

The Social Innovation Trap: Critical Insights into an Emerging Field*

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Abstract:

We present an integrative approach to social innovation research to build a unified understanding of this emerging field. Based on a systematic literature review of articles about social innovation published in top tier journals from 2003 to 2021, we argue that a social innovation trap, resulting from disciplinary silos, has limited our inquiries thus far. We contend that the social innovation trap has led the field to overlook three key insights. First, fragmentation across disciplines obscures the particular advantages of different sectors to social innovation. Second, the dominance of management within the social innovation field has led us to ignore the extent to which social innovation is embedded in space and place, which makes scale a fundamental dimension in need of exploration. Third, the management bent within social innovation scholarship has favored market perspectives and resisted more democratic approaches. We call attention to two competing schools of thought, the instrumental and democratic perspectives, that open the field to broader inquiries into the role of innovation, knowledge, participation, and outcomes in social innovation. We conclude by delineating a research agenda that incorporates these three insights, to build the foundation for a more comprehensive social innovation field.

Over the last decade, management scholars have increasingly sought to increase their societal impact and use organizational tools to understand efforts to tackle complex social problems. Multiple institutional efforts demonstrate this growing interest: the AMJ 2016 Special Research Forum on Grand Challenges (George, Howard-Grenville, Joshi & Tihanyi, 2016), the Responsible Research in Business and Management (RRBM) position paper in 2018 calling for research that addresses problems important to business and society, the incorporation of societal impact into AACSB accreditation standards in 2020, and the 2022 Academy of Management Program Theme, “Creating a Better World Together.” Academic research has begun to focus on grand challenges (e.g., Ferraro, Etzion, & Gehman, 2015; Gümüşay, Marti, Trittin-Ulbrich & Wickert, 2022b) and interventions to address inequality in developing countries (Mair, Marti & Ventresca, 2012; Mair, Wolf, & Seelos, 2016). A robust research agenda defines and investigates social entrepreneurship (Alvord, Brown & Letts, 2004; Dacin, Dacin, & Tracey, 2011; Mair & Marti, 2006; Vedula, Dobliger, Pacheco, York, Bacq, Russo & Dean, 2021) and hybrid organizations that balance social and financial goals (Battilana & Dorado, 2010; Battilana & Lee, 2014; Smith & Besharov, 2019; Wry & York, 2017). These expanded research inquiries bring us closer to other fields with a long history of examining, and seeking to solve, complex social problems, such as public policy, urban planning, and sociology. By engaging with these other fields, and the questions and approaches their orientations offer, we can advance knowledge more broadly on profound social problems.

To advance this common pursuit, we review research in social innovation, an emergent field centered around a common aim: to advance innovative ways to solve complex social problems. The term social innovation encompasses work both within management and across disciplines that should, in theory, be in dialogue. For example, although social entrepreneurship has received much attention in social innovation (Vedula et al., 2021), this focus on new and emerging ventures excludes other actors tackling complex social problems - including governments, nonprofits, and established firms. Furthermore, inter-organizational collaborations and cross-sector partnerships are central to social innovation (e.g., DeJordy, Scully, Ventresca, & Creed, 2020; Odziemkowska, 2022) but do not fall under the social entrepreneurship umbrella. Our review incorporates diverse research streams to provide a clear research agenda for necessary inquiries in the field.

The literature review reveals that disciplinary silos have created a *social innovation trap*. By failing to consider different disciplinary perspectives, the field of social innovation currently focuses on a narrow set of inquiries that prevent us from understanding the complexities inherent to tackling large-scale social problems. The trap metaphor suggests that the field currently rests in a “local peak” where solutions only appear to be optimal and alternatives are ignored because the fuller landscape is not visible (Levinthal, 1997: 940). The social innovation trap has constrained our understanding of how social innovations emerge, occur, and take root in society, warranting critical re-direction. We do not discount the important work conducted thus far - management scholarship has generated essential insights in social innovation - but rather aim to enable a fuller and more comprehensive field to develop. We offer three insights gleaned from

breaking free of the social innovation trap, by looking beyond management and across these disciplinary silos. First, different sectors have different strengths in social innovation processes. Second, scale is a fundamental but underexplored dimension of social innovation that helps illuminate the spatial facets of social innovation. Third, more expansive positions across an ideological spectrum from instrumental to democratic approaches can extend questions and approaches beyond the dominant market-based orientation. We conclude with future research suggestions that address these insights and help the field escape the social innovation trap. Before turning to our findings, we first define social innovation and review our methodological approach.

WHAT IS SOCIAL INNOVATION?

As the field has emerged, social innovation definitions have proliferated. Logue (2019) identified several elements common across definitions, including social value for collective rather than private gain and pursuing significant and transformative change. Social innovation often entails collaboration and participation, which relate to broader, social principles of justice and empowerment (Logue, 2019; Voorberg, Bekkers & Tummers, 2015). Finally, social innovation research notes the importance of a range and diversity of potential actors (Logue, 2019; Tracey & Stott, 2017). Throughout, core facets of social innovation—from problem definition to determinations of success—are inherently political endeavors open to contestation (Lawrence, Dover & Gallagher, 2014; Slater, 2021).¹

We favor an inclusive definition to enable different research streams to engage in productive dialogue. For example, Tracey and Stott (2017) offer social entrepreneurship (efforts of new enterprises), social intrapreneurship (efforts by existing organizations), and social extrapreneurship (collaborative efforts) as a typology of social innovation research that captures the breadth of research relevant to this space. They adopt a generic definition of social innovation as one that captures both the development *and* implementation of solutions to social problems, and where benefits accrue to actors beyond those developing or implementing those solutions (see also Mulgan, 2006; Nicholls & Murdock 2012). The transformative social change described in social innovation focuses attention on human needs that have been neglected or imperfectly addressed by markets, by the government, and by the nonprofit sector (Moulaert & MacCallum, 2019; Santos, 2012; Seelos & Mair, 2017). To this end, social innovation seeks to “fundamentally change the relationships, positions, and rules” of the status quo, in large part to address current deficiencies (Voorberg et al., 2015: 1334). Some definitions focus on novel outcomes, while others focus on processes for enacting social change.

Synthesizing work to date, we define social innovation as a novel process or product that intends to generate more effective and just solutions to address complex social problems for collective gain. This definition encompasses both market-oriented innovations and processes

¹ Following Moulaert (2010), we refer to ‘political’ here as openness to “contestation, dispute and differential claims” (6). In contrast, depoliticization refers to closing down this potential for contestation.

focused on justice and equity. It includes both the development and implementation of solutions. Next, we examine the social innovation literature and build a theoretical framework that illuminates the challenges of research to date. We use these insights to offer a potential path forward for the field.

METHODS

We conducted a systematic review of the academic social innovation literature by searching 28 journals for articles published between 2003 to 2021.² Because social innovation has various definitions, we selected articles based on six keywords: social entrepreneurship, social innovation, social enterprise, grand challenges, wicked problems, and public sector innovation. With this approach, we sought to include common topics across fields and disciplines, but we acknowledge that we likely missed relevant articles that used different keywords. We included articles where at least one of these terms appeared in the article title, abstract, and/or as an article keyword. For example, we only included research on social movements, NGOs, and corporate social responsibility if they used one of our keywords.

We searched across disciplines, including management, public management, public policy, urban planning, and sociology.³ We chose these disciplines because bibliometric reviews of social innovation suggest management and public policy/planning are the two dominant clusters (Silveira & Zilber, 2017; van der Have & Rubalcaba, 2016). We searched across the following journals: *Academy of Management Annals*, *Academy of Management Discoveries*, *Academy of Management Journal*, *Academy of Management Review*, *Administrative Science Quarterly*, *American Journal of Sociology*, *American Sociological Review*, *Journal of Business Ethics*, *Journal of Business Venturing*, *Journal of Planning Education and Research*, *Journal of Policy Analysis and Management*, *Journal of Public Administration Research and Theory*, *Journal of Social Policy*, *Journal of the American Planning Association*, *Management Science*, *Organization Science*, *Organization Studies*, *Planning Theory*, *Planning Theory and Practice*, *Policy Studies Journal*, *Public Administration Review*, *Public Management Review*, *Research Policy*, *Social Forces*, *Social Policy and Society*, *Strategic Management Journal*, *Strategic Organization*, and *Urban Studies*. We searched both top-tier journals and second-tier journals to account for the possibility that a new field may emerge from the periphery or in sub-areas within mainstream dialogues (see Online Appendix Table A1 for a full list of articles by journal). We exclude *Stanford Social Innovation Review* (an outlet that seeks to bridge research and practice) because we are focused on the academic conversation, although we acknowledge this exclusion limits our view of the field. Finally, based on our own knowledge of the field, we added 38

² We ended the search on October 15, 2021. The beginning point for our time frame corresponds with previous literature reviews suggesting the field began a “take off” phase in 2003 (van der Have & Rubalcaba, 2016, p. 1927). Further, *Stanford Social Innovation Review* was founded in 2003.

³ We also searched five top geography journals and found no substantive conversation on social innovation. As a result, we did not include these journals in our corpus. However, we draw on geography literature in our second insight.

journal articles and eight books that are important to social innovation but not included in the initial literature review scope. Given the speed at which the field is developing, we reference articles published after October 2021, but they are not included in our analysis of the corpus discussed below.

Our approach yielded 428 journal articles and books (referred to as articles throughout the paper). We read each abstract and retained only articles related to social innovation. This reduced our final sample to 319 articles and books. Most social innovation articles appear in management (73%) and used the keywords social entrepreneurship, social enterprises, and social innovation (47%, 22%, and 14% of management articles, respectively). Social innovation is the topic of 29% of policy articles in our corpus (with 23% examining public sector innovation, and 23% social enterprise).

Based on an inductive and iterative analysis of these 319 abstracts, we coded key aspects of social innovation: impetus, mechanism, market, participation, and scale (see the Online Appendix for descriptive tables). We reviewed the full-text of articles that were highly cited or particularly exemplified a code or area of the literature. The codes emerged inductively through conversations about the abstracts. Not all abstracts could be coded for each concept.

Impetus identifies where social innovation originates or the primary agent of change, coded as: individuals, organizations, community, and/or government. *Mechanism* reflects how change is understood to occur or where the levers of social change are theorized— such as identifying whether the study focused on developing new organizational structures, forms or processes; or how social innovation processes leverage new relationships or collaborations. The majority of articles had a clear impetus (71%) and mechanism (61%). *Market* captures whether market-based solutions are explicitly discussed (0/1). Roughly a third of the abstracts reference markets. *Participation* describes the extent to which social innovation involves participation of, and engagement with, local stakeholders. We coded articles that referenced limited engagement of constituents or stakeholders (coded as 1) or that referenced more substantial shifts in decision-making power (coded as 2). We consider this latter category “inclusive participation,” which suggests a deep and influential engagement of stakeholders, intended beneficiaries, or the broader public across the social innovation process. Only 10% (33 articles) of articles in our literature review explicitly address participation.

Finally, we coded for *scale*. This aspect emerged last, after early rounds of coding and analysis. As we will show, social innovation inherently focuses on particular places and social contexts, making scale a relevant consideration and an important area of inquiry for the field. A core concept in the geography discipline, scale captures the importance of spatial units of analysis; for example, the concept of scale helps distinguish geographies and levels of political jurisdictions. Many abstracts did not mention place (coded as 1), and others mentioned place as it related to data collection but without reference to the meaning or importance of place (coded as 2). Scale was considered an aspect of the article when abstracts referenced details about place (coded as 3), such as by discussing contingencies of a place or state context, or when abstracts centered their analysis in a place or scalar inquiry (coded as 4). Twenty percent of articles were

coded as substantively engaging place (coded as 3 or 4). We expand upon this concept in the sections that follow.

THE SOCIAL INNOVATION TRAP

Our review of the social innovation literature reveals a field divided by disciplinary silos and dominated by management. This research landscape forms the basis for a *social innovation trap* that has limited the field's efforts to understand social problem-solving by obscuring three key insights. The social innovation trap is inspired by Elinor Ostrom's (1996) "conceptual trap" critique (Logue, 2019). As Ostrom famously states, "the great divide between the Market and the State or between Government and Civil Society is a conceptual trap arising from overly rigid disciplinary walls surrounding the study of human institutions" (1073). To this end, she argues for a "bridging of the gulf" in our theory and analysis to foster synergy across "our academic barriers" (1083). At the time, the conceptual trap produced governance frameworks that reflected the opposing, totalizing approaches of either privatization *or* regulation, rooted in distinct academic conversations. Ostrom used the conceptual trap insight to show how this binary choice set overlooked potential, alternative governance solutions, such as those combining aspects of regulation, privatization, and collectivism, which could sometimes prove more effective in social problem-solving.

In a similar way, we leverage insights from our literature review – and our conversations as a multidisciplinary author team – to assert that the social innovation field has produced its own trap. Disciplinary silos have not only fragmented the field but afforded management an outsized influence on the field's development. By addressing our three insights, social innovation research can illuminate a broader and more effective array of social problem solving tools. Although the term social innovation is used across multiple academic disciplines,⁴ these research streams rarely engage directly with each other. Bibliometric reviews of social innovation substantiate these siloed disciplinary research clusters (Silveira & Zilber, 2017; van der Have & Rubalcaba, 2016).

Furthermore, given the different sectoral focuses across disciplines, management has largely studied firms, while the other disciplines tend to examine government and grassroots action. Within management,⁵ social innovation is seen to occur through individuals and organizations (85% of the articles). For example, multiple papers study how the social entrepreneur's motivations (such as values, empathy, and compassion) shape organizational founding and later decisions (Bacq & Eddleston, 2018; Miller, Grimes, McMullen & Vogus, 2012 ; O'Neil & Ucbasaran, 2016). In contrast, policy, planning, and related disciplines study social innovation through more varied sources, with government and the broader public viewed

⁴ For simplicity, we refer to management, public policy, planning, and sociology as disciplines, although management, public policy, and planning might be more accurately considered as fields of study.

⁵ We theorize about the implications of a social innovation trap for management research. This trap may also exist for other disciplines studying social innovation.

as important stakeholders (44%). The non-management literature often assumes government needs to be part of solutions (Hofstad, 2011; Laegreid & Rykkja, 2021).

In addition, this varied sectoral focus across discipline leads management scholars to largely focus inwardly on organizational structures, forms, and processes for engaging in social innovation (61%; see also Table 2 in Wry & Haugh, 2018). Much of this research focuses on the nature, benefits, and challenges of hybridity (Battilana & Lee, 2014; Seelos & Mair, 2007; Shepherd, Williams & Zhao, 2019; Smith & Besharov, 2019; Wry & Zhao, 2018). The dual mission of social enterprises can conflict, reflecting incompatibilities between revenue generation and the social mission (e.g., Osorio-Vega, 2019). The literature focuses on the extent to which the conflict within dual missions manifests itself in decision making and organizational operations (e.g., Pache & Santos, 2010; 2013). The management literature dominance has yielded less attention to the role of governments and communities in social innovation efforts, instead primarily focusing on the internal workings of organizations. Although an important subset of management research focuses on relationships and collaborations (20%), a full 37% of non-management papers take this approach.

These fragmented disciplines are particularly problematic given the field of study: social innovation addresses complex social problems, which necessarily span places, social actors, and social contexts. As a result, these investigations are difficult if not impossible to understand from the perspective of any single sector or discipline. Social innovation in the context of grand challenges, for example, requires partnerships, regulatory infrastructure, and understanding the interconnectedness of contemporary social problems (Gümüşay, Marti, Trittin-Ulbrich & Wickert, 2022a), which suggests expertise and conversations outside of the management realm. Moreover, the dominance of management within social innovation has led the field to orient itself within the priors and biases of the management field, leading the social innovation field to have disproportionately focused on organizations as a unit of analysis and markets as the dominant framework.

Altogether, following Ostrom's logic, these disciplinary silos and the dominance by management have not only segmented the field, but shaped—and limited—the set of questions that have emerged to investigate social change (Silveira & Zilber, 2017; van der Have & Rubalcaba, 2016). Without moving beyond the disciplinary silos, we reach a dead end in our theorizing. Herein lies the social innovation trap.

In the sections that follow, we draw from the literature to describe the social innovation trap that has constrained research and debates in the field. We glean three insights to identify areas for future research in the field that help us escape the social innovation trap.

Insight 1: Different Sectors have Different Strengths

The first insight obscured by the social innovation trap is that different spaces and sectors of society have particular strengths and weaknesses that ultimately shape how social innovations are understood and evaluated. The disciplinary silos driving the social innovation trap ignore

how different sectors approach social innovation. It is only by looking across these sectors that we can recognize each sector’s unique potential for supporting social impact. Further, the functions and relative advantages of sectors differ across context—for example, the role and authority of government institutions in China as opposed to the United States—underscoring the importance of foregrounding the relationships between and across sectors in social innovation research.

Insert TABLE 1 about here

Sectoral Strengths. Public sector research, including public policy and planning, focuses on the role of government institutions and other public organizations. From this work, we observe that public institutions are uniquely positioned to diffuse innovation to the population-level, through their funding mechanisms, inherent longevity, rootedness in place, and ability to embed social change into public policies (Borras & Edler, 2020; Hofstad, 2011; Rosen, O’Neill & Hutson, 2018). Relatedly, the coercive power of the state—that is, the public sector’s authority to legislate, regulate, and tax—is essential to enabling social innovations to become embedded into and transform systems (a goal of social innovation). Although a central pillar of institutional theory (e.g., coercive isomorphism; DiMaggio & Powell, 1983), the role of government is rarely theorized in the social innovation field. As shown in Table 1, examples like welfare reform, healthcare reform, and carbon markets demonstrate the enormous potential for leveraging the public sector’s unique position to tackle social problems by transforming systems across entire populations and jurisdictions.

In contrast, much of management research has focused on organizational adaptation and learning, as well as understanding innovation and the adoption of new strategies. Building on extensive research on innovation capabilities (Curley, 2016; Jeppesen, 2021), organizations are crucial locations for piloting and experimentation (Demircioglu & Audretsch, 2017; Ferraro et al., 2015; Luo & Kaul, 2019). These questions motivate research on social entrepreneurs, social enterprises, and hybrid organizations (focused primarily but not exclusively in the private sector). With effective solutions tested, organizations can seek to replicate, grow, or scale their ideas (André & Pache, 2016; Busch & Barkema, 2021; Henriques, Mair & Beckman, 2022; Seelos & Mair, 2017). For example, Busch and Barkema (2021) describe the process by which a community organization in South Africa scaled their efforts to over 20 locations worldwide.

Finally, those organizations and actors representing civil society, including grassroots movements, community advocacy, and related nonprofit organizations, are well positioned to deeply engage with affected populations. Sociology, public policy, and planning literature all highlight how grassroots approaches can support wider participation and provide local knowledge, given their relationship to local residents and affected populations. These grassroots efforts place inclusive participatory processes on center stage (Andrews & Biggs, 2006;

Gonzalez, Moulaert, & Martinelli, 2010; Rosen & Painter, 2019). Gram Vikas provides a common example of inclusive participation in the social innovation literature, where the organization vests the local community with decision-making authority, enabling sustainable innovation (Chowdhury & Santos, 2011; Mair et al., 2016; Santos, 2012; Seelos & Mair, 2017). Other emerging social movements, like Black Lives Matter (BLM), have mobilized on the ground to advocate for new policy innovations and institutional change.

Altogether, these research streams suggest that sectors promote social innovation and social change in vastly different ways. Importantly, these sectoral differences in where and how to engage social innovation processes are often implicit in these literatures (but see Luo & Kaul, 2019). While we do not want to reify these sectoral advantages, we use this division to encourage a sensitivity to the unique possibilities of each sector, as well as the potential for combining their activities. The strength of the sector in a given institutional context further impacts what the sector can accomplish (e.g., the development of the public sector in Canada vs. Bangladesh, or the role of NGOs and private firms in these countries).

Existing Cross-Sector Research. Thus far, we see two broad areas where cross-sector research has developed. First, research has recognized sectoral interdependence. For example, efforts to grow social innovations are often limited by a lack of resources, and actors seek funding from other sectors. Strategies like earned-income, which provide financial resources for organizations to scale without seeking external funding, are only possible for a subset of organizations engaged in social change. Social innovations ideas can obtain grassroots funding through crowdfunding and other platforms (Logue & Grimes, 2022). Bringing diverse sets of funders to the platform, however, requires crafting an institutional infrastructure that enables the platform to appeal to multiple stakeholders. Cobb, Wry and Zhao (2016) find that financial and development actors (representing the private and public sectors, respectively) fund different types of microfinance organizations, reflecting their different underlying logics and rationalities. Philanthropists in the nonprofit sector also bring distinct theories of change that shape how they evaluate and fund social innovation (Ventresca & Savaget, 2020); for example, Di Loenzo and Scarlata (2019) examine the role of venture philanthropy as a particular funding source in India. Interdependencies with other sectors also shape how social innovations emerge and evolve. For instance, Zietsma and Lawrence (2010) describe how forestry firms in British Columbia initially convinced governmental actors to set policy and enact legislation to protect the practice of clearcutting. When environmental activists pressured a leading industry firm, the government's power to relax regulation and convene multi stakeholder committees were critical agents for large changes to industry practice.

Second, the social innovation field has focused significant research attention on a particular set of innovative institutional arrangements—cross-sector collaborations—as the possible pathway to reconcile divisions across sectors. Investigating cross-sector collaborations has a rich history (Gray, 1985), and represents a particular focus of research on grand challenges (Howard-Grenville & Spengler, 2022). Weber and Khademian (2008) argue that the privileged attention these collaborations enjoy reflects their ability to address the ambiguity and complexity of social

problems, leverage capacity from various sectors, create new knowledge and shared learning across sectors, collectively govern resources, and establish shared goals. A significant subset of cross-sector research describes ways in which actors build common understandings to effectively collaborate despite their differences (Di Domenico, Gray & Purdy, 2018; Di Domenico, Tracey & Haugh, 2009; Lawrence, Hardy & Phillips, 2002; LeBer & Branzei, 2010; Selsky & Parker, 2010; VanTulder & Keen, 2018).

Despite this enthusiasm for cross-sector partnerships, a more critical perspective follows from Swyngedouw (2005), who highlights that cross-sector partnerships sometimes do not meet their promise of democratization, horizontal decision-making, and increased participation. Indeed, cross-sector partnerships can undermine the public sector and democratic goals by creating markets for public goods (Eikenberry & Kluver, 2004; Hall, Alcock & Millar, 2012). Further, collaborations face coordination challenges (Cristofoli, Meneguzzo, & Riccucci, 2017; Purdy, 2012) and can be thwarted by power asymmetries (Gray, Purdy & Ansari, 2022; Hardy & Phillips, 1998) that can reduce their ability to tackle grand challenges (Couture, Jarzabkowski & Lê, 2022).

This first insight highlights the distinct sectoral advantages for social change and possibility for cross-sector collaboration. Next, we explain how the disciplinary silos underlying the social innovation trap lead the field to overlook considerations of scale.

Insight 2: Scale is a core dimension of social innovation

The emergence of the social innovation field from fragmented disciplinary conversations has obscured a second key insight: scale is a core aspect of social innovation. Social innovation scholarship recognizes levels of analysis as important units of consideration (i.e., individuals, organizations, fields; van Wijk, Zietsma, Dorado, de Bakker & Marti, 2019). However, scale, understood as “units of different spatial resolution,” references ontological and epistemological facets of space and place (Agnew, 1994; Brenner, 2001; Dittrich, 2022; Marston, 2000; McMaster & Sheppard, 2008, p. 14; Moore, 2008; Sayre & Di Vittorio, 2009; Swyngedouw, 1996). We contend that scale poses a particularly important consideration given the field’s attention to grand challenges, which are inherently situated in places and, by definition, span geographies. Yet almost half of the abstracts we reviewed do not mention a place of inquiry (30% of the empirical papers). Another 31% mention place but do not theorize about the role of place (e.g., data was collected in the Western U.S.). This is particularly notable in management. Only 16% of the management articles situate or center their analysis on scale or place (compared with 31% of the non-management articles).

By failing to consider the nuances of place and space, the social innovation trap obscures the importance of scale. Yet, the attributes of scale can enable social innovation research to more deeply theorize social contexts, as well as efforts to translate across contexts. As highlighted in Table 2, scale has many potential facets that are relevant for social innovation inquiries. First, *environmental* facets of scale refer to features of the natural and built environment. For example,

built environment characteristics, such as the location of new bridges, shape the innovations of new ventures in a region (Dutta, Armanios & Desai, 2022). Second, *political* features of scale refer to the different political jurisdictions that can influence the social innovation context. For instance, how cash-based assistance is utilized in a refugee camp can only be understood in reference to the political context in which the camp resides, which includes the national scale but also the activities of local governments (Gatzweiler, Frey-Heger & Beckman, 2023). Third, *economic* characteristics can frequently be understood as relating to scale, referring to the varied availability of financial resources across spatial units like counties or countries. For example, Wry and Zhao (2018) demonstrate how the quality of market-supporting institutions in the local context shapes the social and financial trade-offs that social enterprises make. Fourth, scale can have *cultural* features, such as when religion, identity, or caste varies across spatial units. Mair et al. (2012) report how the exercise of property rights among women in Bangladesh are influenced by the cultural and religious understandings embedded in local villages. Fifth, demographic distributions, networks, and the constellation of actors in a given locality highlight the *relational* aspects of scale. For example, Dutta (2019) shows how community-level factors such as racial and economic segregation influence the emergence of social entrepreneurship (see also Dutta, 2017). Sixth, scale can be shaped by *historical* characteristics. For example, the historical effects of redlining (Molotch, Freudenburg, & Paulsen, 2000) influenced the development of urban tree canopies, which impact the local effects of climate change (Locke et al., 2021).

Articulating these facets of scale help clarify what scholars mean by “context.” Research has incorporated context; for example, scholars have studied how social norms and the geographic and institutional environments in a region shape the effectiveness of governmental policy in stimulating entrepreneurial activity or the growth of sustainable industries (Meek, Pacheco & York, 2010; Russo, 2003; Sine & Lee, 2009). However, the umbrella concept of scale provides an organizing construct for distinguishing the various aspects of context that shape social innovation, which can help scholars identify patterns across places and contexts.

Scale is also relevant to understand processes of scaling. It is important to clarify that scale is not the same as size or scaling (Bansal, Kim & Wood, 2018; Bowen, Bansal & Slawinski, 2016). Scaling can be understood as spreading social innovations to more people and places, to increase impact (Dees, Anderson & Wei-Skillern, 2004; Molecke & Pache, 2022), and it is related to a broader literature on diffusion (Naumovska, Gaba & Greve, 2021). Scaling in the social innovation literature can include organizational implementation, replication, or spreading programs, practices, or ideas (Busch & Barkema, 2021; Dees et al., 2004; Seelos & Mair, 2017). Scaling often involves other institutional actors, such as governments and international actors to proliferate change strategies and embed new practices into institutions. Social innovation efforts frequently require leveraging, shifting, or transforming institutions at regional, statewide, national, and even global scales (Moulaert, Martinelli, & Swyngedouw, 2005). Research on scaling can bring a deep understanding of the ecosystem and institutional context in which social innovation occurs (Bacq & Eddleston, 2018; Mair et al., 2016; Smith, Kistruck, & Cannatelli, 2016).

Viewing scaling in terms of scale and its different facets helps identify the dynamics that can emerge in this process. Scaling is not as a neutral process, but rather an inherently relational process with power dynamics, where actors have varying influence over which policies get adopted, where, and how (Colven, 2020; Peck, 2011; Slobodian & Plehwe, 2022). For example, local and global elites leveraged their influence to promote a large seawall in Jakarta to address the issue of land subsidence (sinkage) over promising solutions sought by local actors (Colven, 2017; Colven, 2020). Thus the facets of scale, here the environmental, political and relational, can shape the scaling process and, ultimately, the outcomes produced.

We see efforts to address the complexities of scale among management scholars examining the challenge of translating ideas across institutional distances (Claus, Greenwood & Mgoo, 2021; see Wedlin & Sahlin, 2017, for an overview), such as moving an idea from the U.S. to Italy (Tracey, Dalpiaz & Phillips, 2018).⁶ For example, Italy and the U.S. may differ based on social norms, laws, culture, and governance structures that manifest differently—within and across countries. The attributes of scale help predict how these scaling and translation efforts will unfold.

Next, we draw attention to two specific scalar dynamics relevant to social innovation.

Social innovation contexts involve multiple scales. Social innovation is situated within the multiple scales in which people and places reside.⁷ In the above example of attempting to move a social innovation from the United States to Italy, it is not only the national scale that introduces relevant attributes. Rather, the environmental, political, economic, cultural, relational, and historical attributes of social innovation—at the national, state, and more local levels—can arise across multiple scales. For instance, consider whether the social innovation is deployed in Northern versus Southern Italy, within a large city or rural village, or in a coastal or inland region. Translation efforts are operating across multiple scales simultaneously. They may also occur in a *nested* manner—for example, two neighboring villages in Italy may vary in local government, but exist within the same region and national context. Therefore, the local context is shaped by not just the national scale, but rather the global, local, and intermediary scales of a particular place (Brenner, Peck & Theodore, 2010a; Brenner, Peck & Theodore, 2010b; Peck & Theodore, 2007). Altogether, these dynamics illustrate the multiple, interacting, and sometimes nested nature of scale.

Further, different powers, resources, and advantages reside at different scales. For example, the potential for collective action is easier in localized contexts, where populations tend to be more homogenous (Dittrich, 2022). Further, the coercive powers of the state are located not just within government, but within government at particular scales. In the United States, for example, the national and state governments have powerful regulatory and taxation authorities. However, local governments are largely granted the ability to regulate land use, which gives

⁶ See research on policy mobilities for a discussion of this topic in geography and public policy.

⁷ Scales are not neatly hierarchical, fixed entities, but rather scales should be understood as overlapping and inherently interrelated. Smaller scales are not necessarily fully contained within broader scales (Agnew, 1994; Cox, 2013; McMaster & Sheppard, 2008).

local governments unique and important powers over land development and local planning. Therefore, as social problems like inequality exhibit varying local expressions, different tools to solve social problems reside at different scales (Benner & Pastor, 2015; Dittrich, 2022; Mair et al., 2016; Ostrom, 2012). To enact a particular solution requires activating the tools available at the appropriate scale(s) for intervention—underscoring the insight that scale is an inescapable consideration for the social innovation field.

Social innovation must contend with an inherent tension of scale. The tension of scale in social innovation reflects the divergent goals of simultaneously attending to the local context while pursuing avenues to transform broader institutional arrangements. Scaling represents a frequent, ultimate objective of social innovation: to spread strategies that work across populations and places. Yet this must happen simultaneously with situating social innovation in its local context (Chatterjee, Ghosh, & Leca, 2022; Moulaert, Martinelli, Swyngedouw, & Gonzalez, 2005). Therefore, the social innovation endeavor is not just a process of simultaneously operating across multiple scales, but implicitly seeks to “jump” scales (Smith, 2008).

Although explicit attention to this tension in social innovation is somewhat rare, research is beginning to study this scalar tension. Building on early conversations about scaling (Dees et al., 2004), Westley et al. (2014) call attention to the different ways in which social innovations can spread, including “scaling up” (moving towards impact across broader geographies) and “scaling out” (extending solutions across new locations). Chatterjee et al. (2022), in a study of childhood malnutrition in India, show how actions move across scales. They recognize the unique position of higher level actors such as government agencies to enact promising solutions into policies that reach broader populations. They show how a NGO’s flexible engagement across scales worked with and accommodated governmental priorities and mandates, engaging other grassroots actors in ways that extended activities to new places.

One possibility to resolve this tension of scale focuses on the need to flexibly adjust to dynamic local contexts while providing structure to direct action across space. For example, Zellner and Campbell (2015) argue that the application of complex systems approaches can help address wicked problems because this framework is founded in flexibility, iteration, and adaptation based on collective learning. Gatzweiler et al. (2023) also engage in a scale-sensitive inquiry by studying a particular social innovation, cash based assistance that is enacted through global institutions, like the World Bank and United Nations (i.e., UNHCR). Flexibility allows service-providers to implement cash-based assistance in ways that work in their locales while providing enough structure to create common meaning and understandings across locales. Contrasting with Chatterjee et al. (2022), Gatzweiler et al. (2023) detail a more top-down approach where global entities work to embed the practice, flexibly, across local contexts. Both the top-down and bottom-up examples probe the tension of scale by studying efforts to simultaneously pursue large-scale social changes while situating social innovation into local contexts.

The tension between scaling up and situating in place requires the simultaneous enrollment of different sets of actors and institutions across scales. For example, as solving climate change requires activating the potential for global governance through the United Nations, it also requires coordinating and working through national and sub-national governance bodies, including local governments, while attending to different local manifestations of the problem. Each scale matters, shaping not just context, but offering the potential for intervention. Attention to scale provides us with clear direction as to the relevant actors and attributes of study because it is insufficient to contextualize social innovation only in local communities, as the examples of the UN in climate action and cash based assistance reveal. Thus, centering scale in social innovation inquiry and explaining its various attributes offers a promising step forward to tackle this seeming “paradox” of diverging local and global considerations (George, Baker, Tracey & Joshi, 2019).

Beyond obscuring the importance of scale, the disciplinary silos and dominance of management in the social innovation space also orients the field towards market-based approaches, which reveals the third insight we derive from the social innovation trap.

Insight 3: The Bias Towards the Instrumental School of Thought

The siloed disciplinary landscape of the social innovation field obscures that the field is characterized by two competing perspectives: an instrumental one, based in market approaches to social problems, and a democratic one, which seeks open participation and just distributions for social transformation (Ayob, Teasdale & Fagan, 2016; Montgomery, 2016; Moulaert & MacCallum, 2019).⁸ Following the management bias in social innovation and the dominance of market-oriented governance frameworks in contemporary liberal democracies, the field favors instrumental frameworks. This limits the scholarly questions asked and the empirical investigations pursued (Moulaert & MacCallum, 2019; Sandel, 2012).

To preview these two perspectives, in the instrumental framework entrepreneurs are viewed as experts that drive social innovation. This instrumental approach reinforces existing, hierarchical power structures, while emphasizing market-oriented goals such as productivity, competition, and measurable social impact. In contrast, under the democratic perspective, a wider range of actors hold expertise and can drive social innovation, which creates a more diffuse power structure and challenges existing social relations. Furthermore, this approach treats members of the public as actors that can be mobilized through political and social consciousness, to promote broader social change. Democratic organizing emphasizes non-hierarchical designs,

⁸ These schools of thought have been described using a variety of terms. ‘Instrumental’ has been termed ‘technocratic’, ‘entrepreneurial’, ‘utilitarian’, and ‘minimalist’ by different authors (Ayob et al., 2016; Bouchard, 2013; Moulaert et al., 2005; Montgomery, 2016; Unger, 2015; for a history of these terms and paradigms, see Moulaert & MacCallum, 2019). We use the term ‘instrumental’ because it captures the idea of a means to an end, where markets are seen as a means to solve social problems, rather than ‘democratic’ which seeks broader transformations. The term ‘democratic’ highlights formal processes that are focused on just distributions, open participation and broad decision rights, and joint stakes in decisions (Battilana et al., 2018).

participation and shared decision rights, and a joint stake in the outcome (Battilana, Fuerstein & Lee, 2018; Battilana, Yen, Ferreras & Ramarajan, 2022).

We do not interpret these perspectives as entirely distinct nor totalizing in effect. Rather, these divergent frameworks represent two poles of a broad spectrum of potential approaches to social innovation (Moulaert & MacCallum, 2019), where a particular social innovation can fit into instrumental and democratic approaches in heterogeneous ways. Table 3 unpacks the different elements of instrumental and democratic approaches.

Insert TABLE 3 about here

Means of Innovation refers to the fact that the instrumental and democratic perspectives differ in how ideas emerge and are validated. Instrumental approaches emphasize the role of markets in motivating and shaping social innovation. The instrumental approach largely focuses on creating socially responsible products within markets (such as sustainable goods; Alt & Craig, 2016; Sine & Lee, 2009; Weber, Heinze & DeSoucey, 2008), bringing new actors to entrepreneurship to reduce inequality or poverty (such as women; Venkatesh, Shaw, Sykes, Wamba & Macharia, 2017), or supporting the emergence of new markets for marginalized actors (such as microfinance or crowdfunding; Cobb et al., 2016; Moss, Renko, Block & Meyskens, 2018; Seelos & Mair, 2007). Within management, 30% of all articles explicitly discuss markets in their abstract (note that this does not capture articles where a market framework is implicit).

In contrast, democratic perspectives suggest that social innovations frequently emerge outside of market frameworks, emphasizing engagement and advocacy. To this end, democratic social innovations advance solutions from cooperative models to challenge food systems and property ownership paradigms, to broader social movements that support social change through democratic participation (Ashforth & Reingen, 2014; Battilana et al., 2022; Mayer, 2009; McFarlane et al., 2021). For example, Mothers Against Drunk Driving (MADD) mobilized resources to transform cultural understandings of driving under the influence, and enabled change in federal laws to discourage drunk driving (Fell & Voas, 2006; McCarthy & Wolfson, 1996). The advocacy and engagement of mothers who had lost children to drunk driving produced a successful campaign that transformed the public understanding of drunk driving, and created an innovative organizational structure to sustain momentum in tackling this problem (Fell & Voas, 2006; McCarthy & Wolfson, 1996). The social innovation of MADD is defined by the novel organizational structure, advocacy tools utilized with a range of public and private actors, and how they facilitated a fundamental shift in the public's understanding of drunk driving.

Knowledge refers to sources of expertise. Instrumental approaches often take for granted that essential expertise and necessary information comes from entrepreneurs and technical

experts who offer unique ideas, resources, and means to tackle social problems. Entrepreneurial vision, emotions, and experience are seen as key factors for the emergence of social innovations and social entrepreneurship (Bacq & Alt, 2018; Miller et al., 2012; Waddock & Steckler, 2016). The instrumental perspective advances a top-down approach to knowledge creation, issue framing, and expertise more generally. The concept of entrepreneurial opportunity recognition, prevalent in entrepreneurship writ large, highlights the role of founders in discovering new social venture opportunities (Tracey, Phillips & Jarvis, 2011; Wry & York, 2017; Yitshaki, Kropp & Honig, 2021; Zahra, Gedajlovic, Neubaum & Shulman, 2009), albeit acknowledging that founders are embedded in particular communities (Vedula, York & Corbett, 2019).

In contrast, democratic approaches incorporate a wider range of expertise across social innovation processes (Montgomery, Dacin & Dacin, 2012). For example, community enterprises are an organizational form that draw on the expertise of local communities (Tracey, Phillips, & Haugh, 2005). Local knowledge is seen as valid and important to understand and address social problems, and democratic governance processes ensure that local residents have the opportunity to share their knowledge. However, to date very few articles in social innovation writ large explicitly note the community as a source of knowledge and impetus for innovation (4% of those where impetus was coded).

Participation refers to the extent to which social innovation processes involve a wide range of affected stakeholders. Papers drawing on the instrumental approach often focus on the value of stakeholder engagement to achieve better outcomes (e.g., Barnett, 2007; Lumpkin & Bacq, 2019). For example, Ferraro et al. (2015) describe “participatory architecture” as important to resolving grand challenges, which are “a structure and rules of engagement that allow diverse and heterogeneous actors to interact” (373). From the instrumental view, participation helps identify social innovation solutions. This perspective limits control—if not fully, then at least partly—over problem framing, experimentation, or implementation to recognized stakeholders and experts. In the instrumental perspective, we often see stakeholder engagement at the beginning of the process (Dentoni, Bitzer & Pascucci, 2016; Phillips, Alexander & Lee, 2019), and decision making rights are reserved for entrepreneurs or those in leadership roles. These approaches preserve existing power distributions and influence social innovation, as those with the power to define the problem shape the range of solutions considered (Giridharadas, 2019).

In contrast, democratic-oriented social innovations challenge existing resource distributions and structures in order to create processes and outcomes that can disrupt the status quo (McFarlane et al., 2021; Voorberg et al., 2014). Importantly, these approaches call for structuring participation to enable greater decision rights, not satisfied with psychological empowerment and voice (Bacq & Aguilera, 2022; Battilana et al., 2018). We see Gram Vikas developing the capabilities of local villages to build and manage all aspects of water sanitation services in their communities (Chowdhury & Santos, 2011; Mair et al., 2016; Pless & Appel, 2012; Santos, 2012). Participation can also be seen as a component of justice writ large (Blue et al., 2019). Rosen and Painter (2019) offer coproduction participatory frameworks to understand how a collective impact organization, committed to long-term engagement and iterative

participation, shifted to address multiple topics important to the community that were not included in their initial efforts. From this perspective, coproduction enables participants to challenge all aspects of social innovation, from problem framing to determining who gets to participate. Others call attention to how entrenched, systemic barriers can misdiagnose the problem, let alone find a resolution, which calls forth the need to shift power dynamics (Frey-Heger, Gatzweiler & Hinings, 2021; Gray et al., 2022). Despite its centrality to social innovation, we see limited attention to participatory processes in the abstract (10%), with half detailing more limited engagement strategies (most consistent with the instrumental perspective).

Outcomes capture different approaches to evaluating effective and just solutions—the ultimate goal of social innovation. The instrumental perspective is most concerned with effectiveness and privileges market-oriented goals of efficiency and productivity. For example, social enterprises create economic opportunity by hiring marginalized residents, which also promotes revenue-generation for the organization (Tracey et al., 2011). This dual model of providing employment opportunities and generating profit has been embraced widely in the social innovation space, as have efforts to expand entrepreneurial activity as a way to tackle social problems (Sine & Lee, 2009; Venkatesh et al., 2017). In this way, instrumental perspectives focus on a social problem like fostering economic opportunity for marginalized populations by creating new markets or providing employment opportunities. Furthermore, the instrumental perspective views metrics as a catalyzing force for social innovation and as critical to develop (Millar & Hall, 2013; Santos, 2012; VanSandt et al., 2009).

In contrast, democratic perspectives are most attentive to the justice component of outcomes. This approach emphasizes how costs and benefits are distributed across populations, to advance more just distributions. The democratic perspective sees activism and other pathways to achieve more just distributions as central to social innovation. Relatedly, the democratic perspective seeks to empower actors, but here empowerment refers to developing new social and political capabilities. For example, Blanco and León (2017) describe how urban mobilization in Barcelona not only improves outcomes for residents but politically engages marginalized populations. Importantly, these goals may be longer-term and more difficult to measure than instrumental social innovation goals.

It is important to note that instrumental and democratic outcomes can sometimes work in concert, but other times conflict. When these goals align, instrumental solutions improving efficiency, for example, also accomplish larger democratic outcomes. Mair, Wolf and Seelos (2016) describe how access to clean water and sanitation also reduces gender and health inequalities in villages in India (see also Haugh & Talwar, 2016). However, instrumental and democratic outcomes often conflict. For example, Sandel (2012) discusses the emergence of instrumental, market-oriented social innovations to address climate change, including carbon markets, carbon offsets, and tradable pollution permits. Under carbon markets, actors can exchange carbon credits—essentially trading their ability to pollute—to set limits on carbon emissions. From a democratic perspective, however, carbon markets create a problem: they allow wealthier polluters to continue and sometimes extend their activities, potentially

concentrating pollution in less resourced communities. Democratic approaches focus on climate justice and aim to transform the system to be more equitable and just (Wright & Nyberg, 2019), recognizing that marginalized communities are more vulnerable to the effects of climate change (despite being the least responsible for it).

By viewing the social innovation field as an ideological continuum with multiple dimensions, rather than a sharp divide, we advance a nuanced view that reflects the complex and multi-faceted nature of social innovation, social actors, and social contexts more generally. For example, community enterprises (Tracey, Phillips & Haugh, 2005) fall across the ideological spectrum with both democratic and instrumental features: these organizations advance democratic sources of knowledge and participation while falling squarely within the instrumental perspective by relying on market-based tactics.

To summarize, a social innovation trap, derived from disciplinary silos, has limited the field's inquiries and broader understanding of social innovation. Our literature review illuminates three key insights obscured by this social innovation trap. First, different sectors have particular strengths and limitations, which shapes their possibilities for enacting social change and pursuing social innovation. Second, the social innovation endeavor requires an appreciation of the multiple scales that shape context. Social innovation must also confront the tension of scale: the goal of scaling solutions that work to enact broader social change, while ensuring that innovations work within particular, localized contexts. Third, we call attention to the instrumental and democratic schools of thought underpinning the field, to avoid privileging market perspectives and approaches promoted by the instrumental perspective.

AN AGENDA FOR SOCIAL INNOVATION RESEARCH

With the social innovation trap and insights moving us beyond the trap thus summarized, we draw from each insight to identify and direct the field toward these areas of needed inquiry.

Incorporating the First Insight: Activating Sectoral Advantages

By recognizing the social innovation trap and revealing sectoral advantages, we call for research to explicitly explore the unique advantages of different sectors, how these advantages can be leveraged, and the sectoral challenges to be addressed. For example, the cross-sector collaboration literature often emphasizes common problem-solving in a way that does not necessarily reflect the opportunities or constraints faced by different sectors. Recalling Zietsma and Lawrence (2010), a sectoral analysis of the collaboration between industry and environmental activists would draw out the regulatory and convening power of government, the power of advocacy by social movement organizations, and the possibilities for experimentation by the private sector as generalizable insights of cross-sector collaborations. Similarly, rather than creating policies that are intended to encourage the private sector to engage in prosocial behavior, which can be quite narrow (Gatignon & Bode, 2023), we might approach policy

questions with a view to leverage sectoral strengths (e.g., rather than firms being required to engage in CSR activities, perhaps firms should be mandated to fund a broad set of non-profit activities). Insights such as these can help scholars identify barriers that can frustrate social innovation, such as the particular challenge of fragmentation for organizing at the grassroots level or how cross-sector collaboration processes can narrow organizational attention to a collective response and in so doing hinder the ability to tackle grand challenges (Couture et al., 2022).

Another approach is to consider the temporal sequencing of sectoral actors in social innovation processes. For example, organizational efforts may be best focused on early stage idea iteration, with scaling best directed by or coordinated with other sector actors with more resources or regulatory powers. Santos (2012) describes such a scenario where Unis-Cité developed a civic service program to create a sense of cohesion among unemployed youth in France. Unis-Cité created and piloted a program in several cities with good results but experienced difficulty securing the resources to scale. It was not until civil unrest in the French suburbs that the government realized the problem of youth integration. In response, the government provided funding that enabled Unis-Cité to scale. Here we see the impact of civil society, through youth protests, as the impetus for the government to attend to the issue, as well as resources enabled by eliciting a public sector response. Understanding the temporal aspects along with the role of private sector organizations as they interact and work alongside actors in the public sector and grassroots actors will deepen our scholarly understanding of social innovation and social change in profound and important ways.

We also see possibilities to expand management inquiries by engaging with the insights of other disciplines. For example, management scholars should treat government agencies not just as organizations but as political institutions with particular tools that can be leveraged to advance broader change but that also face constraints. Management research can also learn from grassroots inquiries, where organizations and social movements are often uniquely positioned to engage residents and understand their lived experiences, in order to generate new insights into social innovation in more inclusive, equitable, and effective ways.

Incorporating the Second Insight: Understanding Scale and its Implications

Understanding scale requires attention to two inherently scalar aspects of social innovation. First, the insight that social innovations are embedded within multiple scales suggests new opportunities for understanding social innovation contexts. Schools, for example, are organizations nested within multiple scales, including districts and states. While scalar relationships can be fluid and transcend hierarchical orderings, the scalar nature of regulatory powers in which schools exist (both within districts and states) shapes the organization and operation of schools. More broadly, examining context in terms of its scalar attributes enables a nuanced understanding of which actors are or should be engaged, the scales at which their influence and interests may lie, and the ways in which their activities may be enabled or

constrained by these features. For example, returning to Mair et al. (2012) and their examination of efforts to build inclusive markets in villages across Bangladesh, a scalar inquiry might consider how the community, political, and religious institutional spheres they detail vary across scales, reflecting interacting regional, divisional, and national attributes. For example, the infrastructure of a given village may depend on the region in which it is situated or its topography, and the village is shaped too by the economic conditions in Bangladesh writ large. Understanding the scale at which relevant characteristics occur can help identify relevant patterns in their manifestation, which can inform the translation of social innovation across contexts. We call for social innovation research to incorporate scale as a variable of interest in its inquiries since the multiple scales in which social innovations take place frequently shape the context, behavior of actors, and social outcomes in varying ways.

Further, by identifying the inherent scalar tension in the social innovation field, we acknowledge that the goal of spreading social innovations (to move to broader scales) frequently conflicts with the goal of ensuring that social innovations work in particular contexts (to remain or become local). These diverging pressures of scale highlight that transformative social change frequently requires broad-scale efforts at the same time that the embedded nature of social problems means that social innovation is uniquely local (Chatterjee et al., 2022; Moulaert, Martinello, Swyngedouw, & Gonzalez, 2010). In discussing humanitarian crises in 2016, UN secretary general Ban Ki-Moon characterized this tension for the UN when he called for the agency to be “as local as possible, as international as necessary” (UN, 2016). Fundamentally, social innovation scholars must study the potential compatibilities between, and barriers to, situating and scaling social innovation. For example, California emissions policy directs automakers to particular standards and thus pushes policy across states and often to the federal level, given the sheer size of the California automobile market. In addition, a large number of cities across the U.S. committed to the Paris Agreement in response to federal inaction. Focusing on the scale of these efforts, and the relationships between action across scale, helps to anticipate the challenges and impact of these actions, as well as to study interventions and their outcomes at the appropriate scalar unit and resolution. Just as the unit of analysis shapes how we understand social innovation and related outcomes (Henriques et al., 2022), so too does the spatial unit(s) of analysis.

Scholars need to consider and articulate the rationale for the scale(s) of inquiry in their research designs. This is because the scalar unit is consequential: measurement at one scale may provide contrary evidence at a different scale.⁹ Because scale has ontological and epistemological features, it is also important to recognize the social construction of scale and its consequences. Smith and Stevens (2010) note that different types of entrepreneurs operate with different scales in mind (from the local to the global), which implicates their networks, metrics, and scaling strategies (see also Zahra et al., 2009). Furthermore, scholars should consider scales

⁹ The resolution, or spatial unit at which analysis is conducted, can impact the conclusions reached through geographical analysis. This insight can produce statistical bias: see, for example, the Modifiable Areal Unit Problem (McMaster & Sheppard, 2008; Wong, 2009).

beyond the spatial scale discussed here. For example, the temporal scale of inquiry - such as short or long-term impacts - also differ across scale. By examining only short-term outcomes, scholars can obscure long-term impacts (Bansal et al., 2018). Altogether, the way social innovation inquiries are designed, including the spatial and temporal units of analysis deployed, can shape how we perceive their efficacy.

Incorporating the Third Insight: Centering the Democratic Perspective

Instrumental and democratic perspectives shape social innovation in complex and far-reaching ways: from the way that participation is envisioned, to the goals of social innovation itself. Yet markets have become depoliticized - the unquestioned status quo. This poses a consequential challenge for the field: the dominance of the instrumental perspective can narrow the set of potential interventions available and considered within social innovation. For the social innovation field to effectively solve complex social problems, the field must be able to challenge existing systems, institutional frameworks, and current resource distributions when problems necessitate deeper social change. This calls attention to the need to draw out the democratic aspects of social innovation.

Means of Innovation. For social innovation to create solutions that effectively address grand challenges, the field must consider more than innovations that emerge and are validated through entrepreneurs in markets. By foregrounding social problems, the appropriate and relevant spaces for instrumental and democratic innovations can be explored. This may enable social innovation scholars to see a fuller array of social innovation efforts and interventions. Furthermore, this insight suggests that it would be fruitful for the social innovation field to more deeply engage with social movements literature. For many grand challenges, from gun violence to climate change to racial injustice, at least part of the solution is necessarily democratic: to change social consciousness and shape the policy agenda. To return to the example of Mothers Against Drunk Driving, the movement's policy success hinged on making the act of drunk driving socially taboo and an appropriate space for government intervention (Fell & Voas, 2006; McCarthy & Wolfson, 1996). To engage with the social consciousness dimensions of grand challenges, however, the field must contend with agnotology, or the social construction of ignorance, recognizing that many grand challenges persist because of, and in relation to, organized, resourced political interests that have a stake in the social problem continuing (Rayner, 2012; Slater, 2021). Scholars can study new organizing tools and strategies, such as social media and the mobilization of youth in the Sunrise movement and gun violence movement, as social innovations. Further, democratic success can enable and support markets. Many market-based social innovations in environmental sustainability, for example, have depended on greater environmental consciousness. This suggests ways in which the field can study the connection between the instrumental and democratic perspectives.

Knowledge. By foregrounding the democratic perspective, a wider range of voices can be considered experts, lending perspectives that may challenge our underlying social structures and

systems. Furthermore, it is important to consider what knowledge is excluded. For example, Peredo, McLean & Tremblay (2019) ask what is distinctive about indigenous social innovation. They point out that traditional and ancestral knowledge sources are often ignored in social innovation despite bringing expertise in areas such as environmental sustainability and land management. It is also important to understand how power-holders shape the understanding and articulation of knowledge. As Khan, Munir & Willmott (2007) detail in their case of child-labor soccer balls manufacturing in Pakistan, powerful actors shape how knowledge is shared and interpreted in ways that silence other truths. In Pakistan, eliminating child labor did not address poverty wages and perpetuated poor outcomes for women and children, but this knowledge was left in the “shadows” (despite this knowledge being clearly articulated by marginalized women and children).

Participation. Instrumental perspectives can undermine or co-opt broader democratic participation (Mayer, 2009; Mouleart et al., 2005; Rosen & Schweitzer, 2018). Social innovation efforts may need to transition from instrumental to democratic conceptualizations of participation over time in order to secure both immediate and long-term change. For example, drawing from the earlier example of co-production in a collective impact initiative (Rosen & Painter, 2019), long-term change could only be pursued through an iterative process that drew out relevant social problems and, ultimately, changed which stakeholders engaged and to what end. When community members or marginalized populations are left out of decision making processes, there is not the participation necessary for procedural justice. We encourage the field to embrace participation as a foundational element of social innovation.

Outcomes. A disproportionate attention to market outcomes can undermine democratic social innovation outcomes by creating harmful social spillover effects. Markets are not neutral social institutions, but rather they can fundamentally reshape the context for social innovation, the social problems they intend to solve, and society more generally (Sandel, 2012). For example, creating markets around carbon emissions (including carbon markets and carbon credits) can lead to a reduction in emissions, but it also changes how people think about the act of polluting and, relatedly, each actor’s obligations to environmental stewardship. As Sandel (2012) explains, a carbon market “entrenches an instrumental attitude toward nature, and it undermines the spirit of shared sacrifice that may be necessary to create a global environmental ethic” (76). When actors care less about polluting because of their changed relationship to pollution and the environment, they lose a stake in democratic outcomes, such as the just distribution of costs and achieving significant progress in solving climate change.

As a result, the social innovation field must embrace opportunities to debate the appropriate and inappropriate spaces for markets, the proper design of instrumental social innovations, and the relevant outcomes to pursue. Indeed, the social innovation field cannot avoid larger political conversations about the role of markets in society (Henderson, 2020) and must be able to consider options to transcend, constrain, and sometimes even deliberately counter, market ends. Consider again the example of microfinance. Muhammad Yunus, the founder of Grameen Bank, relied on market mechanisms to tackle poverty and gender inequality,

with the goal of transforming systems through microfinance (see Zahra et al., 2009). This is an instrumental means of innovation because it relies on market mechanisms, and Yunus created a market with a hybrid mission. However, in the process of creating a market, new actors were drawn into the space - market actors with different underlying motives and more focused on profit (Cobb et al., 2016; Munir, 2014; Yunus, 2011). The profit-seeking actors abandoned some of the practices that worked to tackle inequality (such as loan officers who developed relationships with borrowers) and ultimately undermined the democratic aims of transforming the system (Dorado & Fernández, 2019). The aggregate social impact of microfinance, then, cannot focus on Grameen Bank alone but must consider the ecosystem created and the aggregate effects of multiple organizational efforts, not all of whom may be pursuing social innovation goals. Such examples lead critics of the instrumental perspective to question whether democratic outcomes such as system transformation can be achieved with instrumental market-mechanisms (Giridharadas, 2019; Munir, 2014).

Integrating the Insights from the Social Innovation Trap

Taken together, future research should consider how the insights presented here may interact. For example, how does the inherent scalar tension of attending both to the local and global work alongside the democratic perspective? What are the important distinctions and compatibilities between social innovations operating at a local scale and those focused on democratic outcomes? How do social innovation efforts take advantage of sectoral expertise while pursuing democratic processes of knowledge generation and participation? How does our understanding of sectoral advantages and the balance of instrumental and democratic perspectives change when considered in national contexts with different interests, governance structures, and with power residing at different scales? Finally, we articulate a rationale for more research into democratic social innovations, but this partially reflects the market-oriented focus of current research (although not fully, as democratic aims are particularly important to justice oriented innovations). In a less market-oriented time, what are the limitations of democratic perspectives for social innovation?

A Call for Attention to Inherent Features of a Social Innovation Field

Scholars studying *social* innovation must remember that social problems are contested and subject to different views of what constitutes the problem and their appropriate solutions (Ferraro et al., 2015; Lawrence et al., 2014). Framing our social problems and how to tackle them is an inherently political endeavor that has broad social implications, which underscores the need for wide participation throughout the social innovation process—starting with problem definition (Slater, 2021). This is also where our focus on academic discourse rather than work that bridges research and practice may limit our inquiry. The interplay between research and

practice is particularly important in the social innovation field because issues on the ground, experienced by practitioners, can support democratic processes and reveal more effective solutions. If we had included *Stanford Social Innovation Review* in our analysis, for example, we might have observed a larger role of philanthropy in social innovation, as philanthropy is a practice-focused voice that is very involved in the social innovation space. The extent to which philanthropy embraces democratic or instrumental perspectives may have a large impact on social innovation efforts on the ground.

Relatedly, the field also must attend to moral and ethical considerations related to the study of society, social groups, marginalized populations, and related interventions to attempt social change (here we disagree with Santos, 2012). If social innovation studies social value creation, then it cannot avoid issues that management scholars frequently view as normative: beyond questions of economic efficiency, the field must consider questions of equity, justice, morality, social difference, and social obligation. For example, moral and ethical considerations arise in both experimentation and the evaluation of social innovation research. These activities, and the considerations they produce, are integral to the field and must be interrogated. As management treads further into the intellectual territory of social innovation, it can learn from disciplines that have long engaged with these questions, including public policy, urban planning, geography, anthropology, and sociology.

Furthermore, studying social *innovation* can create two consequential biases. First, the field risks under-appreciating existing solutions. Sometimes the most promising solutions are long-standing ones that can be either considered or approached in new ways, or treated with new importance when elevated as social policy. In a similar way, effective solutions might sometimes require dismantling or rethinking past, embedded practices that were once innovations. For example, solving climate change will require us to think about our dependence on the automobile—a one-time innovation that now drives carbon emissions. This perspective suggests that social innovation must also create the potential for undoing or subtracting, which can be difficult (for example, the automobile industry is deeply vested in the persistence of vehicular travel) (Klotz, 2021; Vinsel & Russell, 2020). Second, by emphasizing innovation and the creation of new markets, the field risks overly valorizing innovation. Social innovations can sometimes create harm, such as with the development of microfinance. Altogether, not all innovations advance social progress, nor create beneficial outcomes (Alvarez León & Rosen, 2020; Vinsel & Russell, 2020).

Finally, the creation of a coherent field to study *social innovation* faces the difficult task of being applicable to a multitude of grand challenges. Yet, effective social innovations for one grand challenge can undermine progress toward another. For example, solutions to global economic inequality that advance industrialization can undermine climate change solutions; conversely, policies that call for strict emissions targets can frustrate efforts to pursue economic development and build critical infrastructure. This potential for conflicting social progress is why climate and environmental justice advocates call for understanding the interrelated nature of economic and environmental inequality, to advance solutions that are beneficial along both ends

(Gümüşay et al., 2022; Schlosberg & Collins, 2014). In addition, beyond the issue of potential negative externalities, social innovations may not easily translate across grand challenges: effective solutions for one issue may not be successful for another.

Altogether, social innovation research reminds us that grand challenges are, by definition, complex problems. Thus, the study of social innovation to address these issues must attend to these complexities through a nuanced, grounded approach that also appreciates the larger landscape. The insights we derive from the social innovation trap framework provide a potential roadmap for the field to expand its walls and broaden its impact. We call for non-management scholars to bring their perspectives to the social innovation field, and for management scholars to embrace a broader conceptualization of social innovation. These distinct research streams should also engage in mutual learning through interdisciplinary collaboration, to pursue cross-sectoral, multi-scalar, and democratically-sensitive research that can more effectively inform strategies to solve our contemporary social problems.

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TABLE 1
The Silos of the Social Innovation Trap

	Examples of social innovations	Inherent strengths
Public Sector: Government and other public organizations	Welfare reform; health care reform; carbon markets/cap and trade	Diffuse and embed through public policy
Private Sector: For-profit and market-oriented non-profit organizations	Social entrepreneurship, social and community enterprises, cooperatives, hybrid organizations	Innovation and piloting
Civil Society: Grassroots organizing, community, and related nonprofits	Black Lives Matter, Gram Vikas	Inclusive participation

TABLE 2
Different Attributes of Scale

	Examples of Scale	Examples in Literature
Environmental: Natural and built environment	Topography (e.g., rivers, oceans) Euclidean distance	New bridges and foundings (Dutta et al., 2022) Location of oil in Santa Barbara and Ventura (Molotch et al., 2000)
Political	City, state, federal, global power of institutional actors	Cash-based assistance for refugees across countries (Gatzweiler et al., 2023) Malnutrition in India (Chatterjee et al., 2022)
Economic	Resource availability	Market-supporting institutions shape social-financial trade-offs (Wry & Zhao, 2018)
Cultural	Religion Caste Identity groups	Differences across four LBQ cities (Brown-Saracino, 2015) Sanitation in Bangladesh villages (Mair et al., 2012)
Relational: Networks and other social factors	Demographic distributions Networks	Patterns of segregation and social entrepreneurship (Dutta, 2019)
Historical: Historical characteristics and path dependencies	Across spatial dimensions (geographic, political, cultural, relational)	Redlining and urban tree canopies (Locke et al., 2021)

TABLE 3
The Two Poles of the Social Innovation Field

	Instrumental	Democratic
Means of Innovation	Innovations emerge and are validated through entrepreneurs in markets	Innovations emerge and are validated through engagement or advocacy
Knowledge	Narrow expertise in entrepreneurs, elites	Shared expertise, in community and broader public
Participation	Participation is a tool to achieve a specific end: need a diverse set of stakeholders to improve innovations	Inclusive participation is an end in itself, because it aims to achieve procedural justice and encourage shared power
Outcomes	Measurable social value creation; targeted economic improvement; efficiency; productivity; expanded markets	Social value creation through more just distributions of costs and benefits and/or increased social and political capabilities

ONLINE APPENDIX

TABLE A1

Distribution of Social Innovation Articles By Journal from 2003 to 2021

Source/ Journal	Number of articles	Percent
Journal of Business Ethics	91	29
Journal of Business Venturing	44	14
Public Management Review	40	13
Research Policy	23	7
Organization Studies	13	4
Academy of Management Journal*	11	3
Social Policy And Society	10	3
Urban Studies	10	3
Public Administration Review*	8	3
Academy of Management Review*	5	2
Organization Science*	5	2
Strategic Management Journal*	5	2
Administrative Science Quarterly*	4	1
Journal of Social Policy	3	1
Planning Theory & Practice*	3	1
Academy of Management Discoveries	2	1
American Sociological Review*	2	1
Planning Theory*	2	1
Academy of Management Annals	1	0
Journal of Planning Education and Research*	1	0
Journal of Policy Analysis and Management*	1	0
Journal of Public Administration Research and Theory*	1	0
Management Science*	1	0
Policy Studies Journal*	1	0
Social Forces	1	0
Strategic Organization	1	0
Other	30	9
Total	319	100

**Coded as top-tier journals*

Note: Two additional top-tier journals were included in the search for all social innovation articles: American Journal of Sociology and Journal of the American Planning Association. Neither of these journals yielded articles that met our inclusion criteria.

TABLE A2
Number and Percent of Articles by Social Innovation Term and Discipline

Social Innovation Keyword	Discipline			
	Management	Policy	Planning & Sociology	
Social Entrepreneurship	109 <i>46.98</i>	10 <i>12.99</i>	0 <i>0.00</i>	
Social Enterprise	50 <i>21.55</i>	18 <i>23.38</i>	0 <i>0.00</i>	
Social Innovation	33 <i>14.22</i>	22 <i>28.57</i>	7 <i>70.00</i>	
Grand Challenges	26 <i>11.21</i>	1 <i>1.30</i>	0 <i>0.00</i>	
Wicked Problems	8 <i>3.45</i>	8 <i>10.39</i>	3 <i>30.00</i>	
Public Sector Innovation	6 <i>2.59</i>	18 <i>23.38</i>	0 <i>0.00</i>	
	Total	232 <i>100</i>	77 <i>100</i>	10 <i>100</i>

TABLE A3
Number and Percent of Articles by Impetus and Discipline

Discipline	Organization/ Individual	Community / Government	Total
Management	137 <i>85.09</i>	24 <i>14.91</i>	161 <i>100</i>

Non-management	37	29	66
	<i>56.06</i>	<i>43.94</i>	<i>100</i>

TABLE A4
Number and Percent of Articles by Mechanism and Discipline

Discipline	New organizational form	New relationships/ collaborations	Social Movements	Financing	Other	Total
Management	87 <i>60.84</i>	29 <i>20.28</i>	7 <i>4.9</i>	11 <i>7.69</i>	9 <i>6.3</i>	143 <i>100</i>
Non-management	20 <i>38.46</i>	19 <i>36.54</i>	5 <i>9.62</i>	3 <i>5.77</i>	5 <i>9.61</i>	52 <i>100</i>
Total	107 <i>54.87</i>	48 <i>24.62</i>	12 <i>6.15</i>	14 <i>7.18</i>	14 <i>7.18</i>	195 <i>100</i>

TABLE A5
Number and Percent of Articles by Discipline and Place/Scale

Place/Scale	Management	Non-management
Unspecified place and place limited	194 <i>83.62</i>	60 <i>68.97</i>
Place and place centered	38 <i>16.38</i>	27 <i>31.03</i>

Total	232	87
	100	100

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