

**SOCIAL INNOVATION: INTEGRATING MICRO, MESO AND MACRO LEVEL
INSIGHTS FROM INSTITUTIONAL THEORY**

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Forthcoming, Business & Society.

March 15, 2018.

Abstract

Social innovations are urgently needed as we confront complex social problems. As these social problems feature substantial interdependencies among multiple systems and actors, developing and implementing innovative solutions involve the re-negotiating of settled institutions or the building of new ones. In this introductory article we introduce a stylized three-cycle model highlighting the institutional nature of social innovation efforts. The model conceptualizes social innovation processes as the product of agentic, relational and situated dynamics in three interrelated cycles that operate at the micro, meso and macro-levels of analysis. The five papers included in this special issue address one or more of these cycles. We draw on these papers and the model to stimulate and offer guidance to future conversations on social innovations from an institutional theory perspective.

Keywords

Social innovation; institutional theory; institutional change; grand challenges

Introduction

Social innovations are urgently needed as we confront complex social problems such as climate change, urban mobility, poverty alleviation, income inequality and persistent societal and endemic violent conflict. Variously called “wicked problems” (Rittel & Weber, 1973), “metaproblems” (Trist, 1983), or “grand challenges” (Ferraro, Etzion & Gehman, 2015; George, Howard-Grenville, Joshi & Tihanyi, 2016), these problems feature substantial interdependencies among multiple systems and actors, and have redistributive implications for entrenched interests (Rayner, 2006). As such, developing and implementing novel solutions to social problems often involves re-negotiations of settled institutions among diverse actors with conflicting logics (Helms, Oliver & Webb, 2012) or the building of new ones so as to “change the basic routines, resource and authority flows, or beliefs of the social system in which the innovation occurs” (Westley & Antadze, 2010: 2). This special issue addresses such institutional processes and in this introductory article, we explore how insights from institutional theory contribute to our understanding of such profound changes.

Institutional scholars increasingly study efforts to alleviate social, economic, and environmental problems (e.g., Amis, Munir & Mair, 2017; Helms, et al., 2012; Mair, Wolf & Seelos, 2016). Their work offers an alternative lens on social innovation relative to those offered by other theoretical perspectives, such as stakeholder management, corporate social responsibility, and cross-sector partnerships. These perspectives have advanced management knowledge on the interface between business and society (de Bakker, Groenewegen, & den Hond, 2005; Frynas & Yamahaki, 2016; Scherer & Palazzo, 2011). Yet, these studies often take the perspective of businesses attempting to gain benefits or reduce risk by acting on societal problems (Griffin & Prakash, 2014; Vock, van Dolen & Kolk, 2014), without focusing on the views of other actors, or even ignoring them altogether (Ansari, Munir & Gregg, 2012; Banerjee, 2008; Nahi, 2016). Shallow “benign” business interventions may deflect attention, and often maintain existing power structures which can even reinforce ‘darker’ aspects of wicked problems (Khan, Munir & Willmott, 2007; Martí, forthcoming; Tracey & Stott, 2017). Moreover, most studies on social innovation start at the micro-level, foregrounding the social innovator who addresses dire social needs that the market or state have failed to (adequately) address (Dacin, Dacin, & Tracey, 2011). Institutional theory instead foregrounds the macro-level, assessing the positions and actions of interdependent actors in institutional contexts (DiMaggio & Powell, 1983), and considering seriously the idea that rules, norms and beliefs are socially constituted, negotiated orders (Martí, Courpasson & Barbosa, 2013; Strauss, 1978), which can be renegotiated to promote social innovations (Van Wijk, Stam, Elfring, Zietsma & den Hond, 2013). Social innovators are central, but so are the social orders that influence and pattern their action.

The five papers included in this special issue advance an institutional theory-based understanding of social innovation. They explore a variegated set of issues including social inclusion in a South American

metropolis, green products/services in Europe, participatory governance in Brazil, addiction treatment in Canada, and green information systems in the US. In all, the institutional setting of reference plays a central role. We start this introductory article setting out a stylized three-cycle model highlighting the institutional nature of social innovation efforts. The model emerged from exploring how institutional theory enhances understanding of social innovations, drawing on the common themes that emerged from the five papers in this special issue. We situate the model in the literature and then discuss the five papers in the context of the model's cycles. We further highlight the cross-cutting theme of unintended consequences and morality in social innovation processes. The introduction closes by elaborating on how this model, and the papers from which it draws, stimulate and offer guidance to future conversations on social innovations from an institutional perspective.

Introducing the Three-Cycle Model of Social Innovation

There is much discussion about the meaning of social innovation (Edwards-Schachter & Wallace, 2017; George, Baker, Joshi & Tracey, 2018; Moulaert, 2013), almost to the extent that “the term is ‘overdetermined’” (Edwards-Schachter & Wallace, 2017: 64). Social innovation for us describes the agentic, relational, situated and multi-level process to develop, promote and implement novel solutions to social problems in ways that are directed towards producing profound change in institutional contexts (see also Lawrence, Dover & Gallagher, 2014; Cajaiba-Santana, 2014). We understand this process as embedded and self-reflective, and that it may be coordinated and collaborative, or that it may be the emergent product of accumulation, collective bricolage and muddling through daily work (Garud & Karnøe, 2003; Smets, Morris & Greenwood, 2012). We further emphasize that what is central to this understanding is that social innovations are able to address a persistent problem only insofar as they gain permanence through their institutional embedding (Moulaert, 2009). Social innovation efforts then depend not only on the will of actors to see them through but also on the institutional conditions that frame them. These conditions may be too uncertain for social innovations to gain traction. For example, efforts to bring healthcare to children in Palestine gained but temporary standing in the form of proto-institutions (Lawrence, Hardy & Phillips, 2002). Conditions can also be intransigently settled for change to be something more than spurious. For example, efforts to alleviate the living conditions of children in Sialkot, Pakistan failed to unhinge the structural economic conditions that define them (Khan et al., 2007). Even when conditions are settled enough, embedding efforts require both time and ‘on the ground’ involvement to make social innovations institutionally ingrained. Examples of social innovations that address a persistent problem and have produced profound social change include technological innovations such as the birth control pill (Eig, 2016), policy decisions such as the creation of natural parks (Westley, McGowan, Antadze, Blacklock, & Tjornbo, 2016) and innovative practices such as microfinance (Bornstein, 1996).

The five papers in this special issue all describe diverse complex social problems, distinct solutions in different stages of development, very different actors and very different institutional contexts. There are, however, noticeable commonalities and complementarities in their empirical narratives. Building on them and existing literature on social innovation and institutional theory, we suggest a three-cycle model of social innovation processes (see Figure 1).

Insert Figure 1 about here

The model depicts three cycles that are firmly interconnected. The first cycle zooms in at the micro-level on (embedded) individuals, proposing that actors become more agentic through their interactions with others. In these interactions, they experience emotions which enable them to hear and understand others' viewpoints, stimulating reflexivity, challenging their taken-for-granted perspectives, and partially (or wholly) disembedding them from their governing institutional environment, creating room for new, innovative perspectives to enter their thinking and acting. The emotional energy of these interactive processes fuels their will to engage in agency. The second cycle zooms out to the meso-level, pointing to increases in interactions among diverse actors and their engagement in meaning-making projects in "interactive spaces". It is at this meso level, where we see how actors' interactions and framing produce the frictions, highlight the tensions, and identify or create the cracks behind the new opportunities for social innovation. It is also here where we can observe how actors' efforts can begin to jointly (re)negotiate the structures, patterns and beliefs that constitute their social worlds and, even if tentatively and in a fragmentary manner, to co-create alternative proto-institutions with the potential to become institutionally embedded. Note that the second cycle is enabled by the first: emotions, reflexivity and disembedding underpin the agency that is involved in interactions, negotiations, co-creation and embedding; they create room for innovation. Finally, the third cycle zooms further out to the macro-level. It recognizes that institutional contexts, often structured around organizational fields, guide, or even discipline the dynamics of the micro and meso cycles. This macro view is important because it allows acknowledgement of how institutional contexts differ in their enabling and constraining influence on actors' actions. Institutional contexts enhance, or stall the agentic energy emerging from the micro and meso cycles, bringing unpredictability to actors' efforts. The framing influence of the macro level, however, is not homogeneous. While structured interactive spaces at the meso level can (temporarily) shield actors from institutional discipline, the patterning effects of the institutional context remain very influential in any attempts to institutionalize social innovations, and can stall or thwart such efforts. Yet social innovation efforts can also engender embedding dynamics that, by redefining the macro-context, bring about profound social change. Note that these efforts may also produce unintended negative consequences, calling attention to issues of morality in social innovation. In the next three sections, we discuss each of the cycles and connect them

to the literature and the papers in the special issue, followed by a discussion of the cross-cutting theme of unintended consequences and morality in social innovation.

THE MICRO CYCLE: INTERACTIONS, EMOTIONS, REFLEXIVITY AND DISEMBEDDING IN ENABLING AGENCY FOR SOCIAL INNOVATIONS

Social innovators are often presented as heroes in the social innovation literature (Dacin et al., 2011). They are portrayed as unusually creative, charismatic, and enlightened, able to identify opportunities where others see problems, hope where others give up, and with a skill set that allows them to invent, create organizations and foment entrepreneurial approaches to the alleviation of complex social problems. From an institutional perspective, this heroic view is misleading. Social innovators may indeed be creative, charismatic, and enlightened but their ideas and plans, as well as their access to resources to see them through, are institutionally embedded (Beckert, 1999; Seo & Creed, 2002). Their efforts then are more likely to replicate, with limited variance, the world that surrounds them, than to change it in any radical way (Giddens, 1984). Innovators need to gain, at least partially, a disembedded perspective for their efforts to bring about the radical institutional changes required for social innovation. Responding to scholarly calls to take the notion of embedded agency in social innovation seriously (Cajaiba-Santana, 2014), the first cycle in our model is directed to this specific question: how can embedded individuals become more agentic over time and direct their agency to engagement in social innovation? We argue that answering this question requires attention to actors' interaction patterns and their emotional involvement, since these are key to stimulating sufficient reflexivity and disembedding to support engagement in social innovation. Although these dynamics are highly intertwined and often occur simultaneously, we start with discussing reflexivity as this construct has gained much prominence in institutional theory to resolve the paradox of embedded agency (Suddaby, Viale & Gendron, 2016). We then consider emotions and also highlight the relevance of interactions in this cycle as we see interactions as the linchpin that connects the institutional disembedding and embedding dynamics that link the micro cycle with the meso and macro cycles of our social innovation model.

Reflexivity. Embedded as they are in nested social systems that frame their behavior in both obvious and understated ways, actors envision alternative ways for getting things done because of their reflective capacities (e.g., Leca & Naccache, 2006; Mutch, 2007; Ruebottom & Auster, forthcoming). Reflexivity describes “an individual’s general awareness of the constraints and opportunities created by the norms, values, beliefs and expectations of the social structures that surround them” (Suddaby, et al., 2016: 229). Literature suggests that reflexivity can be prompted by jolts (Meyer, 1982), the structural positions actors occupy whether in institutional contexts like organizational fields (Greenwood & Suddaby, 2006; Leblebici, Salancik, Copay & King, 1991) and organizations (Battilana, 2006), as well as individuals’

social positions, skills and histories (Pache & Santos, 2013; Suddaby et al., 2016). Social movement organizations have also been ascribed a role in prompting reflexivity by challenging extant field-frames (den Hond & de Bakker, 2007; Lounsbury, Ventresca & Hirsch, 2003; Zietsma & Lawrence, 2010), delegitimizing extant practices and questioning the values and belief systems that undergird them (den Hond & de Bakker, 2007; Hiatt, Sine & Tolbert, 2009). These factors (jolts, social positioning, skills, and social movements) each influence the likelihood of actors gaining reflexive awareness of tensions, cracks, and contradictions among institutional prescriptions (Seo & Creed, 2002). The likelihood of noticing these tensions, cracks, and contradictions increases when actors engage in *interactions* with others embedded in different institutional logics, exposing them to novel ways of thinking and acting (e.g., Smets, Morris & Greenwood, 2012). This increase follows from the emotional reactions that accompany interactions.

Emotions. The role of emotion in framing the likelihood of reflexivity in social change processes has been suggested by the emerging literature on institutions and emotions (Zietsma & Toubiana, forthcoming, a; b). Emotions connect people to one another in social groups (Turner & Stets, 2005; Goodwin, Jasper & Polletta, 2001), and connect people to social problems (Goodwin et al., 2001), often through their commitment to institutionalized beliefs or values, or through their commitment to, or compassion for (Grimes, McMullen, Vogus & Miller, 2013) specific social groups. These emotional investments in institutions (Voronov & Vince, 2012), people (Creed, Hudson, Okhuysen, Smith-Crowe, 2014), and social problems (Goodwin et al., 2001) can stir actors to devote time, effort, and resources to social innovation activities (Voronov & Vince, 2012).

The literature further specifies the type of emotional response associated with social innovation by pointing that, when people *interact* together, particularly on moral causes that they are committed to, they often develop positive social emotions --such as respect, liking and trust, stimulating openness and reflexivity (Fan & Zietsma, 2017). Together, these shared social and moral emotions help to disembed people from their ‘home’ logics and embed them in shared projects (Fan & Zietsma, 2017). Moreover, relating together also builds emotional energy, defined as the type of “positive and energizing feeling that comes from participating in a high-intensity interaction ritual” (Collins, 1993, p. 208). That energy can fuel and sustain social innovation efforts through the obstacles, wrong turns, and re-learning involved in processes of social change (Cartel, Boxenbaum & Aggeri, forthcoming; Fan & Zietsma, 2017; Ruebottom & Auster, forthcoming).

Micro Cycle Insights in this Special Issue. The interplay of interactions, emotions, reflexivity and disembedding enabling agency is most evident in the paper by Martin de Holan, Willi and Fernandez (this issue). These authors tell a beautiful story of Martin, an impoverished shantytown resident in a large metropolis in South America who rose to create a social enterprise and build connections for

others out of the shantytown. Their research pushes our understanding of the connection of emotions and social innovation significantly by showing how institutional conditions of poverty and exclusion can be associated with negative emotional states that help to rust these institutional conditions in place. The key to challenging these institutional constraints, these authors argue, comes from shifting to positive emotional states associated with interacting with “known strangers” (Martí et al., 2013; Poletta, 1999) who inhabit alternative institutional worlds. Such interactions helped to disembed Martin from the oppression of shantytown poverty, and embedded him within a new social world. He gained reflexive awareness, envisioning other possibilities (developing a projective self), and became energized by the social support of these known strangers. This combination of interactions, positive emotions, reflexivity and disembedding enabled Martin to build an escape ladder out of the oppressive structures of the shantytown through his socially innovative enterprise (Martin de Holan et al., this issue).

The role of interactions, emotions, reflexivity and disembedding in social innovation also comes through in the study by Purtik and Arenas (this issue). While social and sustainable innovations are often hard to accept because they require new ways of living and being (disrupting the status quo), the innovators in Purtik and Arenas’ study were able to create positive emotional experiences among users by letting them interact physically with the product (and in some cases, engaging them in co-creation to influence its design). These experiences had powerful effects on users, dismantling fears and associating joy and amazement with the new products. These emotions supported reflexivity among users, which enabled them to disembed themselves from their institutionalized beliefs and values and engage with new ways of acting.

Finally, in the paper by Ometto, Gegenhuber, Winter and Greenwood (this issue), interactions, emotions, reflexivity and disembedding again emerge as influential. The authors identify the emergence of *herding spaces*, inhabited by the members of a social enterprise, the I-BUS incubator. Interactions in these herding spaces played a central role in generating emotional encouragement for organization members and rejuvenating them so that, according to the authors, they became disembedded from mainstream logics and embedded into the moral purpose of the social enterprise. However, as the organization scaled, social ties between employees and students became limited through compartmentalization, and full-time employees became too time constrained to participate in these herding spaces. As a result, both the social and moral fabric of the organization began to fray, and mission drift ensued. The authors recommend the use of “emotional entrainment rituals” (Collins, 2004) to safeguard members’ normative commitment and group solidarity as social enterprises scale.

THE MESO CYCLE: INTERACTIVE SPACES FOR NEGOTIATING, CO-CREATING, AND EMBEDDING SOCIAL INNOVATIONS

While social interactions among emotionally-driven and reflexive actors may explain why actors engage in social innovation at the micro level, the sustained efforts required to bring about the accompanying social change are better understood at the meso level. Here we can observe the different kinds of “interactive spaces” that generate, promote, sustain, or erode the interactional, emotional, and reflective dynamics of the micro cycle. We can also observe how actors see new opportunities for social innovation, and begin to negotiate and co-create them together, and in doing so, help to (or fail to) embed them in their respective contexts. This is what the meso-level cycle in our model sets out to capture.

Interactive Spaces. Over the last decade, attention to interactive spaces has grown in organization studies. Examples of such arenas for social interactions and discursive exchanges include conferences and trade fairs in organizational fields (Lampel & Meyer, 2008; Maguire & Hardy, 2009; Schüssler, Rüling & Wittneben, 2014), free spaces in social movements (Polletta, 1999; Haug, 2013), relational spaces in organizations (Kellogg, 2009) and experimental spaces to negotiate new arrangements across organizational and field boundaries (Cartel, et al., forthcoming; Dorado, 2013; Zietsma & Lawrence, 2010). Drawing upon Polletta (1999), Haug (2013: 707) argues that such interactive spaces are crucial for social movements and for organizational change because they “facilitate meetings and other kinds of face-to-face encounters that provide the [required] kinds of associational ties.” These ties then advance the “capacity to identify opportunities, supply leaders, recruit participants, craft mobilizing action frames, and fashion new identities, tasks essential to sustained mobilization” (Polletta, 1999: 8). Such spaces are also critical for organizational fields: they facilitate debate and discussion among actors with alternative views of social problems, while the ties that frame these spaces provide a social platform for institutional innovation (Lampel & Meyer, 2008; Van Wijk et al., 2013). For example, Dorado (2013) identifies the formation of these interactive spaces with the creation of small groups including individuals inhabiting different organizational fields (banking, development) as crucial in the emergence of microfinance in Bolivia. Obviously, not all interactive spaces are supportive of innovation. Recent studies of resistance have emphasized “the meaningfulness of the physical place within which resistance is nurtured and enacted” (Courpasson, Dany & Delbridge, 2017: 237; see also Fernández, Martí & Farchi, 2017).

Negotiation and Co-creation. When these interactive spaces cross different fields or different types of actors, they become important spaces for negotiations of new types of arrangements (Kellogg, 2009; Cartel et al., forthcoming; Helms et al., 2012). For instance, Kellogg (2009: 675) describe how relational spaces as “areas of isolation, interaction, and inclusion” in the hospital she studied were relevant in allowing physicians of different status to develop relational efficacy, shared frames and shared identities and to negotiate the practices that enabled institutional change. In another example, Mair, Martí and

Ventresca (2012) describe how the NGO BRAC recognized the mobilizing power of such spaces for debating, negotiating and resolving extant institutional arrangements. Facing strong resistance by defenders of the status quo, BRAC purposefully created a space where contrasting views on women's position in rural Bangladesh were debated and possible ways to ameliorate their position were explored. Moreover, interactive spaces can shield actors from institutional constraints, allowing them to see the need for new practices, technologies and standards. Participants may co-create new provisional arrangements, or "proto-institutions" (Lawrence et al., 2002), often through intense struggles, negotiations and bargaining (Zietsma & McKnight, 2009), or through collaborative efforts to solve problems (Lawrence et al., 2002; Fan & Zietsma, 2017). Interactions over proto-institutions do not come without consequences however; they may result in the dilution of the radicalness of the proposed solutions (Van Wijk et al., 2013) or in the convergence of competing proto-institutions (Zietsma & McKnight, 2009).

Embedding. While actors in interactive spaces can become disembedded, enabling social innovation efforts, embedding dynamics are required for these efforts to become enduring elements in the institutional context (Lawrence, Suddaby & Leca, 2011). In each of the studies described in the section above, the negotiation and co-creation of novel institutional arrangements involved coordination among multiple actors with multiple aims. The involvement of this multiplicity of actors and interests improved the chances of embedding the innovation in the macro-context by helping to build their acceptance (Lawrence et al., 2014; Zietsma & Lawrence, 2010). But embedding actions need to move beyond the social circles of reference of actors to become ingrained in preexisting organizational routines, linked to the core values of important stakeholders (Maguire, Hardy & Lawrence, 2004), and supported by the boundary organizations that govern dominant practices and interactions, as O'Mahoney and Bechky (2008) noted in their exploration of the open source software movement. Social movement organizations can also facilitate such embedding processes by developing robust alternative field frames that support new modes of action (den Hond & de Bakker, 2007). In doing so, social movement organizations combine work to deinstitutionalize contested field frames with efforts to institutionalize alternative field frames that are more in line with their own objectives or ambitions. Critically, the agentic efforts emerging from interactive spaces and further supported by others can stall and fail to diffuse social innovations in time and space. And even when actors' efforts thrive in the micro and meso-cycles and are nurtured by supportive macro cycles, their embedding may bring negative consequences that social innovators neither foresee nor desire with their well-intended initiatives (e.g., Khan et al., 2007).

Meso Cycle Insights in this Special Issue. Several of the papers included in this special issue illuminate the role of interactive spaces, negotiation, co-creation and embedding in social innovation. The notion of "interactive spaces" is explicit in the paper by Ometto et al. (this issue). The authors highlight the

importance of two types of “interactive spaces”. Their study showed that in order to gain permanency for its balancing of social and commercial goals, a social enterprise not only needs “spaces of negotiation” that offer the opportunity of direct interaction to create shared understanding and to negotiate a common stance (and that are regularly discussed in the social innovation literature, see Battilana, Sengul, Pache & Model, 2015). They also need “herding spaces” that serve to connect an organization to its (changing) institutional context. Yet, as their study attests, when social enterprises scale up, “compartmentalization” may ensue and, with it, the required herding spaces are undermined. This contributes to the stalling of this social innovation through mission drift.

The study of Carberry, Bharati, Levy & Chaudhury (this issue) also highlights the interactional dynamics undergirding social innovation processes. Building on recent efforts to bridge research on social movements and institutional theory, the authors demonstrate how the emergence and diffusion of green information systems, an instance of what they name a corporate social innovation, is the result of multiple interactions, “both conflictual and collaborative”, within a broader system that includes activists, corporate managers, different sorts of field-level actors, and the wider social, political, and cultural context in which all these actors are embedded. Thus, their study shows how social innovation does not emerge, simply, from heroic, enlightened social (or corporate) entrepreneurs but rather from a “collective and dynamic interplay” (Phillips, Lee, Ghobadian, O’Regan & James, 2015: 442) of a collectivity of actors.

In the studies of Huq (this issue) and Purtik and Arenas (this issue), dynamics of co-creation and embedding are central. Both studies not only elucidate how professionals and users became embedded in the social innovation process respectively, but also illustrate how the meso-cycle is enabled by the micro-cycle: emotions, reflexivity and disembedding underpin the agency that is involved in negotiations, co-creation and embedding. Huq (this issue) studied addiction treatment professionals and their exchange partners like employing organizations, government, service providers and professional associations in Canada. Her study shows how disrupting actions can be a necessary, precipitating dynamic for actor reflexivity and thereby for social innovation in highly institutionalized, professional fields. The disrupting actions by distinct actors helped institutionally embedded professionals distance themselves from their extant ways of working, creating room for reflecting on traditional models and volunteering alternate modes of action. Huq suggests that embedding professionals in social innovation processes requires a strong “top down” vision on where to go with the field in order to encourage professionals to see things differently and explore alternatives together. Yet, this vision also needs to be broad and flexible to allow for “bottom up” processes where change agents explore and experiment with new modes of working.

Purtik and Arenas (this issue), in turn, highlight how the companies they studied strategically engaged future users of their novel green technologies and services in the innovation process. While these companies embedded users in the innovation process to different degrees and at different stages, they all recognized that users could play a central role in supporting the acceptance and institutionalization of their innovations. By learning more about users' expectations, needs and ideas on the technologies during the innovation process, companies became more reflexive about the functionalities of their design as well as more capable of challenging and shaping the informal institutions. Users' pleasurable physical experiences with the innovative offerings helped to disembed them from their institutionalized beliefs and values. Users further worked to diffuse the innovations within their personal networks by "evangelizing" (Massa, Helms, Voronov & Wang, 2017) about them on social media.

THE MACRO CYCLE: INSTITUTIONAL CONTEXT AND ITS EFFECTS ON MICRO AND MESO CYCLES

Following our earlier reasoning, social innovation processes could be seen as coming at the hands of emotionally fueled and reflexive actors who use interactive spaces to negotiate, co-create and embed social innovations (micro and meso cycles). However, actors' emotions, their will to engage, and the reflexivity associated with the ability to identify opportunities for engagement are situated dynamics (Barley & Tolbert, 1997; Dorado, 2005; McAdam, 1996), that are fueled or hindered by the institutional context in which they occur. Furthermore, even when actors are able to engage in social innovation, their innovations can only gain permanence and diffuse if they become embedded in the institutional context. The macro cycle focuses on this context, which includes broader societal level institutions such as democracy, capitalism, entrenched systems of social class, poverty, and exclusion, as well as field-level institutions, with fields encompassing the set of organizations that interact with one another "frequently and fatefully" (Scott, 1995: 207-208) in a "recognized area of institutional life" (DiMaggio & Powell, 1983: 148). Social innovation usually features issue fields since social problems often cross sectors and fields and have broad implications. Issue fields comprise actors from different fields who are all interested in a particular issue (Hoffman, 1999), while exchange fields "contain a focal population of actors and their interaction or exchange partners (suppliers, customers, etc.)" (Zietsma, Groenewegen, Logue & Hinings, 2017: 396). Issue fields thus typically feature participants with very different norms, beliefs, practices and other institutions, as they often remain embedded in their (different) home exchange fields, even as they participate in issue fields. While societal institutions are often very difficult to change, one means by which they do change is through the formation of issue fields that focus on change in a particular issue domain. Hence, we next explore how field conditions can have significant effects on social innovation processes.

Field Conditions. Focusing first on the effect of field conditions on the ability to identify opportunities for social innovation agency (via the micro and meso cycles), we note that fields featuring multiplicity (Oliver, 1991), that is, multiple and potentially competing logics (Greenwood, Raynard, Micelotta, Kodieh & Lounsbury, 2011) or institutional prescriptions are more apt to trigger reflexivity because they are more likely to expose actors to institutional contradictions (Seo & Creed, 2002). Yet the degree of institutionalization also matters for how noticeable or actionable opportunities for social innovation are likely to seem to actors (Dorado, 2005). When issue fields feature low multiplicity and high institutionalization, actors within them see few opportunities for social innovation because they are locked into their own way of doing things – these fields are, what Dorado (2005) called, “opportunity opaque” (see also Wijen, 2014). When fields feature high multiplicity and low institutionalization, actors within these fragmented and volatile fields cannot predict what the likely outcomes will be to any social innovation efforts they introduce, making these fields “opportunity hazy” (Dorado, 2005). By contrast, when a moderate degree of both multiplicity and institutionalization are present, opportunities appear transparent to field members (Dorado, 2005). Members can both see the institutional contradictions revealed by multiplicity, allowing them to question their own taken-for-granted beliefs and assumptions, and they are freer to act on them because institutionalization is neither strong enough to discipline away any innovation nor weak enough to make its results unpredictable. As such, field conditions featuring moderate levels of both multiplicity and institutionalization are likely to feature the most fertile homes for micro cycles oriented towards social innovation.

Field conditions, of course, also define the likelihood of meso cycles to support or hinder social innovation processes. Fields with high multiplicity and low institutionalization are likely to be highly volatile and unpredictable. Negotiations and co-creation are likely to be difficult with too many parties and positions involved and conflicts may be intractable. Embedding may also be impossible as too many disparate groups must be convinced to take on a particular social innovation, without the necessary infrastructure to embed the innovation within. Similarly, fields with low multiplicity and high institutionalization may hinder the formation of interactive spaces for social innovation since there would be too little diversity or too many power-plays in negotiation/co-creation processes. Further, any social innovation that would occur would be difficult to embed in the already highly institutionalized field due to threats to actors’ vested interests. By contrast, fields with both moderate multiplicity and institutionalization may hold out the best hope for the development and institutionalization of interactive spaces for social innovation both because diversity would exist in interactional processes, and because embedding could take place within relatively permeable social structures (van Wijk, et al., 2013).

Macro Cycle Insights in this Special Issue. The papers in this volume help us to further understand how institutional contexts frame the likelihood and outcomes of social innovation. Huq’s exploration

of social innovation in the context of medical programs for addiction treatment is set in an opaque professional exchange field, where approaches had become so settled that they hindered the emergence of creative approaches. Huq highlights three kinds of disrupting actions that may not bring a solution to the field's social problem, but they may create enough transparency to allow for alternative paths to emerge. In the case studied by Huq, these disrupting actions together seemed to help to form a novel macro-level structure where people from adjacent fields were drawn in to come up with new practices based on shared interests in the social problems related to addiction.

In turn, the papers by Purтик and Arenas (this issue) and by Carberry and colleagues (this issue) explore social innovations that bring about change without dramatically redefining field conditions. Purтик and Arenas study socially responsible or environmentally conscious products and services. Their field of reference, market based solutions to environmental problems, is consistent with the capitalist order (Weber, 1952) that currently dominates the world economy, yet the innovations studied by these authors require adjustments in consumption behavior. Carberry and colleagues explore how movements foster green practices within corporations. More specifically, they study the adoption of green information systems, which are meant to transform organizations and society into more sustainable entities. In both cases, social innovation is feasible (albeit not necessarily easy or without initial resistance) because of their embedding within, as opposed to the breaking away from, the established order. As demanded within the capitalist order, the innovations fit customer specifications and /or generate revenue streams for monetization of the value created.

The article by Ometto et al. (this issue) offers interesting insights on how, despite good intentions and ideas, things go wrong - ending up with mission drift. The article explores the scaling up of a social enterprise, an organization that challenges the standards of organizing associated with the capitalist order. The authors illustrate the challenges that such a process involves and show how, while the innovations involved may be replicated and diffused, they are likely to lose those elements that run against the grain of established practices. The study then illustrates the role of institutional conditions in stalling the ability of social innovation to gain permanency and diffuse in time and space.

UNINTENDED CONSEQUENCES AND MORALITY

A cross-cutting theme in all three cycles is that because social innovations address “wicked” complex problems (Dorado & Ventresca, 2012; Westley et al., 2013) we cannot disregard the unintended consequences which likely occur in many institutional change efforts (Lawrence et al., 2014; Selznick, 1949). Explorations of institutional change in the context of social innovation then invites us to further our limited understanding of the role of “good intentions” (Ansari et al., 2012; Khan et al., 2007) in any and all efforts to bring about institutional change. The case of microfinance, a paradigmatic example of

social innovation is, in this regard, quite telling. Many microfinance initiatives have advanced the goals of the social innovators that launched them and certainly transformed the relationships between lenders and borrowers in the credit market. They have for example had, quite often, a positive transformative impact on the social systems in which those exchanges take place, and affected gender relations and intra-community power and resource distributions, among others (Mair et al., 2012). However, well-intended social innovation efforts can backfire and have pernicious consequences when the social innovation becomes co-opted (Selznick, 1949) and is used to advance interests other than those of the beneficiaries it once served. For example, Khan et al.'s (2007) article on the dark side of institutional entrepreneurship shows how the effort to eliminate the long-standing practice of child labor in the world's largest soccer ball manufacturing cluster in Sialkot, Pakistan, ended up producing spurious outcomes, in appearance beneficial, but in effect exacerbating the original situation and reinforcing the deep poverty of these children's families with the consequent impacts on the well-being of the children. For the case of microfinance, research shows how the broad reach of microfinance institutions in some areas may result in the disruption of traditional community forms of communal support and self-reliance (Bateman, 2010). Such disruption can generate unbearable levels of anxiety and guilt leading some borrowers to take dramatic actions, even suicide. We saw this happening in the recent microfinance crisis in Andhra Pradesh, India, among borrowers of a microfinance provider (SKS) that had abandoned the practice of thoroughly vetting the repayment capacity of borrowers (Dorado, 2015; Roodman, 2012). As more organizations embrace the label, but not the practices of microfinance, the likelihood of microfinance trapping many of the poor in undesirable debt treadmills has increased.

The studies in this special issue have not explicitly focused on unintended consequences and moral issues. Nonetheless, it is worth mentioning how the study of Martin de Holan et al. (this issue) describes how the social innovator they studied escaped poverty, but also experienced the downside of this escape—loneliness, sorrow, and guilt in his liminal position between two worlds. Also the article by Ometto et al. (this issue) indicates how scaling social enterprises may lead to unintended consequences, in this case, the mission drift of the organization.

In short, institutional theory provides us with a lens to understand social innovation processes that emphasizes its multi-level and complex nature. Dynamics at all levels may be aligned. We can find actors, emotionally driven and reflexive, to engage in social innovation at the micro level, who inhabit interactive spaces supportive of their efforts, and find themselves in fields with degrees of complexity and institutionalization that allow them to define, gain support, and advance their well-intended goals. Such alignments, in time and space, are possible and produce “tipping points” in social innovation processes (Van Wijk et al., 2013). On the other hand, lack of alignment may be more common. For example, actors that benefit from the status quo may intervene to hamper, stall, or co-opt social innovations with potentially nefarious results. Nevertheless, lack of alignment also generates an

unstable equilibrium, suggesting that social innovation processes which are not possible at one point in time may become so at a future date when the context is “ripe” for change (de Castro & Ansari, 2017).

TOWARDS A RESEARCH AGENDA

In this section, we draw on the three-cycle model of social innovation to stimulate and offer guidance to future conversations on social innovations from an institutional perspective. We discuss these recommendations for a further research agenda in the three cycles and close with an outlook towards unintended consequences and morality.

Micro cycle. Regarding the micro cycle, we signal three promising lines of research. Whereas the papers in this special issue have mainly highlighted how emotions can fuel social innovation efforts, literature shows that emotions may also impede social innovation. Emotions may be holding institutions in place despite external changes that call them into question, and they may stall social innovation processes (Calhoun, 2001). Actors may “look away” from problems that challenge their institutional commitments, engaging in denial to avoid acting on them (Delmestri & Goodrick, 2016), and socially excluding those who challenge valued institutions to silence and discipline them (Moon, 2013). Emotionally virulent and even violent attacks (Gill & Burrow, forthcoming; Moon, 2013) by those emotionally vested in the status quo have been documented, and negative emotions have been found to lead to conflicts among those engaging in social innovation (Fan & Zietsma, 2017; Mair et al., 2012), sometimes leading to innovation failure (Ackermann, Franco, Gallupe & Parent, 2005; Eden & Huxham, 2001). While the papers in this special issue have not dealt with the issue of resistance against social innovations, we believe the topic warrants more research. For instance, Huq (this issue) did not find overt signs of resistance in the professional exchange field she examined, but it would be interesting to see whether this might alter if the novel work practices began challenging extant power distributions, jurisdictional boundaries and dominant practices in the field. Or would such resistance be mitigated through processes of co-creation, making the professionals emotionally vested in the innovations? Innovation fatigue may also be an issue – in the workplace, among people being asked to change again and again, among (ethical) consumers, who question the veracity of social innovation claims after many turn out to be false, and among citizens who are tired of new solutions imposed upon them, and experience cynicism and change-exhaustion. Understanding such emotionally grounded skepticism and disinterest in social innovations is relevant if we are to understand why some innovations succeed in becoming embedded in institutional contexts whereas others fail.

Second, extant literature has tended to concentrate on tensions experienced by people in hybrid organizations (e.g., Battilana & Dorado, 2010), but less on the emotional distress at the individual level for those acting as social innovators. Yet, social innovation can also create serious social stress and

distress for social innovators as shown in the paper by Martin de Holan et al. (this issue). The innovator they studied was left “in between” the social worlds and networks of the shantytown and cosmopolitan metropolis, which implicated emotional states such as loneliness, sorrow, and guilt. Such negative emotions have also been reported by some members of the organization studied by Martí et al., (2013). In their own wording, they were “hurt” by experiencing distrust from the poor community they were working and living with and by their constant awareness of “not being one of them.” These findings allude to recent work that indicates that occupying brokerage positions between different social groups not only brings social benefits to individuals, but also comes with psychological costs such as social stress (Carboni & Gilman, 2012). Social innovators may also experience high levels of social stress when demand scales faster than their social enterprise (e.g., Joni, 2015) or when they are confronted with significant challenges in their attempt to change the mainstream market from “within” (Koks, 2017). Conflict in negotiations for social innovation can finally wear people down, reducing emotional energy for innovation processes, and leading to distrust of other social innovators with different views (Fan & Zietsma, 2017). Examining how such emotions affect social innovators’ innovative work, the organizational design of their enterprise and their outlook on (the pace of) scaling thus provides a promising line of inquiry.

Finally, there has been only very limited work on emotions and reflexivity and their effects on disembedding in social innovation, and this is an opportunity that could benefit from substantial attention. While much prior work on social innovation and social movements focuses on discursive appeals associated with framing, and recent work looks at the relative resonance of cognitive and emotional framing (Giorgi, 2017), emotions and reflexivity are also highly stimulated by images (Lefsrud, Graves & Phillips, 2016; Meyer, Höllerer, Jancsary & Van Leeuwen, 2013), such as art, or photographs meant to stimulate moral shock. Very limited work in the management literature on social innovation has addressed these issues, and yet their power is obvious if one but examines the websites and fundraising campaigns of various non-profits (e.g., Worldvision¹) or activist groups (e.g., People for the Ethical Treatment of Animals²). Similarly, limited work in the management literature on social innovation has examined other sensory experiences and their power to move people, though Ruebottom and Auster (forthcoming) and Tracey (2016) represent interesting exceptions.

Meso Cycle. We have presented “interactive spaces” as the linchpin of the model and believe that more research on such spaces is warranted. We suggest four directions for research. First, the use of interactive spaces in social innovation processes presumes that different groups will engage in interactions with those outside their circles, possessing different interests, resources and frames of

¹ <https://www.worldvision.org/>.

² <https://www.peta.org/>.

reference. It is widely recognized that such membership heterogeneity may pose governance challenges (e.g., Ferraro et al., 2015) and hence more research is needed to understand how actor engagement and commitment in interactive spaces is fostered and maintained. For example, Cartel et al., (forthcoming) describe how “distancing work”, which involves creating rules and procedures for a novel game-like simulation relieved institutional pressures, enabled open experimentation and fostered excitement in trying out different arrangements and strategies for a European Carbon Market, which subsequently helped to anchor new arrangements in practice. Studies on interactive spaces would also benefit from adopting a critical management perspective (Khan et al., 2007) in examining these spaces as meaning-making projects involving heterogeneous actors. With social problems being socially constructed (Lawrence et al., 2014), a critical perspective invites us to pay more attention to questions like: *Where* are the definitions debated and decided upon? Who is able or allowed to take part in these discussions? What are the means by which voices are heard or not heard in these interactive spaces? How does power influence negotiations in interactive spaces? (see also Schüssler, et al., 2014).

Second, the study of interactive spaces is also relevant from the standpoint of the rise of novel forms of organization that mark contemporary society (Ahrne & Brunsson, 2011; Ahrne, Brunsson, & Seidl, 2016). Whereas formal organizations typically rely on all organizational elements – membership, hierarchy, rules, monitoring, and sanctioning – to achieve their objectives, Ahrne and Brunsson (2011) suggested that alternative organizational forms may make only selective use of these different organizational elements to achieve an organized social order. Examples of such “partial organizations” are found in standards and partnerships for corporate social responsibility (Rasche, de Bakker, & Moon, 2013) or in fluid social collectives like hacker groups (Dobusch & Schoeneborn, 2015). The interactions that unfold in interactive spaces, such as the “herding spaces” Ometto et al. (this issue) identify, could also be seen as examples of such partial organizations, especially when field conditions are hazy (Dorado, 2005): there are no clear ideas yet on membership, hierarchy or rules, and monitoring and sanctioning are not present. Examining interactive spaces from such a perspective can help us think about alternative organizational principles and organizational forms (de Bakker, den Hond & Laamanen, 2017; Haug, 2013) required for social innovation.

Third, relating to these ideas on novel forms of organization discussed above, future research could also focus on the role of interactive spaces in fostering resistance *against* social innovation. An emerging literature, often building (but not exclusively) on the “critical relational geographies turn” (Massey, 2005) looks at how resistance and social innovation processes, as lived experiences, suppose the appropriation, occupation or temporary use of spaces and places (Daskalaki & Kokkinidis, 2017), and this issue is growing in empirical prominence with the rise of alt-right and nationalist movements globally.

A final interesting avenue for future research on interactive spaces is to focus on web-based platforms for co-creation (Grönroos, 2012). It is possible in our web-enabled world that much more diverse sets of people can interact on platforms on issues of interest, and thus may be able to innovate in much less constrained ways. Work on the sharing economy and co-creation platforms provides some hope that we as a society are getting better at this kind of work. On the other hand, more critical views see such platforms as new forms of social control, that may leave participants feeling cynical, powerless and exploited (see, e.g., Roberts & Zietsma, forthcoming).

Macro Cycle. Finally, the papers in this special issue provide new insights into the role of macro conditions on the micro and meso cycles of social innovation. Our reading of these papers suggests three alternative paths of inquiry.

First, the paper by Huq (this issue) suggests a need to expand our vocabulary, adding terms such as ‘social disruptor’. This expansion may be particularly useful when exploring processes of innovation within opaque fields, such as the addiction treatment context studied by Huq. Opportunities for social innovation may appear in such contexts following not on innovation efforts but on efforts that interrupt, disrupt, short-circuit, or undermine established routines that otherwise would go unquestioned. The efforts of these actors would lack the socially oriented goals expected among social innovators, but the dissonance created by their actions may be able to generate an institutional space that is welcoming of the reflexive, co-creative, and negotiation processes identified in the micro and meso cycles. Scholars have approached these actions as exogenous shocks (Meyer, 1982), which is disheartening, as it provides little guidance on how to actually impact change from within the system itself. The more endogenous approach that Huq illustrates provides a more hopeful view of change. Our focus thus needs to shift to consider not only the efforts of creation but also those of interruption or destruction of the established order.

Second, the paper by Ometto et al. (this issue) sheds light on another important dynamic hindering social innovations. It connects emerging research on the scaling of social innovations (Mair et al., 2016) with classic institutional research on forces likely to sap social innovations from their most novel and crucial elements over time, namely research on cooptation (Pfeffer, 1973; Selznick, 1948; 1949) and rationalization (Weber, 1952). Most current research on the upscaling of social innovations is focused on issues of resources and mainly disregards these institutional forces. This paper, however, renews our interest on these dynamics central to the institutional research agenda.

Third, the paper by Martin de Holan and coauthors (this issue) speaks about the societal level institutions that make poverty and exclusion in the shantytowns of South America such an intractable problem. The challenge they explore is old, the fields involved are unclear, and the paths to alleviate it in any

meaningful way appear sterile. The paper, though, emphasizes that while individuals may not be able to change the conditions fueling this intractable problem, they can escape them by traveling through social corridors generated by their interpersonal connections. Escaping field conditions may appear, at first sight, as a rather disappointing form of social innovation but its role should not be underestimated. For example, Hirschman (1993) showed how escaping, exit in his nomenclature, brought about dramatic social change through the wave of massive migration from East to West Germany. While escapees made individual decisions to leave the oppressive conditions of the East, the accumulation of their decisions brought down the wall – the type of oppressive social structure behind many of the world’s intractable problems. This paper, then, as that of Huq, points to the need for research that broadens our understanding of the processes that bring about social innovation beyond the actions of heroic social innovators.

Unintended consequences and morality. Finally, while the papers in this special issue touch upon our understanding of the potential unintended negative effects in social innovation processes (e.g., Martin de Holan et al.; Ometto et al., this issue), they remain silent on (or rather assume) the positive morality of intentional efforts to transform social reality. Most literature on institutional change elaborates on how productive it can be to think of people as actively engaged in interpreting institutions and as actively choosing to reproduce some, to tear others down in part or in whole, and to create new institutions from the building blocks they find at hand (Dobbin, 2010). However, in so doing, this literature a-critically assumes or neglects moral considerations: the question of intentionality is central (Lawrence & Suddaby, 2006) but not the question of social desirability. Paraphrasing the anthropologist James Scott, this should be morally and scientifically inadmissible (2012, p. xiii), because social change processes can end up strengthening patterns, norms, and power structures that benefit incumbent actors and marginalize the poor, or depleting and exploiting particular communities or resources, whether intended or not (Crane, 2013; Martí, forthcoming; Shelley, 2003). Important questions of morality are, accordingly, important avenues for future research.

CONCLUSION

In this introductory article we have advanced a multi-level conceptual model to explore social innovation with an institutional lens. Our model is inspired by the five papers included in this special issue along with the extant literature. Together with these papers, this special issue adds value to the study of social innovation in two main ways. First, we present an institutional theory-based model that highlights the agentic, relational, situated and multilevel nature of social innovation and moves away from the overly linear and functionalist understandings of social innovation that has plagued much of the practitioner literature. The goal is not to obfuscate, by adding complexity, but acknowledge that the institutional conditions underpinning complex social problems are unlikely to disappear in a flash at the

hands of a hero still to come. Instead, our model suggests that novel forms of organizing by diverse actors may mobilize the emotional energy and reflexive awareness necessary to interrupt extant modes of action and generate alternatives, and then embed them in institutional contexts to produce profound change. Second, we unveil a deficiency in institutional theory, namely its disregard for the morality of actors' intentions. Our focus as institutional scholars, more frequently than not, is on how actors can escape institutions to work for change, disregarding why they should want to and the moral consequences of doing so.

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Figure 1: Three cycle model of social innovation

