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FROM PARTNERSHIP TO FIRM: HYBRIDITY AS SOURCE OF ROUTINE CHANGE

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Strategic partnerships have recently gained foothold in the Danish construction industry as a novel collaborative interorganisational relationship. Strategic partnerships have so far been used in major construction programmes and can be seen as a hybridised organisational form that draws on multiple existing organisational forms in creating new interorganisational routines and developing collective knowledge. The objective of the paper is to explore how a strategic partnership creates new routines by developing collective knowledge, and how these routines are transferred to the constituent organisations as firm-specific routines. Empirically, we draw on data from a strategic partnership between the City of Copenhagen's client unit, ByK, and a group of six AEC firms that constitutes the consortium named TRUST. Data is collected in the period 2017-2019 and consists of 22 interviews describing developments in the strategic partnership and in the constituent firms. In the analysis, we apply an institutional theory perspective in a parallel analysis of developments in the strategic partnership and in two of the constituent firms (the client and the contractor). We show that the strategic partnership creates new interorganisational routines in pursuit of collective knowledge and that the constituent firms learn from their engagement in the strategic partnership, which leads to creation of new routines and changes in existing routines. As such, the paper contributes to an understanding of how new intraorganisational routines created in a strategic partnership ramify to firm-specific routines in the constituent firms.

Keywords: hybridity, organisational learning, routines, strategic partnership

INTRODUCTION

Firms' ability to acquire new knowledge and learn from experiences is critical for organisational survival and prosperity in contemporary societies (Chan *et al.*, 2005). Along with the worldwide transition from industrial societies to knowledge societies, the acquisition and utilisation of knowledge have become of greater importance across industries and firms. As such, knowledge can be perceived as a fundamental resource in contemporary societies to obtain social and economic wealth while capital and labour have become secondary (Drucker 1993). This is in part due to the increasing complexity of modern markets and the services that companies have to deliver. Institutional complexity (Jay 2013) stemming from external demands from clients and

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other stakeholders to deliver on different and potentially conflicting concerns, necessitates firms engage in learning to acquire new knowledge to develop their organisational routines. For instance, Javernick-Will (2009) argues that organisations that expand into new international markets need to acquire institutional knowledge to reduce the knowledge gap - i.e., the difference between knowledge a firm possesses, and the knowledge required to operate in the new market.

In construction management research, inquiries on organisational learning have primarily examined intraorganisational learning processes at the project level with reference to the fragmented and project-based nature of the industry (e.g. Chan *et al.*, 2005; Eriksson *et al.*, 2017; Styhre *et al.*, 2004). However, firms can also acquire knowledge and learn from experiences made by other firms (Greve 2005), or through engagement in collaborative interorganisational relationships, such as strategic partnerships, where knowledge is developed collectively among firms (Larsson *et al.*, 1998; Ring and Van de Ven 1994). Strategic partnerships, likewise, other collaborative concepts such as partnering (Bresnen and Marshall 2000), aim to deal with fragmentation and lack of integration in the industry. However, where partnering mostly has been applied in attempts to improve project performance on single projects (Bresnen 2009), a strategic partnership aims to ensure performance across multiple related projects (Gottlieb *et al.*, 2020). This involves development of organisational routines that go beyond needs of the single projects and capitalising on the learning processes that develop in the joint organisation. An interesting topic that remains yet underexplored is how collective knowledge developed in a strategic partnership is adopted at an organisational level and results in firm-specific routines. A common premise in the literature on organisational learning is that organisational routines are created and changed when organisations acquire new knowledge and thereby learn (Levitt and March 1988). A considerable number of studies have examined how routines are created or changed through learning from organisations' own experiences (Ingram 2002). Feldman *et al.*, (2016) argue that routines are enacted in specific times and places and are inseparable from the context in which they are embedded. This means that transferring routines is an effortful enactment. Moreover, Bertels *et al.*, (2016) show that the transferral and integration of an external routine is shaped by organisational culture to establish a fit. This begs the questions of how and what firms individually learn from routines developed in collaborative interorganisational relationships such as strategic partnerships.

The objective of the paper is to explore how a strategic partnership creates new routines by developing collective knowledge, and how these routines are transferred to the constituent organisations as firm-specific routines. The paper empirically draws on data collected in a strategic partnership between 2017 and 2019. The theoretical basis of the paper is literature on organisational learning and the institutional theory concept of hybrid organising.

ORGANISATIONAL LEARNING AND ROUTINES

Organisational learning processes are central as a basis for achievement of strategic advantages in rapidly changing environments (Ingram 2002; Levinthal and March 1993; March 1991). According to Levitt and March (1988: 320), organisations are learning by “encoding inferences from history into routines that guide behavior”. In this context, routines should be understood as the conventions, forms, procedures, rules, strategies and technologies, which organisations are intermingling with and constructed by through their daily operations (Levitt and March 1988).

In his pioneering work on organisational learning, March (1991) distinguishes between two types of organisational learning processes - exploration and exploitation. Exploration refers to experimentation with new alternative organisational routines while exploitation refers to the refinement and extension of existing organisational routines (March 1991). Both learning processes are critical for the development of sustainable competitive advantages but are, however, also difficult to manage simultaneously because of their different natures, which cause ongoing tensions in most modern firms (Battilana and Lee 2014; Eriksson *et al.*, 2017).

While individual firms are deemed to learn through changes in their prevalent organisational routines (March 1991), a strategic partnership can learn by creating or changing its interorganisational routines or repertoire of possible joint activities (cf. Larsson *et al.*, 1998). A strategic partnership can facilitate collaboration among the constituent firms by providing an organisational form that encourages joint activities and where interorganisational routines are created and adapted to pursue development of collective knowledge (Larsson *et al.*, 1998). Such organisational forms are combinations of assets, competences and resources that are located within and transferred from the constituent firms of the strategic partnership. The forms can therefore be labelled hybridised organisational forms that draw on multiple existing organisational forms (Battilana and Lee 2014; Oliver and Montgomery 2000).

Hybrid organising as a mechanism for changing routines

Hybridised organisational forms are mixtures of multiple far more 'parent' organisational forms (Oliver and Montgomery 2000). According to Battilana and Lee (2014), hybridised forms uphold their sustainability through ongoing hybrid organising that manage internal and external tensions when interacting and fusing aspects of multiple organisational forms. Hybrid organising can be defined as "the activities, structures, processes and meanings by which organizations make sense of and combine aspects of multiple organizational forms" (Battilana and Lee 2014: 398). Thus, hybrid organising is introduced as an approach to deal with disorders stemming from interaction of multiple organisational forms that are conventionally separated (Battilana 2018).

Strategic partnerships are likely to engage in hybrid organising to deal with multiple organisational forms and their related activities, structures, processes and meanings in pursuit of specified objectives. Formation of new hybridised organisational forms allows strategic partnerships to adhere to institutional prescription from multiple established organisational forms that are recognised as legitimate (Battilana 2018). The interorganisational routines and joint activities, which are highlighted as being important in development of collective knowledge in strategic partnerships (cf. Larsson *et al.*, 1998), can thus be viewed as a result of the mixing of multiple organisational forms through hybrid organising (Battilana 2018). By understanding hybrid organising in strategic partnerships, we will be able to better understand how collective knowledge is developed by mixing organisational forms (Battilana and Lee 2014). Furthermore, we will be able to understand how constituent firms may use the strategic partnership as a vehicle for organisational learning by enacting and recreating routines developed in the strategic partnership.

RESEARCH CONTEXT AND METHODS

Strategic partnerships have recently gained foothold in the Danish construction industry as a novel collaborative organisational form. A strategic partnership can be

defined as a legal frame between a 'client' and a consortium of 'suppliers' with strong focus on collaboration and sharing of organisational assets, competences and resources throughout a programme of projects to achieve specified objectives (Gottlieb *et al.*, 2020). Since 2016, six strategic partnerships have been announced in the Danish construction industry by client organisations from the public sector and the social housing sector, which is showed in Table 1.

Table 1: Ongoing and forthcoming strategic partnerships in the Danish construction industry

| Client/Sponsor | Supplier/Consortium | Estimated value | Duration |
|---------------------------|---------------------|-----------------|-----------|
| Copenhagen Municipality | TRUST | €320M | 2016-2020 |
| Copenhagen Municipality | DSP PLUS | €90M | 2016-2020 |
| FSB | HJEM | €400M | 2019-2024 |
| KAB | &os | €800M | 2019-2024 |
| Capital Region of Denmark | To be determined | €960M | 2021-2024 |
| Egedal Municipality | To be determined | €50M | 2021-2024 |

Common to the strategic partnerships is that they rely on a long-term and integrated organisational setup, which can be considered an alternative to the fragmented and project-based nature of the industry where focus typically is on short-term efficiency. Moreover, the strategic partnerships rest on the assumption that it is possible to achieve cost efficiency and diminish conflicts and disputes by: (i) dedicating multiple related projects to the strategic partnerships; and (ii) mobilising multi-firm assets, competences and resources into the strategic partnership organisations.

Establishment of strategic partnerships is thus touted as a way to obtain collective benefits such as market access, scale economies and competence development through the development of collective knowledge (cf. Larsson *et al.*, 1998). The collective knowledge in strategic partnerships is developed by encouraging joint activities and by creating new interorganisational routines (Larsson *et al.*, 1998). However, this type of knowledge is also attractive for the constituent firms in order to ensure competitive advantages and improvements of future returns (March 1991) and adopt to future demands when delivering complex construction projects (Eriksson *et al.*, 2017). Thus, an important perspective is how strategic partnerships create and change their interorganisational routines in pursuit of collective knowledge and how the constituent firms, simultaneously, learn from their engagement in a strategic partnership.

Empirical data and data collection

The empirical point of departure is the strategic partnership between Copenhagen Municipality and TRUST (see Table 1). The strategic partnership was tendered in 2016 and is organised as a €320M four-year programme comprising 40 new-build and renovation projects of schools and day care institutions in the City of Copenhagen. Copenhagen Municipality is represented in the strategic partnership with their client unit, ByK, while TRUST represents a consortium of employees from two architecture firms, two engineering firms, one landscaping firm and one contractor. The contractor, E&P, is contractual responsible on behalf of the entire TRUST consortium.

The data set used in the study consist of 22 open-ended interviews with informants from ByK and E&P, which we conducted between 2017 and 2019. This means that we have limited the empirical scope of the study to include only the two contract holders who are also the largest and most decision-intensive parties. The aim of the

interviews was to gain in-depth information pertaining experiences and viewpoints on selected research topics regarding the strategic partnership (Turner 2010). During the interviews, we used an interview guide with predetermined questions that were closely related to our research topics and thus set the scene for each of the conversations (Weiss 1995). Moreover, we asked follow-up questions when the interview questions were either too unclear to the informant or if we wanted a more thorough answer on a specific question. Each interview was audio-recorded with permission of the individual informant, and all the conversations started with a short non-audio-recorded briefing about the purpose of the study where the informant also could express his or her concerns. The informants are listed in Table 2.

Table 2: Conducted interviews

| Organisation | ByK | E&P |
|----------------------|---|---|
| Number of interviews | 12 | 10 |
| Informants | Head of Construction (x2); Head of Finance and Secretariat; Head of Office I (x2); Head of Office II (x2); Legal Director (x2); Project Manager (x2); Senior Consultant | Business Area Director; CEO of E&P; CEO of TRUST; Collaboration Developer; Head of Calculations; Head of Productions; Head of Resources; Project Director I; Project Director II; Project Manager |
| Duration (min) | Between 53 and 85 with an average duration of 68 | Between 38 and 73 with an average duration of 56 |

EMPIRICAL FINDINGS

This section is divided in three subsections. The first subsection describes joint activities and interorganisational routines that have been created in the strategic partnership in pursuit of collective knowledge development. The last two subsections describe how ByK and E&P, respectively, are in the midst of creating and changing their routines as a result of their engagement in the strategic partnership.

New interorganisational routines and development of collective knowledge

The strategic partnership between ByK and TRUST is a temporary multi-firm construct expected to achieve specified objectives in the public and private sectors through collaboration and sharing of assets, competences and resources. Public sector organisations, such as ByK, are traditionally known to be nested in a wider administrative system and conforming to a bureaucratic-hierarchical organisational form for the benefit of the public institution (Morris and Farrell 2007). Firms operating in the construction industry, such as E&P, are largely project-based (Chan *et al.*, 2005; Eriksson *et al.*, 2017), which is an organisational form associated with low degree of bureaucracy and hierarchy to make project-specific goals achievable for the benefit of the firm. The strategic partnership provides a hybridised organisational form that mix aspects of the forms found in public sector organisations as well as in project-based firms. The hybridised organisational form is supposed to facilitate creation of joint activities and new interorganisational routines allowing the strategic partnership to develop collective knowledge (Larsson *et al.*, 1998).

The strategic partnership created a hybridised organisational form by defining an overall and quite broad objective that ByK and TRUST endorsed. The objective was to balance cost and quality of the projects in the best possible way, and to build trust

among the constituent firms to diminish and resolve conflicts effectively. This objective was comparable to strategic objectives found in ByK and E&P. One of ByK's objectives was to achieve cost efficiency, as also emphasised by ByK's Head of Construction: "we have seen comparable projects at significantly lower prices in other municipalities, so it is likely that this can also be realised in Copenhagen". According to the CEO of E&P, one of their objectives was: "to get closer to our clients [and] restore the bad reputation of the industry associated with low productivity development and many conflicts". The strategic partnership's objective thus mirrored ByK's and E&P's own interests and gave incentives to work together despite of compliance to different organisational forms.

The strategic partnership promoted joint activities, work procedures and cultural aspirations, in effort to create new interorganisational routines that were considered essential in meeting the defined objective of the strategic partnership. For instance, an office dedicated to the strategic partnership was established and working from the office was mandatory for project members (i.e. employees) from the constituent firms that were allocated projects in the strategic partnership. Project members were moreover expected to adhere to the prevalent activities, work procedures and cultural aspirations in the strategic partnership. These included, among other things, new types of meetings aimed at disseminating knowledge laterally to bridge knowledge gaps between project members that had different professional backgrounds. The project members were also required to use the same hour registration system so the strategic partnership's operational management group could monitor resource usage on ongoing projects and plan resource allocation on forthcoming projects regardless of the project members' organisational affiliation. Furthermore, project members were expected to participate in weekly SCRUM sessions where all project members presented their tasks for the week and set deadlines on internal project-specific deliveries. These examples illustrate how the strategic partnership developed and extended the hybridised organisational form by promoting activities and work procedures that spanned multiple organisational forms and thereby created new interorganisational routines (Battilana and Lee 2014; Oliver and Montgomery 2000).

The strategic partnership also endeavoured to socialise project members from the constituent firms into the hybridised organisational form by nurturing cultural aspirations of how to behave as part of the strategic partnership. For instance, the strategic partnership's management group formulated a core story describing the values and beliefs that the strategic partnership wanted to be associated with and the project members had to follow and respect. The values and beliefs were, among other things that all project members had to stimulate and propagate high degrees of belonging, collaboration, empowerment, risk sharing and trust. Furthermore, all new project members had to attend so-called onboarding activities, which were an introduction to the hybridised organisational form and training in how to behave in accordance with the core story of the strategic partnership. The socialisation of project members was an attempt to conform behaviour to the activities and work procedures and thereby make the interorganisational routines more stable (Battilana 2018). It is worth mentioning, that the development of the hybridised organisational form was not as smooth as the description may indicate. Several project members were for instance replaced along the way, as they could not reconcile themselves with working in the new organisation form.

The strategic partnership thus commenced hybrid organising by creating joint activities and interorganisational routines that broke down the traditional

organisational boundaries. The hybrid organising allowed the strategic partnership to grow as a joint organisation and develop knowledge for the benefit of the entire strategic partnership. This was also expressed by ByK's Project Manager: "when a problem arises in the strategic partnership, it is a problem for all of us [...] the community is distinguished and there is way more genuine collaboration that are not guided by a contract". Hence, the strategic partnership developed collective knowledge on issues such as long-term orientation, interorganisational trust building and collective awareness (Larsson *et al.*, 1998). Moreover, the strategic partnership learned and developed gradually through the collective knowledge. For instance, a new calculation concept tailored for the strategic partnership was developed over a period of one-and-a-half-year because of ambiguity about project costs. Also, principles for involvement of the contractor, E&P, in the design phase of the projects were made to add knowledge on buildability as early as possible. This was agreed because too many projects had to be redesigned in the construction phase.

Creation and changes of routines in ByK

Following the initial work in the strategic partnership, ByK initiated changes in their own organisational routines. A new 'fourth' office (i.e. division) is established and expected to get a prominent role in ByK in coming years. The office will in the beginning be the only that does not handle any strategic partnership projects. The office is, however, likely to become a dedicated strategic partnership office in ByK if more strategic partnership tenders are prepared in the municipality. As elaborated by ByK's Head of Construction: "we are about to establish a new office in ByK and have decided that it, as the only of our office, should not be part of the [existing] strategic partnership [...] but if we prepare a new strategic partnership tender, we definitely need to consider whether we should dedicate the office to the strategic partnership". There are two reasons why ByK is reluctant to place strategic partnership projects in the new office but would reconsider if a new partnership were established. The first is that it takes a long time for employees affiliated to the office to socialise into the strategic partnership and learn the new routines. The second is that it is complex for the employees to work simultaneously in the strategic partnership and on conventional projects. ByK is thus aware that partnership-specific routines are a challenge to existing in-routines.

ByK has also established a new cross-organisational forum in an attempt to coordinate laterally in the organisation that is otherwise known to be highly hierarchic. This is emphasised by ByK's Project Manager: "when problems arise in ByK, they are often addressed in the top of the hierarchy, but they should also be addressed and managed across our organisation". The cross-organisational forum, is according to ByK's Project Manager, directly inspired by experimentation with lateral meeting types in the strategic partnership. The forum can thus be deemed as a routine that initially was explored and developed as a partnership routine, and subsequently has been transferred and adapted in ByK as a part of their efforts to coordinate laterally, which their existing routines otherwise do not support.

Ongoing evaluations of the strategic partnership is also undertaken by ByK in order to assess what can reasonably be expected and demanded if a new strategic partnership tender is prepared. This is elaborated by ByK's Legal Director: "this partnership is the beta version and if we prepare a new one it will be the first version and the one after will be the second version [...] we have already developed many paradigms together, but we must be more consistent in our needs and how to measure them". ByK is thus

aware that there not necessarily is a fit between the demands of the routines developed in the strategic partnership and in their own organisation (Bertels *et al.*, 2016).

Creation and changes of routines in E&P

In E&P, engagement in TRUST has resulted in strategic partnerships being defined as a new business area. E&P has accordingly established a new partnership division under the control of the CEO of TRUST. The new division has its own strategy and group of employees as well as processes and procedures. The partnership division was established after several discussions in E&P's board whether a strategic partnership constitutes a large project with numerous sub-projects, thus fitting within existing organisational routines, or a programme organisation requiring a new governance structure. The prevalent understanding that a strategic partnership is a hybridised organisational form that mixes multiple established forms (e.g. the bureaucratic-hierarchical organisational form and the project-based form), however, conflicted with the notion that a strategic partnership constitutes a large project. Strategic partnerships were therefore recognised as a new business area and assigned its own division. As argued by E&P's Project Director II: "TRUST is a brand-new organisation that we have built. The organisation handles project development, design and construction, and it is not typical for a contractor to work within all these areas [...] some would definitely say that it is too imaginative".

As a direct consequence of their engagement in TRUST, E&P has also adopted routines developed and tailored for use in the strategic partnership such as the new calculation concept. The calculation concept was developed as a partnership routine to deal with discrepancies associated with different institutionalised calculation routines in, respectively, public sector organisations and project-based firms. According to E&P's Head of Calculations, the concept has been adopted in E&P as it can be refined to accommodate other client organisations and thus be used to clarify discrepancies stemming from having to comply with different calculation routines.

Finally, E&P has established a career path within strategic partnerships that young employees can choose in the same way that they can choose to become traditional project managers or BIM experts. Employees who choose a future within strategic partnerships will be trained in the values and beliefs known from the strategic partnership such as belonging, collaboration, empowerment, risk sharing and trust.

DISCUSSION

Studies on hybrid organising has mostly examined hybridity from the perspective of the development of organisational forms, identities or rationales (Battilana *et al.*, 2017). In the study, we have studied hybridity from the perspective of routines to understand how the pursuit of collective knowledge in a strategic partnership shape interorganisational routines. We argue that the creation of new routines is important in the formation of hybridised organisational forms as they provide a way to manage internal and external tensions when multiple organisational forms interacts and are fused. By focusing on the level of routines, we contribute to an understanding of the diffusion of hybrid practices and their influence on firm-specific operations. Routines are patterns of action, and while these might be situated, they can also be enacted (as effortful or emergent accomplishment) across contexts and form connections with other routines (Feldman *et al.*, 2016) to create change, innovation and variation.

In the empirical findings, it was thus illustrated how both ByK and E&P create and change routines that are directly inspired by the interorganisational routines created in

the strategic partnership; ByK by creating a cross-organisational forum and E&P by adopting the bespoke calculation concept. Moreover, both ByK and E&P have established new divisions based on their experiences from the strategic partnership. ByK established their division to relieve the pressure on their employees that are allocated the strategic partnership projects. E&P established their division in effort to strengthen their market position and to exhibit their belief in the strategic partnership as a hybridised organisational form. Furthermore, ByK is part of a political reality characterised by bureaucratic-hierarchic structures and processes and thus considers the strategic partnership as an opportunity to create new routines that can help them navigate in the administrative system. E&P, on the other hand, is a project-based firm, and considers the strategic partnership as an opportunity to develop routines that can improve outcomes at project level, but also as a way to move closer to their clients by mixing aspects of multiple organisational forms. The hybridised organisational form thus implies the development of collective knowledge and the creation of interorganisational routines to allow experimentation with existing institutionalised routines associated with the bureaucratic-hierarchical form and the project-based form of organising. Moreover, the organisational form allows the constituent firms to refine and implement new firm-specific routines based on collective knowledge developed in the strategic partnership.

CONCLUSION

The objective of the paper was to explore how a strategic partnership creates new routines by developing collective knowledge, and how these routines are transferred to the constituent organisations as firm-specific routines. In the study, we have shown that the strategic partnership promotes activities, work procedures and cultural aspirations in the formation of a hybridised organisational form. We have also shown that the constituent firms learn from their engagement in the strategic partnership, which leads to creation of new and changes in existing routines. Common to ByK and E&P is that they adopt and refine routines created in the strategic partnership as firm-specific routines when they are considered attractive alternatives or add-ons to already institutionalised routines.

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