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SCALING UP SOCIAL INNOVATION: A META-SYNTHESIS

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ABSTRACT

Purpose: This paper aims to analyze how features raised in the case studies in the field of social innovation, from the meta-synthesis methodology proposed by Hoon (2013), indicate factors that promote social innovation scalability

Originality/gap/relevance/implications: The number of publications on SI, despite an increase perceived, is still limited. Consequently, researches dedicated to understand the scalability of the process of SI are still scarce, thus constituting a gap research.

Key methodological aspects: To achieve the objective of this research, we followed the eight meta-synthesis steps proposed by Hoon (2013) which is an exploratory-inductive research design for synthesis of primary data collected through case studies whose primary purpose is to build theory. It was analyzed 66 articles identified in the Web of Science database, nine of them were selected to join this meta-synthesis.

Summary of key results: The findings of this research can be summarized in the concept proposed "environment favourable to the scalability of a SI" with features of the internal environment, divided between aspects of the entrepreneur and the organization, and settings of the external environment, mediated (or not) by a bridge organization.

Key considerations/conclusions: The findings of this study advance the SI literature in two main points: Concept proposition of "environment conducive to the scalability of a SI" and to draw attention to the field of study on the promoting factors of continuity and growth of a SI. As for the practical contributions, the results of the research can help social innovations managers in the expansion phase of its operations, suggesting some elements to consider.

KEYWORDS

Social innovation. Scalability. Enlargement. Meta-synthesis. Creating social value.

1 INTRODUCTION

Innovation, mainly related to the technological innovation of products, is seen as an important element in generating economic value and of considerable importance to the maintenance of competitiveness and longevity of companies (Freeman, 1994; Tidd, 2001). From the increasing awareness whose benefits of innovation and economic growth have not reached all the people of the world and most people still live in inadequate conditions (Hart, 2005), a debate about the need for a vision was established with greater focus on social issues.

Therefore, discussions were initiated on disruptive innovations, including debates on the development of products and services that could improve the quality of life of people with lower income (Christensen, 1997) on innovations developed to meet the needs and improve the bottom of the pyramid of life quality (Prahalad & Hart, 2002; London & Hart, 2004; Berger & Nakata, 2013), on frugal innovations with simplified and low cost technologies (Zeschky, Widenmayer, & Gassmann, 2011; Lim, Chaisung, & Ito, 2013) and, more recently, on social innovation (SI), the central point of this research.

The main element of SI is the creation of social value (Marshall, 2011) and is intimately related to the study of social entrepreneurship and social business (Peredo & Mclean, 2006). Furthermore, it emphasizes that the SI arises when an individual or a group of people identifies a social need and there are new proposed solutions organized creatively (Westley, Antadze, Riddell, Robinson, & Geobey, 2014). Although some concepts have been proposed in the literature, there is still no consensus among researchers, because the field is under development (Phillips, Lee, Ghobadian, O'Regan, & James, 2015). In relation to the empirical investigations in the context of SI, as Phillips *et al.* (2015) state, there are three predominant fields: the role of social entrepreneur (Austin, Stevenson, & Wei-Skillern, 2006; Lehner & Kansikas, 2012; Ruvio & Shoham, 2011; Zahra, Gedajlovic, Neubaum and Shulman (2009), the partnership relationship (Edwards, Matti, & Alcántara, 2012; Lettice & Parekh, 2010) and the importance of the institutional environment (Desa, 2012; Moore, Westley, & Nicholls, 2012).

However, there is lack of more research to concentrate efforts on understanding the SI and its main constituent elements, as well as a process view (Phillips *et al.*, 2015). Within this line of research, there is the necessity of clarify how a SI can be facilitated, and this is a subject that has not been adequately addressed in the literature (Estensoro, 2015). This field of research on how the SI can be facilitated goes beyond the initial phases of the project and includes the scalability phase, whose focus is on expanding impact of SI beyond the local level. According to Westley *et al.* (2014), how a SI can gain scalability or main

and peripheral elements, important for this stage of SI, have not yet been fully explored in the literature.

Given this theoretical gap, this paper aims to **analyze how raised features on case studies in social innovation, from the meta-synthesis methodology proposed by Hoon (2013), indicate factors that promote SI scalability**. In order to do this, a meta-synthesis was developed for the purpose of recommendations based in Hoon (2013), which involve the identification of potential studies area, data extraction, analysis and synthetic interpretation of qualitative case studies. The methodology of meta-synthesis involves eight steps proposed by the author and is an exploratory-inductive research design for synthesis of primary data collected through case studies, and whose main purpose is to build theory. Thus, 66 articles identified in the Web of Science database have been analyzed, nine of which selected to join this meta-synthesis. Therefore, this paper is divided into six sections: this introduction, literature review on social innovation and scalability of a social innovation, research design, analysis of articles, discussion and conclusions.

2 SOCIAL INNOVATION

The concept of SI is not a consensus among specialists in the area yet, and one reason is the theme's contemporaneity. According to systematic review by Phillips *et al.* (2015), the first publication involving IS was Kanter (1998), which considered the term as a way to innovate seeking to reach not only new markets but also ensure return to society. After this study, a small number of articles published in the subsequent years and a considerable increase in the number of publications was achieved only from the year 2008 (Phillips *et al.*, 2015).

The conceptual definitions can vary from a broad view as Moulaert, F., Martinelli, F., González, S., & Swyngedouw (2007), which defines SI as a tool for urban development in order to meet human needs, even the most specific views such as Mulgan (2006, p. 146), which considers the SI as "innovative activities and services that are motivated by the goal of meeting a social need". This last definition was chosen to guide the steps of this research. Although there are conceptual differences between the two lines, it is worth noting that both deal with the social issues hitherto unresolved, in other words, the focus is the social aspect of innovation (Maclean Harvey, Gordon, & Shaw 2012).

The conceptual line from Mulgan (2006) has a closer relationship with the concepts of social entrepreneurship, social enterprise and social business; therefore, it focuses on solving social problems, especially those related to poverty. Although there are specifications that distinguish these terms, all of them are related to "initiatives that explicitly seek to create social value through the use and

management of human and financial resources that are partly generated by the market" (Borzaga, Depedri, & Galera, 2012, p. 400). Choi and Majumdar (2014) suggest treating social entrepreneurship as a concept cluster that combines the concepts of social value creation, social entrepreneur, social enterprise, market orientation and SI. Therefore, although differences remain on the specifications of each concept, in general they all seek to create social value (Marshall, 2011).

The role of a social entrepreneur and the idealization of a SI are driven from the existence of a social problem hitherto unsolved. Often, this problem is classified as insoluble and, therefore, it is the social entrepreneur's mission to diagnose it and propose innovative solutions (Murray, Caulier-Grice, & Mulgan, 2010), and this phase was considered in this article the first of the SI process.

The second phase of the SI process, defined in this study, is the development (Bhatt & Altinay, 2013). Such development, in addition to the commitment of the social entrepreneur and his team, required its own resources or was obtained via philanthropic (Maclean, Harvey, & Gordon, 2013) or through strategic partnerships (Le Ber & Branzei, 2010; Estensoro, 2015) that assist in the development of SI process. Besides financial resources, strategic partnerships can help with directions, exchange of experiences, knowledge sharing and even the occupation of "institutional voids" in fragile environments with poor infrastructure, poorly established rules, lack of governance and trust. It is emphasized, as an example, Kolk and Lenfant's (2015) analysis in three cases of strategic partnerships (between multinational companies and local communities) for coffee production and marketing in the Democratic Republic of Congo.

The first and second phases of the SI process were treated with more attention in the literature until now. Since the expansion phase of the SI, the focus of this article will be addressed in the next section.

2.1 SCALING UP SOCIAL INNOVATION

The third phase, classified in this study, of the SI process consists of the expansion of operations beyond local dimensions (Bhatt & Altinay, 2013). Although the last level of the spread of SI is the expected change caused in the system (Dees, Anderson, & Wei-Skillern, 2004), in practice, most SI does not reach this stage (Westley *et al.*, 2014).

The scalability of the SI process occurs when a pilot project reaches a satisfactory level of performance and can be implemented on a larger scale to provide greater social value creation (Webb *et al.*, 2010). In detail, this process occurs when organizations focusing on SI or social enterprises begin their efforts at the local level (initial conditions). Over time, they develop replication strategies (scaling out), create networks and develop knowledge, gain experience and repu-

tation. When they are successful in the previous step, social enterprises reach the systemic level change (system change) (Westley *et al.*, 2014).

The scalability of a SI can be discussed in two trends. The first is related to where the SI will be expanded: scaling up and scaling deep (Smith & Stevens, 2010). The scaling up strategy seeks to expand the role of the SI to other geographic regions and, therefore, reach a larger number of people (Taylor, Dees, & Emerson, 2002). Already the scaling deep strategy is related to the ability of enhancing the creation of social value in the place of origin, either by improving the service offered or by increasing the number of options available to the population (Taylor *et al.*, 2002).

The second trend is related to how the expansion SI process occurs. Dees *et al.* (2004) suggest that they occur between two extremes of a continuum: dissemination in which the social entrepreneur shares information with other entrepreneurs or social enterprises in order that these agents put to practice the SI in other regions (expansion of low cost and low control); and branching in which SI scalability is achieved through the development of "branches", new organizational structures, linked to initial social enterprise (characterized by higher costs and greater control). The most common strategies are up and branching scaling, i.e. expansion of SI to other locations through its own expansion structure.

However, to expand operations, the SI must overcome barriers to reach more people in different places, from local to regional, from national to global (Westley & Antadze, 2010). With scalability, the mission to spread the SI in order to maximize social change and solve the problems in question is performed (Perrini, Vurro, & Costanzo, 2010). However, it is worth noting that not all social innovations are predestined to spread, some can maintain their local operations without any concern for growth (Westley *et al.*, 2014).

Although the relevance of the issue of scalability of a SI, there are few studies that are dedicated to this mission. Besides the theoretical relevance, understanding how the scaling process can be interesting for the empirical field, since much of the social innovations fail at this stage (Westley *et al.*, 2014).

3 RESEARCH DESIGN

To fulfill the objective of analyzing the favourable environmental characteristics for the SI scalability phase, it was used the methodological procedures of meta-synthesis proposed by Hoon (2013). Such a method can be defined as "an exploratory, inductive research design to synthesize primary qualitative case studies for the purpose of making contributions beyond those achieved in the original studies" (Hoon, 2013, p. 523). The synthesis from case studies allows the construction

of theory (Eisenhardt, 1989; Yin, 2009), as well as the collection of the insights obtained in several independent studies and thus consolidate the results of primary studies to contribute more robustly with the theory in question (Hoon, 2013).

Chart 1 summarizes the eight steps developed in this study, indicated by Hoon (2013) on the construction of a meta-synthesis.

Chart 1

META-SYNTHESIS PROTOCOL

STAGES OF META-SYNTHESIS	ANALYTICAL GOAL	STRATEGY OR ANALYTICAL PROCEDURE USED	OUTCOME TO GENERATE A THEORETICAL CONTRIBUTION
1. Framing the research question	Theoretical and conceptual deepening of the SI in order to gain greater familiarity with the field, especially with the latest discussions and identify the theoretical gap in the literature.	Search and reading academic publications of the research field in SI, especially the last five years. Special attention to theoretical review articles and suggestions for future studies of the most recent publications.	Identification of the theoretical gap that could be filled with a meta-synthesis study.
2. Locating relevant Research	Identification of relevant publications on SI.	Search the key term "social innovation" in "topic" field without date restriction in the database "Web of Science".	A sample of 66 articles in the area of "business" and "management". Out of this total, a sample of 30 articles was classified as a qualitative case study.
3. Inclusion criteria	Inclusion of articles that was consistent only with the scope and the previously established goal.	Development of three specific criteria for inclusion and exclusion of articles. Then full text reading and evaluation of the 30 articles selected across the defined inclusion and exclusion criteria.	Out of the 30 articles selected in the previous step, 9 of them fit the criteria.

(continue)

Chart 1 (Continuation)

META-SYNTHESIS PROTOCOL

STAGES OF META-SYNTHESIS	ANALYTICAL GOAL	STRATEGY OR ANALYTICAL PROCEDURE USED	OUTCOME TO GENERATE A THEORETICAL CONTRIBUTION
4. Extracting and coding data	Reading and carefully rereading full text of each selected article. Coding study characteristics and their proceeded insights.	Development of a spreadsheet with general data of the articles and the initial coding of the sections related to the aim of this study.	Organization and possibility of broad overview of each article.
5. Analyzing on a case-specific level	Identification and analysis of variables that could be related to the scalability phase of a SI (purpose of this paper).	Causal networks developed for each case included in the study.	Identifying themes, level of analysis and how each case was related to the scalability phase of a SI.
6. Synthesizing on an across-study level	Visualization and analysis of the cases altogether. Development of a meta-causal network capable of encompassing the findings of causal networks of each case in a meta-causal network.	Meta-causal network.	Identification of logical patterns established between the cases regarding the scalability of a SI phase.
7. Building theory from meta-synthesis	Identification of the concept of environment conducive to the scalability of a SI.	Link between the results with the literature on the scalability of a SI.	Identification of the concept of environment conducive to the scalability of a SI.

(continue)

Chart 1 (Conclusion)

META-SYNTHESIS PROTOCOL

STAGES OF META-SYNTHESIS	ANALYTICAL GOAL	STRATEGY OR ANALYTICAL PROCEDURE USED	OUTCOME TO GENERATE A THEORETICAL CONTRIBUTION
8. Discussing	Discussion of the results of the meta-synthesis and its limitations.	Discussing rigor, reliability, and validity.	Legitimizing the validity and reliability of the procedure and activities used.

Source: Adapted from Hoon (2013).

For the systematic search of publications on SI, it was used the term "social innovation" for the topic field, incorporating title, keywords and abstract, in the categories Business and Management ISI Web of Science database. For the time interval for the publication, it was not set a start date research and, therefore, the research encompassed all publications of the area available in the database by the year 2015. As a result, it was returned 133 publications and, after applying the filter to include only article, remaining 66.

Through previously established analysis of the title, keywords and abstract and full reading when necessary, were classified as false positive results – not directly related to SI (4), action research strategy (1), review studies (2), quantitative methodologies (7), and conceptual studies (24). Therefore, out of the total of 66 publications, 38 was excluded, leaving 28 articles classified as qualitative case studies. These articles were submitted to analysis, according to the inclusion and exclusion criteria outlined in Chart 2.

Chart 2

INCLUSION OR EXCLUSION CRITERIA

INCLUSION CRITERIA	RATIONALES	ARTICLES EXCLUDED FROM ANALYSIS
Qualitative case studies	This criterion was used in order to include publications which demonstrate only that using the case study method detailed description of the use of the method. The illustrative case studies with the aim of demonstrating the practical application of the concept were excluded from analysis.	Illustrative case examples (Simms, 2006; Raufflet, 2009; Herrera, 2015).

(continue)

Chart 2 (Continuation)

INCLUSION OR EXCLUSION CRITERIA

INCLUSION CRITERIA	RATIONALES	ARTICLES EXCLUDED FROM ANALYSIS
SI concept related to Mulgan view (2006, p. 146) that considers SI as "innovative activities and services that are motivated by the goal of meeting a social need".	This criterion was used in order to include publications that were only directly related to the concept of SI from Mulgan (2006).	Innovation in general scope with small references to SI (Mcloughlin & Preece, 2010; Kinder, 2010; Witkamp, Raven, & Royakkers, 2011; Fink, Lang, & Harms, 2013; Bas & Guillo, 2015).
Focus in growth stage, expansion or scaling up a SI	This criterion was used in order to gather the publications that addressed only, even if indirectly, scalability process or extension of a SI. Although these articles treat the SI as Mulgan's (2006) concept, scalability phase has not been addressed in studies.	Social economy (Klein, Tremblay, & Bussières, 2010). Focus on identifying SI opportunities and planning of social enterprises (Lettice & Parekh, 2010). Importance of corporate philanthropy for the initial phase of the SI (Maclean, M., Harvey, C., & Gordon, J. (2013). 2013). Focus on stage identification of an opportunity to SI and the construction of a social enterprise. It does not address the development phases or scalability of a SI (Marcy, 2015). Conflict between organizational objectives focused on profitability and the generation of social value (Le Ber & Branzei, 2010b). Pure description of the case "Fundacion Paraguaya" (Maak & Stoetter, 2012).

(continue)

Chart 2 (Conclusion)

INCLUSION OR EXCLUSION CRITERIA

INCLUSION CRITERIA	RATIONALES	ARTICLES EXCLUDED FROM ANALYSIS
Focus in growth stage, expansion or scaling up a SI	This criterion was used in order to gather the publications that addressed only, even if indirectly, scalability process or extension of a SI. Although these articles treat the SI as Mulgan's (2006) concept, scalability phase has not been addressed in studies.	Knowledge management in SI (Chalmers & Balan-Vnuk, 2013). Outsourcing of IT services as a way to SI (Sandeep & Ravishankar, 2015). Focus on exploration of new areas of business (Igarashi & Okada, 2015). Events for dissemination of SI (Citroni, 2015).
Check Quality	Sought to evaluate the articles for their complete description of the case, clear connection between theory and empirical evidence, multiple data sources, among other criteria related to the quality of the case studies according Eisenhardt (1989) and Yin (2009).	No further studies were excluded due to quality assessment.

Source: Elaborated by the authors from Hoon (2013).

From the application of the inclusion and exclusion criteria, nine potential articles have remained to integrate this meta-synthesis. The selection criteria applied, previously detailed, is possible to be organized into five items: 1. the presence of the term "social innovation" in the title, keyword or abstract of academic articles indexed in the Web of Science database; 2. focus on the studies on SI based on the concept proposed by Mulgan (2006), concerning innovative activities that are motivated to achieve goals related to the satisfaction of social needs, in order to exclude the articles that focus on other areas of knowledge than not the management and administration; 3. empirical study using the qualitative case study methodology; 4. focus on the topics of growth, expansion and scalability of SI; and 5. methodological quality in the case studies development of case studies. By imposing these five selection criteria, nine articles were selected for this meta-synthesis. Once these items were chosen, a new stage began, whose focus is on collecting and encoding data from a careful reading of the full texts selected as sample. Chart 3 was used as a guide for the data encoding and this has enabled the organization of the data extracted from articles as well as the display of information and the main findings in each articles.

CHART 3

DATA CODING FORM

General data
Author, date, title and journal.
Focus
Question and aims of the research.
Theoretical framing
What is the concept of SI the study considered? Is this choice in accordance with the options of this article? How is the scaling up of a SI treated?
Research Context
Country of carrying out the research and sector which was developed.
Methodology
Research strategy, consistent with the objective presented, number of cases, level and unit of analysis, data collection techniques, data analysis techniques, accuracy and dense description of the procedures adopted.
Data Analysis Approach
Description of case studies, evaluation as to the description of the SI scalability stage.
Key findings
Identification of key insights generated and developed frameworks.
Discussion
Identification of research findings across the field of study.
Conclusions
Main theoretical and empirical research contributions.
Overall Assessment Articles
Relevance of the study to the field, quality and reliability.

Source: Adapted from Hoon (2013).

In the analysis on case-specific level, it was sought to identify and analyze the categories that could be related to the amplification of SI. As a result of this stage, it developed specific causal networks for each case involving mainly the identification of subjects, the level of analysis and how the case was related to the SI scalability phase. In sequence, cross-study level synthesis was developed in order to visualize and analyze the data together and thus generate a meta-causal network encompassing the main findings and the patterns found in the cross-case analysis, as discussed in next section.

4 RESEARCH PAPERS ANALYSIS

The first three stages of the meta-synthesis proposed by Hoon (2013) led to the identification of nine articles that have integrated this meta-synthesis, as shown in Chart 4:

CHART 4

SELECTED ARTICLES FOR META-SYNTHESIS

AUTHOR / YEAR	JOURNAL	JCR – ISI IMPACT FACTOR	TITLE
Bhatt and Altinay (2013)	Management Decision	1,429	How social capital is leveraged in social innovations under resource constraints?
Kolk and Lenfant (2015)	Journal of Public Policy & Marketing	1,2	Cross-sector collaboration, institutional gaps, and fragility: the role of social innovation partnerships in a conflict-affected region
Le Ber and Branzei (2010a)	Business & Society	1,468	(Re)forming strategic cross-sector partnerships
Manning and Roessler (2014)	Journal of Business Ethics	1,326	The formation of cross-sector development partnerships: how bridging agents shape project agendas and longer-term alliances
McMullen and Adobor (2011)	Leadership & Organization Development Journal	0,362	Bridge leadership: a case study of leadership in a bridging organization
Murphy, Perrot and Rivera-Santos (2012)	Journal of Business Research	1,480	New perspectives on learning and innovation in cross-sector collaborations

(continue)

Chart 4 (Conclusion)

SELECTED ARTICLES FOR META-SYNTHESIS

AUTHOR / YEAR	JOURNAL	JCR – ISI IMPACT FACTOR	TITLE
Perrini *et al*. (2010)	Entrepreneurship & Regional Development	1,519	A process-based view of social entrepreneurship: From opportunity identification to scaling-up social change in the case of San Patrignano
Weerawardena and Mort (2013)	Journal of Public Policy & Marketing	1,2	Competitive strategy in socially entrepreneurial nonprofit organizations: innovation and differentiation
Westley *et al*. (2014)	The Journal of Applied Behavioral Science	0,914	Five configurations for scaling up social innovation: case examples of nonprofit organizations from Canada

Source: Elaborated by the authors from Hoon (2013).

From the selection of the articles, an individual analysis of the publication was made, performed based on the items shown in Chart 4. The encoding of selected publications was made through the reading of all articles across the coding criteria. In this manner, data analysis proposed by selected articles was determined, seeking to understand the cases analyzed, as well as the evidence presented on the scalability stage of a SI. It should be noted that these elements are the "data" that are part of the meta-synthesis and therefore is from them that the conclusions are designed (Hoon, 2013).

Following, analysis and synthesis of the main insights and frameworks presented in the articles were performed. It was tried to explore the insights generated in each case on the characteristics that would provide the amplification of SI, stressing on elements that should initially occur for scalability. As a result, causal networks were developed for each case in order to visualize patterns that could be part of the meta-causal network.

As argued by Miles and Huberman (1994), causal networks in case-specific level direct analysis in a way that patterns and contrasts are found in cross-case level. From this, the patterns about the scalability stage, found in nine

articles which integrate this meta-synthesis, have been raised. The information is available in Chart 5.

Chart 5

CATEGORIES IDENTIFIED FROM NETWORK

CASES	INTERNAL ENVIRONMENT		EXTERNAL ENVIRONMENT
	ENTREPRENEUR	ORGANIZATION	
Bhatt and Altinay (2013)	- Entrepreneur experience in the current social enterprise or in previous companies. - Personal ability to establish partnerships to conquer social capital.	- Employees training.	- Partnerships – the entrepreneur can hardly scaling up your SI by himself. - Social networks as a source of financial resources and complementary competence. - Merger with other companies (social or commercial) as a way of increasing the performance. - Involvement of the local community. - Need of the existence of an institutional support by institutions and government agencies in order to create a conducive ecosystem to SI, as well as existing in developed economies (US and UK, for example). - Increased participation of beneficiaries. This would reduce costs for the expansion of the offered social innovation or to complement innovations that are necessary.

(continue)

Chart 5 (Continuation)

CATEGORIES IDENTIFIED FROM NETWORK

CASES	INTERNAL ENVIRONMENT		EXTERNAL ENVIRONMENT
	ENTREPRENEUR	ORGANIZATION	
Kolk and Lenfant (2015)	- Not addressed.	- Professional and technical training of employees. - Achievement certifications in order to guarantee the origin and characteristics of the SI product/ service in new markets.	- The need for an institutional environment created and maintained mainly by the government, conducive to business development, are SI or not. - Establishment of partnerships in order to improve the competitiveness of SI business in fragile institutional environments; the introduction of corporate governance practices; the quality of offered products; access to financing. - Possibility of technical visits and exchange of experiences with other SI organizations.
Le Ber and Branzei (2010a)	- Not addressed.	- Experience and learning from the partnership relations. established in the past as important elements in the development of new relationships in new markets. - Adjustment of internal roles in relationships with other companies, according to needs.	- Establishing partnerships as a way to allow access to new technologies and other resources. - Maintaining long-term partnerships as a way to reduce risk and increase the benefits for both parties.

(continue)

Chart 5 (Continuation)

CATEGORIES IDENTIFIED FROM NETWORK

CASES	INTERNAL ENVIRONMENT		EXTERNAL ENVIRONMENT
	ENTREPRENEUR	ORGANIZATION	
Manning and Roessler (2014)	- Leader capacity to establish partnerships with other actors.	Not addressed.	- The participation of external intermediaries (bridge organizations) facilitates the formation of individual projects and long-term alliances with other actors.
McMullen and Adobor (2011)	- Not addressed.	Not addressed.	- Bridge organizations can assist in developing partnerships between small SI organizations to large enterprises. - The leader of a bridge organization inspires and motivates the parties involved in the pursuit of common objectives, both economic and social. - The leader of a bridge organization acts as a director of partnerships and the management of companies, especially in smaller. - The bridge organization seeks to support organizations involved in the partnership relations. This support can be done through informal actions that guarantee proximity to the SI organizations.

(continue)

Chart 5 (Continuation)

CATEGORIES IDENTIFIED FROM NETWORK

CASES	INTERNAL ENVIRONMENT		EXTERNAL ENVIRONMENT
	ENTREPRENEUR	ORGANIZATION	
Murphy *et al.* (2012)	- Leader experience.	- Experience of social enterprise to operate a SI on a small scale before the expansion stage.	- Importance of collective learning with partners in regard to strategic decisions and to environmental adversities. - Employment contract with employees and residents suppliers in locations where there is expansion of pretension.
Perrini *et al.* (2010)	- Attempt to make it less dependent on the business model of its leader.	- Before the scalability, it should be clearly understood critical determinant of success and how they are dependent on which part of the environment and are difficult to replicate. - Minor adjustments in the structure may be necessary in order to make it suitable to the new environment. - Coherent structure with the SI phase.	- Partnerships established with local actors scalability stage, focus on creating local social value and cost savings; - Networks can help not only with resources, but can also guide the replication processes and change of scale through sharing of experiences.

(continue)

Chart 5 (Conclusion)

CATEGORIES IDENTIFIED FROM NETWORK

CASES	INTERNAL ENVIRONMENT		EXTERNAL ENVIRONMENT
	ENTREPRENEUR	ORGANIZATION	
Weerawardena and Mort (2013)	- Not addressed.	- Development of incremental and radical innovations focused on new markets. - Learning from multiple sources (including domestic) is an antecedent of innovation in social business. - Employees training. - Focus on differentiation in order to maintain the leadership of the working area - maintenance on market/ competitive advantage.	- Learning from various sources / networks. - Partnerships as a source of resources and knowledge. - Government support.
Westleyet al. (2014)	- Leader's ability to motivate people/actors/ professionals. - Visionary leader.	- Internal learning. - Participatory organizational culture. - Product/Service quality.	- Search for support beyond local actors to the systemic change objectives are maintained.

Source: Elaborated by the authors.

Based on the patterns set out in Chart 5, the meta-causal network was developed. This network was developed through the interpretation of variables that emerged in the cross-examination of cases phase. Two environments were considered significant in cross-examination, "internal environment", divided

between features of "entrepreneur" and "organization" and "external environment" as shown in Figure 1.

The meta-causal network shown in Figure 1 revealed the existence of an internal environment and an external environment conducive to the expansion of SI stage. The internal environment was divided between aspects of the entrepreneur and the organization. With regard to entrepreneurial characteristics, it was observed some leadership ability, regarding the function of engaging employees and partners for the implementation of social activity, experience in social enterprise or other organizations and political skill as important elements to the scalability of a SI. The importance of the entrepreneur in social enterprises or the development of innovations has been addressed in other publications of literature in this area (Sharir & Lerner, 2006; Lettice & Parekh, 2010), for example, the importance of Martin Burt at organization Fundación Paraguaya (Maak & Stoetter, 2012).

Although the leader presence is an important feature in the identification and management of SI, it was found that in the scaling up stage, the organizational structure must be re-arranged in order to achieve full operation without the presence of the leader. Sometimes, this is a barrier so difficult to overcome that there is a necessity to change the leader (Westley *et al.*, 2014).

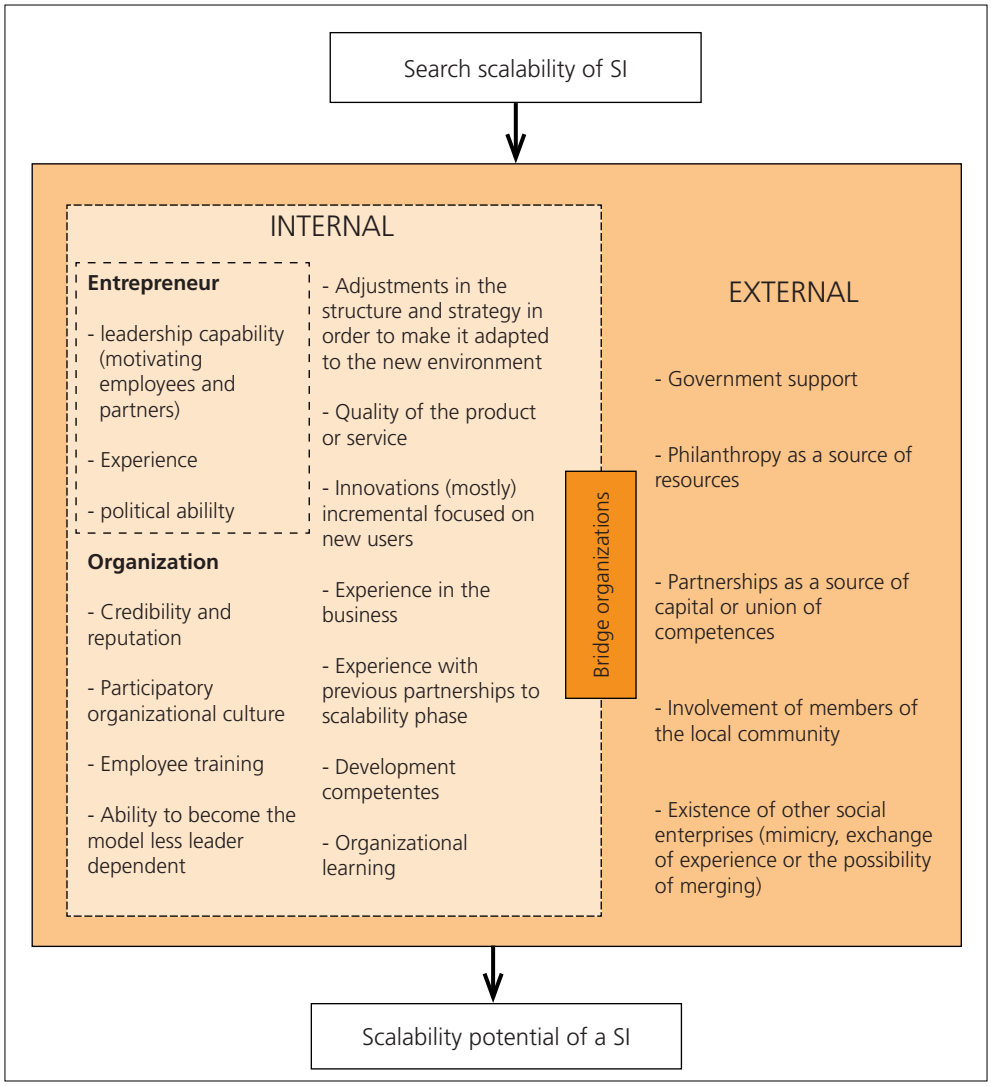
With regard to organizational aspects, it is noteworthy the importance of the credibility and reputation of the social enterprise as a means to gain support in fundraising or exchanging experiences with foreign partners, treated as essential to the scalability stage of a SI (Jamali, Yianni, & Abdallah, 2011; Kolk & Lenfant, 2015). In addition, participatory organizational culture has been identified as an important feature for the extension of a SI. This is due to the complexity of this phase and the need for interaction among members of the social enterprise in seeking to expand the capacity to create social value. The need for training of employees can also be related to the previous step, since it enables better use of the team's contributions and less leader reliance.

Still on the organizational aspects, it was found that the business model of a social enterprise should be adapted to the new scalability target environment and this should be done through adjustments in the structure and strategy to address the particular needs of the new place. In some cases, the social business models are difficult local adaptation and present problems in maintaining the environment, as in cases of IT service outsourcing in India, presented by Sandeep and Ravishankar (2015).

Another internal element worth mentioning is the quality of products or services, because it is fundamental to the good acceptance in a new market, especially in low-income market, as highlighted by Foster and Heeks (2013). In addition, innovations are important ways for organizations focused on SI reach new

FIGURE 1

PROMOTING FACTORS OF SI SCALABILITY



Source: Elaborated by the authors.

markets, as the products or services offered mainly in order to mitigate some social problems related to poverty can be re-adequate (Karippacheril, De Reuver, & Bouwman, 2013), innovated radically or incrementally (Tarafdar, Singh, & Anekal, 2013) and even disruptively (Hart & Christensen, 2002; Nakata & Weidner, 2012).

Previous experience with the business or the SI was another element identified as relevant because, according to Le Ber and Branzei (2010a) and Bhatt and Altinay (2013), the experience of the organization and its members is an important ally in step growth of a SI. It was also possible to realize the importance of previous experience with partnerships, as it reveals the importance of the participation of external actors to the success of a SI at all stages, including the expansion stage, as social entrepreneurs and their teams have not always experience for this (Bhatt & Altinay, 2013).

The analysis of such identified elements also allows the disclosure of two factors: organizational learning and competences development, since such elements already identified as credibility, training, independence of a leader, knowledge of previous experiences and so on to actualize need organizational learning and from developing organizational competences to enable adjustments, training, application knowledge, internal development and other activities related to the aforementioned promoting factors.

In the external environment to the organization looking for the scalability of their SI, nine elements have been identified as relevant. The first of these relates to the need for governmental support, since especially in certain fragile institutional environments, characterized by the lack of rules, reliability and infrastructure, as defined by Kolk and Lenfant (2015), there are difficulties for the development and expansion of SI.

Two other elements identified as important in a SI scalability stage, given its complexity and expensiveness (Smith & Stevens, 2010), are philanthropy and partnerships as a way of raising funds and, in the second case, gathering skills and access to new technologies. The importance of partnerships was identified in studies, such as Le Ber and Branzei (2010a) in which, by analyzing four relations of partnership between companies and non-profits in Canada, it could be concluded that they were essential for accessing technologies and spreading risk innovations.

It also could be identified that the involvement of the local community is one of the important elements for the success of a SI in the indoor environment. This can be discussed in two parts; the first of them is the adaptation of SI to the growing market and the second is related to the increased possibility of creating social value through the generation of jobs in the environment to rely on the SI the dissemination stage, as the case of IT outsourcing companies that led jobs for poor rural populations of India (Sandeep & Ravishankar, 2015), or by hiring local suppliers.

Another external factor identified in the meta-synthesis is related to the existence of other social enterprises. This allows a mimicry of actions when a social enterprise is reflected on another to formulate their strategies, exchange experi-

ences and to the possibility of mergers as a way of expanding the creation of social value.

After detailing the characteristics identified as relevant from the cross-case analysis, a focus beyond characterized as internal and external environment emerged. This is the bridge organizational model that acts as a link between the internal environment and the agents of the external environment. McMullen and Adobor (2011) and Manning and Roessler (2014) treat it as an important means for the success of a SI to connect the internal needs and competences with the possibilities of the external environment. It is noteworthy that, although identified in this research, not always the bridge organization is a necessary means of connection between the external and internal environment, where the focus is scalability of SI.

5 DISCUSSION

The results presented here lead a breakthrough in the meta-synthesis literature to address jointly insights on the relevant characteristics in a SI scalability process. In sum, this meta-synthesis contributes to the field of SI studies in two ways. The first is given to suggest the concept of 'environment conducive to the scalability of a SI' including internal features, divided between aspects of the entrepreneur and the organization, as well as intermediated external characteristics (or not) by a bridge organization. The second draws attention to the field of study in SI, here called managing the scalability of promoting factors of SI to ensure its continuity and growth. The three prominent fields in research on SI, according to Phillips *et al.*, 2015, aim at comprehending studies on 1. the role of the entrepreneur, 2. the relations of partnership and 3. the importance of the institutional environment for SI. It is possible to verify that studies on the management of SI and replication practices, such as the SI scalability, is not a major field of study in the area yet. As seen in these terms, this research contributes to increase the understanding of how a SI can be multiplied and, thus, obtain social impact within a greater number of people.

6 CONCLUSION

This study aimed to examine how characteristics raised in the case studies in the field of social innovation, from the meta-synthesis methodology proposed by Hoon (2013), indicated factors that promote social innovation scalability. The SI perspective used in this paper is consistent with the approach adopted by Mulgan

(2006) that sets the SI of other forms of innovation by its focus on creating social value, with the pursuit of satisfaction of human needs, especially those dissatisfied by poverty of population. Based on this concept, the criteria was selecting case studies within the SI, and from that selection, with the application of meta-synthesis. Thus, it was possible to identify the factors promoting the SI scalability presented in this study. This identification led to the classification of external and internal factors, as well as the delimitation of entrepreneurial character of factors and identification of the presence of bridge organizations and their role. The meta-synthesis was developed from 66 cases collected and analyzed and nine were based on the steps indicated by the author.

Theoretical contributions can be identified in the study. The first one is related to the concept of Favorable Environment to the Scalability of the SI since it addresses the manner a SI can gain scalability, in other words, how a SI can increase its social impact. This research gap has been proposed by Westley *et al.* (2014) and Estensoro (2015) who found that the topic still needs new studies to clarify how an SI can expand and enhance deepen its impact on society. The second contribution concerns the capacity of the research to considerate internal elements, derived from the entrepreneur and the enterprise, scalability promoters of a SI with elements of the external environment, in addition to organizations bridging which are able to improve the relationship between these environments. This range of elements constitutes a theoretical contribution to the field since they consider various elements that compose the complex environment in which SI are developed. Approaches focused on specific elements (the entrepreneur, the enterprise or the environment) are more common in literature. A third theoretical contribution of this article refers to the concentration of efforts to understand the subsequent steps after implementing a SI because, as demonstrated by Phillips *et al.* (2015), the initial stages of this process have already been studied in depth in the literature of the field.

With regard to the empirical contributions of this paper, it may be said that social entrepreneurs or team members dedicated to scaling up a SI can adopt the meta-causal network then developed as an initial support to the identification of the elements that could assist them in this stage of the life cycle of a SI. It is noteworthy that the proposals developed here are not intended to become a manual or a guide to the social entrepreneur. It aims to help the teams involved in the scalability of a SI, providing a theoretical contribution to the field of study. It is encouraged new researches that look for a vigorous analysis of the elements identified, the inclusion of new elements or the exclusion of some of them.

With regard to the limitations of this meta-synthesis, by selecting only nine studies out of 30 articles identified as qualitative case study in the field, there

is a risk of reducing the interpretations presented in the analysis. However, it emphasizes that this was the amount of articles found in the literature with this theme in particular. This is justified by the delimitation of the subject and the newness of publications.

Future studies within the management field of the promoting factors of scalability of a SI may be made in the light of several organizational theories, for example, Resource-Based Theory, Stakeholder Theory, Agency Theory, Organizational and Interorganizational Learning and Competence, institutional theory, among others, which may reveal important factors regarding the scalability of a SI.

ESCALABILIDADE DE INOVAÇÕES SOCIAIS: UMA META-SÍNTESE

RESUMO

Objetivo: Este artigo tem por objetivo analisar como características levantadas em estudos de caso realizados no âmbito da inovação social, a partir da metodologia de meta-síntese proposta por Hoon (2013), indicam fatores promotores de escalabilidade de inovação social.

Originalidade/lacuna/relevância/implicações: O número de publicações sobre SI, embora crescente, ainda é restrito. Consequentemente, as pesquisas que se dedicam a compreender como ocorre o processo de escalabilidade de uma SI ainda são escassas, constituindo um *gap* de pesquisa.

Principais aspectos metodológicos: Para cumprir o objetivo desta pesquisa, foram seguidos os oito passos de meta-síntese propostos por Hoon (2013), que é um projeto de pesquisa exploratório-indutivo para a síntese de dados primários coletados por meio de estudos de caso cujo objetivo principal é a construção de teoria. Foram analisados 66 artigos identificados na base de dados Web of Science, sendo nove deles selecionados para integrarem a presente meta-síntese.

Síntese dos principais resultados: Os achados desta pesquisa podem ser sintetizados na proposta do conceito de "ambiente propício à escalabilidade de uma SI", composto por características do ambiente interno, divididas entre aspectos do empreendedor e da organização, e por configurações do ambiente externo, mediadas (ou não) por uma organização-ponte.

Principais considerações/conclusões: Os resultados encontrados nesta pesquisa avançam a literatura de SI em dois pontos principais: a proposição do conceito de "ambiente propício à escalabilidade de uma SI" e ao chamar atenção para o campo de estudos sobre os fatores promotores da continuidade e crescimento

de uma SI. Quanto às contribuições práticas, os resultados da pesquisa podem auxiliar gestores de inovações sociais na etapa de ampliação da sua atuação, sugerindo alguns elementos a serem considerados.

PALAVRAS-CHAVE

Inovação social. Escalabilidade. Ampliação. Meta-síntese. Criação de valor social.

ESCALABILIDAD DE LAS INNOVACIONES SOCIALES: UN METASÍNTESIS

RESUMEN

Objetivo: Este artículo tiene por objetivo identificar analizar cómo las características planteadas en los estudios de caso en el campo de la innovación social, a partir de la metodología meta-síntesis propuesto por Hoon (2013), indican factores de innovación social, promotores de escalabilidad.
Originalidad/laguna/relevancia/implicaciones: Aunque el número de publicaciones sobre innovaciones sociales es creciente, aún es limitado. Por lo tanto, este artículo fue desarrollado para ayudar a llenar esta brecha teórica.
Principales aspectos metodológicos: Para cumplir el objetivo de esta investigación, fueron seguidos los ocho pasos de meta-síntesis propuestos por Hoon (2013), rue es un diseño de investigación exploratoria-inductivo para la síntesis de los datos primarios recogidos a través de estudios de caso cuyo objetivo principal es la construcción de la teoría. De esta forma, se analizaron 66 artículos identificados en la base de datos Web of Science, de los cuales fueron seleccionados nueve para realizar el meta-análisis.
Síntesis de los principales resultados: Los resultados de esta investigación se resumen en la propuesta del concepto de "ambiente propicio a la escalabilidad de una innovación social", compuesto por las características del ambiente interno, las cuales a su vez se dividen en: los aspectos del emprendedor y de la organización, y en las configuraciones del ambiente externo, moderadas (o no) por una organización-puente.
Principales consideraciones/conclusiones: Los resultados de esta investigación avanzan en dos aspectos principales en la literatura de innovaciones sociales: la propuesta del concepto de "ambiente propicio a la escalabilidad de una innovación social" y llaman la atención hacia el campo de estudios de los factores que promueven la continuidad y el crecimiento de una innovación social. En cuanto

a las contribuciones prácticas, los resultados de esta investigación pueden ayudar a los administradores de innovaciones sociales en la etapa de expansión de sus operaciones, sugiriendo algunos elementos a ser tomados en cuenta.

PALABRAS CLAVE

Innovación social. Escalabilidad. Expansión. Meta-síntesis. Creación de valor social.

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