fear enable (or hinder) societal transformation via *Shape up!*, *Shake up!*, and *Shift up!?* How might these individual drivers moderate and/or mediate hybridity practices to achieve societal change collectively?

Expanding Drivers, Mechanisms, and Impact of Transformational Hybridity

Second, future research could unpack the connections and interrelations between hybridity practices, boundaries, and impact. For instance, a social business start-up may adopt different organizational and inter-organizational arrangements when compared

to a large corporation or NGO. Thus, exploring differences in the founding, evolution, and impact of cross-sector business models (Pedersen et al., 2021), collaborations for systemic change (Teasdale et al., 2023), and civic wealth creation arrangements (Down Kennedy, 2021) would enrich knowledge on more specific transformation processes. For example, how do hybridity practices shape the evolution of cross-sector partnerships? To what extent do discrete hybridity practices and boundaries drive disruptive transformation or incremental changes? What is the relevance of social-symbolic work and other bonding mechanisms that can *Shape up!* practices, *Shake up!* boundaries, and *Shift up!* impact?

Our framework and the papers in the Special Issue mainly adopt a positive view on the role of transformational hybridity in addressing societal grand challenges. We acknowledge, however, that hybridity has also been associated with less desirable practices, inter-organizational relationships and impact. To illustrate, hybrid organizations have adopted practices, such as ‘skimming’ in which, to reduce costs, beneficiaries with the most acute needs are excluded from service provision (Dart, 2004; Teasdale, 2010), and ‘tactical mimicry’ – public identification as a social enterprise – in order to secure public sector resources (Dey and Teasdale, 2016, p. 485). In relation to boundaries, ‘enforced hybridity’ in a cross-sector collaboration created a ‘false commonality’ that had little impact on changing the power dynamics between the partners (Dudink et al., 2024, p. 498). Moreover, the ‘liability of hybridity’, theorized from research in the humanitarian and philanthropic sectors, describes how ‘influential actors in such fields oppose them or are unwilling to support them [hybrid organizations]’ (Dahan and Leca, 2025, p. 2), leading to negative judgements which greatly diminish the impact of hybrid organizations. Future research on such practices, boundaries and impact – *Shape*, *Shake* and *Shift ‘down!’* – would support the development of more critical perspectives of transformational hybridity.

Also, one should ask when and how *Shape up!* and *Shake up!* influence *Shift up!* and which moderators and/or mediators assist and/or impede transformational hybridity. Recent research by Chung et al. (2025) discovered that the extent of corporate activism is dependent on internal and external stakeholder preferences such that organizations engage with social issues only after they are settled and institutionalized. On this view, consideration of the legal and institutional landscape is integral to explaining transformational hybridity. Further research could thus investigate how individuals, organizations, and inter-organizational arrangements fuel transformation in the context of external resistance.

Investigating Transformational Hybridity in Diverse Contexts

Finally, the Special Issue presses us to consider hybridity and the role of sectoral and geographical differences (Beckman et al., 2023). The papers in this Special Issue report research conducted in social enterprises located in countries in Europe (Curran and Ozcan, Mair and Rathert, Reinecke and Wrona, Weber et al.), Canada, and Asia (Polychronopoulos et al.), Australia (Logue et al.) and Latin America (Grabski-Walls and Ambos), as well as between Europe and producers and suppliers based in Sub-Saharan Africa (Bruder and Sydow). Hybridity research has the potential to span

geographical boundaries and furnish more contextualized explanations of the transformative role of hybridity in individuals, organizations, inter-organizations, and societies. Most of the societal grand challenges, such as poverty, hunger, inequalities, and climate change, are experienced all over the world; however, there are important variations between developed and developing regions, which urge contextualization regarding how *Shape up!*, *Shake up!*, and *Shift up!* manifest and evolve in different contexts.

Scholars recently called for contextualized management research that better acknowledges and investigates non-Western settings (Wickert et al., 2024). This requires scholars to embrace more Indigenous and localized understandings of entrepreneurial and organizational phenomena (Banerjee, 2022; Muzio, 2022). For example, scholars could adopt decolonized approaches to develop ‘indigenous theories’, that is, ‘using local language, local subjects, and locally meaningful constructs’ (Bruton et al., 2022, p. 1059). By leveraging contextual differences – institutions, philosophies, and cultural values – (Barkema et al., 2015), research has considered the role of indigenous values, such as the Kenyan *Harambee* (‘let us all pull together’) in forming relationships between organizations, evaluators, and target beneficiaries, and explained how this was overcome by ‘contextualized practices’ (e.g., collective land acquisition) to better generate social impact (Kim, 2025).

Our framework, then, creates three opportunities for transformational hybridity research. First, the diversity and cultural richness of geographical, economic, social, and institutional contexts are likely to influence *Shape up!*, *Shake up!* and *Shift up!* It follows that research could discover if and how individuals and organizations in the Global South develop *Shape up!* practices and *Shake up!* Boundaries, especially considering collectivity in building relationships and the adoption of indigenous mechanisms rooted in kinship (Arjaliès and Banerjee, 2024; Kim, 2025). Second, the influence may be such that *Shape up!*, *Shake up!* and *Shift up!* mechanisms influence contexts, for instance at the institutional level. Third, in extreme contexts, social and environmental problems may be difficult to address, leading us to call for further investigations of how *Shape*, *Shake* and *Shift up!* addresses societal grand challenges in novel places, for example, slums, favelas, townships, disaster areas and war zones (Ciambotti and Pedrini, 2021; Kolk and Lenfant, 2015; Lumineau and Keller, 2025). In such extreme places and contexts where social change is difficult to achieve, scholars can investigate how hybridity practices and boundaries fuel societal transformation in the presence of severe institutional weaknesses, powerful elites, corruption and other adverse conditions. For instance, how can cross-sector partnerships involving indigenous people and communities address resistance to social change? Our conceptual framework equips scholars with a new tool to investigate organizational, managerial, and entrepreneurial phenomena across geographical, economic, social and institutional contexts, and contribute to addressing the ‘absence of voices from the Global South in the production of management knowledge’ (Banerjee, 2022, p. 1075).

CONCLUSION

In this introductory article, we have advanced a conceptual framework that connects hybridity across organizational, inter-organizational, and societal levels, providing

theoretical insights and empirical evidence of how hybridity drives societal transformation. Inspired by the eight papers included in this Special Issue, we have introduced three interlinked mechanisms of transformational hybridity – *Shape up!*, *Shake up!*, and *Shift up!* – that drive societal transformation across different levels: (i) *Shape up!* – the practice transformation mechanism; (ii) *Shake up!* – the boundary transformation mechanism; and (iii) *Shift up!* – the societal transformation mechanism. Taken together, these mechanisms illustrate how hybridity evolves from practices (*Shape up!*) to boundaries (*Shake up!*), and vice versa. It also shows how, in their interplay, hybridity practices and boundaries may drive large-scale systemic change (*Shift up!*).

This Special Issue makes two key contributions. First, it emphasizes how practices and boundaries connect hybridity research across organizational, inter-organizational, and societal levels – beyond the field's traditional focus on internal tensions and solutions to conflicting demands and logics (Battilana and Lee, 2014; Santos et al., 2015). Our framework broadens hybridity research, including units of analysis at the inter-organizational and societal levels, revealing the potential for hybridity to engender concerted efforts via the *Shape up!*, *Shake up!*, and eventually the *Shift up!* mechanisms.

Second, the framework and papers included in the Special Issue explicate that the influence of hybridity in tackling societal grand challenges is subject to complex and recursive processes, rather than a sequential and cause–effect approach to societal transformation. Our Special Issue portrays hybridity as a continuous and cyclical force across multi-level mechanisms that may bring forth and reinforce societal transformation. By leveraging transformational hybridity, new policies, partnerships, investors, communities, and stakeholders can meet the creativity of entrepreneurs and organizations to innovatively craft societal transformation together. Against the backdrop of increasingly present societal grand challenges, such as wars, inequalities, poverty, and climate change, research and practice urgently need to identify multi-level and multi-actor solutions for a better life and a better world.

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NOTE

[1] For exceptions, see Ansari et al. (2013), Bishop and Waring (2016), and Gray and Purdy (2018).

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