

Towards an integrative definition of scaling social impact in social enterprises

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Highlights

- Scaling social impact is an important but often poorly understood concept in the social enterprise literature.
- This paper intends to bring construct clarity to the concept of scaling social impact.
- Drawing on a systematic literature review, an integrative definition of scaling social impact is provided.
- This integrative definition makes the concept of scaling social impact more empirically operable.
- Practitioners could use the five features underlying the integrative definition as a handy tool to accomplish various tasks.

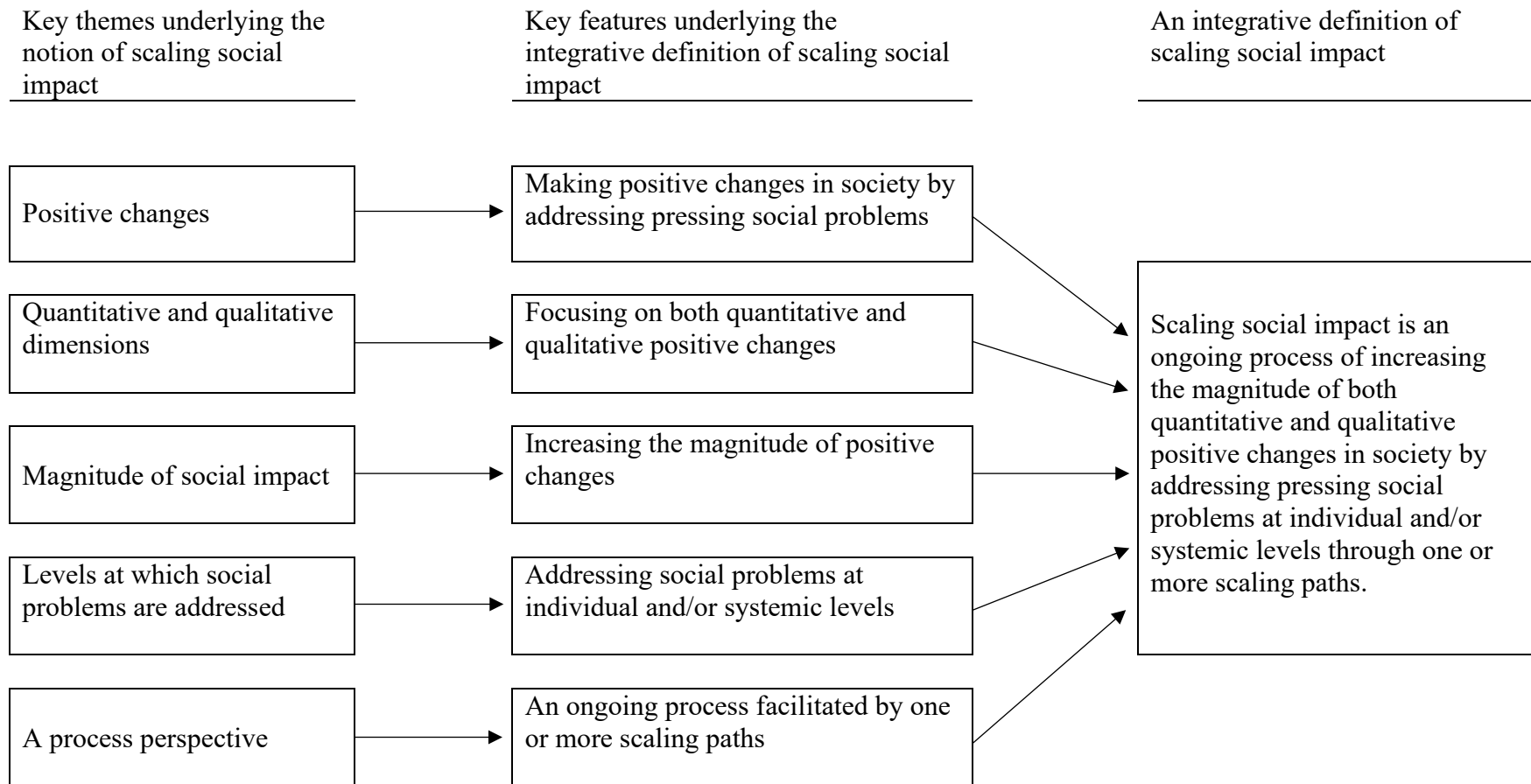


Figure 1. An integrative definition of scaling social impact in social enterprises

Towards an integrative definition of scaling social impact in social enterprises

Abstract

Scaling social impact is a key concept in the social enterprise literature. While central, the wide range of meanings and the lack of conceptual uniformity detract from its usefulness. To tackle this issue, this paper conducts a systematic review to derive an integrative definition of scaling social impact: Scaling social impact is an ongoing process of increasing the magnitude of both quantitative and qualitative positive changes in society by addressing pressing social problems at individual and/or systemic levels through one or more scaling paths. Alongside improving conceptual clarity, the definition offers an operational structure with five underlying elements, setting the basis for new empirical work and theorising in social enterprise research.

Keywords: Scaling social impact; Social value; Definition and concept; Construct clarity; Social enterprise; Social entrepreneurship

1. Introduction

Scaling social impact has long been regarded as a critical phenomenon in social enterprises (Alvord, Brown, & Letts, 2004; Dees, Anderson, & Wei-Skillern, 2004; Uvin, 1995). It is considered the single most important criterion to judge the performance of social enterprises (Ebrahim & Rangan, 2014; Molecke & Pinkse, 2017). Indeed, it lies at the centre of all activities performed by various stakeholders (e.g., impact investors, social incubators, government authorities, etc.) surrounding social enterprises (Austin, Stevenson, & Wei-Skillern, 2006; Sud, VanSandt, & Baugous, 2009).

It is no surprise that scaling social impact has remained a popular research topic. For example, researchers have investigated the implementation of different strategies to scale social impact (e.g., Dees et al., 2004; Lyon & Fernandez, 2012; Vickers & Lyon, 2014), the processes of scaling social impact (e.g., Desa & Koch, 2014; Dobson, Boone, Andries, & Daou, 2018), the drivers of scaling social impact (e.g., Bacq & Eddleston, 2018; Bloom & Chatterji, 2009), and the challenges of scaling social impact (e.g., André & Pache, 2016; Bradach, 2003). Although such an advancement of scaling social impact as a research topic is laudable, there remains considerable ambiguity and inconsistency surrounding its definition, as will be discussed later.

To help the advancement of any scholarly field in a less fragmented way, it is important to clarify the key definitional and conceptual issues surrounding the field (Suddaby, Bitektine, & Haack, 2017). In line with this, to advance social enterprise research, several scholars (Bacq & Janssen, 2011; M. T. Dacin, Dacin, & Tracey, 2011; P. A. Dacin, Dacin, & Matear, 2010; Mair & Martí, 2006; Peredo & McLean, 2006; Weerawardena & Mort, 2006) have addressed the definitional and conceptual challenges around several notions, such as social enterprises, social entrepreneurship, and social entrepreneurs. However, such an attempt regarding the notion of

scaling social impact is largely missing. This is surprising, given that it is a key concept in the social enterprise literature. The current paper addresses this issue.

Drawing on a systematic literature review (Doherty, Haugh, & Lyon, 2014; Saebi, Foss, & Linder, 2019), as will be detailed later, this paper provides the following integrative definition of scaling social impact:

Scaling social impact is an ongoing process of increasing the magnitude of both quantitative and qualitative positive changes in society by addressing pressing social problems at individual and/or systemic levels through one or more scaling paths.

This paper makes three contributions. Firstly, by providing an integrative definition of scaling social impact, this paper joins other researchers (e.g., Bacq & Janssen, 2011; M. T. Dacin et al., 2011; Mair & Martí, 2006) in addressing the definitional and conceptual challenges in the social enterprise literature. Secondly, this article contributes to the literature on scaling social impact (e.g., André & Pache, 2016; Bloom & Chatterji, 2009; Islam, 2020) by bringing construct clarity (Suddaby, 2010) to this important research topic. Thirdly, by outlining how the integrative definition makes the concept more empirically operable, this paper hopes to enable a more in-depth investigation of issues around scaling social impact in social enterprises.

2. Method

This paper builds on a systematic literature review, which is guided by several prior review articles (e.g., Doherty et al., 2014; Saebi et al., 2019; Shepherd, Williams, & Patzelt, 2015). Given the aim of this paper, two sets of keywords were developed to identify relevant articles. Firstly, the following set was developed to locate articles in the social enterprise context:

“social enterprise”, “social business”, “social venture”, “third sector”, “social sector”, “social entrepreneur*”, “social innovat*”, “hybrid organisation”, and “hybrid organization”. Secondly, to ensure the comprehensiveness of the search, the keyword “scal*” was created to identify articles regarding scale, scaling, scalability, etc. These keywords were searched in the *Scopus* and *Web of Science* databases using their article title, abstract, or keywords feature in the following fashion: i) any words from the first set of keywords AND any words from the second set of keywords, and ii) no boundaries on time period. This search produced 817 articles in Scopus and 528 articles in Web of Science.

To derive a manageable and quality sample of articles, we drew on Doherty et al. (2014) and Saebi et al. (2019) and delimited our search to peer-reviewed articles in English and journals rating at least 2 by the Chartered Association of Business Schools (2018). This generated 157 articles in Scopus and 100 articles in Web of Science, totalling 176 articles after omitting duplicate entries in databases. Furthermore, in line with the objective of this paper, articles were removed if i) they treated the phenomenon of scaling social impact in a trivial way, and ii) they did not provide a definition of scaling social impact. This left a total of 30 articles. After reading these 30 articles, another four articles (e.g., Dees et al., 2004; Lyon & Fernandez, 2012) were identified that met the criteria to be included in the review. Thus, the final sample contained 34 articles (see asterisk-marked articles in the Reference section of this paper).

The articles were coded and analysed in several iterative stages (Shepherd et al., 2015). In the first stage, relevant contents of each article were coded for the “definitions of scaling social impact”. Table 1 summarises a variety of definitions that have a focus on scaling social impact in the social enterprise context, and that are not an exact duplication of each other.

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In the second stage, existing definitions of scaling social impact were examined to understand their similarities and dissimilarities. This revealed the ambiguity and inconsistency that exists around the current definitions, which is discussed in the next section.

3. A critical overview of existing definitions of scaling social impact

Although scaling social impact is a widely-used term in the social enterprise literature, many studies (e.g., Auvinet & Lloret, 2015; Chliova & Ringov, 2017) have used the term without providing a definition of it. Even when scaling social impact is defined (see Table 1), it is given a variety of meanings. This poses definitional challenges around this concept.

Some definitions frame scaling social impact as more about serving individual beneficiaries. For example, Dees et al. (2004, p. 30) define scaling social impact in terms of “serving more people” as well as “serving them well”. Likewise, Kickul, Griffiths, Bacq, and Garud (2018) link scaling social impact with the development of products/services to serve greater numbers of people in wider geographic areas. Here, the degree of social impact scaling is positively related to reaching larger numbers of beneficiaries (André & Pache, 2016; Ebrahim & Rangan, 2014).

In contrast, other definitions regard scaling social impact as more about creating and sustaining social value by changing rules at the broader institutional level (Bloom & Dees, 2008; Tjornbo & Westley, 2012). In this case, the underlying premise of scaling social impact is to change “the system that created the social problem in the first place” (Westley et al 2014, p. 237).

Still, other definitions conceptualise scaling social impact in terms of a variety of phenomena. For example, VanSandt, Sud, and Marme (2009, p. 421) define scaling social impact as expanding efforts “to move from solving local, idiosyncratic problems” to addressing regional and global issues. In contrast, Palomares-Aguirre, Barnett, Layrresse, and Husted (2018, p.

4506) refer to scaling social impact “to increase the impact of a given program” “while maintaining financial stability to ensure survival” of the focal social enterprise.

The definitional challenges around scaling social impact are further exacerbated because of inconsistencies of using various extended terms such as *scaling up*, *scaling out*, *scaling deep*, *scaling wide*, and *scaling across*. The same extended term has often been used to mean different phenomena. For example, Bocken, Fil, and Prabhu (2016, p. 305) describe scaling up social impact as “increasing the number of customers or members of a business as well as expanding its offer and maximising its revenues”. In contrast, Tjornbo and Westley (2012, p. 179) refer to scaling up “to a change strategy that targets institutions, resource flows, and beliefs at a broader systemic scale”. Yet again, for Lyon and Fernandez (2012, p. 69), scaling up is “a continuum ranging from internal organic growth controlled within the organisation to wider dissemination of good practice”.

Furthermore, different extended terms have been used to describe the same phenomenon. For example, the same phenomenon – reaching more people by expanding geographical coverage – has been labelled as “scaling out” in Westley, Antadze, Riddell, Robinson, and Geobey (2014, p. 237), “scaling up” in Khare and Joshi (2018, p. 33), and “scaling wide” in Dobson et al. (2018, p. 4556).

The above discussion is not meant to criticise prior research but to highlight the ambiguity and inconsistency that exists around the definition of scaling social impact. One way to address this issue is to derive an integrative definition of scaling social impact.

4. Deriving an integrative definition of scaling social impact

To derive an integrative definition of scaling social impact, existing definitions were analysed to identify key themes around the concept. In this case, the process was similar to the inductive

approach for analysing qualitative data (Gioia, Corley, & Hamilton, 2013; Lincoln & Guba, 1985), whereby initially developed themes were gradually refined into more fine-grained themes by going back and forth between the data and the literature. After several iterations, five key themes emerged: positive changes, quantitative and qualitative dimensions, magnitude of social impact, levels at which social problems are addressed, and a process perspective. These key themes were further honed by consulting with the broader social enterprise literature. This gradually led to the development of five key features underlying the integrative definition of scaling social impact, which is discussed below.

4.1 Making positive changes in society by addressing pressing social problems

Social impact is widely understood in relation to the creation of positive changes in society by addressing pressing social problems (Bacq & Eddleston, 2018; Kickul et al., 2018; Rawhouser, Cummings, & Newbert, 2019). Here, the term “pressing social problems” is used in a broader sense to represent all unaddressed or poorly addressed problems that persist in society, such as homelessness, hunger, unemployment, drug abuse, carbon emissions, etc. (Mair, Battilana, & Cardenas, 2012; Zahra, Gedajlovic, Neubaum, & Shulman, 2009). Indeed, making positive changes in society is the fundamental reason for the existence of social enterprises (Austin et al., 2006; Kimmitt & Muñoz, 2018; Perrini, Vurro, & Costanzo, 2010).

4.2 Focusing on both quantitative and qualitative positive changes

Social impact encompasses two broader dimensions: quantitative and qualitative. The quantitative dimension of social impact is related to making positive changes in terms of quantity or number (e.g., increasing the number of beneficiaries) (Bloom & Smith, 2010; Blundel & Lyon, 2015). On the other hand, the qualitative dimension of social impact is related to making positive changes from a quality perspective (e.g., enhancing the quality of lives of beneficiaries) (Nason, Bacq, & Gras, 2018). Some social enterprises are reported to favour the

quantitative aspect of social impact over the qualitative aspect because the quantitative aspect is relatively easy to measure and achieve (Molecke & Pinkse, 2017). However, scholars criticise such an act, and warn that social enterprises should not prioritise “numbers” (i.e., quantity) over “people” (i.e., quality) (Bradach, 2010; Uvin, Jain, & Brown, 2000). Indeed, it is widely accepted that both quantitative and qualitative dimensions of social impact are important to achieve while scaling social impact (Dees et al., 2004; Lee & Restrepo, 2015; Smith & Stevens, 2010).

4.3 Increasing the magnitude of positive changes

Despite differences in how researchers have interpreted the term scaling, the basic premise underlying all the interpretations focuses on a common theme – to *increase the magnitude* of something (in this case, positive changes) (Cannatelli, 2017; Desa & Koch, 2014; Smith, Kistruck, & Cannatelli, 2016). This is consistent with how the term scaling has generally been used in business and management literature (Chliova & Ringov, 2017; Coff, Coff, & Eastvold, 2006). It should be noted that, at times, the magnitude of positive changes may increase rapidly, while at other times, it may increase moderately or slowly (Bloom & Chatterji, 2009; Ingstad, Knockaert, & Fassin, 2014; Walske & Tyson, 2015).

4.4 Addressing social problems at individual and/or systemic levels

Social impact can be created by addressing social problems at the individual beneficiary level as well as the systemic level (Bacq, Ofstein, Kickul, & Gundry, 2015; Westley et al., 2014). There is no consensus about whether addressing social problems at the individual level should receive priority over the systemic level, or vice-versa. It should be noted that not every social problem may be suitably addressed at both individual and systemic levels (André & Pache, 2016). Furthermore, not every social enterprise may address a certain social problem at both levels due to, for example, lack of sufficient resources and expertise (Langevang & Namatovu,

2019). However, researchers generally agree that when contextual factors (e.g., the nature of the social problem and organisational capability and resources) allow, scaling social impact should emphasise addressing a social problem at both individual and systemic levels (Alvord et al., 2004; Scheuerle & Schmitz, 2016; Uvin et al., 2000). This can provide several benefits, including providing a long-lasting solution to the focal social problem (Bloom & Dees, 2008).

4.5 An ongoing process facilitated by one or more scaling paths

Most scholars view scaling social impact as an ongoing process rather than a one-off event (Bauwens, Huybrechts, & Dufays, 2019; Easter & Conway Dato-On, 2015). Such a process perspective underscores the evolving nature of the phenomenon of scaling social impact in social enterprises, as the context in question continues to evolve (Bocken et al., 2016; Desa & Koch, 2014). In social enterprises, the process of scaling social impact is facilitated by one or more scaling paths. Some of these scaling paths include developing innovative products/services to address unmet social needs (Ometto, Gegenhuber, Winter, & Greenwood, 2019), expanding geographic coverage to reach larger numbers of beneficiaries (Zhao & Han, 2019), building networks to exchange best practices around addressing a certain social problem (Montgomery, Dacin, & Dacin, 2012), providing training and advisory support to other social enterprises to help them to grow effectively (Ebrahim & Rangan, 2014), and undertaking advocacy work to change public policy for social betterment (Bloom & Chatterji, 2009). However, there is no consensus about the best path to scale social impact. Rather, it is generally acknowledged that pursuing multiple scaling paths has a greater potential to make an enhanced social impact (Grant & Crutchfield, 2007; Islam, 2020; Lyon & Fernandez, 2012; Vickers & Lyon, 2014).

The above discussion shows how each of the five distinctive yet interrelated features represents different aspects of the notion of scaling social impact in social enterprises. By combining these five features, Figure 1 presents an integrative definition.

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5. Discussion and conclusion

Scaling social impact is an important but often poorly understood concept in the social enterprise literature. Drawing on a systematic literature review, this paper provides an integrative definition of scaling social impact, which is based on five distinctive yet interrelated features. From a theoretical viewpoint, this article brings construct clarity to the notion of scaling social impact. Construct clarity is an essential component for effective theorisation of issues surrounding a phenomenon (Suddaby, 2010). As such, the current paper provides a platform for effective theorisation of issues around scaling social impact. For example, studies in the area of drivers of scaling social impact (e.g., Bloom & Chatterji, 2009; Bloom & Smith, 2010; Palomares-Aguirre et al., 2018) have apparently adopted a *static* lens, where they have explored drivers of scaling social impact in general. However, the proposed integrative definition encourages researchers to adopt a *process* lens, where scaling social impact is an ongoing process rather than a one-off event. Viewing the phenomenon of scaling social impact as an ongoing process implies that a social enterprise's scaling activities are likely to change over time, for example, in relation to different stages of the organisational life cycle. That is, as a social enterprise enters each life-cycle stage, its scaling activities are likely to be shaped by the unique characteristics of that stage. Accordingly, the drivers that could be effective in scaling social impact in one life-cycle stage (e.g., the start-up stage) may not be equally effective in another life-cycle stage (e.g., the maturity stage), and vice-versa. Therefore, rather

than exploring drivers of scaling social impact in general, researchers could explore drivers across different life-cycle stages of social enterprises. This would offer a more complete theorisation opportunity around drivers of scaling social impact.

Furthermore, by bringing construct clarity to the notion of scaling social impact, this paper addresses the prevailing conceptual ambiguity around it. The current paper thus joins other researchers (e.g., Bacq & Janssen, 2011; M. T. Dacin et al., 2011; Mair & Martí, 2006) in addressing the definitional and conceptual challenges in the social enterprise literature. This article hopes that the proposed integrative definition will pave the way for a more effective communication and a greater exchange of ideas among scholars interested in pursuing research into issues surrounding scaling social impact.

The proposed definition of scaling social impact also makes the concept more empirically operable, which would assist with a more in-depth investigation of relevant issues. For example, while investigating whether and to what extent a social enterprise has been able to scale its social impact, researchers could use the following five criteria that are based on five features underlying the integrative definition: i) whether there is evidence of positive changes in society, ii) whether there is evidence of both quantitative and qualitative positive changes, iii) whether the magnitude of quantitative and qualitative positive changes is high, medium, or low, iv) whether scaling social impact involves addressing the focal social problem at the individual and/or systemic level, and v) whether scaling social impact has been considered as an ongoing process (or just a one-off event).

The integrative definition presented in this paper has also implications for practitioners. For example, social entrepreneurs could use the five features underlying the integrative definition to get a quick dashboard view of their organisations' progress in scaling social impact, which could also be used while pitching to investors and media. Similarly, impact investors could use

the five features underlying the proposed definition as a quick assessment tool to shortlist/select potential investee social enterprises, which would offer them a higher social return on their investment. For example, investing in social enterprises that focus on both quantitative and qualitative (rather than only quantitative) positive changes in society and that consider scaling social impact more (rather than less) as an ongoing process is likely to generate a higher social return on investment. Furthermore, as scaling social impact is at the heart of all activities that social incubators and accelerators do, they could use the five features underlying the integrative definition as a quick screening tool for selecting applicants (i.e., social enterprises) for their programmes, as well as identifying the development areas of the enrolled applicants throughout various phases of the programmes. Overall, as the proposed definition is comprehensive enough to cover the major aspects of the concept and as it is easily understandable and interpretable, practice communities could use it as a common language to promote a common understanding of issues around scaling social impact.

In conclusion, this article shows that considerable ambiguity and inconsistency exists around the concept of scaling social impact. It is hoped that the proposed integrative definition of scaling social impact will be useful for both scholars and practitioners to move forward with their scholarly and practice agenda.

Table 1. Definitions of scaling social impact (ordered alphabetically)

Authors	Definitions
Alvord et al. (2004, p. 275)	Scaling up [... includes] three major patterns for widening the impacts of successful social entrepreneurship initiatives: (a) expanding coverage to provide services and benefits to more people, (b) expanding functions and services to provide broader impacts to primary stakeholders, and (c) initiating activities that change the behavior of other actors with wide impacts, scaling up impacts indirectly.
André and Pache (2016, pp. 664-665)	Scaling across refers to an approach that focuses on disseminating and sharing the social innovation developed by the social entrepreneur with other actors. ... Scaling deep refers to an approach that focuses on improving and enriching current processes in order to enhance the impact on beneficiaries. ... Scaling up refers to the approach that focuses on designing operations to reach out to new beneficiaries in geographical locations not yet served by the venture.
Blundel and Lyon (2015, p. 93)	Scaling of social impact is also evident through the replication process as other organizations draw on the HHW model and adapt it for their context.
Bocken et al. (2016, p. 305)	'Scaling up' in this paper is defined ... as: Increasing the number of customers or members of a business as well as expanding its offer and maximising its revenues until it reaches millions of people.
Dees et al. (2004, p. 30)	[Scaling social] impact should not just be about serving more people – it should be about serving them well.
Desa and Koch (2014, p. 148)	Scaling social impact is the process of expanding or adapting an organization's output to better match the magnitude of the social need or problem being tackled.
Gauthier, Ruane, and Berry (2019, p. 350)	Increasing the impact a social-purpose organization produces to better match the magnitude of the social need or problem it seeks to address.
Guha (2019, p. 1367)	Scaling-up can be defined as “expanding, adapting, and sustaining successful projects, programs, or policies over time for greater development impact”.
Khare and Joshi (2018, p. 33)	Scaling can be understood as increasing the reach or geographical spread of the enterprise termed as Scaling Up.
Kickul et al. (2018, p. 410)	Scaling social impact can be defined in two categories: 'depth impact' and 'breadth impact'. The first, refers to a qualitative improvement in terms of development of product/services scope in serving the needs of the target community while the second, refers to the quantitative growth of impact, designed to reflect geographic expansion or increases in the number of people benefitting from the solution.
Lee and Restrepo (2015, p. 462)	Scaling-up takes into account the number of beneficiaries, the quality of the service as well as its sustainability.
Lyon and Fernandez (2012, p. 69)	Scaling up can be seen as a continuum ranging from internal organic growth controlled within the organisation to wider dissemination of good practice. This continuum therefore represents a shift from the complete control within an organisation to a situation where the originator of the innovations and developments has limited power over

Authors	Definitions
	how this is implemented. In each case the objective is to increase social impact, although how this is done may change.
Palomares-Aguirre et al. (2018, p. 4506)	The ability of a social business to increase the impact of a given program for more beneficiaries, while maintaining financial stability to ensure survival.
Smith and Stevens (2010, p. 588)	<i>Scaling up</i> refers to the growth in social value by expanding a current programme to other geographic locations. ... <i>Scaling deep</i> means ‘focusing . . . energies and resources on achieving greater impact in your home community by doing one of the following: improving the quality of your services, achieving greater penetration of your target client population, finding new ways to serve your clients, extending your client services to new client groups developing innovative financial management approaches and serving as an example to others in your field’ [emphasise in original].
Smith et al. (2016, p. 681)	Scaling is defined as increasing the magnitude of the social impact of the organization and focuses on the efficient growth or expansion of social impact.
Tjornbo and Westley (2012, p. 179)	Scaling out refers to the replication and growth of the innovation in new markets and locations through market mechanisms; scaling up refers to a change strategy that targets institutions, resource flows, and beliefs at a broader systemic scale.
Uvin (1995, p. 927)	Increasing the impact of grassroots organizations and their programs.
Uvin et al. (2000, p. 1410)	Scaling up is about “expanding impact” and not about “becoming large”.
VanSandt et al. (2009, p. 421)	Scaling is the term used to describe efforts to expand in order to move from solving local, idiosyncratic problems to addressing issues that affect increasing number of people over larger geographical areas.
Westley et al. (2014, p. 237)	“Scaling up” refers to identifying opportunities and barriers at broad institutional scales, with the goal of changing the system that created the social problem in the first place. ... “Scaling out”, defined as the organization attempting to affect <i>more</i> people and cover a larger geographic area [emphasise in original].

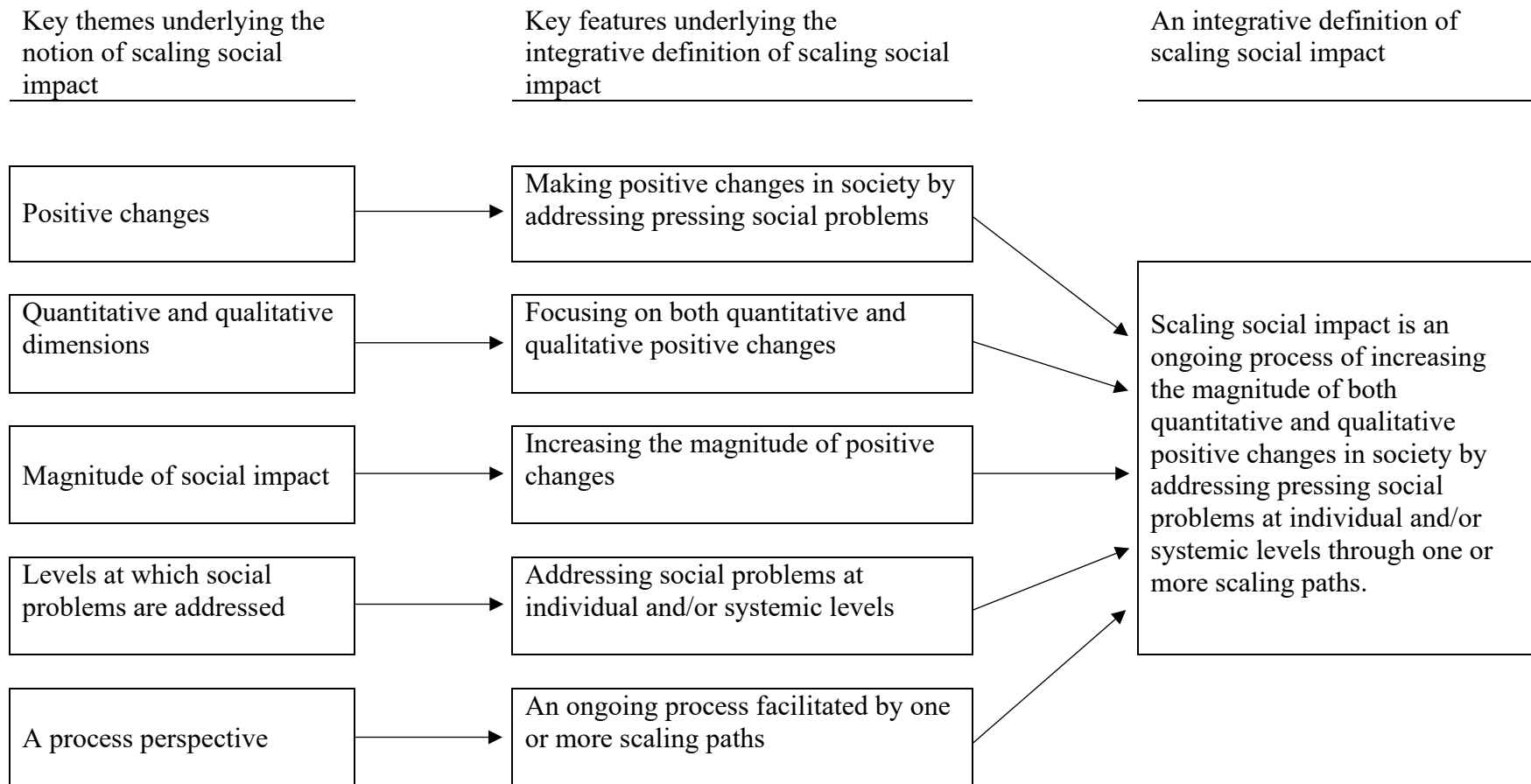


Figure 1. An integrative definition of scaling social impact in social enterprises

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