
1. Inclusion and innovation: a call to action

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Social inclusion is at the heart of sustainable development. Inclusion implies that a concerted effort is required to bring in the “excluded,” marginalized or disenfranchised. Inclusion implies that there are structural and systemic barriers that reinforce this exclusion, making it challenging to be inclusive. The United Nations (UN) 2015 Sustainable Development Goals keeps social inclusion at the core of its 17 goals, that sustainability, prosperity and growth should be shared across all inhabitants of this world. Social indicators reveal that while we are living longer and, in many countries, healthier lives, the distribution of wealth has become less equal, and social and economic opportunities for growth and wellbeing are becoming unequally accessible to large proportions of our global population. It would suffice to say that inclusion has become one of the most pressing political and economic problems of society today.

GRAND CHALLENGES AND SOCIAL INCLUSION IN MANAGEMENT RESEARCH

A core focus of business schools is the preparation of students for careers within organizations that value a certain set of functional competences and soft skills that help business create economic value. Traditionally, much management research has also been oriented toward the instrumental needs of these employer organizations to innovate in the marketplace and in how they manage their organizations to create and capture economic value (Tracey and Stott, 2017, p. 51). Increasingly, however, a subgroup of management researchers has engaged with broader questions of value creation, moving beyond the goals of Pareto efficiency and optimization bequeathed to management research by the field of economics (George et al., 2012), to consider broader questions of social value creation (Di Domenico et al., 2010). Much of this work has considered one or more of a very wide variety of “social purpose organizations” (Tracey and Stott, 2017, p. 52), but it also extends to traditional organizations that are tightly focused on economic value appropriation, but which at the same time engage in some social purpose activities either as part of profit-seeking or in addition to it (Aguinis and Glavas, 2012). For those of us interested in having our work be of some use in addressing both societal grand challenges (Eisenhardt et al., 2016; George et al., 2016) and their more local instantiations, a simple question underlies all of this work: What can we, as management scholars, do to both *help* and *encourage* those who are creating and leading organizations engage in forms of innovation that bring benefit to people and communities that have been excluded or marginalized from socio-economic resources and opportunities?

Grand challenges – such as poverty, extreme inequality, climate change and hunger – require insights and actions at every level from changing individual behavior to changing international relations (George et al., 2012). In terms of the sorts of organizations that

management scholars are accustomed to studying, such challenges call for solutions that involve social entrepreneurship, social intrapreneurship and also “social extrapreneurship,” which refers to forms of inter-organizational action that facilitate “alternative combinations of ideas, people, places and resources to address social challenges” (Tracey and Stott, 2017, p. 53).

Because of the breadth of issues and the stacked height of the levels of analysis invoked in studying grand challenges, this work opens up a vast array of opportunities for management scholars to pursue novel questions in novel contexts within the bounds of their disciplinary frameworks. One could readily build a successful career by examining grand challenges through the single disciplinary lens of sociology, economics, psychology, organization theory, strategy, organizational behavior or entrepreneurship. Indeed, given the structure of academic careers, including those in business schools, there are strong incentives for people to stay largely within their disciplines. Unfortunately, the sorts of wicked problems (Dorado and Ventresca, 2013) we face are very unlikely to yield much ground to insights bounded within any single discipline. Such self-imposed limitations therefore squander much of the opportunity we face to help entrepreneurs and leaders engage in beneficial social action.

The argument is commonly made that much of management research is too “theoretical” and distant from practice to allow us to be of much help even with regard to our traditional clients: large, profit-oriented corporations (Baker and Pollock, 2007; George, 2014). Our approach to privileging theory, which Hambrick (2007, p. 1346) described as “religious fervor,” often seems to provide a poor fit with Lewin’s (1943) maxim that “there is nothing as practical as a good theory.” Instead, it often seems to be theory for the sake of theory. Yet, it is not clear that either recurring criticisms or the dedication of Academy of Management conferences to themes about practical relevance have made much of a dent in this issue. The same concern extends to our work on social innovation. Despite encouraging moves toward broadening the domain of what “counts” as good management research by some elite journals (George, 2014), journal gatekeepers and tenure committees are slow to change and continue to focus on traditional notions of theoretical contribution. This, in turn, is likely to slow the movement of young researchers toward pursuing the sorts of questions and engaging in the sorts of fraught cross-disciplinary approaches that might contribute directly toward addressing societal grand challenges. Not to put too fine a point on it, if we are unable as a professional community to change the largely self-imposed institutional constraints of our own career and reward systems, how can we reasonably hope to help bring the sorts of institutional changes that grand challenges seem to demand (Ferraro et al., 2015; Fligstein and McAdam, 2012)?

THE CHALLENGES OF BOUNDEDNESS AND THEORIZING

Relatively speaking, inclusive innovation represents a somewhat more tractable subset of work on social challenges and innovation. Defined as “the development and implementation of new ideas which aspire to create opportunities that enhance social and economic well-being for disenfranchised members of society” (George et al., 2012, p. 663), inclusive innovation refers to “grassroots” efforts at innovation in which those driving the innovation may include the “disenfranchised” people for whom the innovation seeks to

provide opportunities. It also refers to more market-driven approaches in which companies, frequently multinational corporations (MNCs), provide goods and services that help to improve the circumstances of the disenfranchised, sometimes also inviting their participation in the provision of such products and services (Pansera and Owen, 2018).

There seems to be some sort of underlying belief or hope – if not faith – that grand challenges require and will therefore somehow call forth grand responses. But what if the more probable response in most cases is a patchwork of many, many more bounded efforts? While the search for “scalability” in social innovation remains the touchstone for dealing with grand challenges, “replicability” of solutions may be the more realistic, albeit prosaic path. From this perspective, inclusive innovation may be an important pathway toward dealing with some of the thorniest social problems the world faces.

Much of the research on inclusive innovation is quite local and bounded. It is about whether and how relatively contained and focused efforts can bring progress against social challenges. For example, Petersen et al. (2018) compared the efforts of two sub-Saharan universities to improve small-scale farmer livelihoods by building their innovation capacity and found that small differences in their approaches to learning seemed to make substantial differences in outcomes. Such studies can suggest relatively replicable approaches to social innovation when they identify common elements that lead to success or obstacles that can be overcome. Similarly, Powell et al. (2018) conducted a longitudinal study of eight cross-sector partnerships in South Africa in which the interests of disenfranchised people were juxtaposed against the interests of an assortment of government, business and civil society participants. They uncovered a pattern in which greater progress was achieved in dealing with zero-sum tradeoffs involving inequality, poverty and environmental degradation when the participants dealt explicitly with their conflicting material interests rather than treating them as differences of perspective. Such conflicting material interests and zero-sum tradeoffs are likely to be common across many kinds of social innovation.

We might think of the myriad local efforts at inclusive innovation as sets of experiments in social inclusion. From this perspective, the proliferation of studies of more bounded examples of inclusive innovation may be a path to discoveries about what can work and gain traction more broadly, through replication. In this *Handbook*, Stott, Fava and Salwinski (2019), develop the important point that community enterprises are often resilient to “the feast and famine of public policy attention” and that they “proffer solutions.” Peredo, McClean and Tremblay (2019) take this approach to broadening local social innovation one step further by asking “what we can learn from distinctively indigenous social innovation that could inform our attack on social problems faced not only by the indigenous but by other disadvantaged peoples and communities?”

Lest we become too optimistic and start thinking that because it may be the most feasible path to scale, replication is somehow “easy,” other studies such as Dacin and Dacin’s examination of collective social innovation on Fogo Island (2019) highlight the importance of deep contextualization to the success of localized efforts. While their finding that “place embeddedness, community identity and community character” matter may provide general lessons, it also suggests the challenging and detailed work that would be required for replication elsewhere. This resonates as well with McGahan’s argument (2019) that inclusive innovation in healthcare requires that we “evaluate, community by community, whether and how health can be supported using currently available tools and

technologies . . .” Even less Panglossian, Hall et al.’s (2012) study of the Brazilian tourist industry shows how policies encouraging inclusive innovation can lead to destructive outcomes in the face of “weak institutions.” They outlined how well-meaning attempts to attract travelers to the beaches of Recife and create jobs for local residents inadvertently turned the city into a magnet for “sex tourism,” increasing street crime and leading to thousands of children being forced into the sex trade. Of course, the manifold replication of local solutions is hardly a panacea when we are talking about challenges of global proportions.

PATHWAYS FROM SOCIAL INCLUSION TO LARGE-SCALE, SOCIAL CHANGE

We therefore inevitably return to questions about the role of inclusive innovation in large-scale, innovative social change. There appear to be at least three important pathways to explore. The first is the provisioning of new infrastructure that can potentially level the playing field for opportunities between haves and have not. Development projects that provide access to clean water and electricity can sometimes emancipate residents (and perhaps especially female residents) from endless hours of backbreaking labor, freeing up time and energy to pursue other activities. In some cases, such large-scale projects underwritten by governments or public–private partnerships can be implemented in ways that are sensitive to local contexts and invite participation (Powell et al., 2018). One form of public infrastructure provision that has received substantial attention is access to internet connectivity. Concerns over the “digital divide” between poorer and wealthier individuals and communities also led to the idea that the internet could be a source of information, education and market access that would allow poor people and communities to improve their socio-economic status, in part through promoting entrepreneurship. Provision of telecommunication utilities can also support the provision of telemedicine into rural areas, allowing greater inclusivity in medical care (McGahan, 2019). Research on each of these topics has pointed to both successes and failures (Cumming and Johan, 2010; Warschauer, 2003), leaving open the window for research that improves our understanding of how best to deploy ICT infrastructure to support inclusivity.

A second pathway connecting inclusive innovation to large-scale, innovative social change is through corporate action (either “intrapreneurship” or “extrapreneurship” as described by Tracey and Stott, 2017). Research along these lines includes work stemming from the bestselling *Fortune at the Bottom of the Pyramid* (Prahalad, 2004) that views social engagement around inclusivity as a corporate strategic activity, as well as later work on topics such as “intrapreneurial bricolage” (Halme et al., 2012) that put the locus of activity supporting inclusivity at middle management levels. Here, too, the evidence paints a mixed picture of the success of corporate bottom of the pyramid (BoP) programs, which have also generated criticisms that they may sometimes do more harm than good for the people “at the bottom of the pyramid” (Kolk et al., 2014). An individual we know who has led dozens of BoP training programs involving immersion in poor communities put one criticism to us pretty bluntly: “It becomes like a corporate retreat for executives, like one of those ropes training trust-building weeks. They love it. Then nothing comes of it.”

Finally, several bodies of research examine pathways to institutional and political

change. A substantial body of work by institutional theorists has examined the institutional conditions of exclusion and inclusion and the possibilities of change (Khan et al., 2007; Lawrence and Suddaby, 2006; Mair and Marti, 2009; Tracey et al., 2011). For example, Maguire et al. (2004) studied institutional entrepreneurship in the emergence of inclusive approaches to treatment advocacy in Canada. Battilana and Dorado (2010) examined the early processes through which commercial microfinance, an intentionally inclusive and large-scale innovation, emerged and moved toward institutionalization in Bolivia.

In parallel with work on institutional innovation and entrepreneurship, a promising and somewhat critical body of work is emerging based on so-called “field theory,” which focuses on the importance of social movements to broadening the impact of social innovation (Fligstein and McAdam, 2012). From this perspective, many different forms of social benefit organizations (Tracey and Stott, 2017) could be viewed as distributed instantiations of social movements. This work could lead us to treat the creation of social movement organizations as an important form of entrepreneurship (Baker and Powell, 2019). It is probably fair to say that none of the larger-scale social innovations connected to inclusive innovation has yet made any substantial dent in the list of grand challenges the world faces. It is also not yet fair to judge the contributions of management scholarship on this basis. But eventually, it will be fair to make such judgments.

Much work on inclusive innovation is in fact nicely problem-focused, rooted in concern for social issues and empathy for those who suffer most directly from Grand Challenges (e.g., Souder, 2019, Tan and Tan, 2019; Zhou and Shaw, 2019). To be only slightly irreverent, an increasing number of management and entrepreneurship scholars find themselves moved by the promise of inclusive innovation more than they find themselves moved by the promise of increasing the bottom line of multinational corporations. If, however, we want to do research that actually makes a real and positive difference, this probably has to become a main focus of our work, and achieving this focus probably requires institutional entrepreneurship closer to home.

Obviously, we cannot let go of theorizing, because we have no other vehicle for cumulating and challenging the results of research, but the theories we privilege should probably be tethered to more practical metrics than those we celebrate now. In addition, the imaginary division of labor we now sometimes describe between management researchers and those who “translate” this research to practitioners may need to be supplanted to some extent by rules for tenure, promotion and other rewards that value not only fundamental research but also getting our hands dirty doing “engaged” research and even participating in and studying “implementation.”

While Grand Challenges provide a rich tableau of opportunities *for us* to build our careers by focusing on contributions to elite disciplinary journals, it may be time that we start thinking more about the opportunities our work can provide to those outside of the academy. If our underlying goal is to both *help* and *encourage* an array of players to entrain themselves to efforts to deal with grand challenges, we need to show that such efforts are opportunities – that is, that they are both desirable and feasible (Stevenson and Jarillo, 1990) – not just for us, but *for everyone else*.

EMERGENT RESEARCH THEMES IN INCLUSIVE INNOVATION

In this *Handbook*, we curate 26 contributions organized around five core themes and, in doing so, highlight the approaches by which scholars are taking up this challenge.

Social Innovation in Practice

The constituent chapters of Part II offer a range of insights pertaining to this theme: two of the chapters encourage us to question the very basis of social innovation as a “tool” for inclusion, and focus on the issue of sustainability to illustrate their arguments. Another provides a framework for rethinking social innovation pedagogy, while the remaining two chapters, respectively, focus on the distinctive challenges of social innovation in the context of healthcare and the complex web of issues surrounding social impact measurement.

In her chapter “A Silent Evolution: Innovative and Inclusive Narratives on Sustainability,” Ana Cristina Campos Marques draws on complexity and chaos theories to argue that we are currently witnessing the emergence of a “new narrative” on sustainability. Based on interviews from leading figures in the sustainability field, she identifies a set of “microstories” on sustainability, contrasting them with the “grand narratives” that currently frame social understanding of the relationship between people and the natural environment. She builds a framework – the “social attractor framework” – which seeks to explain how microstories can challenge, and ultimately radically alter, dominant conceptions of sustainability. Her framework is designed to explain how deep-rooted change can unfold from micro-level action.

Christopher Wright and Daniel Nyberg’s chapter on “Climate Change and Social Innovation” also focuses on sustainability, but they adopt a very different approach than the previous chapter, one based on political economy. For these authors, current approaches to sustainability – rooted in the notion of social innovation – are premised on neo-liberal myths about the role of markets, corporate self-regulation and the potential of social enterprise to offer ready-made “solutions.” There is an urgent need, these authors argue, to reflect more critically on social innovation, and to view it as part of “a hegemonic political project.” Their core argument is that we need an alternative conception of social innovation, one in which “social movements and communities reclaim a central role in shaping our climate future, and social innovation re-emphasizes themes of justice, equality and human rights.”

Julie Battilana, Brittany Butler, Marissa Kimsey, Johanna Mair, Christopher Marquis and Christian Seelos are concerned with how to best support practitioners in their quest to address intractable social problems, and to do so at the “relevant scale.” As the title of the chapter suggests – “Problem, Person, and Pathway: A Framework for Social Innovators” – the authors present a framework based around “3Ps,” each of which offers a different lens that social innovators can draw upon to augment their effectiveness. They involve (1) unpacking the nature of the focal problem and the risks associated with it; (2) reflecting on the motivations and power position of the person leading the innovation; and (3) conceptualizing a pathway for change – the social innovator’s position in the broader ecosystem. This distinct pedagogical approach offers rich insights for educators seeking to support social innovators.

Anita McGahan focuses her chapter on the critically important topic of “Inclusion

and Innovation in Healthcare.” She argues powerfully that there is a moral imperative to promote inclusion with regard to healthcare: that so many people in the world’s poorest countries can live their lives without direct experience of professional healthcare is a fundamental injustice. Moreover, a core message of the chapter is that innovation is required not only in the Global South, but also the Global North: healthcare systems in many of the world’s richest countries have become unaffordable. While global inequality in healthcare may be shocking, there is an opportunity for governments and organizations of different kinds to “cultivate stability and prosperity.” The author offers “an agenda for research on the role of organizations, markets, and communities in social innovation in healthcare” which can help push forward knowledge in this area and which have crucial implications for practice.

Few topics are as debated in the world of social innovation as social impact measurement – an issue that tends to raise the temperature in a room of practitioners whenever it is discussed. In their chapter “How Do We Know When Social Innovation Works? A Review and Contingency Model of Social Impact Assessment,” Greg Molecke and Anne-Claire Pache tackle the core issues head on. They acknowledge that social impact is “tricky” and “ambiguous.” Their chapter is important because it represents one of the few attempts to “map the current knowledge on social impact to allow researchers and innovators alike to make sense of the multiplicity of approaches currently available and to overcome the challenges associated with their implementations.” The end result is a contribution which brings much needed clarity to a contested set of ideas, and which has significant implications for the study and practice of impact measurement.

Community and Place

The second core theme is community and place. As this set of chapters makes clear, communities can take many different forms, and the challenges of social inclusion and social innovation may vary dramatically across time and place. That said, there are also some commonalities, and a core insight from the contributions in the *Handbook* is that harnessing shared experience of hardship and a common identity are at the heart of effective efforts to promote social and economic inclusion in marginalized communities of all kinds.

In their chapter “Indigenous Social Innovation: What is Distinctive? And a Research Agenda,” Ana María Peredo, Murdith McLean and Crystal Tremblay focus on a topic that has been sorely neglected by management and innovation researchers. As the authors make clear, social innovation in the context of indigenous communities is distinct. While these communities are many and varied, and therefore defy straightforward classification, they tend to face a particular configuration of challenges that are rooted in colonialism and racism. The authors are interested in the question of “what specifically indigenous social innovation (ISI) might look like, and whether something like that is already taking place.” The specific example of T’Sou-ke – “a small, Canadian First Nation of approximately 250 members located on the southern tip of Vancouver Island” – is used to help answer this question and to show how the study of ISI has the potential to shed light on the challenges faced by other disadvantaged communities.

Jeffrey Robinson, Amol Joshi, Lutisha Vickerie-Dearman and Todd Inouye are interested in innovation in a very different context – that of urban neighborhoods. In

their chapter, “Urban Innovation: At the Nexus of Urban Policy and Entrepreneurship,” the authors focus on the challenges and opportunities of social inclusion through urban innovation. The overarching aim is to “synthesize the current attempts to encourage social innovation from a policy perspective and to describe the various business models that are used to enact innovative solutions to urban challenges.” The particular models discussed in the chapter include social enterprise, venture accelerators, triple bottom line ventures, benefits corporations and technology parks.

Neil Stott, Michelle Fava and Natalie Slawinski’s chapter – “Community Social Innovation: Taking a Long View on Community Enterprise” – explores community social innovation in its historical context with a particular focus on geographical communities. As the authors point out, while the language of community enterprise, entrepreneurship and innovation may be new, the core ideas are not. Indeed, these ideas have existed in various guises for many generations. However, academic interest appears to have waned in recent years – with attention focused instead on the apparently heroic actions of individual social entrepreneurs. The aim of the chapter is to “reinvigorate scholarly interest in community social innovation and community enterprise.” To do so, the authors review the work on community economic development stretching back to the 1970s, offer a framework to support theory building around community social innovation that is rooted in practice, and offer an agenda for future research.

The contribution by Tina Dacin and Peter Dacin – “Collective Social Innovation: Leveraging Custodianship, Tradition and Place on Fogo Island” – also focuses on social innovation at the community level, but with a specific focus on how tradition and place interact to provide resources for communities. A core part of the argument is that community members can act as “vested custodians” through the reinvention and renewal of traditions, offering the possibility of “inclusive prosperity.” This leads to a framework for collective social innovation with three key elements – place embeddedness, community identity and community character – each of which are “inextricably intertwined through their rootedness in place.” To illustrate these arguments, the authors draw on the community of Fogo Island, a small and remote island situated off the coast of Newfoundland, which offers an interesting example of collective social innovation dynamics.

Systems, Institutions and Infrastructure

The third theme is systems, institutions and infrastructure. These chapters highlight the challenges of making the systemic social change required to tackle the most intractable social problems, whether that be supporting older people, creating public infrastructure in resource-poor environments or reconfiguring global supply chains. At the same time, however, each of the chapters in this part points to the opportunities – rooted in part in changing technology – open to social innovators, and the potential to make radical change at varying levels of scale.

David Souder’s chapter on “Coordinating Infrastructure Changes to Meet Retiring Baby Boomers’ Needs” is focused on a specific, but often neglected, social innovation challenge: how to cater for people’s changing circumstances as they transition from employment to retirement. In the United States, as in much of the Western world, the proportion of retirement age people is set to rise dramatically. Many live in suburban areas which were designed for families rather than for older people, but the baby boomers

entering retirement do not want to move, which presents a complex set of planning and infrastructure challenges. The author argues, however, that these challenges also represent an opportunity: “Done well, catering to the needs of baby boomers can jump-start demand and ultimately promote inclusion across age and income demographics, generating spillover benefits . . . and revitalizing city centers for generations to come.”

Hwee-Pink Tan and Hwee-Xian Tan are also focused on issues connected to ageing, and the desire of older people to remain living independently in their homes throughout their later years. The authors’ chapter, “Sustainable Technology-Enabled Innovations for Ageing-in-Place: The Singapore Example,” focuses on the role of technological change, and in particular the rise of artificial intelligence, to support older people. The authors review existing initiatives designed to leverage technology to support senior citizens and introduce a framework that the authors hope will facilitate the sustainability of these efforts. They also share their own experiences of initiatives that combine technology with socio-behavioral sciences and clinical validation, backed by a collaborative ecosystem of key stakeholders, for vulnerable seniors to age well and gracefully in their own homes and local community. The chapter concludes with a set of recommendations for future research in this important area of inquiry.

In his chapter on “How Firms Bring Social Innovation and Efficiency to the Global Effort to Recover from National Uncertainty Shocks,” Luis Ballesteros offers an optimistic view on the role that corporations can play in times of crisis such as natural disasters, terrorist attacks, technological accidents, pandemics and sustained episodes of violent crime. As the author notes, these crises bring with them a set of economic issues with the potential to devastate communities. More often than not, the author argues, governments, non-profits and multilateral agencies simply do not have the capabilities to meet such challenges – challenges imbued with increasing complexity as commercial activity becomes more globalized. The arguments contained in the chapter have important policy implications, and raise questions about how best to incorporate business organizations into relief efforts in an efficient and effective manner.

Nuno Gil’s chapter on “The Lack of Public Goods in Emergent Economies: A Call for Research and a Case Study of an Innovative Organisational Design” addresses the thorny issue of how emerging economies can effectively provide the basic infrastructure required to meet the needs of growing populations. This is particularly challenging because policy makers in these economies are operating in the context of institutional voids – inefficient markets, ill-defined property rights, poor regulation and weak judiciary and contract-enforcement mechanisms. In developing his arguments, the author connects to the organizational design literature, contrasting the inclusive, market-based approach of Western governments to infrastructure development with the centralized, state-led approach found in China. The author introduces a research agenda based around the concept of “ambidextrous systems.” In doing so, he draws on the “extreme” case of the upgrading of Cairo’s “garbage cities” – a project that effectively and quickly promoted the development of much needed infrastructure while at the same time challenging and changing key elements of the institutional environment.

Silvia Dorado and Pablo Fernández focus on a core question in social innovation research: How can we replicate – and therefore magnify the impact of – effective solutions to social problems? Their chapter – “An Institutional Framework to the Scaling Up of Inclusive Social Innovations: The Case of La Salada” – draws on core ideas from

institutional theory in order to address this question. They focus in particular on the importance of two concepts: (1) justification – the arguments that actors use “to frame and gain support for innovations” and (2) cooptation – the power dynamics “that frame the negotiations required for a social innovation to gain permanency and diffuse.” To illustrate their arguments, the authors draw on the fascinating case of La Salada, a market located in a “dodgy” municipality on the outskirts of Buenos Aires, which provides opportunities for marginalized people to “create, develop, and grow their businesses from backroom workshops to legal or paralegal establishments.”

Warren Nilsson also draws on institutional theory, and particularly the notion of institutional work, to explore social innovation and radical social change. His chapter, “Social Innovation as Institutional Work,” conceptualizes social innovation as a kind of social movement. The overarching goal of this movement is to promote “everyday systemic agency,” and the core challenge involves connecting “macro-systemic grand challenges to micro-praxis.” An institutional work lens is particularly useful, it is argued, because such a lens helps to reveal the complex power dynamics and vested interests that are inevitably implicated when actors engage in deliberate institutional change. Five “performative dimensions” of institutions are outlined – roles, social identities, resource flows, authority processes and meanings – which can be used by researchers and practitioners to investigate whether a particular social innovation is creating deep-rooted change at the level of the system.

In their chapter “Challenges for Global Supply Chains and Opportunities for Social Innovation,” Yong Kim and Gerald Davis suggest that the increasingly dispersed nature of supply chains in the global economy presents an intriguing set of issues and possibilities for those seeking to make positive social change. Specifically, the fragmentation of supply chains renders monitoring and control very difficult; indeed, even ascertaining the identity of supply chain members is far from straightforward in some industries. However, it is this very disaggregation that presents opportunities for social innovators, because it allows them to enter supply chains with relatively few resources. The effects of social innovations can also be amplified in a way that was unthinkable when the traditional Chandlerian approach to supply chain organization was predominant: “the impact of small-scale innovative activities and services with social purposes may be transferred to different parts of global supply chains due to the complexity and interdependencies among the related companies.”

Individuals, Organizations and Organizing

The chapters that constitute the fourth core theme are diverse in the topics they cover and the theories they draw upon, but collectively they show the multi-level nature of inclusive and social innovation. Charlene Zietsma and Madeline Toubiana begin this part with a contribution that unpacks the crucial, but often neglected, role that emotion can play in social change. Their chapter on “Emotion as the Glue, the Fuel and the Rust of Social Innovation” draws attention to a range of affective dynamics that can shape the nature of social innovation in fundamental ways. Crucially, these dynamics can both facilitate and impede efforts to create positive social outcomes. The chapter is structured around three different types of social innovation – social entrepreneurship, social intrapreneurship and social extrapreneurship. It draws on three discrete metaphors – social innovation

as glue, fuel and rust – to explore the emotional underpinnings of each of these forms of social innovation. The metaphors are used to derive a research agenda which highlights a fascinating set of issues for social innovation researchers to explore.

Xiang Zhou and Jason Shaw focus on a topic that goes to the heart of inclusive and social innovation: inequality. Indeed, much of the motivation to engage in social and inclusive innovation stems from a desire to address this issue. The authors begin their chapter – “Income Inequality: Consequences and Implications for Social Innovation” – by considering definitions of income inequality and the challenges of measuring it. They then review the outcomes of inequality at two different levels: within organizations and within nations. They conclude with a powerful research agenda on income inequality and social innovation, and offer a series of “social-innovation-based actions that organizations and governments may take to address income inequality.” In doing so, they point out that management research has not engaged systematically on the topic of inequality, and highlight a range of opportunities to make important contributions – both practical and theoretical.

Yasser Bhatti and Jaideep Prabhu focus on the interrelationship between three influential concepts: social innovation, frugal innovation and inclusive innovation. In their chapter, “Frugal Innovation and Social Innovation: Linked Paths to Achieving Inclusion Sustainably,” the authors offer a theoretical model that connects social innovation and frugal innovation using the concept of inclusion as a “common denominator.” The core argument is that, when these concepts are combined into an overarching framework, new opportunities arise to solve the Grand Challenges of our time and improve social and economic inclusion sustainably around the world. In addition, the authors highlight a range of possibilities for future research at the intersection of social, frugal and inclusive innovation, and consider their potential implications.

Elizabeth Embry, Jessica Jones and Jeff York focus on “one of the greatest managerial challenges of our time”: the role of entrepreneurship of different kinds – economic, social, institutional and environmental – as a way of tackling human-induced climate change, a problem that is set to worsen as the global population grows and consumption increases. In their chapter on “Climate Change and Entrepreneurship,” these authors argue that, while management research has focused mainly on corporations and policy makers, the limitations of these actors in meaningfully addressing the problem have become all too apparent. Their core argument is that there is a set of entrepreneurial opportunities embedded in the ecological, societal and human health impacts of human-induced climate change, and that we urgently need to understand more about the nature of these opportunities and how entrepreneurs can exploit them. The theory offered in the chapter represents a starting point for entrepreneurship research that may help to find solutions to climate change impacts.

Marya Besharov, Wendy Smith and Tiffany Darabi consider a specific organizational form deeply implicated in addressing social issues – social enterprise – and a specific theoretical perspective that has played a key role in illuminating social enterprise dynamics – paradox theory. Their chapter, “A Framework for Sustaining Hybridity in Social Enterprises: Combining Differentiating and Integrating,” focuses on the challenge of how organizations can sustain two apparently conflicting logics over time. To do this successfully, the authors argue, social enterprises need to combine features that “*both* differentiate *and* integrate logics.” Interestingly, the authors show how this can be done at the

individual, group and organizational levels. They construct a framework that highlights the potential for social enterprises to combine logic differentiation and integration. This framework allows the authors to offer a research agenda on social enterprise sustainability, which contains valuable suggestions for moving research on this topic forward.

The last chapter in this part is by Yves Plourde and is concerned with “Organizing for Global Change.” As the author makes clear, there is no shortage of seemingly intractable global problems – problems that are “systemic and structural,” meaning that “despite their urgency there is a tendency to deny that they even exist.” Addressing such problems requires global change organizations with the ability to collaborate across organizational and sectoral boundaries, but this is far from straightforward. Drawing on sensemaking theory, the chapter outlines three fundamental challenges inherent in organizing for global change (making sense of the focal problem, the construction of an action plan to deal with it, and the organization of people and resources). To illustrate these challenges, three discrete episodes in the history of a high-profile global change organization – Greenpeace – are explored and discussed.

Networks and Social Change

The final theme of the *Handbook* contains four chapters concerned with relationships and ways of organizing within and between organizations. A key theme that emerges from these chapters is that addressing the most deep-rooted social issues requires collaborations across organizations of very different kinds. At the same time, such collaborations are far from straightforward and bring with them many challenges that need to be navigated and negotiated. Ann Florini begins the part with a chapter on “Collaborative Governance,” which she defines as a type of governance that “goes beyond the traditional governmental hierarchies and market-based approaches” to collaboration. The concept is connected to a range of practices that have emerged in multiple domains including public management, corporate social responsibility and multi-stakeholder collaboration, and is seen as essential to the achievement of global goals. It is, the author argues, an important social innovation in its own right because it represents a novel way of organizing designed to address deep-rooted social problems involving a range of actors including communities, foundations, corporations and governments. The chapter builds new theory about collaborative governance and suggests research opportunities designed to help scholars shed new light on it.

Arno Kourula’s contribution considers a related set of issues to Ann Florini’s: it focuses on alliance networks as an emerging and increasingly common type of collaboration designed to address the “grand challenges” of our time. His chapter, “Inclusive Innovation Through Alliance Networks,” begins by outlining what he terms “the collaborative imperative” and the need to move beyond conventional approaches to collaboration if we are to address these grand challenges. It then explores research to date in the field of alliance network studies, highlighting in particular the concept of an organizational role as a key element in the functioning of alliance networks “as drivers of inclusive innovation.” The author concludes the chapter by offering a research agenda to help guide scholars in their study of alliance networks from a role-based perspective.

The chapter by Christian Busch and Harry Barkema focuses on the role of social networks in social innovation. Their chapter – “Social Entrepreneurs as Network

Orchestrators: A Framework and Research Agenda on Networks and Leadership in the Context of Social Innovation” – makes the case that social networks are fundamental to any meaningful attempts to address social problems, and that these networks inevitably cut across sectoral boundaries. The authors make the important point that while there has been a burgeoning of research about the role of social networks in the creation and scaling of commercial ventures, network dynamics in the context of social innovation remain poorly understood. In response, the authors develop a framework of “transformative network orchestration” that builds on and extends existing work on networks and leadership, and applies them to social innovation. As well as offering an intriguing set of ideas for the study of social innovation, the chapter offers important opportunities for future research.

The final chapter in the *Handbook* by Helen Haugh and Maggie O’Carroll, “Empowerment, Social Innovation and Social Change,” focuses on the key issue of empowerment – arguably a building block of social innovation, albeit one that is often ignored or glossed over by researchers in management and organization studies. As the authors point out, this concept is often considered in the context of women in the Global South, but applies irrespective of gender and country setting. It begins by critically analysing the concept, including with respect to its definition and measurement. A novel framework that helps to make sense of and organize empowerment research is then offered, as are some “cautionary tales for empowerment researchers.”

Together, these chapters provide a comprehensive coverage of levels of analyses, contexts and applications of inclusive innovation and social change. Whereas each chapter acts as a call for research, we now discuss how a research agenda on social inclusion and innovation can also address on-the-ground problems.

A RESEARCH AGENDA ON SOCIAL INCLUSION AND INNOVATION

Social inclusion and innovation has been a topic that management scholars have taken up with significant enthusiasm, mostly over the past two decades. Yet, other social and applied sciences have championed this effort for much longer. Our focus as management scholars has been to integrate some of these views on how businesses and organizations can become actors for social change. Furthermore, innovation as a domain of study can also be applied to organizing processes. By building on management research on innovation, we can then focus on social inclusion as the core phenomenon of interest. In doing so, management scholars can systematically engage with other social and applied science disciplines to define research questions, examine empirical contexts and generate replicable, scalable, customizable solutions to the seemingly intractable problem of social inclusion. In this section, we highlight the persistent barriers to inclusion as a phenomenon of study.

Our chapters draw on a rich diversity of theoretical lenses. With previous calls for management research on inclusive innovation, the focus has been on achieving theoretical richness – by explaining problems and contexts with potential for social impact (e.g., George and Schillebeeckx, 2018; George et al., 2012; George et al., 2016). The response to these calls for research on framing theoretical problems around “Grand Challenges” has been strong. Yet, as we mention in the introduction of this chapter, scholarly attention has

been on the theoretical development and richness rather than on highlighting potential ways to solve the problem itself. The maturity of the management field in understanding such grand challenges has also commensurately increased. In this *Handbook*, we now call for a shift from *theoretical focus* to *practical action*.

Tractable Problems of Inclusion and Social Change

Our chapters in this *Handbook* draw from a rich repertoire of theories, and tackle wide-ranging phenomena and contexts where inclusion and social change are the key outcomes. Our scholarly training encourages us to frame a social problem through a theoretical lens, because theoretical contribution is the currency that is carried from one context to another, and one article to a subsequent article. Another, perhaps less traditional, approach is to highlight the problem itself. If we could focus our energies on the problem itself, then perhaps we could similarly generate a compendium of solutions to the problem across contexts – allowing a cumulateness in our energies to tackle societal maladies. We hope that as students become professors, they will devote greater energies and define their own work through the problems they seek to solve. This problem-solving orientation in management could someday soon become the primary pathway to impact and relevance of our academic scholarship.

Problems of access

When is inclusion defined to be a problem? When not everyone has access to a product or service that is generally seen as a meaningful enhancer of social or economic wellbeing. Perhaps then some scholars in the management field could champion systematic efforts at addressing problems of access as their singular focus of research. Some chapters provide frameworks and outcomes by which inequality is perpetuated and can be addressed (e.g., Zhou and Shaw, 2019). In many studies on financial inclusion, for example, the fundamental problem of growth is access to banking facilities. But more powerful in the individual's economic wellbeing is when individuals can then access credit facilities such as microfinance loans. The “digital divide” is a problem of accessing the internet or other mobile-based services, and even more so, accessing information and knowledge that could lead to more productive activities, for example, access to weather information, seeds or pesticides for improving the productivity of farming practices.

Substantial research on gender issues in the workplace is framed around fairness and opportunities for growth for women, and thereby highlights one form of the problem of access (e.g., Joshi et al., 2015). More recent access problems are seen in housing, health-care and urban infrastructure where significant potential for community and perhaps world-saving solutions exist; several are highlighted in contributions in this *Handbook* (e.g., McGahan, 2019; Robinson et al., 2019; Souder, 2019; Tan and Tan, 2019). Our theoretical approaches to access can be translated into solutions or perspectives on access. Scholars can address the challenges of access by asking questions about: (1) the physical and social barriers to access; (2) the seeking or the provisioning of access (or the lack thereof); and (3) the behavioral and socio-economic impact of access.

Problems of scale

Often, large-scale social change requires systems or macro-level changes in values, norms and institutions. A substantial literature exists on institutional theory approaches to social change and social movements. Institutional theory has been a popular lens because of its flexibility to explain multi-level change across multiple actors and multiple time frames. The problem of scale, however, is a substantive issue. A problem of scale might require solutions of scale, making scalability of field-level interventions an important selection criterion. In this *Handbook*, Dorado and Fernández (2019) and Nilsson (2019) suggest institutional approaches to social innovation and change, and provide avenues for future research.

Significant institutional infrastructure weakness, such as lack of healthcare, or sudden shocks, such as currency devaluation or civil strife, might challenge the entire system and trigger mass migration for economic or political reasons. Such substantial shifts that affect the social fabric while causing systemic upheaval call for institutional solutions to alleviate suffering and declining quality of life. In contrast, it is perhaps misconstrued that large-scale problems require commensurately complex and large-scale solutions. This might not be the case – not all problems require complex, institutional change. Energy access issues, such as rural electrification, and slum infrastructure upgradation through combinations of interventions such as solar installations, lamps and toilets are simple and yet effective ways of addressing social problems (e.g., Parikh et al., 2012; Parikh et al., 2015). Although climate change is a large-scale problem, it can be tackled in part by local entrepreneurship efforts (Embry et al., 2019). The presence of large-scale problems provides a new focus for scholars in search of solutions: (1) What attributes of large-scale problems might influence the nature of solutions for social innovation? (2) When do institutional solutions provide more sustainable outcomes and impact relative to speedier interventions? (3) Are there patterns of institutional change in social innovation exemplars? (4) What factors make for scalable solutions, and what influences their success?

Problems of localization

Social change, irrespective of scale, is implemented at the local or community levels, which raises important challenges of rejection or acceptance of solutions, as well as adaptation of solutions to local mores, values and customs. Peredo et al. (2019) ask the question of what makes for indigenous social innovation. Frugal innovation (e.g., Bhatti and Prabhu, 2019) emphasizes local solutions to local problems. Besharov and colleagues (2019) suggest that there is a need to differentiate and integrate solutions in social enterprises. Similarly, Stott and colleagues (2019) articulate the need for community-level enterprises in social innovation. Dacin and Dacin (2019) provide a rich case study of Fogo Island where solutions leverage the community's distinct identity and traditions.

Perhaps the localization problem is addressed when we adopt the Problem, Person, Pathways framework proposed by Battilana and colleagues (2019). Busch and Barkema (2019) suggest that solutions require individual leadership and mobilization of resources across local networks. The challenge of localization could imply the lack of scalability of solutions, which raises an important paradox for social innovation scholars: (1) What are the nature of tradeoffs between localization and globalization of social impact solutions? (2) How do successful projects navigate the localization problem through customization? (3) When is it necessary to localize solutions? (4) How do we leverage local solutions

for global impact? (5) What modifications in organization or behaviors are needed to effectively scale local solutions to global problems?

Problems of behavioral change

Social science scholars have dedicated decades of effort in understanding behavioral change. The provision of public goods and services is not uniform across countries and contexts, and in many places the expectations of such services are non-existent (e.g., Gil, 2019). Changing individual, firm and community-level behaviors has been noted as the root cause of sustainability challenges, for example, in natural resource consumption and degradation on non-renewable natural resources (e.g., George and Schillebeeckx, 2018). One approach to changing behaviors for social change is through empowerment (e.g., Haugh and O'Carroll, 2019). Zietsma and Toubiana (2019) point to emotions as the core driver of behavioral change. Yet, as our chapters note, the challenges of empowerment and sustaining emotional commitment through these efforts remain significant.

Every day we hear news of floods, fires and natural calamities – and often these events are blamed on climate change. More detailed analyses will shed light on contributing local causes such as excessive housing construction in flood plains, or over-farming and depletion of natural barriers such as trees and forests. Climate change and sustainability are significant domains where social innovation and inclusivity become critical drivers (e.g., Marques, 2019; Wright and Nyberg, 2019). Those of us living in coastal communities would vouch for the plastic crisis in our rivers and oceans. European countries have implemented supplementary charges for use of plastic bags for grocery shopping in order to curtail rubbish disposal. Recently, Thailand and the Philippines closed several of their scenic islands that have been ravaged by tourism in order to allow replenishment of natural habitats. Innovative efforts by Ant Forest, a division of the Chinese payments giant Ant Financial, have adopted a mobile gamification approach to instil sustainability sensibilities and a savings mentality in their customers, and correspondingly create real world impact by planting trees commensurate to their customers' virtual world behaviors. These are examples where behavioral changes are needed, and are being implemented.

The solutions for behavioral change could well involve a multipronged approach, which correspondingly raises interesting problems to study and solve: (1) When do different behavioral change efforts succeed, and why? (2) What motivates individuals to change behaviors, and what are the different behavioral responses to change stimuli? (3) What factors influence thresholds or tipping points for behavioral change and attention allocation to problem solving?

Problems of collaboration and coordination

Collective action and common resource problems have been highlighted with the award of the Nobel Prize for Elinor Ostrom's work. Yet, this is just the beginning as shown by the chapters on collaborative and network models of governance for new models to organize for impact (e.g., Florini, 2019; Kourula, 2019; Plourde, 2019). Collaboration and coordination highlight fundamental challenges in organizing collective action where goals and incentives differ among parties. Studies have examined contexts such as disaster aid or the coordination of medical supplies (e.g., Ballesteros, 2019). We need more efforts in understanding how collaboration can be successful in a tri-sector context. The Sustainable Development Goals list Partnerships as a priority area – to highlight the

need for collaboration between the private sector (business), the public sector (government) and civil society (non-governmental organizations, communities and individuals). This tri-sector collaboration becomes the bedrock of social innovation and change. Yet, management research provides very limited understanding of how collaboration between multiple parties can be structured, aligned and executed successfully. Though there are some works on public–private partnerships, for example, in healthcare (e.g., Caldwell et al., 2017; Roehrich et al., 2014), there is a substantive lack of attention on solutions by which private and public coordination and collaboration can be made successful. The problems of coordination and collaboration raise several attendant challenges requiring organizational solutions: (1) How do we create goal congruence among actors with divergent interests and backgrounds? (2) How do we structure relationships, contracts and mechanisms to reinforce collective action for the collective good? (3) What types of problems require tri-sector collaboration, and when is it better for public–private, public–civic, private–civic dyadic forms of organizing?

Problems of transparency and impact

Trust is at a deficit. Societal trust in business and government are at historic lows. In such an environment, asking individuals to rise above their misgivings to solve a collective problem is a challenge – and this influences whether individuals and firms engage. The lack of trust also suggests that individuals no longer find credible the promises of firms when they advertise products as sustainable. In some cases, firms are culpable when they claim more sustainable processes than they actually use, labeled “greenwashing.” Kim and Davis (2019) point out that the “Nikefication” of global supply chains means that the production of goods through globally sourced and distributed processes further reduces the verifiability of sustainable practices. Even if not deterred by lack of trust, individuals might believe that the scale of the problem is so large that their individual effort is meaningless. These issues suggest that if solutions could provide easier ways to assess impact or verify corporate claims on sustainability this might support engagement in positive change behaviors.

Molecke and Pache (2019) provide frameworks that begin to unpack the problems of social impact assessment. New technologies, such as blockchain, offer new solutions to the trust and verifiability of impact assessment. For example, blockchain is now being used to verify farm-to-fork sustainability practices in farming, logistics and packaging in grocery chains. New financial models of “tokens” allow tokenizing of forests and promote sustainable forestry or natural resource consumption. Such new technologies and new models of assessment provide avenues to assess impact easily and inexpensively, which raises new questions for management scholars: (1) How can impact assessment be done more efficiently and effectively? (2) How do verifiability and trust impact behaviors and engagement? (3) What factors influence the credibility of corporate claims on sustainability or social impact? (4) When do new technologies allow for creative new models of social change at large scale?

CALL TO ACTION

Our introductory chapter and this *Handbook* provide a call to action. Each chapter in the *Handbook* provides fresh insight into a global problem and associated solutions to tackling it. Inclusive innovation is the development of new ideas which aspire to create opportunities that enhance social and economic wellbeing for disenfranchised members of society – it has action and actionability at the core of its definition. The *Handbook* is organized into distinctive themes: (1) social innovation in practice; (2) community and place; (3) systems, institutions and infrastructure; (4) individuals, organizations and organizing; and (5) networks and social change. These five themes reflect current theoretical approaches and frameworks, cut across levels of analysis, and provide a rich tapestry of problem-solution contexts that can guide future research.

Our emphasis on action suggests a fundamental shift in management scholarship by focusing sustained scholarly effort on deep-rooted and seemingly intractable global problems, with the explicit aim of social impact. To catalyse our conversations, we have provided six classes of problems: (1) access, (2) scale, (3) localization, (4) behavioral change, (5) collaboration and coordination, and (6) transparency and impact. While these six problems are not meant to be comprehensive, they provide a foundation to begin an exploration of solutions. When a former UN Secretary General launched the Sustainable Development Goals he provided a call to action by saying, “There is no Plan B, because there is no Planet B.” We are hopeful that management researchers, and business scholars more broadly, will adopt an action-oriented approach to their scholarship, and define the success of their work through its social impact outcomes.

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