Journal of Business Ethics (2025) 202:473–486
https://doi.org/10.1007/s10551-025-05975-1

COMMENTARY

On Addressing Societal Challenges: The Influence of Archetypal Biases on Scaling Social Innovation

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Received: 20 December 2023 / Accepted: 16 February 2025 / Published online: 11 March 2025

Abstract
The purpose of this article is to encourage greater reflexivity among social innovation practitioners and researchers about the influence of unconscious biases and assumptions on addressing societal challenges. Drawing on previous research and insights gained from our 30 + years' experience in practice, we present four archetypes of social innovation. Each archetype is rooted in an underlying paradigm of organizational sociology. We outline how the archetypes fundamentally shape how social innovations are prioritized and supported to scale through the influence of unconscious biases. These inherent biases both illuminate and obscure different aspects of social innovation scaling processes. The presented archetypes are significant as they impact the ethical, normative dimensions of social innovation to address societal challenges and opinions about what types of supports should be provided. Through highlighting the different assumptions that underpin each archetype, we advocate for practitioners and researchers to develop greater reflexivity about their own cognitive and normative biases when considering how social innovation scaling can address societal challenges.

Keywords Social innovation · Scaling · Societal challenges · Biases · Archetypes

Introduction

The scaling of social innovation is increasingly viewed as central to addressing the social, health, educational, and environmental challenges we face (André & Pache, 2016; Martin et al., 2023; Smith et al., 2016). Across areas as diverse aging populations, migration, mental health, and climate change there is a recognition of the need to grow, adapt, and spread solutions that have been demonstrated to be effective at solving problems (Baglioni, 2024; Chand & Tung, 2014; Gasparin et al., 2021; Repo & Matschoss, 2019). Yet, the lack of understanding of the different underlying assumptions about social innovation has led to confusion and criticism of the field. In practice, social innovation is approached in different and quite distinct ways, reflecting varied perspectives on its meaning. According to Brandsen et al., (2016, p. 5), social innovation is becoming a "buzzword" in the United States (US) and European Union (EU) policy circles. There exists fundamentally divergent viewpoints regarding the crucial factors that drive innovations to have a societal impact and uncertainty about the nature of scaling and how it should be supported (Seelos & Mair, 2013). There is also recognition of the challenges in scaling effective solutions to a level where they can help tackle societal challenges and a desire to address this issue by providing more structured supports (European Commission, 2019).

In response, this commentary article presents four archetypes of social innovation. We use the term "archetype" to describe the different sets of cognitive and normative assumptions that shape how social innovation is understood. We contend that the different archetypes influence not only how actors cognitively perceive scaling, but also their normative assumptions about which innovations should be adopted to address societal challenges and how they should be supported to scale.

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There are complex ethical considerations ingrained within efforts to affect social change (Beckman et al., 2023) and there are ethical implications arising from the influence of unconscious biases and assumptions (Martin et al., 2012) on addressing societal challenges. We align with views that position business ethics scholarship at the center of better understanding and impacting upon societal-level challenges (Böhm et al., 2022). Extant research has explored a diversity of related topics, such as the role of ethics in problem solving (Fan & Cunliffe, 2024), the differing ethics associated with those who champion, design, and implement transformational business models (Martí, 2018), ethical decision-making (Larres & Kelly, 2023), and the role of stakeholder partnerships in the context of societal-level challenges (Dentoni et al., 2018). This commentary proposes practice-focused and theoretical contributions to this expanding body of literature concerned with the ethical considerations of addressing societal challenges and the unconscious biases that may shape the approaches taken.

The practice of social innovation involves a diversity of actors jointly generating ideas, developing associated solutions, and successfully scaling these solutions to engender societal value through political endeavor and contestation (Beckman et al., 2023; Lawrence et al., 2014; Logue, 2019; Seelos & Mair, 2007). Relatedly, the scaling of social innovation is complex and iterative. It involves "balancing the implementation of new ideas and expansion through existing organizational strength" (Mair, 2018, p. 884). A "tension of scale" (Beckman et al., 2023, p. 692) can be created by the dual motives of ensuring the social innovation works in place but is also spread more widely (Chatterjee et al., 2023). Context matters (Ometto et al., 2019; Seelos & Mair, 2020) and is entwined with scaling efforts. We align with the stream of work that has cast a spotlight on this oftentimes over-simplified aspect of social innovation work (Beckman et al., 2023; Chatterjee et al., 2023; Westley et al., 2014). Beckman et al. (2023) highlight that existing, effective practices can be demonized while potentially harmful, less effective approaches become valorized. The archetypes that we develop help clarify why there is confusion around what social innovation is and how this leads to different, sometimes contradictory advice on how scaling processes should be supported.

Supporting social innovations to successfully scale their impact requires having a holistic understanding of the multiple challenges that social innovation faces (Avelino et al., 2019; Mair & Gegenhuber, 2021; Živojinović et al., 2019). Stakeholders frequently frame social innovation with only the solution in mind (Chandra et al., 2021). The specifics of how to reach the solution are much less clearly defined. Scaling is more complex than solely the formulation of what is deemed to be the "right" solution. It also necessitates an ability to "change attitudes and conceptions shared in society" (Mair, 2018, p. 884). To help practitioners and the academic community reflect in a more rounded way on these challenges, the four archetypes we present each have a strong normative component that shapes which types of social innovations *should* be supported. As Beckman et al., (2023, p. 700) conclude:

> If social innovation studies social value creation, then it cannot avoid issues that management scholars frequently view as normative: beyond questions of economic efficiency, the field must consider questions of equity, justice, morality, social difference, and social obligation. For example, moral and ethical considerations arise in both experimentation and the evaluation of social innovation research. These activities, and the considerations they produce, are integral to the field and must be explored.

In order to advance this research agenda and inform practice there is a need to make explicit the cognitive and normative assumptions that underpin how people think about social innovation and how this shapes approaches to address social challenges. Beckman et al. (2023) explored the different, siloed understandings of social innovation across public, private, and civil society sectors and the different instrumental and democratic schools of thought that arise from this fragmentation. We build on this work by highlighting four fundamentally different archetypes of social innovation that operate across sectors. The reason why this is important is that over the last forty years within the different sectors of public, private, and civil society, there has been a proliferation of the instrumental school of thought, particularly from the private into the public (Hood, 1991) and civic sectors (Salamon, 1993). We argue that this has led to social innovation drawing heavily on functional approaches and heroic, simplistic conceptions of entrepreneurs in civil society (Healy et al., 2024). There is a need to separate out the different ways in which people think about social innovation, make explicit the underlying assumptions, and then consider the practice implications for addressing societal challenges. By revealing the underling archetypes and their implications for practice, this paper responds to the call by Beckman et al. (2023) to incorporate a greater understanding of complexity in comprehending how social innovation addresses societal challenges. It also responds to Gray's (2022) appeal to integrate more realistic assumptions about power into efforts to tackle social issues. Our archetypes rest on the theoretical foundations of Burrell and Morgan's (1979) classic work that highlights how organizational research is influenced by fundamental paradigms about the nature of society and how it operates. Through emphasizing the different assumptions underpinning each archetype, we illustrate how they tend to lead to the prioritization of certain supports and the neglect of others.

This paper is timely as new support structures are being established across the EU to promote and encourage social innovation. In 2021, through funding from the European Social Fund (ESF), the EU announced the establishment of the "ESF Social Innovation + initiative" with a budget of €197 m. As part of this initiative, the EU has supported the development of National Competence Centers for Social Innovation across nearly all EU countries with a strong focus on supporting social innovations to scale. In September 2023, the EU announced a funding call to further strengthen and consolidate these centers. In the US, support for social innovation has long been a focus of large institutional philanthropy. The Obama White House established an Office of Social Innovation and Civic Participation in 2009. Speaking in 2016, President Obama stated: "We've applied data and evidence to social policy to find out what works, scale up when it works and stop funding things that don't, thereby fostering a new era of social innovation."

Given the priority that social innovation has been afforded in public funding and philanthropy, it is appropriate that we reflect on the different assumptions which underpin how we think about social innovation and how these assumptions shape the supports provided to those seeking to scale social innovations. The different archetypes of social innovation are not explicitly discussed in practice. Instead, those supporting social innovation often make unconscious, biased assumptions about how innovations scale, assuming away the challenges and overestimating the efficacy of certain types of supports. The central argument of this paper is that developing an awareness of these archetypes and identifying their associated assumptions and biases will assist practitioners, as well as the supporters and funders of social innovation. This awareness will help them assess whether they have considered which types of funding programs and supports might best address the significant, urgent, and complex societal challenges we face.

Four Archetypes of Social Innovation and How they Impact Scaling

Researchers have explored how the fundamental assumptions we make influence how we think about organizations and organizing (Burrell & Morgan, 1979; Mintzberg et al., 1998; Morgan, 1980, 2006). Morgan (2006) investigated how the metaphors or images that we often unconsciously use to conceptualize organizations fundamentally shape how organizations are managed and led. Similarly, Mintzberg et al. (1998) explored how different understandings of strategy affect how organizations think about planning. We follow this approach of developing schools of thought within business and management thinking that shape how and why people engage in different practices. We argue that the different approaches to supporting social innovations to scale are based on fundamentally different, often unconscious, cognitive and normative assumptions about if, how, and why social innovations should be scaled.

We draw on the classic organization text of Burrell and Morgan (1979) as a foundation for four archetypes of social innovation. The four sociological paradigms set out by Burrell and Morgan (1979) provide a framework of fundamentally different ways to conceptualize organizing. We use the term "paradigm" to describe the underlying philosophical and sociological understanding of the world around us (Kuhn, 1962). Burrell and Morgan (1979) derived four paradigms that provide the theoretical building blocks for how we understand organizations; radical humanist, radical structuralist, interpretive, and functionalist. Burrell and Morgan's (1979) paradigms are derived from the fundamental schisms and tensions that they found within the sociological literature. They contrasted the sociology of regulation and the sociology of radical change and the intellectual traditions of objective and subjective social theory to develop their paradigms. These paradigms are the building blocks of the archetypes that we develop and while there is not a perfect alignment with our archetypes, the central schisms and tensions that they outline helped us derive the archetypes of social innovation.

While the archetype concept is used in a variety of ways in the organizational literature, there is a "taken for grantedness" about the term that leads to it being regularly applied without definition (Hou & Ma, 2024), with its meaning assumed to be known. Archetype is commonly used to refer to organizing configurations (Miller & Friesen, 1984). For example, Kurmollaiev et al. (2024, p. 1268) speak of "a distinctive configuration of processes and structures." Another application draws on the Jungian "archetype-as-such," where archetypes represent interpretative understandings of organization that may or may not be surfaced (e.g., Paca & Rozuel's, 2024 work on organizational mythologies). As we indicate in our discussion about the paradigmatic foundations of our archetypes, we address both organizing configurations and interpretations. We draw on Greenwood and Hinings' (1993, p. 1052) definition of archetypes as "a set of structures and systems that reflects a single interpretive scheme." This conceptualization of archetype brings together configurational structures and systems with "meaning, intentions, preferences, and values" (Brock, 2006, p. 158).

Table 1 introduces our four archetypes. Each archetype represents a fundamentally different way of thinking about social innovation. From an ethical perspective, this enables us to surface and make discussable previously unconscious biases and understand the different positions that actors adopt relating to whether and/or how to scale. We offer the archetypes not as a menu of equal options for approaching

Table 1 Four archetypes of social innovation

	Novel ideas	Entrepreneurial	Complexity	Social movement
Implicit framing	Social systems work effectively and, once proven, innovations diffuse	Innovation reliant on leadership of focal individuals	Wicked problems prevent the emergence of solutions	Economic and political power imbalances within fields
Barriers to scaling of innovations	Market failure in the financing of social innovation	Existing conventions and large recalcitrant systems	Complexity of systems, uncertainty, and differing interpretations of priorities	Power imbalances within fields inhibit diffusion of innovations that challenge the status quo
Change strategy	Generation of new ideas and models and demonstration of effectiveness	Contestation and driving of change by focal individuals	Adaptive approaches, action research	Mobilization of economic, political, and symbolic power

scaling, but rather to illustrate and explain the multiple avenues to social innovation scaling. The archetypes are intended to support practitioners and researchers in gaining greater reflexivity about their own cognitive and normative biases when considering how social innovation can help address challenges at a societal level and positioning their own practice and the implications of that practice.

Social Innovation as the Creation and Diffusion of Novel Ideas

This archetype focuses on the generation of novel ideas which then diffuse and provide more effective ways of addressing social challenges (Phills et al., 2008). This mirrors the role of new technology in creating economic growth within neoclassical economic theory. Establishing the efficacy of the new approach is a key task, with a high value attached to the potency of evidence-based solutions to then diffuse within fields. By focusing supports on ideation and testing, it is assumed that larger funders within these systems, whether they be public or private, will gravitate toward these new, more effective approaches. Social innovations are developed, rigorously tested (often in a pilot setting) with the use of randomized controlled trials (RCTs) to assess efficacy in comparison to settings without the innovation, manuals for implementation are written, and the models are scaled across a range of countries in line with these models. The core model remains intact and fidelity to the implementation manual is assessed. Critically, in this archetype of social innovation, it is assumed that large social, health, educational, and environmental systems, both public and private, demand the most effective innovation and therefore over time these innovations grow and flourish (Mulgan et al., 2007).

This archetype is located within Burrell and Morgan's (1979) functionalist paradigm and is based on "purposive rationality" (Burrell & Morgan, 1979, p.107) which holds a view that science can be objectively applied to advance society in a structured, ordered way. There is an underlying belief that science and discovery advance and integrate society and, similar to the natural sciences, that societies tend toward equilibriums. Scaling is therefore seen as a process which naturally occurs when an innovation is demonstrated to be effective and scaling is the preserve of these systems. Resources are prioritized toward the ideation, piloting and testing phase of the process given the belief that science can measure and predict solutions as there is an underlying assumption that more effective solutions to social problems will be applied. With this belief in science and a view of society as integrated, there is a normative assumption that these solutions enhance the social good and the scaling of social innovations is surmised to be socially valuable. An example of this archetype can be found in the early childhood development field. The Nurse–Family Partnership (Olds, 2006) has developed models for improving health and developmental outcomes that are rigorously tested with RCTs over many years to measure and demonstrate their efficacy. The models are codified and manualized to enable reproduction and diffusion across different contexts. While RCTs are held up as the "gold standard" within this archetype, they can also be a source of bias. Critiques of RCTs in the critical geography and political mobility literatures raise the efficacy of trial results without due consideration of the context for application, challenges of governance of the testing process, and the unaddressed power dynamics surrounding the validation and legitimization of social innovations (Webber & Prouse, 2017).

Perhaps an even more fundamental challenge lies in the taken for granted assumptions made within this paradigm about how scaling happens. The conceptualization of scaling as a process which naturally occurs for proven social innovations is, we argue, a significant shortcoming in the diffusion of novel ideas archetype of social innovation. For example, many of the programs funded by strategic and scientific philanthropy (Healy & Donnelly-Cox, 2016) position social innovation primarily as growing effective solutions outside systems that can then be scaled by mainstream social, health, educational, and environmental service providers

(Brest & Harvey, 2018). As such, this archetype would be firmly located within Burrell and Morgan's (1979) sociology of regulation in which the existing social order is maintained and works harmoniously to bring about incremental improvements. Regarding the objective-subjective spectrum, it is clearly on the objective end. In terms of practice, this has led to inherent biases that focus on the support of the early ideation phase and testing of the innovation rather than supporting the proliferation of the ideas. Scaling itself is not supported. These biases may also be classified as ethical shortcomings (Gafni et al., 2021). While the intention of the supporters framed within this archetype is to support the scaling of social innovation, the actions taken may actually hinder scaling. Contrary to this archetype's assumption of scaling as a naturally occurring process, evaluations of EU social innovation support programs (EU Commission, 2019) have found that the generation of new, socially innovative ideas does not often translate to changing practice in related fields and that supports are needed for innovations to scale in these complex, sometimes contested, systems:

> "…The limited funding and lack of follow-up mechanisms (within Employment and Social Innovation [EaSI] or other instruments, such as the European Social Fund [ESF]) are obstacles to systematically scaling up tested social innovations. At the moment, despite the valuable information provided to policy-makers, there are no examples of scaled-up interventions, which is the ultimate goal of the social policy experimentation funded by EaSI." (European Commission, 2019, p. 24)

The challenges experienced in terms of scaling effective innovations has recently led the EU toward a greater focus on developing social innovation infrastructure to support scaling and integrating social innovation into the larger funding programs that have the capacity to scale solutions as outlined above.[1]

Social Innovation as an Entrepreneurial Process

In this archetype of social innovation, entrepreneurship is the key driving force. It is centered on the role of iconic leaders who envisage change and then, partly through force of personality, drive implementation. According to Dacin et al. (2011), this heroic image is widespread within the social entrepreneurship literature, a field which itself has struggled to establish a clear identity (Aubrey, 2017; Schneider, 2016). This lens focuses on the creative vision of individuals and their tenacity to implement change. Similar to the methodological individualism of Austrian economics, this archetype of social innovation focuses on how new spontaneous orders are created and old orders destroyed by individuals pursuing their visions for change (Novak, 2021). There is less interest in establishing objectively effective solutions and more emphasis on the role of leading individuals in envisaging and then driving processes of change. This archetype illuminates the often mercurial concept of innovation leadership (Ashoka, 2021), with a particular emphasis on charisma and vision, and the need for scaling to be driven by focal individuals. The archetype of innovation is one of "creative destruction" (Schumpeter, 1942, p. 82). In line with a central tenet of Austrian economics, there is an underlying suspicion of government as an institution which is often seen as inhibiting the capacity of individuals, in particular entrepreneurs, to drive change and express individual creativity. As Leadbeater (1997, p. 23) states from the perspective of social entrepreneurship: "The welfare state as a whole is not regarded with much affection, it is not particularly effective at generating social support cohesion. To many of its critics, the welfare state breeds passivity, bureaucracy and disillusion."

This antipathy toward government is interesting due to the fact that in Organization for Economic Co-operation and Development (OECD) countries government is often the large direct service provider and/or provider in the social arena. Teasdale et al. (2023) found when reviewing the social entrepreneurship literature from 2005 to 2009 (which they refer to as the "Emergence of the Hero Social Entrepreneur") that there had been very few references to the potential role of government in empirical articles. In contrast to the novel ideas archetype, there is far less emphasis on demonstrating the effectiveness of the solutions proposed using post-positivist, scientific methods. Teasdale et al., (2023, p. 231) in their wider review of 30 years of research on social entrepreneurship found that:

> …Despite social impact being conceptualized as the only characteristic common to all definitions of social entrepreneurship, there are hardly any empirical studies within the most prominent literature showing what social entrepreneurship actually achieves… The final stage in the social entrepreneurship research journey necessitates us measuring what difference it actually makes (and to whom).

This archetype is similar to aspects of the radical humanism paradigm set out by Burrell and Morgan (1979), particularly the anarchistic, individualist strand, which argues for "total individual freedom, untrammeled by any form of external or internal regulation" (Burrell & Morgan, 1979, p. 299). Within this paradigm, social advancement would come

[1] E.g., HORIZON-MISS-2024-CROSS-01-01 (the European Social Innovation Advisory Network) and HORIZON-MISS-2024-CROSS-01-02 (the European Networked Catalyst Fund for Social Innovation).

not by the intervention of the state but by an association of egoists acting without coordination to disrupt the social order (Burrell & Morgan, 1979). That said, the alignment of this archetype to the radical humanist paradigm is only partial. Many studies have criticized social entrepreneurship in practice, despite the field's espoused commitment to creative destruction and to aligning with conserving and legitimating the basic tenets of the social order (e.g., Cooks et al. 2003; Nicholls, 2010). Despite its claims of challenging the status quo, in practice it would not align with the radical social change dimension of the radical humanist paradigm. However, the anarchistic, individualist strand aligns well with this archetype of social innovation in terms of locating the key nexus for social change in the capacity of individuals to bring about radical change. Given that the identification and support for people with the subjective traits of entrepreneurs is core to this approach to innovation rather than the rigorous assessment of the social impact of these social entrepreneurs (Saebi et al., 2019), this archetype is located firmly on the subjective rather than objective end of Burrell and Morgan's (1979) social theory spectrum.

In terms of biases, the entrepreneurial process archetype often underplays the complexity of the systems and nature of distributed power across a variety of professions, civil society groups, public sector administrators, and other staff by focusing on a focal agent of change, i.e., the social entrepreneur. This underlying antipathy for the complexity and bureaucracy of government often leads to parallel, duplicative approaches to address significant social challenges in developed economies, but with few exemplar cases of where these models and approaches have grown to significant scale with assistance from social innovation support structures (Teasdale, 2023). In some ways, the positioning of small, nascent social innovations as having the capacity to disrupt systems rather than exploring compatibility or alignment with at least aspects of these public system, marginalizes and excludes these innovations from influencing the most important ways in which social challenges are addressed.

Another bias in this archetype may be seen in assumptions made about the relevance of place (Beckman et al., 2023; Chatterjee et al., 2023; Westley et al., 2014). Innovation research has demonstrated that both overreliance on the local and lack of attention to the wider context may lead to poorer innovation outcomes. The local search bias literature applied to an innovation context recommends seeking out external innovation sources to overcome the limits of local knowledge sources (Lüthje et al., 2006) through, for example, crowdsourcing (Lampe, 2023). Conversely, place-based perspectives on social innovation point to the possible limitations of viewing social innovation as a construct that may be applied in the same way to varied geographies (Do & Fernandes, 2020). Place-relevant processes may be critical in conferring legitimacy (Samuel et al., 2022).

An example of this archetype is the creation of Ashoka in the 1980s which sought to identify and appraise people as social entrepreneurs. Those deemed to have unique qualities and pioneering ideas are awarded Ashoka Fellowships. Recently, the social entrepreneurship field has acknowledged the need for a more coherent approach to engaging with complexity. Key organizations called collectively for the field of social entrepreneurship to embrace complexity (Ashoka et al., 2020) and "new allies" in the form of government to unlock the potential of social entrepreneurs (Ashoka et al., 2021). Within this emerging model of engaging with complex systems, entrepreneurs are still the focal actors driving bottom-up change and credited with specific heroic traits: "they are ambitious, persistent and proactive, comfortable with risk and future oriented. They display critical thinking skills, flexibility, and adaptability" (Ashoka et al., 2021, p. 9). This highlights the importance of understanding the different underlying, fundamental assumptions of each archetype. Even though significant efforts are being made to incorporate more complex, sophisticated understandings of the systems within which social entrepreneurship takes place, the entrepreneurs are still the key actors.

Social Innovation as a Process of Navigating Complex Systems

This archetype of social innovation locates it within a labyrinth of complex, challenging, contested systems where scaling requires navigating this complicated terrain. The challenges of scaling social innovations identified through previous social innovation programs have given rise to a significant interest in complex systems (Chalmers, 2021; Healy et al., 2024; Zellner & Campbell, 2015). There are a myriad of actors, including professions, unions, people using services, constituencies affected or motivated by particular issues, and politicians, all of whom have perspectives that need to be taken into account when scaling social innovation. The role of public administration systems comes more clearly into focus having been largely neglected under both the novel ideas and entrepreneurial process archetypes of scaling, as does the complex web of funding across non-profit organizations in social, health, educational and environmental systems. The innovation itself is adapted and reframed as the scaling process takes place and those scaling the innovation need to be cognizant of the different logics. Scaling in this approach is less about taking a model that has been demonstrated to be effective and diffusing it, and more about exploring how models can be adapted and co-constructed, often within local community contexts.

Much of the complexity within this archetype of social innovation is based on different interpretations and logics that exist within fields. This archetype is located primarily within the interpretative paradigm as set out by Burrell and

Morgan (1979). From this standpoint there is no objectively "good" social innovations and there is a rejection of scientific, positivist approaches to evaluation. As such, this archetype is based on what Burrell and Morgan (1979) would consider subjective rather than objective social theory. The normative value of social innovation needs to be understood from different perspectives and it is important, particularly from the existential strand of phenomenology, to understand the different realities which other actors adhere to (Burrell & Morgan, 1979). Scaling processes therefore involve negotiating these multiple realities that exist within fields. Many approaches draw on the collective impact concept developed by Kania and Kramer (2011) to align available organizational resources to scale innovations and grow impact (André & Pache, 2016). The central interest is to align and co-ordinate across diverse stakeholder groups (Martin et al., 2023; Phillips et al., 2017) to scale innovation in complex systems. This has led to a recent upsurge in organizations engaging in attempts to create alignment through facilitated discussions, often drawing on more functionalist approaches which assume that the logics and interest within fields can be aligned. There is an underlying assumption that reframing and discussion, often drawing on sense-making and scenario planning approaches, will lead to alignment around scaling and adapting new methods and approaches (e.g., Kahane, 2004). Within the social innovation field, this has led to a repositioning for some of the concept of social innovation more around innovative ways to involve communities and other groups in multi-sector initiatives to address societal challenges. An example of this is the growth of the Living Lab movement across Europe that has led to the sharing of knowledge and expertise about how best to convene all relevant actors to address problems as diverse as reducing CO2 emissions to healthy aging (European Network of Living Labs, 2024). Consequently, this archetype aligns with Burrell and Morgan's (1979) sociology of regulation. It seeks to facilitate incremental reforms and gradually scale innovations through consensus, viewing this as achievable through reframing and discussing key issues.

In terms of biases, one of the drawbacks of bringing everyone into a room to discuss societal problems is that the degree of complexity and challenge in scaling within these systems can be psychologically overwhelming at the outset (Head & Alford, 2015). This can lead to some innovators and funders not engaging with the reality of scaling and preferring instead to focus on early-stage idea development. Another shortcoming is that it is often an idealistic assumption that there is the potential to co-construct solutions among actors that have deeply ingrained beliefs, interests and resources around solutions to societal challenges (Gray et al., 2022). Such inherent biases point to the relevance of governance constructs within social innovation systems (Donnelly-Cox et al., 2021), and the governance implications of public administration systems' involvement in social innovation (Zimmer & Smith, 2021). Yet, governance systems themselves may reflect power asymmetries between actors (Toepler & Anheier, 2021). As a countermeasure, social innovations may be delivered by multiple stakeholders, including public sector actors (Murray et al., 2010).

Social Innovation as a Process of Social Movement

For some, collective impact initiatives are inadequate as they do not recognize the power imbalances within complex systems (Gray, 2022). Car manufacturers, for example, often have more influence over what clean fuel innovations get scaled within the industry than environment-focused non-governmental organizations. Social movement research focuses on the mobilizing process, as well as the framing and power structures of activists as they organize to achieve social change (McAdam & Scott, 2005). Engaging in collective processes with more powerful stakeholders is going to mean that, while they might be willing to virtue signal with small initiatives, given their obligations to shareholders they will use their superior power to limit the extent to which innovations scale if it does not ultimately benefit their shareholders. For innovations to scale within this archetype, communities must mobilize using their own political, economic, and symbolic power, creating social movements to stoke the demand for social innovations to scale. This can be both at an individual level (e.g., people using mental health services seeking more input and choice in their services), as well as growing social movements in social, health, educational and environmental fields. In this archetype, convening multi-sector actors to design and implement scaling processes can lead to powerful stakeholders who, fearing losses, may employ passive-aggressive tactics to delay and obstruct progress. This archetype of social innovation aligns with Burrell and Morgan's (1979) sociology of radical change and brings the need to challenge and confront the status quo. Given the influence of framing and changing narratives, as well as challenging economic inequalities, there are aspects of both objective and subjective theories. As Gray et al., (2022, p. 3) state: "Neglecting power may lead to celebratory accounts of 'successful' institutional change arising from multi-stakeholder partnerships even when the status quo with respect to power does not shift and no lasting impact is recognized."

This archetype is influenced mostly by the radical structuralist paradigm of Burrell and Morgan (1979). Within this paradigm, society is divided rather than being viewed as integrated. It is seen as continually in contradiction, crisis, and conflict. From this perspective actors need to question whose interests social innovations serve and mobilize to scale innovations that challenge inequality and address the fundamental schisms within society. The scaling of social innovations therefore need to be part of an effort to bring about radical change to reconfigure power imbalances.

Within this archetype, social conflict and the mobilization of those most impacted by social challenges come into focus. Community organizing techniques are required (Alinsky, 1969) to assert the latent collective power of the community and to frame their arguments for scaling innovations in compelling ways. An example of this archetype is the Treatment Action Campaign in South Africa, which successfully advocated for the distribution of new anti-retroviral drugs for people who are HIV positive, despite opposition from the government and patent-holding commercial companies (Sabi et al., 2017). This focus on power imbalances has been traditionally neglected within the social innovation field—in particular, within approaches that seek to co-construct solutions using collective approaches (Gray, et al., 2022). In terms of biases, this archetype often focuses on achieving higher policy or funding goals to reach scale, which can leave an implementation gap. If a policy goal is achieved regarding the diffusion of a new practice or model, this scaling still requires detailed discussion and interaction among multiple actors within complex systems to see the innovation through to implementation. It also brings into focus the questions that arise as to how the core active ingredients of an innovative model can be sustained as it is adapted during the scaling process and the need for balancing coordination, flexibility, and control during scaling (Sezgi & Mair, 2021).

Implications for those Seeking to Support the Scaling of Social Innovation

The current support and evaluation structures for social innovation are profoundly influenced by the above underlying understandings of social innovation and what drives them. Based on our professional experience of working internationally within the social innovation field, the two dominant archetypes have been the novel ideas and entrepreneurial process archetypes, and this has shaped the types of scaling supports provided. It is, however, increasingly acknowledged by organizations that have traditionally aligned with the novel ideas and entrepreneurial process archetypes that they need to incorporate more approaches that deal with the complexity of the fields in which they seek to scale innovations (Ashoka et al., 2020). Westley et al. (2014) highlight that scaling to address societal challenges requires practitioners to confront institutional constraints and incorporate complexity into their work. We argue below that by understanding the four archetypes and adopting greater reflexivity on the challenges involved in scaling through these four lenses, related stakeholders can enhance their appreciation of the challenges that scaling efforts face and expand the range of strategies they draw upon when attempting to scale innovations within complex, contested systems. We offer illustrative examples to highlight the profound influence that the archetypes have on support structures, complexity and power dynamics, and learning and evaluation processes.

Recently, there has been a notable increase in support for scaling innovative ideas within complex fields (European Commission, 2022; Yaghill et al., 2022). To date, the level of support for the two dominant archetypes, i.e., novel ideas and entrepreneurial process, has not been balanced with appropriate supports for the complex systems and social movement archetypes. An implication is that in many countries, this has led to the social innovation field being on the margins of efforts to address significant societal challenges (Brandsen et al., 2016), such as climate change, homelessness, migration, and the burdens of chronic disease. Using these four archetypes to critique the existing support structures for scaling social innovations draws attention to inherent biases and shortcomings and the ethical implications of not addressing them.

We are confident that while biases and shortcomings are significant and even systemic in nature, there are pathways for addressing them. Drawing attention is in itself valuable for bringing clarity to core challenges, which can then be attended to through practical action, as well as further explored in future research (Martin & Parmar, 2012). Ethics research has demonstrated that bias awareness can be heightened through targeted educational interventions (Tomlin et al., 2021). In the field of socially responsible investing, ethics researchers have demonstrated that interventions in the decision-making process in the form of nudges can be used to guide investors to more responsible investments (Gajewski et al., 2022).

We argue below for addressing these issues through the adoption of more reflexive approaches. While the adoption of actions—and the influence of biases—may be largely unconscious for decision-makers operating within one of the four archetypes, we propose taking steps to couple intuitive action with more reflexive analysis. Ethics scholarship has illustrated that addressing intuition, analysis, and reflection in relation to each other when making decisions in complex institutional environments facilitates ethical judgments (Provis, 2017, p. 13). Adopting reflexive approaches can help both practitioner and scholarly communities in moving toward better understandings of the gaps in support for social innovation and realizing a future where the scaling of impact is less exception and more the rule.

Enhancing Reflexivity on the Support Structures for Scaling

Within the novel ideas archetype, finance is often conceptualized as risk capital which can drive the development of innovation. Funding is often allocated competitively to the most effective concepts with scaling happening through acceptance of the solutions by markets or public funders (Brest & Harvey, 2018). As we have seen above, the functionalist underpinnings of this archetype lean toward the prioritization of concepts of effectiveness in terms of both impact and cost. Therefore, the creation and diffusion of novel ideas tends to prioritize interventions that can be tested in pilot settings, such as health or educational interventions. The novel ideas archetype heavily emphasizes the production of objective data on effectiveness (e.g., RCTs, impact assessments) and monitoring processes based on key performance indicators (KPIs). The Edna McConnell Clark Foundation in the United States, for example, has an explicit strategy of supporting nonprofit organizations to gather strong empirical evidence, and engage in business planning to grow (Enda McConnell Clark Foundation, 2024). This is part of a much wider movement within philanthropy to draw on scientific methods (Healy & Donnelly-Cox, 2016) and business thinking (Porter & Kramer, 1999) to enhance impacts on societal challenges. The movement has had a profound influence on philanthropy by fundamentally shaping how large foundations, such as the Bill & Melinda Gates Foundation, the David and Lucile Packard Foundation, and the Ford Foundation, operate. These types of social innovation scaling supports draw on a highly functionalist approach that support diffusion of the novel ideas either by the organization directly or by systems that are assumed to be receptive to the new methods. Within this archetype, the scaling process is not viewed as challenging. Rather, it is assumed that the invisible hand of demand from within the social systems guides the adoption of more effective models, with leadership primarily taking the form of effective management. It draws funding away from efforts to understand the complex interests and logics in systems and efforts to challenge the power dynamics within fields.

The entrepreneurial process archetype focuses resources toward supporting and growing early-stage ideas with more of an emphasis on developing and promoting the innovators themselves. Its scaling process encompasses the development of education and support networks for social entrepreneurs. Through this archetype, entrepreneurs who possess traits that enable them to drive the process of scaling are elevated and empowered. The role of social entrepreneur support networks is to promote entrepreneurs, build their profile and skills, and enable knowledge exchange between them. The Ashoka Fellows program, for example, selects social entrepreneurs, builds their profiles, and fosters collaborations globally. The program includes intensive exchanges with the business sector, including collaborations with McKinsey and Co. that draw upon venture capital models to support scaling (Sen, 2007). Leading organizations within the field are recognizing the need to focus more on complex systems (Ashoka, 2020).

The complex systems archetype requires a far more adaptive, iterative approach to scaling where funders provide resources in stages and are often required to discuss the adaptation of the outcomes that they are funding toward. Here, there is a need to support adaptive leadership (Heifetz, 1994; Heifetz & Laurie, 2001; Heifetz et al., 2004) within complex, fluid fields where the solutions as to how best to scale are unknown by leaders and require a much humbler, more curious approach. Leaders need to be helped to adopt strategic perspectives by "getting up on the balcony" and support structures often involve drawing leaders from across the systems together and facilitating them to explore possible solutions. Drawn from the realm of public administration, the "wicked problem" concept (Rittel & Webber, 1973) and complex, adaptive challenges (Heifetz et al., 2004) are becoming part of the lexicon of the social innovation field. Interest has grown in how collective approaches in public administration systems can facilitate effective responses to crises, such as COVID-19 (Entress et al., 2020; Rauhaus et al., 2023).

The social movement archetype focuses more on funding supports to give voice to those most affected by societal challenges and accord them greater power to shape the associated innovations. The growth of models such as 'housing first' in homelessness services, 'self-direction' in disability services, and the employment of 'lived experience' on grant funding assessment panels highlights the increasing interest in co-production and service user engagement (Healy & Clarke, 2020). Power is rebalanced by funding the empowerment of people to advocate for the diffusion of the innovations, involving them in these processes as the innovation gets reshaped during implementation, and mobilizing to counter the pressures exerted by vested interest groups of maintaining the status quo. Promoting the voices of those using a service or affected by an issue is a powerful way to make sense of the need for scaling (Yaghill et al., 2022) and overcome the competing logics of fields (Healy & Clarke, 2020). It also brings into clearer focus the power imbalances within fields and helps social innovators recognize the challenges of scaling. Contestation should be considered alongside complexity, but sometimes requires a different approach. The social innovation field is increasingly moving toward methodologies of collective problem solving, particularly at a local level, but this is often on the basis of an assumed equality among all stakeholders (Gray, 2022). Social innovators need to recognize power imbalances, consider carefully the sequencing of consultations and collaborate with organizations that elevate the voices of vulnerable groups for whom the scaling of the innovations matter most. In the social movement archetype, the leader needs to be supported to organize collectively (Alinsky, 1969), frame the merits of the change effectively (Benford & Snow, 2000), and build linkages to mobilize available resources (McCarthy & Zald, 1977).

As outlined above, increasing reflexivity on scaling supports across each of our four archetypes enables practitioners to expand their perceptions of the opportunities and challenges of scaling and widens the range of possible supports that might be offered across different contexts.

Enhancing Reflexivity on Complexity and Power in Scaling: Adopting a "Small Wins" Approach

Each archetype of social innovation brings certain aspects of the scaling processes into focus while obscuring others. While there is much focus on addressing societal challenges using social innovation, one of the barriers to doing so is the overwhelmingly complex nature of these challenges (Beckman et al., 2023). Similarly, the power asymmetries ensconced in tackling societal challenges (Gray et al., 2022) represent a daunting issue to broach and resolve. In line with Mair et al. (2016) and Dittricht (2022), we recommend building on Karl Weick's (1984) concept of "small wins" to develop and support realistic approaches to scaling. As well as making problems more manageable, the small wins approach also draws on Weick's sense-making and enactment research. This research explores how people can act and rationalize themselves into new, reformed ways of working (Gioia, 2006; Weick, 1977, 1979) and how they develop new identities and narratives for themselves in this process.

By gradually drawing on a range of archetypes to address manageable components of social challenges, social innovators and those supporting them can build a wider understanding of their own biases and how they influence the choices they make. This more reflexive approach makes navigating the complexity and power dynamics of societal challenges more realistic and achievable. The small wins approach focuses on innovating within existing systems rather than piloting an innovation in a separate context, thus avoiding one of the frequent criticisms of the novel ideas archetype. Whereas the entrepreneurial process archetype emphasizes transformative change based on heroic leadership, the small wins approach focuses on incremental, realistic change strategies suited to scaling within complex, contested systems. The small wins approach also avoids the overwhelming pressure of the wicked problem frame (Weber & Khademian, 2008) and instead provides insights into how innovators can work with incumbent actors within complex, contested systems to incrementally overcome challenges and scale innovations.

Enhancing Reflexivity on Learning and Evaluating in Scaling

We argue that reflexivity across each archetype's approach to learning and evaluation will provide social innovation practitioners with a more holistic appreciation of the differing forms of learning and evaluation available. For example, the novel ideas archetype accords a central role to a highly functionalist, positivist approach to evaluation, where scientific techniques are employed to test which innovation should be scaled based on evidence of efficacy and cost. The entrepreneurial process archetype has a somewhat ambivalent approach to impact evaluation (Teasdale et al., 2023). Saebi et al. (2019) and Teasdale et al. (2023) highlight the dearth of evidence of the social impact of social entrepreneurship programs. Despite the lack of rigorous impact evaluations, case studies show that social entrepreneurship thrives in areas where there are institutional voids and that social entrepreneurs engage in bricolage to navigate complex fields rather than engaging in the more dramatic, system-changing creative destruction (Dacin et al., 2011; Mair et al., 2012; Montgomery et al., 2012; OECD, 2021; Shaheen et al., 2023). The complex systems archetype focuses more on qualitative insights into the logics of actors, how these logics can be reshaped, and how innovators can adapt and scale across complex terrains. The sharing of insights by actors at points in time within specific fields is emphasized above objective, transferrable impact data. Within the social movement archetype concentration is on giving a voice to neglected constituencies and redressing the power imbalances within systems so that the scaling process is not inhibited by more powerful actors. Objective data on impact is often important, but it requires framing so that it can reverberate (Benford & Snow, 2000) and advance the scaling of new approaches within these systems.

While it has long been acknowledged that adaptive approaches such as action learning is an effective method for navigating complex systems change (OECD, 2020), it has not been built into the support structures for social innovation scaling. Action research (Coghlan, 2010, 2011; Shani & Pasmore, 1985) involves interviewing stakeholders as innovation scaling processes are underway at regular points and facilitating discussions on how best to exploit opportunities and overcome challenges. Action research can help innovations grow by surfacing undiscussable issues in constructive ways and assist innovators in navigating multiple conflicting logics held by professional groups, unions, and service users. Supporting social innovators to draw upon action research and aligned developmental evaluation methods by providing access to researchers and training would result in practical assistance on how to adapt and position social innovations as innovators try to build acceptance for these new ways of working within fields.

For practitioners, as we outline above, different evaluation and learning approaches are often the result of inherent, unconscious biases developed over time. The choices about whether to engage in an RCT evaluation, adaptive learning, and/or stakeholder consultations involve significant ethical dimensions. While trying to address social challenges, it would be beneficial for practitioners to become more aware of these biases and to consider whether the spread of well-tested innovations such as "housing first" require more RCT evaluations or whether these resources would be better spent on action research to help these approaches to overcome implementation challenges. This reflexive use of the archetypes would facilitate discussion about the ethical considerations involved in decisions about evaluation. Using the different archetypes as "lenses" to overcome biases and to explore what evaluation or adaptive learning tools would be most beneficial for addressing a social challenge would greatly enhance the application of the limited evaluation and learning budgets that organizations addressing social challenges possess. Considering evaluation choices from within the "Creation and Diffusion of Novel Ideas" archetype will tend to lead practitioners toward social impact evaluation methods. The "Entrepreneurial Process" archetype will focus evaluation more toward the impressions of the entrepreneurs about the program supports they receive. The "Navigating Complex Systems" archetype will tend toward adaptive learning approaches like action research. The "Social Movement" archetype will emphasize listening and curating the voices of marginalized groups. The framework of archetypes that we present will help practitioners become more reflexive and more conscious of their biases and the ethical dimensions of the choices they face.

Conclusion

We have argued that the disagreements about how best to support scaling within social innovation fields are largely determined by the assumptions that people make, often unconsciously, about the key drivers and barriers of these processes. Approaching scaling from a novel ideas, entrepreneurial process, complex systems, or social movement archetype will bring certain aspects of scaling clearly into focus and obscure others.

This has a profound influence on what types of innovations get supported to scale and how they are supported. It evokes the old adage: "If you have a hammer, every problem looks like a nail." The four archetypes are not intended to represent a menu of equal options, and indeed on critical assessment, practitioners may determine that some archetypes are objectively superior to others. For practice, however, the primary value of the proposed archetypes is to make explicit their underlying assumptions and to encourage practitioners, support organizations, and funders to take a holistic, reflexive approach grounded in the actual challenges faced by those seeking to scale the impact of social innovation.

For scholarship, we have built upon recent work highlighting an extant "social innovation trap" within the social innovation field (Beckman et al., 2023). This trap has been created by siloed, disciplinary-specific research, a lack of appreciation of the heterogeneous nature of different sectors in the context of social innovation, an under-appreciation of the complexity and nuance of scaling in disparate contexts, and a lack of emphasis on the significance of competing perspectives within the field of social innovation. We draw upon the classic work of Burrell and Morgan (1979) in elaborating our four archetypes of social innovation and unpacking their impact on scaling. In doing so, we have expanded research advocating for a greater appreciation of the implications that alternative perspectives may have on social innovation (Beckman et al., 2023). Ethical dimensions are inextricably linked due to each archetype having strong normative components that shape what types of innovations *should* be supported. Ethics scholarship highlights the ethical shortcomings within archetypes (Gafni et al., 2021) and offers guidance on how the limitations and weaknesses of each archetype can be addressed (Provis, 2017; Tomlin et al., 2021; Gajewski et al., 2022). We add to a growing repository of related business ethics scholarship (Dentoni et al., 2018; Fan & Cunliffe, 2024; Larres & Kelly, 2023; Martí, 2018) that views ethics as a central component of addressing societal issues (Böhm et al., 2022). Against this backdrop of opportunity for engendering impact, we have sought synergies from the authoring team's dual academic-practitioner experiences. Through a plurality of lenses, it is our hope that this commentary instigates further discussion, leading to both practical and theoretical advancement.

Declarations

Conflict of interest There are no conflicts of interest associated with this work.

Research Involving Human Participants and/or Animals Not applicable.

Informed Consent Not applicable.

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