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Social Innovation in an Interconnected World: Introduction to the Special Issue*

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This introduction provides an overview of the special issue and identifies the need for continued work in the area of social innovation, which seeks to create social value and progress and engages multiple stakeholders. Our special issue highlights various levels and stakeholders involved in the process and outcomes of social innovation. While mainstream innovation, which has been traditionally driven by profit maximization motivations, tends to create winners and losers, social innovation that focuses on redistribution of knowledge, discovery, and cocreation changes the key assumptions and logics of the conventional innovation theory. This introduction first briefly outlines current social innovation literature, presents the contributions created in this special issue, and concludes with the identification of three priorities (or needs) for social innovation researchers.

Over the past two decades, social innovations have dramatically changed the landscape of worldwide societal challenges such as social inequality, poverty, pollution, energy provision, unemployment, and health care. Defined as a way to offer novel solutions that can more effectively and efficiently solve social problems and needs and ensure social progress, social innovations like Microfinance and Fairtrade labels have become the main engine of inclusive growth and social change (Cajaiba-Santana, 2014; Phills, Deiglmeier, and Miller, 2008). Several universities, including Stanford, Boston College, University of California Riverside, University of Waterloo, and University of Dublin, have established centers for social innovation. Multiple practitioner- and policy-oriented outlets such as the *Stanford Social Innovation Review* (Stanford Press) and *Innovations: Technology, Governance, Globalization* (MIT Press) have been publishing insights with the purpose of showcasing best practices in this domain for over a decade.

Interest in social innovation has been burgeoning and academic studies flourishing, producing a rich and largely case-based knowledge foundation providing insights into various aspects of social innovation. However, integrative theory development and the deployment of a broader set of empirical approaches to the topic are still lagging. In response, we sent out a call for papers of this special issue in November 2017 and received over 70 manuscripts, a record number of submissions to a special issue published by *JPIM*. While we were thrilled by the number of interested scholars, we also came to notice how fragmented the field of social innovation research was and still is. We are humbled to have had the opportunity to guest edit this special issue and appreciate the time, guidance, and support by Gloria Barczak, the editor-in-chief supporting us in this endeavor.

As the title of this special issue ("Social Innovation in an Interconnected World") reflects, the articles in this issue collectively highlight two key aspects of innovation: *social* and *interconnected*. Understanding the social aspect of innovation means examining the various stakeholders and objectives that drive organizations and individuals in their pursuit of seeking new solutions to problems that hinder social progress. Those stakeholders and objectives are anchored in a specific context (geographical, technological, cultural, etc.), which shapes and molds the innovation process. Yet, both the problems and objectives that drive social innovation are often global in nature (e.g., the United Nations' 17 Sustainable Development Goals, SDG[1])

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[1]The sustainable development goals (SDGs) were introduced by the United Nations and adopted by its member nations with the goal of achieving them by 2030 in order to ensure a sustainable future for people and planet. The SDGs were developed in response to global challenges including poverty, environmental degradation, inequality, and others. See https://sustainabledevelopment.un.org/.

and the most effective novel solutions and processes demand engagement beyond the immediate context in which the problem needs to be solved. Indeed, for novel and workable solutions to be developed and implemented, the United Nations has called for coordinated action between governments, businesses, and citizens to work toward achieving the SDGs.

BIOGRAPHICAL SKETCHES

Dr. Ruby P. Lee is a professor of marketing and director of international programs at the College of Business, Florida State University, USA. Dr. Lee received a bachelor's degree with honors from the University of Hong Kong, an M.Phil. from the Chinese University of Hong Kong, and a Ph.D. from Washington State University. She was named 2016–2017 Fulbright-Hanken Distinguished Chair in Business and Economics and invited to visit Hanken School of Economics in Helsinki, Finland. She has given lectures, invited presentations, and speeches at various universities worldwide. In addition to *Journal of Product Innovation Management*, her research has been published in *Journal of Marketing, Journal of the Academy of Marketing Science, International Journal Research in Marketing, Decision Sciences, Marketing Letters, Journal of World Business, Journal of International Marketing*, among others. She is on the editorial boards of multiple journals such as *Journal of Product Innovation Management, Journal of World Business, Journal of International Marketing*, and *Industrial Marketing Management*.

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The collection of articles in this special issue addresses the two focal aspects of innovation (social and interconnected) across a broad range of contexts and uses various methodological approaches. To properly couch the articles' collective contributions to the field of social innovation, we first briefly outlined selected literature, followed by a summary of the contributions created by the articles in the special issue to our understanding of social innovation. We conclude with an emergent future research agenda outlining three priorities for interested scholars to study.

Social Innovation: A Brief Literature Synthesis

While much research has been generated on innovation that creates social value and progress (for reviews, see, for example, Cajaiba-Santana, 2014; Phillips, Lee, Ghobadian, O'Regan, and James, 2015; van der Have and Rubalcaba, 2016), we are far from reaching consensus on either concepts or theories in this domain. Three uniquely defining characteristics of social innovation—and the research that investigates it—hinder the integration of conceptual, theoretical, and empirical insights across this body of work:

1. *Solution contextuality*. Because social value creation through innovation is anchored within a particular problem context (such as access in education or health care), the dynamics of social innovation are closely linked to specific practices within the problem domain, generating insights that are often less generalizable.
2. *Local/regional focus*. Moving beyond localities and toward an interconnected global perspective is critical yet difficult, as funding mechanisms, networks, and practices tied to social value creation are anchored in geographically bounded markets, compounding the challenges of generalizability and integration across published studies. For example, many scholars recognize that a particular social innovation may work only in a specific social-cultural and social-political context (Moulaert, MacCallum and Hillier, 2013), demanding social innovators to have strong knowledge in local laws, regulations, and other factors (de Medeiros, Ribeiro, and Cortimiglia, 2014; Tracey and Stott, 2017).
3. *Disciplinary heterogeneity*. Understanding social innovation often follows a particular disciplinary

emphasis. For example, engineering researchers investigate technology-focused problems such as carbon emissions and clinical medicine researchers examine chronic illnesses under poverty in the health-care domain. Both might be studying social innovation, but the resulting diversity in methodologies and nomenclature used represents an obstacle to the integration of generated knowledge.

These three characteristics of social innovation and the research that investigates it are reflected in articles that have been published in various journals across many disciplinary fields, showing divergent trends. We believe that such divergence comes from the fact that social innovation is defined in different ways. Theoretically, it is important to clarify the notion of social innovation and examine whether or not and how it is different from frugal innovation (Radjou and Prabhu, 2015), inclusive innovation (Im and Sun, 2015), responsible innovation (Stilgoe, Owen, and Macnaghten, 2013), sustainable innovation (Varadarajan, 2014), and among others. As highlighted above and expanded below, the definitions of social innovation vary across contexts and disciplines, leading researchers to approach social innovation in various ways. Overall, we see three general views of social innovation that emerge from the literature: *process*-, *instrument*-, and *outcome*-based.

Some scholars view social innovation as a *process*. Drucker (1987), for example, defines social innovation as a vehicle for an organization to change its resource allocation processes. According to Mumford (2002), social innovation is "the generation and implementation of new ideas about how people should organize interpersonal activities, or social interactions, to meet one or more common goals." Tracey and Stott (2017, p. 51) describe social innovation as "a broad range of organizational and inter-organizational activity that is ostensibly designed to address the most deep-rooted 'problems' of society, such as poverty, inequality and environmental degradation." Thus, social innovation is a process (Oeij, van der Torre, Vaas, and Dhondt, 2019) that involves various facilitators including agencies, institutions, and social systems (Cajaiba-Santana, 2014).

A second view of social innovation sees it as an *instrument* to solve societal issues. For example, Nicholls and Murdoch (2012, p. 8) argue that social innovations "are seen as highlighting the failure of conventional solutions and established paradigms … across all three sectors of society: private sector market failure; public sector, siloed thinking; a lack of scale in, and fragmentation across, civil society." For this reason, researchers maintain that social innovation works instrumentally to drive changes, meet social needs, and solve social problems. For instance, Mulgan (2006, p. 146) defines social innovation as "innovative activities and services that are motivated by the goal of meeting a social need."

A third approach defines social innovation based upon its *outcomes*. For example, Pol and Ville (2009, p. 881) interpret innovation as social innovation as long as "the implied new idea has the potential to improve either the quality or the quantity of life … [and is] conducive to better education, better environmental quality and longer life expectancy," among other social benefits. Consistent with this definition, Moulaert et al. (2013, p. 16) view social innovation as "finding acceptable progressive solutions for a whole range of problems of exclusion, deprivation, alienation, lack of wellbeing, and also to those actions that contribute positively to significant human progress and development." Various labels have thus developed corresponding to aspects or outcomes of innovations being studied, which broadly fall into innovation that enables social progress. Examples include: base-of-the-pyramid innovation, catalytic innovation, constraint-based innovation, environmentally sustainable product innovation, frugal innovation, inclusive innovation, responsible innovation, among others.

Though more nuanced typologies of the literature exist, even within these three broad approaches to social innovation, a set of diverse definitions are evident, driving different theoretical underpinnings to study social innovation (Moulaert et al., 2013). For example, one stream of research emphasizes the "bottom-up," emerging economies lens, generating insights from new technological advancements, user adoption, and constraint-based innovations (Agarwal, Grottke, Mishra, and Brem, 2017). Relatedly, the business model lens treats social innovation in the "activity system" (Bolton and Hannon, 2016). Through that lens, social innovation depends on the interdependent relationship between the focal firm and "its multiple networks of suppliers, partners and customers" in "a system of interdependent activities that transcends the focal firm and spans its boundaries" (Zott and Amit, 2010, p. 216).

Given the complex, large-scale, and impactful social innovation, some studies have adopted a multiple-level approach. For example, Cajaiba-Santana

(2014) simultaneously investigates the intra-social group innovations, the inter-group social innovations, and a macro level of social systems. Others focus on the structural characteristics at the meso level, such as network- and node-level variables (Alcaide Lozano, Moliner, Murillo, and Buckland, 2019) or a dynamic model that embraces agentic, relational, and situated interrelated cycles (van Wijk, Zietsma, Dorado, de Bakker, and Martí, 2018).

An Overview of Contributions to this *JPIM* Special Issue

The papers accepted in this special issue reflect to some extent the three approaches to social innovation identified (process, instrumental, and outcome). The articles collectively employ different methods and data, from case studies, experiments, to large-scale panel data, and consider a wide range of stakeholders that are engaged. We offer a brief summary of the articles below and in Table 1.

Topic 1: Social Innovation as a Process—Organizing Challenges

The first two articles provide a process perspective on social innovation, at two very different levels and in vastly different contexts. In both studies, however, the authors dive into the complexities of organizing social innovation processes, highlighting the peculiarities at a solution and network level.

In the first article "Looking for a Needle in a Haystack: How to Search for Bottom-Up Social Innovations that Solve Complex Humanitarian Problems," Kruse, Goeldner, Eling, and Herstatt (2019) examine how a lead user process is adapted to enable the identification of solutions to a humanitarian problem. In collaboration with the International Federation of Red Cross and Red Crescent Societies, this study creates a much needed link to the rich innovation and new product development (NPD) process literature. By implementing lead user and idea contest approaches in the context of floods in Indonesia, the study highlights how our standard organizational NPD processes must be adapted to social problems.

The second article in this set, by Verleye, Perks, Gruber, and Voets (2019), entitled "The Long and Winding Road: Building Legitimacy for Complex Social Innovation in Networks," takes a process perspective on social innovation at the inter-organizational network level. Based on an in-depth examination of the development of a new social service network, this study creates much-needed insights into how a variety of organizations and stakeholders attempt to create social value through new service constellations, and the critical role of legitimation processes at this level.

Topic 2: Social Innovation as an Instrument—Performance Challenges

Stephan, Andries, and Daou (2019) represent the instrumental view of social innovation, examining a panel of Belgian firms and how their pursuit of economic and social strategic goals shape knowledge seeking and innovation performance. In their article "Goal Multiplicity and Innovation: How Social and Economic Goals Affect Open Innovation and Innovation Performance," these authors suggest based on their findings that trade-offs (often perceived by managers) between social and economic goals do not exist in terms of innovation performance.

In their article "The Role of Hybrid Organizations in Scaling Social Innovations in Bottom-of-the-Pyramid Markets: Insights from Microfinance in India," Vassallo, Banerjee, Prabhu, and Voola (2019) examine three hybrid forms of organizations for social innovation. The authors empirically explore what types of hybrid organizational forms are more likely to achieve greater usage in bottom-of-the-pyramid markets, especially given market heterogeneity relating to varying levels of development and social diversity.

Topic 3: Social Innovation as an Outcome—Adoption and Uptake Challenges

Steinfield and Holt (2019) adopt a bottom-up perspective to examine subsistence marketplaces in their article "Towards a Theory on the Reproduction of Social Innovations in Subsistence Marketplaces." End users are viewed not only as beneficiaries of social innovations, but as capable reproducers of social innovations. Based on an in-depth case study, the authors develop a typology of the reproduction of social innovations and find that users are capable of reproducing despite the constraints they face in accessing resources and learning required knowledge. Bridging agents (e.g., local government representatives, community representatives, nongovernmental organizations, and social entrepreneurs) are identified as critical for co-creating and coproducing social innovation.

Table 1. Overview of Articles in this Special Issue

Authors	Research Question(s)	Theoretical Foundation	Research Design	Key Concepts	Outcomes Examined	Major Findings
Social innovation as a process: organizing challenges						
Kruse et al.(2019)	What is an effective theory-guided bottom-up search process for social innovations in the humanitarian sector? Which theory could guide this search?	Open innovation	Procedural action research	Lead user, innovation contest, and theory-guided search	Search process effectiveness, idea usefulness, and novelty	Adaptation of lead user approach is needed for an effective theory-guided bottom-up search process for the humanitarian sector to address local knowledge's stickiness and hiddenness
Verleye et al. (2019)	What types, patterns, and mechanisms of legitimacy are established when developing social new service constellations through inter-organizational networks?	Organizational legitimacy	Inductive analysis of a longitudinal case study of a social innovation (new social service constellation) in the health and social care sector	Legitimation and service networks	Internal and external legitimacy of actors and actions, and legitimation patterns in the new service constellation	Particularly in inter-organizational networks, both external and internal legitimacy are needed for social innovations. Stages, patterns, and dynamics of legitimation need to be carefully and proactively managed
Social innovation as an instrument: performance challenges						
Stephan et al. (2019)	How does the pursuit of social and economic strategic goals affect knowledge sourcing and innovation performance? Do economic and social strategic goals interact in their effects?	Strategic goals and open innovation	1257 firms in Flemish Community Innovation Survey (CIS) and regression and response surface analysis	Strategic goals, knowledge-sourcing practices, and innovation performance	External and internal knowledge sourcing, and innovation performance	A firm's emphasis on social goals indirectly impacts its innovation performance through the increased use of two key external knowledge-sourcing practices, while economic goals relate to external information sourcing and not to collaboration
Vassallo et al. (2019)	What types of hybrid organizational forms are more likely to proliferate and achieve greater usage in bottom-of-the-pyramid markets?	Organizational forms	Panel data on microfinance organizations in India from 2002 to 2006	Levels of social diversity and development	Organizational types	Quasi-profit firms are more prevalent and proved to have greater usage than the other two organizational forms in subnational bottom-of-the-pyramid markets. However, in places where development levels are low, not-for-profit firms are more prevalent and achieve greater usage; in places where social diversity are low, for-profit firms are more prevalent and of higher usage
Social innovation as an output: adoption and uptake challenges						
Steinfield and Holt (2019)	How can users in subsistence marketplaces effectively adopt and possibly reproduce social innovations?	Subsistence marketplaces and users	An inductive, case-based approach on 10 cases in Sub-Saharan Africa, including Kenya, South Africa, Mozambique, and Zambia from 2011 to 2018	Knowledge and resource complexities; bridging agents; end user	A distribution channel of a social innovation for reproduction versus adoption by subsistence user-producers	Types of reproduced social innovations ▪ Mimetic ▪ Facilitated ▪ (Facilitated frugal) ▪ Complex ▪ (Complex frugal)

Table 1. Continued

Authors	Research Question(s)	Theoretical Foundation	Research Design	Key Concepts	Outcomes Examined	Major Findings
Venugopal and Viswanathan (2019)	How do social enterprises enable social innovations by implementing changes in a local institutional environment?	Institutional work and embedded agency	Multiformat ethnographic data from 19 social enterprises spread across India (8), Tanzania (5), and Argentina (6)	A "facilitated institutional work" process for social innovation: (1) legitimating, (2) disrupting, (3) re-envisioning, and (4) resourcing	Institutional norms or practices that are required to implement social innovation	To avoid failures, social enterprises need to work with local communities to determine what aspects of local institutions must be altered and what aspects must be preserved; local communities hold social enterprises accountable for their actions
Paparoidamis et al. (2019)	How and why do consumers respond to eco-innovative product designs across various high-tech product categories?	Product design and consumer diffusion	Study 1: innovativeness degrees of eco-innovative attributes (n = 302); Study 2: eco-friendliness of eco-innovative attribute type (n = 157); Study 3: detachability of eco-innovative attributes (n = 93)	Product attribute innovativeness; product attribute eco-friendliness; and the detachability of eco-innovative attributes	Consumers' psychological and behavioral responses	Consumers express higher adoption intentions for new products with radically new eco-friendly attributes; the "greening" new product designs positively influence consumers' psychological and behavior; and the eco-innovative attribute detachability on consumers' responses has a positive impact

Venugopal and Viswanathan (2019), in their article "Implementation of Social Innovations in Subsistence Marketplaces: A Facilitated Institutional Change Process Model" investigate how to deal with the many failures and legitimacy crises among NGOs working in subsistence marketplaces. The authors examine 19 social enterprises to develop a facilitated institutional work process for social innovation with four distinct stages involving social enterprises. They bring about the institutional conditions necessary for implementing social innovations and show the significance of local communities who collaborate with social enterprises.

Using an experimental approach and focusing on end-user adoption, Paparoidamis, Tran, Leonidou, and Zeriti (2019), in their article "Being Innovative, While Being Green," extend the Bloch's (1995) model on product design and consumer response and explore how three key eco-innovative product design attributes (innovativeness, eco-friendliness, and the detachability of eco-innovative features) trigger consumers' psychological and behavioral responses to green products. In the context of eco-innovative product introductions, their study highlights the importance of novel product designs in a green category. The authors also show how consumers evaluate eco-innovative products using various mechanisms.

Where Next? Emerging Research Priorities in Social Innovation

Given the challenges associated with integrating social innovation research across domains and disciplines, it is helpful to identify specific priorities for future inquiries. Rather than developing a list of detailed research questions that present fruitful avenues for inquiry,[2] we believe that identifying broader research priorities will more effectively serve *JPIM* readers interested in conducting work on social innovation. Based on the articles in this special issue, we recognized three pressing needs for researchers in the domain of social innovation to address and thus further our collective understanding in this domain. For each of these three research needs, we identify some exemplar research questions, linking them to the articles in this special issue.

[2]See the Appendix for a detailed listing of important research questions in the domain of social innovation featured in our initial call for papers.

Research Need 1: Integration with and comparison to established organizational innovation concepts and findings. This includes rigorous comparative work that allows for specific uncovering of differences between innovation efforts that seek to create social value and progress and those more economically oriented. Exemplary research questions might be:

- How do (or must) front end of innovation practices (research, prototyping, etc.) differ between social versus nonsocial innovation projects? When and under which conditions? The study by Kruse et al. (2019), for example, identified a set of adaptations in the lead user method that are necessary for innovation in a humanitarian context.
- How is human resource management (HRM) affected when pursuing social innovation? What should incentives and positions look like to effectively pursue social innovation? The issues of legitimacy and legitimation of actors highlighted by Verleye et al. (2019) identify important implications for HRM considerations in social innovation management.

Research Need 2: Outcome-focused investigations that examine the performance implications of social innovations. Studies that integrate or compare explicitly performance aspects within or across stakeholders are particularly needed. Exemplary research questions might be:

- How do we measure the performance of social innovation? Stephan et al. (2019), for example, assess the impact of social strategic goals on overall firm innovation performance. What would be a measure of social contribution from the social goals pursued in a firm's innovation output? How would this measure relate to economic and ecological contributions from a firm's innovation portfolio?
- What are potential costs to social innovation incurred by producers, consumers, and other market actors? How do these market actors balance the cost and benefits of social innovation efforts? While Vassallo et al. (2019) evaluate three types of organizations and show that each organizational form achieves greater usage under various conditions in India and Paparoidamis et al. (2019) focus on consumer responses to green products, if the cost to providers and users are taken into consideration, would their results be different?
- Though all articles in this special issue identify the complexities of social innovation and the

corresponding high effort that is needed to implement it successfully, the implicit higher costs (in terms of time, human resources, organizing, etc.) are not measured. Work that investigates social innovation costs and compares them to the (realized) benefits would be helpful for both academics and researchers.

Research Need 3: Explicit examinations of technological aspects to social innovation. Studies that focus on how emerging technologies might influence the development of social innovation are much needed. Especially technologies that are encompassing of process and instrumental aspects of social innovation could play important roles, influencing also the design of new technological products. Exemplary research questions include:

- How do new technologies affect social innovators and their processes? What benefits of such technologies might be conditional on the type of innovation sought? Steinfield and Holt (2019) examine a set of technologies that enable the creation of social value when adopted and implemented. What broader technologies (e.g., blockchain, cloud technology, and others) might be at work to enhance social value creation and social progress through innovation? Are there downsides of specific technologies to such efforts?
- How might technologies support legitimation and acceptance of social innovations and social innovators? Venugopal and Viswanathan (2019) highlight the challenges associated with the cognitive and relational work needed to implement social innovations in subsistence marketplaces. Given that such institutional work happens in many other environments when new realities and changes arise, what can we learn from the role of technology to facilitate required processes?

In sum, driven by the pressing social needs, the field of social innovation is moving rapidly ahead. Such innovation seeks to address and recognize social value creation as an important goal by industry leaders, policy makers, and academics. We hope you will be inspired by the articles in this special issue.

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Appendix Research Questions featured in the Call for Papers (CFP) for the *JPIM* Special Issue on Social Innovation

1. Social Innovators
   a What are the motivations or inspirations driving social innovators?
   b How do entrepreneurs or innovators think about the social aspect of product innovation?
   c What are the motivations for firms from developed economies to apply social innovation in emerging economies?
   d What are the social innovation relationships or governance structures among different stakeholders (e.g., governments, NGOs, foreign/global funds, suppliers, customers)?
   e How do social innovators overcome the resource constraint and institutional barriers?
2. Social Innovations
   a What concept(s) or theory(ies) are needed to explain social innovation?
   b How is social innovation different from inclusive innovations, responsible innovations, frugal innovations, sustainable innovation, etc.?
   c What processes and mechanisms can be employed for social innovation?
   d What are different strategies, marketing, sales, or supply chains in social innovation?
3. Social Innovation Context
   a What does the ecosystem and infrastructure for social innovation look like?
   b What are social innovation's environmental, social, and economic impacts, and are those impacts constructive or destructive?
   c How do social innovators interact with their ecosystems?
   d How do new technologies, social networks, and institutional environments affect social innovators and their new breeds of innovations?
   e How do B-corp equity, crowdfunding, impactor investment, or new funding sources support social innovation?
4. Social Impacts
   a How do we measure the performance and impacts of social innovation?
   b How do players other than end users in the market such as international agencies (e.g., United Nations), local governments, NGOs, benefit from social innovations?
   c Is there any cost of social innovation? How do we balance the cost and benefits of social innovation?
5. Interconnected, Global Aspects to Social Innovation
   a How do social innovators work across market and industry boundaries?
   b How do social innovations cross market boundaries?
   c How do the different social innovation contexts across the globe enhance or challenge social innovation efforts?
   d How can the social impact be measured across market boundaries and on a global scale? Do costs and benefits accrue differentially across markets of a social innovation?