

**Public–private hybrid organisations in the public sector:
Evidence and future directions from a systematic literature review**

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Abstract

This paper presents a systematic literature review based on the PRISMA approach (final sample of 95 records) that investigates how public–private hybrid organisations (HOs) in the public sector have been studied in the literature. Specifically, this work adopts an organisational perspective to develop an analytical framework based on three dimensions: the relationship between HOs and their environment, the organisational manifestations of hybridity and the outputs of HOs. By providing conceptual clarity on the construct of HOs, this work identifies spaces for cross-fertilisation between HOs and analogous—yet distinct—constructs, such as public–private partnerships and corporatisation.

Keywords

hybrid organisation; public sector; public administration; new public management; literature review

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Introduction

Hybrid organisations (HOs) are ‘formal organizations that utilize the distinctly different principles of more than one of the three sectors (public, private, third)’ (Billis and Rochester 2020, p. 1). Studies have investigated organisations that combine features from the private and third sectors (mostly social enterprises; see Liston-Heyes and Liu 2021; Powell, Gillet, and Doherty 2019) and from the public and private sectors (Vakkuri and Johanson 2020a). Here, we focus on the latter area of research, as the former has already been widely explored in recent reviews (Battilana 2018).

The rise of public–private HOs (HOs hereafter) is a legacy of reforms inspired by new public management (NPM) (Hood 1991) that were aimed at making the public sector more business-like through the adoption of market-based arrangements, including the corporatisation of multiple public service organisations (Andrews et al. 2020; Vos and Voets 2023) and the introduction of values and practices inspired by the market into public organisations (Osborne 2006). Today, HOs account for a large share of the global gross domestic product (10% in 2015; Bruton et al. 2015) and are increasing in number as government spending and intervention in the economy rises sharply (Financial Times 2023, September 5).

Research interest in the relevance of hybridity has increased over time (Kumar Hota et al. 2023, and scholars have converged (e.g. Grossi et al. 2017; Johanson and Vakkuri 2018) on four essential features that define public–private HOs. The first is mixed ownership between public and private shareholders or stockholders (Greve and Andersen 2001). The second is goal incongruence, which refers to the frequent ambiguity and ambivalence of HOs’ objectives (Bianchi, Roy and Teasdale 2022) that incorporate both profit-seeking and societal effectiveness principles (Alexius and Örnberg 2015). The third is the multiplicity of funding arrangements, since the financial stability of HOs can come from multiple sources, including tariffs, direct government funding and revenues from commercial activities (Honingh and

Karsten 2007). The final feature encompasses public and private forms of financial and social control that combine hierarchy (e.g. regulation) with market-driven forms of control (e.g. board appointment) (Koppell 2003). Given the breadth of such a definition, research on HOs has explored diverse organisational arrangements (Karré 2022), including state-owned enterprises (SOEs) (Bruton et al. 2015), municipally owned corporations (MOCs) (Voorn 2022), knowledge-intensive public organisations (KIPOs) (Vakkuri and Johanson 2020b) and the subset of public–private partnerships (PPPs) formalised into independent novel organisations as opposed to being purely contractual.

Despite the rising interest in HOs, we lack a comprehensive mapping of the state-of-the-art knowledge in the field. To fill this gap, we conduct a systematic review of records on HOs (final sample: 95 documents) based on the Preferred Reporting Items for Systematic Reviews and Meta-Analysis (PRISMA) approach (Moher et al. 2009). Our work is motivated by an overarching interest in understanding how HOs in the public sector have been studied in the literature. More precisely, we adopt an organisational perspective to explore the three core dimensions of HOs. The first is their relationship with their environment, which has long been studied as a key source of resource acquisition (Jacobs 1974) and legitimacy (Di Maggio and Powell 1983) for organisations. We are interested in exploring the relationship between HOs and their public stakeholders since it is a driver of democratic accountability and supports the fulfilment of the organisational mission (Bryson 2004). Second, we aim to investigate the way hybridity manifests within organisations both in terms of governance dynamics, since boards in public organisations play a pivotal role in ensuring accountability (Cornforth 2002), and internal functioning choices (e.g. organisational design), which reflect how complex organisations cope with demands from their external environment (Lawrence and Lorsch 1967). Finally, we intend to investigate the outputs of hybrid organisational activities because they represent a crucial benchmark for assessing organisations' efficiency and effectiveness

(Andersen, Boesen and Pedersen 2016). We address the following research questions to guide this literature review:

1. How do HOs relate to their external environment?
2. What are the organisational manifestations of hybridity?
3. What are the outputs of HOs?

In accordance with our questions, we present an analytical framework of the extant research on HOs in the public sector realm that mirrors our three core dimensions of HOs: their relationship with their external environment, the different organisational manifestations of hybridity and HOs' outputs.

This review provides multiple contributions. First, from a unitary perspective, we reconcile several streams of the literature on HOs that have developed in parallel but with little cross-fertilisation, and we distil future research directions that can advance the theoretical and empirical understanding of HOs as a distinctive stream of research. Second, we develop and offer an organisational framework to guide future studies of HOs based on common core dimensions that consider both the environment in which HOs operate and their internal functioning. Finally, our review contributes to providing conceptual clarity on the construct of HOs vis-à-vis other constructs that share some features with HOs while differing in others. Specifically, HOs share with PPPs a focus on having distinctive arrangements between public and private actors and spheres of activity; however, while such arrangements are typically contractual and project based in PPPs (e.g. Casady 2023; Gifford et al. 2023; Marsilio, Cappellaro and Cuccurullo 2011; Wang et al. 2018), HOs are primarily unitary organisations that govern the relationship between public and private spheres through formal governance mechanisms. This difference in the phenomenon under scrutiny justifies the different theoretical lenses adopted to study PPPs and HOs, with transaction cost economics focusing on

the former and organisational institutionalism focusing on the latter. From an analogous perspective, we identify spaces for cross-fertilisation with the growing stream of research on corporatisation (see the dedicated Symposia in *Public Administration* 2022), whose focus on ‘publicly owned or controlled corporations’ that provide public services (Andrews, Clifton and Ferry 2022, p. 179) partially overlaps with the spectrum of HOs. Such cross-fertilisation can support knowledge integration and mutual learning.

The remainder of the paper is organised as follows: the following section presents the methods used in this study; then, we illustrate our descriptive and analytical findings; and finally, we discuss our findings, paving the way for future research.

Methods

To address our research questions, we conducted a systematic review of studies on HOs. The choice of the systematic review approach was appropriate for two reasons. First, in recent decades, interest in HOs in the public sector has sharply increased, and this has led to an adequate number of contributions for use as the basis for a systematic review. Second, the systematic review approach allows for the synthesis of relevant research under a unitary framework. In line with recent studies in public management (Cappellaro 2017; Giacomelli 2020; Nasi et al. 2022), we followed the PRISMA protocol as a reproducible method for selecting and assessing scientific contributions to ensure transparency and clarity (Tranfield, Denyer, and Smart 2003). Below, we detail each step of the review protocol (Figure 1).

----- Figure 1 near here -----

Step 1: Identification

We began the review process by defining the keywords, informed by the authors’ familiarity with the field and some seminal studies that have recently provided comprehensive

contributions on the role of HOs in the public sector, including Denis et al. (2015), Karré (2022) and Vakkuri et al. (2021).

The keywords were selected to capture the dimensions of our topic—that is, HOs in the public sector. Table 1 shows the final set of selected keywords and the search algorithm. Given our purpose of advancing the conceptual understanding of HOs, we isolated studies that referred explicitly to the term ‘hybrid organisation’ in the framing and did not include in the search query different terms, such as ‘public–private partnerships’ or ‘corporatisation’, as alternatives to ‘hybrid organisations’. We also included ‘hybridity’ as a keyword, since it could capture studies that have investigated forms of hybridity in the public sector, including the organisational one. Moreover, because our interest was in HOs in the public sector, the terms we identified allowed us to find records in line with the scope of this review.

----- Table 1 near here -----

Because we were interested in the evolution of the scholarly discourse on hybrid organisations, we included all articles published until December 2022.

This review includes articles from peer-reviewed journals, books and book chapters. We excluded non-refereed publications because the review process acts as a quality control mechanism that validates the knowledge provided by such articles (Light and Pillemer 1984). Finally, we included only articles published in English, which is frequently used in systematic reviews due to the practical difficulties in terms of translation and replicability posed by the use of other languages. Our search algorithm (Table 1) was utilised in two electronic databases: the Web of Science (WoSc) Core Collection and EBSCO – Business Source Ultimate. In both databases, we searched for the presence of the selected keywords in titles and abstracts and added our eligibility criteria as filters (language, time frame and type of publication). We identified 368 articles in WoSc and 114 in EBSCO.

Step 2: Screening

We then merged the two datasets and removed the duplicates (84 articles), ultimately obtaining 398 records. This set was integrated through snowballing to include articles and books that we considered relevant to the analysis, including recently published handbooks (Alexius and Furusten 2019; Billis and Rochester 2020; Johanson and Vakkuri 2018; Koppenjan, Karré, and Termeer 2019; Vakkuri and Johanson 2020a). We included seven additional records and obtained a final sample of 405 manuscripts.

Step 3: Eligibility

The first author read the title and abstract of each of the 405 records to identify those that were consistent with the research question and the inclusion criteria. This was done with a focus on formal organisations (Billis and Rochester 2020) that met at least one of the definitory items identified by Johanson and Vakkuri (2018). Book reviews were excluded. After this process, 123 records were identified as consistent with the research questions and were selected for the next step of the analysis.

Step 4: Inclusion

To grasp their core focus, all 123 records were subject to full-text assessment, with a focus on the descriptive elements and the main contributions. In the end, 28 articles did not meet our inclusion criteria and were thus ineligible, and 95 records were included in the analysis. The main exclusion criterion in this step was an unfit definition of HO, as the organisations under scrutiny were not distinctive. The complete list of records included in the review is listed in Online Appendix 1, while those mentioned in the manuscript are included in the References section. We synthesised the collected evidence to provide an updated picture of the recent research on HOs in the public sector, thereby facilitating the identification of avenues for future research.

Results

Descriptive results

The 95 records included in this study were published between 1987 and 2022 (Figure 2).

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Notably, 85% of the records were published after 2011, with nearly 50% published between 2020 and 2022, confirming that HOs have been gaining momentum in academic research. As for the type of publications, our sample consisted of 87 journal articles, seven books and one book chapter. The 87 articles were published in 52 peer-reviewed international journals. For a complete list of the journals included, please refer to Online Appendix 2. The four outlets that published the most articles on the topic of HOs were *Accounting, Auditing and Accountability Journal* ($n = 9$), *Public Administration* ($n = 7$), *Journal of Public Budgeting, Accounting & Financial Management* ($n = 6$) and *Qualitative Research in Accounting and Management* ($n = 4$). *International Journal of Public Sector Management*, *Public Management Review*, *Public Money & Management* and *Public Organization Review* published three articles each on the topic. This indicates that the core of the research on HOs was developed in journals devoted to public administration and management and management and accounting.

The spectrum of HOs in the public sector

Almost half ($n = 38$) of the records included in this review investigated HOs in the form of SOEs (28 records), which are commonly acknowledged as being ‘organizations with public- and private-sector characteristics’ (André 2010, p. 217), and MOCs (10 records), which are enterprises that municipalities ‘create, own and operate’ (Bergh et al. 2019, p. 321). These organisations are usually created ex novo or from the transformation of previous public agencies to pursue forms of quasi-privatisation (Christensen and Lægveid 2003) while

maintaining the government's full or partial ownership.

Twenty records explored public service organisations (PSOs) that were exposed to private sector-inspired practices (e.g. the introduction of performance management systems) and values (e.g. a focus on efficiency) in the wake of NPM reforms (Osborne 2006). Furthermore, a notable share of records ($n = 11$), including a review (Grossi et al. 2020), elaborated on hybridity in KIPOs, such as universities and research and development centres that experienced considerable exposure to market and competition forces. Ten records investigated PPPs that were formalised into independent, novel organisations. As elaborated in the introduction, the long-standing and well-established stream of literature on PPPs (see Wang et al. 2018 for a review) typically focuses on contractual-based arrangements, and it has hence developed separately from the literature on HOs as formal organisations, with a few exceptions. On a separate note, two records (Koppell 2001; Moe 2001) provided deep dives into a US-specific type of HO—namely, government-sponsored enterprises—which are fully owned by private shareholders but have government-appointed boards that are meant to set objectives related to the public interest (e.g. providing housing to the poorest). Lastly, books and theoretical papers ($n = 14$) frequently investigated HOs as distinctive organisations encompassing all the above-mentioned cases, contributing to the development of research on a combination of features from the private and public sectors.

Furthermore, we located HOs under scrutiny against the criteria advanced by Johanson and Vakkuri (2018) to identify the elements of public-private HOs, which included the presence of at least one of the following: mixed ownership, goal incongruence, the multiplicity of funding arrangements and public and private forms of financial and social control. To do so, we inductively identified the criteria for hybridity in each manuscript from the authors' descriptions of HOs under scrutiny. Please refer to online Appendix 3 for a list of the combinations that can occur per cluster of HOs. Interestingly, we found no single direction in

the relationship between the HOs considered and the hybridity criteria. For example, SOEs can feature goal incongruence and funding from different sources (e.g. tariffs and revenues from commercial activities) (10 records) as well as being hybrid only on one criterion, be it goal incongruence (2 records) or mixed funding (2 records). Furthermore, PSOs were defined as hybrid either when goal incongruence emerged between traditional public and NPM-orientated values (10 records) or when revenues were based on a combination of different sources of funding (6 records). The majority of PPPs studied in our sample match all criteria of hybridity (6 records), with the exception of four cases in which we found an absence of goal incongruence, because the strategic objectives of the public and private parties involved were described as convergent. Finally, records focusing on HOs as distinctive organisations ($n = 14$) match all the criteria of Johanson and Vakkuri (ibidem).

Methods and empirical setting

Concerning the typology of the studies, the seven books combine theoretical chapters with empirical contributions. The overwhelming majority of the remaining records are empirical (68%, see Figure 3), followed by conceptual papers (20%), two literature reviews and two editorials. Interestingly, 32% of conceptual records were published between 2021 and 2022, suggesting that much of the theoretical grounding for the empirical work previously referred to the different frameworks (see the paragraph dedicated to the theoretical framework).

----- Figure 3 near here -----

Of the 65 empirical studies, 47 (72%) adopted a qualitative epistemological stance, 15 used quantitative records and three used a mixed-methods approach. Notably, 38 out of the 47 qualitative studies were based on either single ($n = 23$) or multiple ($n = 15$) case studies. The shortage of quantitative studies shows the potential for more studies of this kind to reinforce and expand the findings of qualitative research in the future.

Empirical studies were mainly conducted in Nordic countries (Denmark, Norway, Sweden, Finland) and the Anglosphere (Australia, the UK, the USA, Canada), followed by Western Europe (France, Germany, Netherlands, Switzerland, Austria). The prevalence of studies from Nordic countries relates to the extensive introduction of decentralisation, contracting out and market reforms that these countries have adopted (Lapsley and Knutsson 2016), with the prominent example being Sweden (Thomasson 2020). Similarly, the Anglosphere is where NPM-driven policies were first conceptualised and promoted, resulting in a radical transformation of public service provision (Pollitt 2015). As for Western European countries, their welfare systems have experienced increasing hybridisation, with actors other than the state delivering services (see Honing and Karsten 2007 on the Netherlands). The remaining records involved HOs operating in Asia (China, Malaysia, Sri Lanka, Indonesia, Vietnam), Southern Europe (Italy) and Eastern Europe (Czech Republic), with only one study from Africa (Tanzania). Two studies (Koppell 2007; Ligorio, Caputo, and Vanturelli 2022) focused on multiple countries from different geographical areas (e.g. China and the USA in Koppell, *ibidem*).

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Finally, the range of public services that hybrid organisations deliver was extended to multiple areas, ranging from education (13 records) to healthcare (7 records), waste management (5 records), transportation (4 records), housing (4 records), welfare (3 records), multiple sectors (20 records) and other, less represented policy fields.

Theoretical background of the included studies

We found theoretical convergence along different streams, as depicted in Table 2.

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The dominant theoretical framework is institutional theory (32 records)—and, more specifically, institutional logic (Thornton, Ocasio, and Lounsbury 2012). Institutional logic is defined as ‘a set of material practices and symbolic constructions constituting organizing principles which are available to organisations and individuals to elaborate’ (Friedland and Alford 1991, p. 248). Logics provide societal rationales that guide organisations and individuals (Battilana, Besharov, and Mitzinneck 2017). Typically, HOs combine at least two institutional logics: market logic, which fosters economic efficiency and profitability under the NPM paradigm, and state logic, which is orientated towards pursuing compliance and legality under the bureaucratic paradigm (Thornton, Ocasio, and Lounsbury *ibidem*). Successful adaptation to the technical and social expectations required by each institutional logic ensures *institutional isomorphism* (Di Maggio and Powell 1983). Nonetheless, these logics bring about competing demands, which challenge both organisational and individuals’ identities (Jay 2013). More precisely, organisations might claim they are adapting to competing demands when, in fact, they are not *decoupling* practices from structure to preserve organisational efficiency (Meyer and Rowan 1977). Individuals can enact different coping mechanisms when confronted with multiple logics (Pache and Santos 2013a), spanning from full adherence to a set of values associated with different logics to defiance when they deliberately oppose a given logic. The research embracing an institutional logic perspective considered in this review builds on these works (e.g. Cappellaro, Tracey and Greenwood 2020) and on their further voluminous theoretical development in organisation theory to investigate HOs’ adaptation to competing demands through management control systems, organisational structure and individual coping mechanisms, which are all extensively described in the section devoted to the analytical findings.

A second body of literature is rooted in studies devoted to hybrid organisations (22 records), including multiple contributions to this review (e.g. Billis 2010; Johanson and Vakkuri

2018, Karré 2022). These manuscripts are typically grounded in the above-mentioned institutional theories of organisations, public accounting (e.g. Grossi et al. 2020) or governance theory, which explores ‘shifts in governance systems at the supraorganizational and systemic levels’ (Denis et al. 2015, p. 275). We decided to illustrate these separately, as a large share of records in our sample explicitly refer to ‘studies on hybrid organisations’ as their theoretical framework, although this cannot be considered a theoretical perspective per se. Together with records building on governance theory ($n = 5$), this stance is more frequent in management studies, especially in accounting-related journals, and it is devoted to exploring how organisations confronted with contradictory demands make sense of complexity.

Research on HOs is also influenced by the agency theory perspective (12 records), which focuses on the contractual relationship between principals (shareholders/owners) and agents (managers/employees). The premise of agency theory is that the separation between ownership and control can result in a conflict of interest between these parties, which is defined as an ‘agency problem’. When the agency problem arises, there is a risk of moral hazard as agents pursue their own interests, which can diverge from the best interests of the principals (Eisenhardt 1989). To address this problem, agency theory suggests various mechanisms and practices, including effective monitoring and control mechanisms and individual incentives. Consistently, the records in this review rooted in agency theory focus on the agency problem arising between a public owner (principal) and an HO (agent) and on the means to confront such a problem. In some cases ($n = 3$), this perspective is related to studies of accountability requests enacted by principals that focus on the ‘process of judging an organisational action or result against a standard and then acting on that judgment’ (André 2010, p. 273).

Some records ($n = 3$) embrace a transaction cost economics perspective, which analyses the costs associated with conducting economic transactions in a market to identify the most efficient governance structure (Williamson 1989). These explore hybrids as arrangements that

might efficiently solve the cost of business interactions concerning other service delivery options—namely, in-house production or market services.

The remainder of the records advance different theoretical perspectives, which we decided to keep together in the ‘Other theories’ category because they were fragmented. As a final remark, Denis et al. (2015) called for research building on four theoretical perspectives to advance scholarly knowledge on hybridity in the public sector—namely governance theory, institutional theory, identity perspective and actor network theory (ANT), which studies networks as a means to bring together heterogeneous actors. The results from our review show that scholars in the field largely developed the first three perspectives, but the call for ANT-inspired studies was neglected.

As the reference theoretical framework deeply influenced scholars’ focus of analysis, we suggest going beyond theoretical boundaries to provide a comprehensive mapping of the state of the art of extant knowledge on HOs, bringing together evidence and conceptual works from different stances.

Analytical findings

We summarise the existing research on hybrid organisations in the public sector in Figure 5, which illustrates the different levels at which HOs can be explored—namely, their relationship with their environment, organisational manifestations of hybridity and organisational outputs. While none of the studies focuses exclusively on the antecedents of organisational hybridity, all records identify NPM-orientated reforms as the main driver of the introduction of market orientation in public organisations or of the corporatisation of public services. Hence, we chose to visually represent this in our framework using dotted lines.

----- Figure 5 near here -----

Our framework starts from the relationship between HOs and their external environment, which

acts as a source of legitimacy, regulation and resource provision. On the one hand, the public actors in this environment act as regulators enacting NPM-inspired policies and the introduction of private sector-inspired values as well as enforcing control over HOs to ensure democratic accountability. On the other hand, public bodies can also own HOs, exerting control in defining corporate governance schemes and in ex post evaluation of organisational outputs to ensure the alignment of interests. Focusing on the organisational manifestations of hybridity, the governance structure reflects the multiplicity of shareholders and the interests to which HOs are subject. In this respect, the literature stresses the role of boards in compromising the conflicting values these actors bring by defining the strategic direction for HOs. Further, management control systems enable the institutionalisation of hybridity through performance management systems and reporting activities, while the organisational structure reflects different levels of integration between the dual missions in HOs' organisational design. At the micro level, we can observe managers' and employees' attitudes towards hybridity, with different degrees of acceptance. Finally, HOs' outputs can be observed at the organisational or employee level.

The following paragraphs describe each section of our framework in detail. Considering the large number of records included in the review, we mention in the text only those that were considered more explanatory in describing each cluster. See Online Appendix 1 for the complete list of records included in each cluster of our mapping.

External environment

The environment is a key source of resource acquisition, legitimacy and control for organisations. Consistently, studies in this cluster ($n = 21$) focus on the dynamic relationships between an HO and its environment—namely, legitimation dynamics ($n = 2$), indirect control through regulation ($n = 10$) and direct control through ownership ($n = 9$).

Legitimacy building and resource acquisition

Because HOs do not follow traditional public bureaucratic or private organisational forms, legitimacy and resource acquisition are more complex, and HOs cope with this issue by working dynamically on their search for legitimacy (Matinheikki et al. 2021). Rosser et al. (2021) explained that in the construction phase, HOs work on pragmatic legitimacy; that is, they work to convey the benefits they generate to their external stakeholders, especially resource-rich ones. Once pragmatic legitimacy is gained, HOs need to build moral and cognitive legitimacy to prosper. To do so, they should work on their organisational practices, including their recruitment and key performance indicators, to become ‘taken for granted’ in their institutional environment.

Control through regulation

Several studies investigate the role of regulation in HO dynamics, which is deemed necessary, as HOs could become a threat to democracy (Moe 2001; Vining and Weimer 2017). The reasons are twofold and have been explored through conceptual papers (e.g. André 2010) and empirical contributions (e.g. Freeman et al. 2019; Koppell 2003). First, HOs can become ‘heavyweight’ actors that are difficult to control and could influence regulators due to the higher resources they entail with respect to ‘pure’ private or public organisations (Koppell 2001), upon which they might leverage for the sake of their interest, possibly harming political and market accountability. Second, hybrids make it difficult to assess ‘who’ is accountable ‘to whom’ and ‘for what’ (Grossi and Thomasson 2015), as they break the traditional vertical relationship of accountability between governments and citizens. Regulation is defined as the key leverage to ensure the alignment of interests between public bodies and HOs (Koppell 1999) and should be primarily devoted to assigning a clear and realistic mission (André *ibidem*) and setting performance goals that satisfy both financial and public missions (Koppell 2007). Such an

approach can foster regulators' ability to compel a hybrid to produce positive externality or refrain from otherwise controversial business activities, which might lead to the abandonment of the pursuit of public-orientated goals (Koppell 2001) and harm organisational survival in the long run (Freeman et al. *ibidem*; Steier 1998).

Overall, this body of literature points to the positive consequences of regulation, yet it asserts that regulation is not enough to ensure HOs' control. The presence of active regulators can safeguard the environment from financial and cultural risks, with the former being related to the loss of public money caused by unfair competition from HOs and risky investments and the latter being associated with a possible decline in the public sector ethos caused by marketisation (Brandsen and Karré 2011). Other scholars (André *ibidem*) claim that regulation per se is not sufficient to ensure proper control, asserting that governments should also be concerned with the functioning of HOs at the process level and with improving their missions and organisational designs, including adequately monitoring the results they achieve.

Control through ownership

Control can be exerted more directly through ownership. Nonetheless, when the public is involved in an HO's ownership, an agency problem arises. Consistently, scholars have investigated strategies to reduce this problem, focusing on two corporate governance mechanisms that can protect owners' interests: board appointment and accountability mechanisms.

First, owners should devote more attention to board appointments, as research has shown that current strategies can result in controversial outcomes. Owners frequently appoint elected politicians to HOs' boards (Bergh et al. 2019), raising an accountability issue because the principal is simultaneously the agent. As politicians are often unaware of the duplicity of their role (Bergh et al. *ibidem*), they are unable to reduce the agency problem. The ambiguity of the role of politics is also recognised by financial markets, with research showing that the

individual political connections of board members have a significant negative effect on the market capitalisation of SOEs, contrary to what happens to ‘pure’ private firms, where this relationship is positive (Giosi and Caiffa 2021).

As concerns accountability mechanisms, an owner can reduce the agency problem by leveraging ex ante or ex post accountability criteria. The former is typically formally defined in an HO’s annual mandate (Liechti and Finger 2019) that binds its activities to accountable results. Such an ex ante activity can be based on different combinations of formal control criteria (Krause and Swiatczak 2020) on inputs, which concern predefined expenditure budgets; behaviours related to prescribed processes and rules; and outcomes, which refer to financial and non-financial performance dimensions. Nonetheless, formal controls are frequently combined with informal mechanisms—notably, trust and off-record dialogues between the principal and the agent (Thomasson 2019), which play a decisive role in reducing the agency problem. It can be noted that research has shown that higher trust is related to outcome-based control (Krause and Swiatczak *ibidem*), as trust fosters a higher alignment in goals between the principal and the agent.

Ex post evaluations should monitor and evaluate HOs’ ability to pursue financial and non-financial results. Nonetheless, research has found a clear prioritisation of financial indicators over socially orientated ones (Alexius and Örnberg 2015; Grossi and Thomasson 2015). This can lead to a risk of mission drift (Ebrahim et al. 2014), which occurs when HOs give up on one of their missions in favour of the other, typically at the expense of the public interest. Improving the quality of ex post evaluation requires empowering both the principal and the HO’s board over the multifaceted nature of HO activities to adapt accountability systems accordingly.

Organisational manifestations of hybridity

The core of the research on public–private HOs is devoted to the phenomenology of

organisational hybridity (54 records). In these studies, which include multiple handbooks (e.g. Billis 2010; Vakkuri and Johanson 2020a) and theoretical contributions (Karré 2022), HOs were investigated as a new form of organising, with the literature on organisational theory and public administration frequently merging (Denis et al. 2015). The organisational manifestations of hybridity have been studied with respect to four different areas related to the management of HOs: governance (17 records), management control systems (20 records), organisational structures (5 records) and employees' job attitudes (12 records).

Governance

Governance refers to the structure of an HO and the mechanisms of the strategic direction of the organisation over time. Relatedly, the focus of the 17 studies included in this section relates to two themes: (1) the features and scope of hybrid governance and (2) strategic management as leverage to balance different and often conflicting organisational features.

As for the former, HOs are recognised as a popular form of organising in the NPM and post-NPM era (Christensen and Lægreid 2011; Johanson and Vakkuri 2018), although some scholars date HOs' roots back to much earlier in time (up to the 1600s; Oppon 2021). Today, HOs are well-developed structures that play a key role in public service delivery (Karré 2022). In some cases, they can serve as temporary modes of organising between full public and full private ownership (Christensen and Grossi 2021), with studies documenting both successful (Greve and Andersen 2001) and unsuccessful (Christensen 2015) experiences.

Surprisingly, we found few studies concerning strategic management as a leverage to reduce conflicting organisational features. Boards, which are supposed to function as steering bodies, should guide HOs towards the pursuit of multiple and often conflicting objectives (Billis and Rochester 2020). Nonetheless, as their members represent multiple stakeholders (and interests), boards themselves can contribute to difficulties in dual goal achievement and in setting HOs' priorities, requiring mutual adjustment (Olsen, Solstad, and Torsteinsen 2017).

Empirical research has found that, with respect to public agencies, HOs are indeed more orientated towards satisfying multiple pressures, including market competition arising from NPM (Joldersma and Winter 2002). However, further research is needed to explore if and how strategic management differs with respect to other organisational forms and how boards can strategically direct HOs in pursuing dual goals.

Management control systems

Management control systems (MCS) are formal and informal processes, mechanisms and structures implemented within organisations to support strategic planning and to guide and monitor the achievement of organisational objectives (Ferreira and Otley 2009). Considering their centrality in supporting goal accomplishment, they have gained notable scholarly attention and been frequently framed as ‘material practices’ that can support HOs in balancing competing demands by institutional logics.

Indeed, MCS can serve as a source of compromise between actors with divergent values (Morinière and Georgescu 2022) and for crafting new solutions that combine different logics (Sargiacomo and Walker 2022). Nonetheless, studies have often found decoupling strategies in MCS (Conrath-Hargreaves and Wüstemann 2019; Frei, Greiling, and Schmidhuber 2022; Mamat, Ahmad, and Said 2021), with elements from competing logics being separated. Such a strategy might put hybridity at risk should HOs be unable to ultimately combine demands over time. A pivotal role in integrating logics within MCS is recognised by ‘institutional entrepreneurs’, who can create consensus within organisations to integrate conflicting demands into practice (Gooneratne and Hoque 2016).

Besides the role that MCS can exert in logic integration, the body of literature in this cluster has developed around two of its core components: performance measurement systems (PMSs) and reporting.

Performance measurement is recognised among the major challenges for managing HOs because these organisations are required to measure and be accountable for their financial results and their ability to achieve a public mission (Grossi et al. 2017), which might lead to ambiguities in interpreting performance results (Vakkuri and Johanson 2020b). The evaluation of HO performance should account for the so-called ‘4-Es’ of efficiency, effectiveness, economy and (social) equity (Vakkuri 2022). A recent review of performance measurement in HOs (De Waele et al. 2021) found no one-size-fits-all approach for HOs and showed how research largely focuses on efficiency, calling for further studies on the multi-dimensional nature of HOs’ performance. Furthermore, the authors of the review found two additional cross-cutting dimensions for HOs’ performance evaluation—namely innovation, which is the extent to which HOs are open, accessible and responsive, and compliance, which captures rules, procedures and codes of conduct. Besides the areas of performance that should be considered in a PMS, a growing body of literature (Vakkuri *ibidem*) has converged on suggesting that the development of PMS can account for the peculiar value creation mechanisms in HOs (Vakkuri and Johanson 2020a)—namely, mixing, compromising and legitimising. The former refers to the development of a PMS that can combine the multiple interests represented in HOs through dedicated measures (e.g. private and public shareholders in an SOE). Compromising reflects the inter- and intra-organisational search for balance among different logics (e.g. through performance dialogues). Finally, legitimisation refers to the PMS structure and measures that might support or hinder a given logic. Nonetheless, to be confirmed, such a theoretical threefold mechanism still requires empirical investigation.

Finally, fewer studies investigated the role of reporting in accounting for the multiplicity of performance dimensions in HOs, finding that economic results are still the prevailing ones (Argento et al. 2019; Ligorio, Caputo, and Venturelli 2022). Perhaps counterintuitively, findings from the Swedish context (Argento et al. *ibidem*) show that sustainability disclosure is

lower among SOEs with a larger government share, as the larger this is, the larger the constituency, and it might be more difficult to find common ground on the dimensions to disclose.

Organisational structure

In this cluster, scholars focus on organisational structure as a means to cope with conflicting institutional logics, which is the dominant theoretical stance of these studies. As described in the section devoted to the theoretical framework, organisational structures have long been investigated to detect strategies of decoupling that occur when organisations expose a compelling structure to meet institutional environment expectations but consciously remain consistent with their actual action to increase organisational effectiveness.

Different organisational responses to conflicting institutional pressures have been identified. First, multiple HOs engage in decoupling (Berge and Torsteinsen 2022; Mo 2022), yet the latter has led to negative consequences because coalitions of organisational members representing different logics have experienced conflict to support the prevalence of their referring institutional logic. Moreover, HOs can engage in ‘selective coupling’ (Pache and Santos 2013b) of elements of each logic to ensure legitimacy to external stakeholders without engaging in internal, costly negotiations (Mzenzi and Gaspar 2022). Other studies show how organisational responses to conflicting institutional demands may vary to the point of hybridisation being ignored completely (Fossetøl et al. 2015), leading to a situation defined as ‘non-hybridity’, which occurs when a market-driven logic is ignored.

Finally, we found one study devoted to the relationship between responses to institutional complexity that occur at the organisational and individual levels (Pekkola et al. 2022). This work found the interconnectedness and disconnectedness of hybridity occurring at different levels, yet the evidence showed no causation or correlation between macro and micro responses, and further research was called for.

Employees' job attitudes

Records synthesised in this cluster investigate employees' job attitudes, which refers to 'evaluations of one's job that express one's feelings towards, beliefs about, and attachment to one's job' (Judge and Kammeyer-Mueller 2012, 344). In particular, these studies focus on (1) managers' attitudes and (2) individuals' identity challenges and coping strategies when confronted with multiple sets of core values (mostly through an institutional logics lens).

As for managers of HOs, research has found distinctive attitudes with respect to those working in 'pure' public or private organisations. These features should be closely monitored in recruitment policies, as managers' attitudes might enhance or reduce an HOs' ability to pursue dual goals (Krogh and Thygesen 2022) and can foster organisational resilience (Lisdiono et al. 2022). More precisely, empirical research has shown that managers in HOs perceive having higher autonomy than those working in traditional public organisations but lower autonomy than those working in private companies (Jacobsen 2022). Moreover, they present lower levels of prosocial motivation with respect to their counterparts in 'pure' public organisations (Jacobsen 2021). Hence, they are more prone to focus on economic results, which might deprioritise public-orientated objectives (also found in Karré 2020b).

Concerning individuals' attitudes towards competing demands, different postures have been identified in the literature. These different responses relate to the contradiction posed by logic to individuals (Pilonato and Monfardini 2022), which can result in identity challenges (see Giacomelli 2020). Professionals in HOs typically experience such identity challenges when navigating between their professional roles and the new NPM-oriented inputs and requests introduced by the market logic, which demands that the meaning of 'good work' is challenged (Schrøder, Cederberg, and Hauge 2022).

Coping strategies are intertwined with personal attitudes. It was found that individuals with previous experience in the private sector can more easily normalise commercially oriented

activities (Gebreiter and Hidayah 2019; Hodgson et al. 2022) through coping strategies based on compliance—that is, adherence to a set of values and practices associated with all logics—or compartmentalisation—as individuals seek to comply with all completed logics but deliberately keep these separate to secure legitimacy. Research has also found cases of ‘partial hybridisation’ (Nguyen and Hiebl 2021), which occurs when individuals display different levels of hybridisation that relate to the level of exposure their organisational unit has to dual logics. In other words, individuals working in the same organisation might adopt different coping strategies in relation to the degree of the introduction of competing logics into the practices of their reference organisational unit.

HO outputs

The final section of our conceptual mapping focuses on outputs (20 records), which relate to achievements that HOs attain through their operations, strategies and activities. Results can be further distinguished between those achieved at the organisational (18 records) and individual levels (2 records).

Organisational-level outputs

Three typologies of outputs at the organisational level are conceptualised in the literature: the accomplishment of multiple goals (6 records), especially economic and public-orientated ones, and the capacity to foster innovation in public services (5 records); the ability to (un)successfully remain hybrid in the long term (1 record); and the economic return of HOs in service delivery (6 records, mostly through a transaction cost economics lens).

As for the first typology, the focus of these studies is on HOs’ ability to keep up with the multiplicity of goals they would pursue. This multi-faceted nature of outcomes is assessed through the evaluation of both economic- and public-orientated results. The inability to achieve dual missions can result in a mission drift (Ebrahim et al. *ibidem*) in favour of economic-

orientated results. The empirical evidence is fragmented and related to very diverse HOs and contexts, which limits the generalisability of the results. As an example, in the US housing sector, HOs can leverage their possibility to provide housing on the private market to support affordable housing production, which would otherwise not be possible in a setting of constrained resources (Kleit, Airgood-Obrycki, and Yerena 2019). Nonetheless, this flexibility comes with the risk of shifting away from the conventional targets of public services—namely, the most vulnerable (Nguyen, Rohe, and Cowan 2012), as shown by the controversial case of the corporatisation of a large Malaysian hospital (Virk et al. 2020). Last, Bergh, Erlingsson and Wittberg (2022) compared Swedish municipalities that owned HOs, intending to assess the relationship between the presence of HOs and citizens' satisfaction. They reported that cities with a higher number of HOs also have higher taxes, higher perceptions of corruption and lower levels of citizen satisfaction with the quality of services. Building on these results, the authors claimed that the creation of HOs might have been related to local governments' willingness to leverage the HOs' peculiar and blurred system of regulation to avoid public scrutiny rather than to provide better services.

Among the hybrid results, some studies focus on innovation capability. Overall, they identify a positive relationship between hybridity and innovation, as different institutional logics can be stimulating for innovative work and collaboration (Sønderskov, Rønning, and Magnussen 2022). The reasons are rooted in the long-term thinking introduced by private logic, which contrasts governments' short-term thinking (Plaček et al. 2021), and through lower government and political pressure (Boukamel, Emery, and Kouadio 2021; Emmert and Crow 1987; Tritto and Lit Yew 2021) with respect to public organisations.

In relation to the ability to remain hybrid in the long term, Cappellaro, Tracey, and Greenwood (2020) performed a deep dive into the mechanisms that might harm the successful integration of a new institutional logic, ultimately leading to its rejection. Building on a case

study of a mature Italian hospital, the authors showed how, after first acceptance of the market logic among professionals, over time, the incumbents' perception of being challenged in their values and core practices led to logic rejection.

The third subgroup of studies investigates the payoff of relying on HOs for service delivery with respect to other forms of organising. The research stresses the importance of ex ante evaluations of public owners' governance choices on new HO formation, as their failure can be costly (Opara and Rouse 2019). In this respect, Vining and Weimer (2016, 2017, 2020) adopted an agency theory perspective and claimed that listed HOs with mixed ownership lower the risk of economic loss, since shares can ultimately be sold to private parties. We found converging evidence in the field of municipally owned companies. Results from Norway and the Czech Republic showed that contracting out to HOs generates cost efficiency for municipalities with respect to 'pure' private companies and in-house production (Soukopová and Klimovský 2016; Johnsen 2021).

Employee-level outputs

With respect to employee-level results, two records explored the impact of hybridity on public servants' retention. Despite their paucity, these studies provide insightful findings that can inform recruitment and human resource policies.

In the section devoted to employees' job attitudes, we described how individuals with a private-sector background seem to navigate more easily in competing logics. The same does not hold for public servants. The exposure to market orientation has been found to increase turnover among long-term public servants of public organisations that undergo corporatisation (Karré 2020b; Krøstel and Villadsen 2016). The integrated interpretation of the results from these sections provides interesting implications for recruitment policies. On the one hand, individuals with a public sector background can find it hard to adhere to competing logics, ultimately choosing to quit their jobs. On the other hand, HOs recruit managers from the private

sector with lower PSM, which might cause the managers to devote less attention to public-orientated goals. The point of equilibrium between different profiles to be hired to ensure the achievement of dual goals is far from being reached and therefore requires more scholarly attention. Additionally, more research is needed to investigate the levers that can limit public-servant turnover in HOs and foster motivation.

Online Appendix 4 summarises the main focus of each research stream included in the three sections of our framework, together with the key publications that illustrate the core elements of the debate in each stream.

Discussion and future directions

Our analysis illustrates the sustained and widespread growth in research on hybrid organisations in the public sector. Factors contributing to the growth in academic interest in the topic appear related to the implications of NPM-inspired reforms, which have deeply influenced the functioning of public organisations and public service delivery, in turn influencing the research agenda.

The literature reviewed in this study focused on different subjects, which we presented in our analytical framework. The first is the relationship between HOs and their environment. The second is that the organisational manifestations of hybridity involve four areas: governance, management control systems, organisational structure and employees' job attitudes. The final subject concerns the outputs of hybridity at the organisational and individual levels. Our analysis shows how the research subject is largely influenced by the theoretical perspective adopted by the authors. Despite the call from Denis et al. (2015) to bring together public management, public administration and organisation studies to advance knowledge on HOs, this invitation has remained largely unanswered.

Our results illustrate some converging evidence in HO studies. For example, regulation is considered an effective instrument to ensure the alignment of interests between public owners

or regulators and HOs. On the other hand, the heterogeneity of results related to HOs' outputs at the organisational level suggests that the benefits of these forms are less clear-cut.

Factors that contribute to some of the variation in the findings across studies are the methods of analysis, the organisations under scrutiny and the context for analysis. The overwhelming majority of records included in this review relied on case studies, which provide crucial evidence to explore relatively new phenomena (Yin 1994). Nonetheless, our review shows that research on HOs now encompasses a consolidated stream that has developed across different disciplines. To advance the knowledge of HOs and overcome the heterogeneity in results that might be related to contextual factors, the field would benefit from studies that can gauge external validity. External validity can be pursued by working in two areas. First, a wider assortment of methods would add a desirable dimension of analytical depth to develop this field of research. To this end, quantitative studies based on observational data could fruitfully clarify the contribution of HOs in the public sector. Relatedly, the replication of extant quantitative studies in different contexts and countries could reinforce and support results on the topic (e.g. on managers' motivational profiles; Jacobsen 2022). Second, and relatedly, empirical research has been developed around different organisations and policy domains. For example, we found studies that dealt with organisational outcomes spanning across housing associations in the US (Kleit, Airgood-Obrycki, and Yerena 2019), a Malaysian hospital (Nguyen, Rohe, and Cowan 2012) and Swedish SOEs (Bergh, Erlingsson, and Wittberg 2019). Since these organisations present different organisational features and operate in profoundly diverse administrative contexts, it is important to account for the research context to elaborate on the generalisability of the results across other HOs.

Moreover, our review shows important room for research on currently overlooked topics. First, the records in this study largely neglected the perspectives of citizens/users. This finding is surprising, as the public management literature stresses the pivotal role of citizens in

the design and delivery of services in the public service ecosystem (Osborne et al. 2022). Hence, we encourage research on citizens/users' involvement in HO processes, such as co-production, service design and, ultimately, satisfaction. Second, as a large share of studies have built on institutional theory, we encourage further explanation of the mechanism of building legitimacy between HOs and their environment. To this end, scholars could fruitfully explore the role of politics in boards to foster or harm legitimacy building, bridging multiple theoretical perspectives presented in this manuscript. Third, we call for the adoption of a dynamic process view to explore the evolving dynamics of HOs and to investigate whether and how hybridity changes in different phases of organisational life. Fourth, we encourage future studies on the relationship between HOs' outputs and external environment actions to investigate whether and how performance results actually inform both public regulators' and shareholders' interventions towards HOs.

Lastly, we assert that studies on HOs could nurture other streams of research. Notably, corporatisation has been attracting relevant contributions (see the dedicated Symposia in Public Administration 2022) and relates to a 'legally separate corporate entity' created to deliver public services that are 'usually made subject to company law' (Andrews, Clifton, and Ferry 2022). Corporatised companies can indeed be considered to be HOs, but not vice versa, since HOs embrace a wider spectrum of organisations (e.g. public agencies experiencing conflicting goals or mixed funding as KIPOs; see Grossi et al. 2020). Nonetheless, these fields could benefit from mutual learning. For example, research on corporatisation has largely investigated the drivers and antecedents of corporatisation (Andrews, Clifton, and Ferry *ibidem*), which is one of the missing pieces in our analytical framework, while HOs can provide insightful evidence on the relationship between political control and the management of corporatised services (e.g. Christensen and Grossi 2021), which is currently underdeveloped in the literature on corporatisation. Besides corporatisation, studies on HOs and on contractual-based public–

private partnerships could mutually inform each other. On the one hand, the research stream exploring mechanisms of building legitimacy and acquiring resources for HOs has presented insightful results to nurture studies on the institutionalisation of PPPs in their environment, which has recently (Wang et al. 2018) been identified as a major research gap in the field of PPPs. On the other hand, contractual-based perspectives on PPPs could provide insightful guidance on multi-dimensional performance measurement systems for HOs, which, as we have shown, require further development. To conclude, this review can facilitate mutual learning between studies to avoid the development of research silos between closely related topics.

Conclusion

HOs have been under intense scrutiny across different disciplines. We have advanced knowledge in the field by organising studies into an analytical framework based on a systematic literature review of 95 academic records following the PRISMA approach. As HOs today are distinctive organisations with a dedicated body of literature, through this review, we support further conceptual clarity between different constructs—notably, PPPs and corporatised entities. As HOs are now pivotal actors in the public sector, we are confident that this review will inspire future research on the role and contributions of these organisations in creating value for society.

Declaration of interest statement

The authors report that there are no competing interests to declare.

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