A Relational Lens on Social Innovation: Tracing Roots to Transboundary Transformative Dynamics

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Introduction

Everyone seems to be talking about innovation these days. Innovation has become the quintessential feature of development in different fields, from business to art, and it appears increasingly in public policies and government programs. The term has become a buzzword of the twenty-first century, and innovation is expected to solve all of today's problems and challenges. The problem is that the word has become so ubiquitous that it now simply means anything 'new', which is not correct and precise and does not make it possible to understand the value of innovation for society. Nor does the obscure understanding of 'social innovation' make it easier to orientate in the hot topic of innovation. However, the emerging wealth of conceptualisations of social innovation generates growing confusion about what it is and what it is not because, until now, there are no clear limits to the concept (Solis-Navarrete et al. 2021). So, what is the nature of social innovation anyway? Where are the seeds of societal change and systemic transformation that can transcend boundaries?

In general, social innovation is a new and expectedly better solution aiming to improve the welfare and well-being of individuals and communities. Things are getting blurred if we try to wrap up this understanding or create boundaries around it. Many authors and schools of thought have explained social innovation from different angles by adding features like empowerment, stakeholders' and end-users engagement, co-creation, obstacles or unmet needs in the current situation, system change, locality, etc. Still, there can be a lot of conceptual and definitional confusion because social innovation has been approached from many disciplinary and interdisciplinary perspectives. Slee and co-authors (2022) pointed out that '*social innovation tends to carry with it the theoretical baggage from different disciplines, which range from geography to sociology and technology studies to management and policy sciences*' and ideas about social innovation are only weakly connected to innovation theory (Slee et al. 2022). Courvisanos (2007) explains that innovation as a process is complex and poorly understood because it is deeply rooted in the uncertainty of the future world and the inability of human beings to predict the future. It makes a strong argument for why there is so much struggle around the popular topic. One of the challenges in defining boundaries for social innovation is related to the relational worldview, as described by Emirbayer (1997). This perspective raises fundamental questions about ontology and adds analytical and methodological difficulties. Given this confusion in the research landscape, it is surprising that so little attention has been paid so far to the roots of innovation and social innovation compared to the amount of empirical research done on these topics. In conducting empirical research, it is essential to clearly understand the underlying principles or beliefs that shape the research. With this contribution to the Review, I seek to position social innovation in a transactional and relational worldview and look for the essence of social innovation from the configuration of relations of the actor as an agent and scenes.

Tracing the historical perspective

The term 'innovation' is not new. As written by the leading thinkers in the field of social innovation Moulaert and MacCallum (2019), the term 'innovation' appeared in the works of Plato and Aristotle but did not become more widely used for some centuries. It reappeared in religious texts in the 15th century, and the term's connotation was rather negative. The prevailing attitude dictated by the catholic church was that renewal and change are perilous. '*The wyse and politike men of this world which have written of commonwealths, have thought us how perilous to every commonwealth is innovation and change*' wrote Polish Roman Catholic cardinal Stanislaw Hozjuszi in the 16th century (Howaldt et al. 2021). However, there were some efforts during reformation to show a change in a positive sense as well. Such is the use of the term by Thomas More (1478–1535). While a prisoner in the Tower of London, More collected several prayers, two of which used the word 'innovation'. The meaning of innovation as renewing man is 'innovation of life' and 'innovation of spirit!' (Howaldt et al. 2021). Despite some exceptions, until the 19th century, the meaning of innovation had negative shades. Such was also the case with the term 'social innovation' which was first used in the context of socialism. From these first notes about the meaning of innovation, whether positive or negative, we can see its roots in renewing or reforming human beings and their relations with others in society. However, it should be noted that the use of the term was somewhat incidental and not more broadly related to discourses or science.

The term 'social innovation' emerged around the 19th century in Europe, a time of highly charged ideological, religious and socio-political debates and struggles. Active promoters of the socialist movement were named social innovators, marking the people who believed in socialist doctrines. Again, based on the book by Moulaert and McCallum (2019), the Encyclopaedia Britannica's article on communism begins: '*Communism is the name given to the schemes of social innovations which have for their starting point the attempted overthrow of the institution of private property*' (Encyclopaedia Britannica 1888:211, cited in Godin 2012). Soon, the other, more optimistic interpretation began to emerge in France, where social innovation came to be associated with more moderate and cooperative forms of social reform (including progressive social goods such as education and legislation on labour, working conditions unions, etc.). At the end of the 19th century, social innovation had taken multiple meanings associated with social change. When societal attitudes were shifting toward individual freedom and social movements forced reforms to balance the unjust impacts of urbanisation and capitalism, the meaning of innovation was also shifted from the revolutionary and radical opposition to the current social order to the positive connotation of doing things differently.

Until the turn of the 20th century, innovation and social change did not receive much theoretical attention. Since then, there has been a growing interest in the academic discourse surrounding innovation theories. According to Tarde, social innovation encompasses any societal transformation that encounters resistance from other equally impactful innovations during its implementation. Tarde's concept highlights the obstacles to social innovations becoming established customs or traditions. (Tarde 1898, cited from the book". A Research Agenda for Social Innovation" by Howaldt, Kaletka, and Schröder 2021). The first decades of the 20th century are the turning point in theorising innovation that has led us through several waves into today's reality, where innovation has become a central idea in coping with different societal challenges at different levels. In the middle of the 20th

century, innovation came under scope as a driver of progress and transformation. Still, the focus turned to economic and technical aspects of innovation, and social, human, and spiritual aspects of innovation lost their position in understanding societal change. The meaning of innovation changed, and it became rich with theoretical concepts. Nowadays, the theory of innovation is mainly associated with the creation of entrepreneurship and economic value and this way was first defined by Joseph Schumpeter (1939). Although this is the prevailing view, it can be observed that innovation is not limited to business anymore. The theory of innovation has been supplemented with new and broader approaches that consider other types of innovation. Significantly, social innovation has gained considerable attention in political discourse over the last decades. Looking at the history of the innovation phenomenon and not being discouraged by its prevalent scientific manifestations as technological innovation, the original meaning of innovation is close to the understanding which is today known as social innovation.

Interactions between theory and practice

The historical evidence of the term innovation and how the meaning has evolved raises the debate on the relationship between practice, research, and theory. In the case of innovation, the theory means an explanation of a particular social phenomenon. As there are not any black-and-white or right-and-wrong explanations for the social phenomenon, the theory cannot be ready and fixed but is constantly evolving. The phenomenon, research and theory form an interconnected whole with the ongoing constructive conflict between the positions. Rule and John (2015) describe it as the unfinalizability of dialogue, meaning that relations among theory, practice and research are never resolved once and for all but continue to generate new collisions, possibilities, and insights. Moulaert and MacCallum (2019) argue that according to a philosophy of science, thoughts and theories develop in interaction with practice in many ways. Theories are visions that influence collective practice, and conversely, visions and concepts often emerge from observing and analysing diverse practices. Therefore, understanding how the 'making' of social innovation was philosophically inspired and theorised and how science was guided by socio-political developments, facilitating or hampering social innovations. '*Social innovation – whether named as such or not – has been presented throughout history in various forms of practice, often resulting in lasting social change, yet also causing counter-reactions leading to socio-political and ethical regression*' (Moulaert and MacCallum 2019). Rule and John (2015) have not set boundaries in time for dialogue within the theory, practice, and research. Thus, it can be assumed that the dialogue can emerge over a long period, even over centuries, like it was within the topic of innovation before it got to the speed where the interactions between positions were easier to see.

Thus, it can be said that despite some theoretical immaturity and the relative youth of social innovation research, social innovation as one of the drivers of social change can be considered as old as society itself. Otherwise, how do we explain that, as a society, we have transformed from cavemen to digital people? What and how happens inside the black box of innovation remains unclear without research and proposed theoretical arguments.

Looking for relational roots of social innovation

Discussing the idea of social innovation is critical to understanding its transformative logic. Similarly to technological innovation, social innovation is complete when it has proved its feasibility and emerged or developed solutions become a practice. Social systems around that topic have adapted to the new reality. Transformative social innovation can be understood as a process by which social innovation challenges, alters or replaces the dominant institutions in a specific context. Transformative change is the goal of social innovation, but it does not happen in the short run and requires a long time and resources to develop and scale before achieving impact and systemic change (Westley et al. 2017). It is not a linear process, but Murray et al. (2010) have described six maturity stages in the social innovation development process, from defining the challenge (or need for change) at the grassroots level to becoming part of the system and stopping being an innovation anymore.

Also, Schumpeter showed with his theories around business innovation that innovation is not just researching, inventing or developing, but it has to result in commercialisation. Innovative change comes through creative destruction - destroying the old forms of accumulation and replacing them with new forms. These transformations work through innovation processes bounded by the specific institutions and political frameworks (or political economy) that influence the development of any particular innovation (Courvisanos 2009). Put it simply, innovation is not just something new, but something meaningfully new as a reaction to some unmet need or unused opportunity to sustain the 'new' and become 'a usual thing'. In social innovation, this systems transformation aims to improve people's well-being sustainably. Still, this explanation does not answer the fundamental nature of innovation or differentiate it from other ongoing societal changes that tackle similar characteristics. One could even say that such a definition presupposes that the world is traditionally static and unchanging, and novelty is something extraordinary and rarely emerges.

In line with the perspectives of Mustafa Emirbayer (1997) and Andrew Abbot (2007), I perceive innovation as a form of change intrinsically connected to relationships. In other words, social life revolves around interactions rather than solely individual actions. The relational point of view sees agency as inseparable from the unfolding dynamics of situations, especially from the problematic features of those situations. The notion is that the meaning of action arises from its relations to other actions and is comprehensible only in social time and place. The unfolding process becomes the primary unit of analysis rather than the constituent elements themselves. This worldview gives a satisfactory foundation of explanation to the widespread and universally accepted understanding that innovation and social innovation are context-dependent. The same manifestation at different times or places has an entirely different meaning and can have different outcomes or impacts. Kindergartens in 19th-century Germany were a social innovation, but not anymore in the 21st-century world. E-participation in elections is an innovation in 2020s Germany but not Estonia. What has transformed is the human action in interaction with others and the surrounding (*scene*), not the acting individual himself (Abbot 2007). Actors as agents and actions in these scenes and networks contribute collectively to changing societal relations and trajectories of development.

Courvisanos (2007) put novelty at the centre of human agency. He analysed the human agency's role in pursuing novelty and explored a continuum of agency-structure relationships that enhance

innovation. These relationships cover environments that are based on agency and contingency, through to those that balance contingency with containment (structure) and situations that are heavily contained. He brought up an interesting aspect of why the mainstream view of human action, which is based on the ontological theory of rational economic man, can not explain change and innovation. Innovation is rooted in the uncertainty of the future world, from which emerge new products, processes, movements, organisations and sources of raw material which cannot be modelled. Lack of knowledge and uncertainty can not be the source of rational choice, which assumes predictability and certainty about the expected outcomes. In the situation of perfect competition, where the knowledge is transparent and instantaneously transmitted, there is no incentive for innovation. Orthodox (microeconomic) concepts of human agency take innovation and new knowledge as something exogenous and do not pay attention to any endogenous role that innovation can play in the dynamic mutual interdependence of institutions and agents. How new understanding and knowledge are obtained and the role of human agency remains unclear. Courvisanos reflects and develops the thoughts of Allen Oakley, who sees that the fundamental aspect of human agency in the economic sphere is centred on choices, decision-making and actions, but satisfactory ontology needs to capture the voluntaristic role of independent human agents in these three aspects, but also recognise the deterministic social structure that governs the phenomena. Oakley (2002: 192) provides a relational description of the dualistic relation between voluntarism and determinism, which I found also promising for explaining the roots of social innovation:

> *'This social and economic cosmos is the unintended collective product of their individual actions immanently and volitionally guided by the situationally imposed rules, facilities and constraints that shape these actions. … But because of uncertainty and the need to depend upon other people within their social environment, the deliberated actions of individuals will for the most part generate phenomena that include outcomes that were not wholly expected and not wholly desired.'*

The roots of the relational worldview, where freedom is not a fixed and pre-given attribute but rather what we can do under given circumstances engaged to other individuals (transaction), are recognisable in this explanation. Oakley's contribution highlights the human agents searching for the balance between the contingency of human action and containment that limits this action. According to Courvisanos, the balance between contingency and containment in any specific real-world setting explicates the sources of human agency and determines its nature. Contingency is a 'free-to-choose' agency concept strongly qualified by what agents know (or have learnt) based on their cumulative biography. Containment is often seen as a part of an exogenous environment rather than situated inside the agency. Individual capacities emerge from this learned past. In this concept, history matters in a very personal way (Courvisanos 2007). So, the knowledge comes from life experiences and the past and is combined with the perception of the scene that also includes memories from other agents, which explains how the seeds of the future lie in history. Both Courvisanos and Oakley interpret the role and capacity of human agents for dealing with novelty as determinants for the success of possible innovations. Dealing with novelty is strongly related to imagination and inspiration fueled by the new combination of past knowledge. So, the novelty does not come out of the blue.

When Abbott described the scene and action as inseparable, and Oakley and Courvisanos described the framing conditions for this action - creativity and freedom vs. the containment influence of the system - it can be seen that society is based on constantly changing human interactions (more precisely: *transaction*) that search for balance in the current scene. Abbott argues that by prioritising interaction as the fundamental element, we can recognise the continuous interplay of various individual interpretations of action sequences. This interplay is a clear reality in social life, where it constantly shapes and reshapes both interactions and social structures. '*Taking action and interaction as primitive is our only effective way to deal with change in social actors and structures. It is far easier to explain permanence as an accidental outgrowth of change than vice versa*' (Abbott, 2007).

If this ongoing flow is the essence of our society, then how does innovation differ from this? To what extent do the continuous changes 'normal' adaptations to the context (evolution?), and when it becomes something 'so new' we would like to name it the innovation? Or even the revolution? We saw that it can be reduced to the interrelation actions between human agents and context that produce the new situations, which in turn begin to seek a new balance through similar kinds of interaction and so on endlessly. Sometimes, these situations are expected with significant probability - based on past knowledge, we can predict what this new balance would be in the future. But not always. There can also be situations that become highly unexpected and unpredictable. Can innovation be distinguished from other types of change when the new knowledge generated through interaction and mutual learning results in fundamentally novel levels of insight and understanding, providing unforeseen input for new circumstances and establishing an unexpected and irreversible context for future actions? Without conceptually new knowledge about some phenomenon, it is impossible to generate a conceptually new scene with new interrelated activities from which the process or service or product develops as a new innovative outcome. Irreversible means that once you have a new realisation and knowledge, you can not ignore it anymore. It becomes part of your life experience and influences subsequent decisions and actions - creating new scenes and situations.

Mutual learning between involved actors has been widely agreed to be one of the core components of the co-creation process (Voorberg et al. 2017, Kohlgrüber et al. 2021). Co-creation, in turn, is considered one of the critical components of social innovation - social innovation emerges through co-creation. Therefore, unexpected new scenes grow from knowledge co-creation based on life experiences, cultural and social heritage and formal knowledge of human agents. The unpredictable outcomes of interaction can be caused by agents and environments with diverse backgrounds and experiences actively engaging. When there is a higher difference in past experiences and knowledge among these agents, it creates an opportunity for entirely novel discoveries. The probability of lucky coincidences and beneficial serendipity increases with greater diversity, leading to co-creating new knowledge that fosters fresh conceptual understanding. While not all combinations of knowledge bring about significant changes, some are more valuable in terms of driving innovation forward. It is impossible to predict what specific combination will emerge, but increasing diversity can positively influence the likelihood of a fruitful coincidence occurring.

The more different past experiences come together to co-create new knowledge of a common situation, the greater the likelihood of new beneficial, unpredictable discoveries. This was also seen in

our empirical research about experimenting with social hackathons as a platform for co-creating new solutions at the local level (Kangro and Lepik 2021, Toros et al.,2020) - working with different stakeholders helped to create a broader context for the original understanding of the problem. A positive attitude towards the plurality of points of view dominated the interviews we conducted with social hackathon participants. The value of the co-creation experience was illustrated well by a local government development specialist:

> *'I really liked the fact that the [blind] woman said that she also wanted to see the sights. But how does she identify the sights, and how does this information reach her? What she said was very nice. I became much more aware of what it means to involve people, the importance of which came to my attention during the hackathons.' (Kangro and Lepik 2021)*

The participants found it challenging to ignore different views. As diverse teams worked closely and the conditions were suitable for listening to each other, they were forced to deal with conflicting opinions (Kangro and Lepik 2021). This raises the question of whether innovation is purposeful and planned or can emerge from serendipity. Increasing diversity among individuals involved in knowledge-creation activities can lead to a higher probability of serendipitous discoveries and novel combinations of ideas. Serendipity has a positive impact on discovery, creativity, and innovation.

The reasoning for social innovation

Understanding social innovation is a complex task. Researchers aiming to analyse this phenomenon face difficulties in determining which new ideas or initiatives, identified early on in their development, are most likely to bring about transformative change and positively impact society. Knowing what kinds of transactions ought to be most highly valued requires capacities for prudential reasoning and the ability to retrospectively track the effects of relationships. As transaction flows endlessly and agents have their cumulative biography with what they are engaged in, separating specific innovation outcomes from the context is impossible. We can see the results of social innovation retrospectively because the meaning becomes apparent over time - for example, in kindergartens. A German educator, Friedrich Froebel, opened the first kindergarten in Blankenburg, Germany 1837. Based on the description by Passe (2010), he had radical thinking that children were naturally good learners and acquired cognitive and social skills by using their natural curiosity and desire to learn. The common belief these days was that 'children were little creatures who needed stern handling to become good adults and play is a waste of time'. Froebel's ideas were so new that the Prussian government closed all kindergartens in 1851, fearing a socialist revolutionary movement. Nevertheless, the concept spread quickly throughout the rest of the world, and by the end of the nineteenth century, many countries had started kindergartens for middle-class children. Kindergartens, as a new practice, opened a new avenue for women's emancipation and released time for education and work opportunities. For middle-class women, it probably was not so much about how to raise children but how to share the parental responsibility. So, the kindergartens had positive side effects that might be the cause why they became popular and changed the system despite the initial prohibition. This social innovation influenced society and the economy by increasing the opportunities to work and active participation in social life. A new reality was created, and social innovation occurred and changed the existing

system, but where and when did it start? What was the starting point of this case where the different scenes transformed in a direction which was, on the one hand, suitable for generating the idea and, on the other hand, accepting and implementing this idea because an idea alone without implementation is not innovation?

This example shows that it was not the theoretical vision of social innovation leading to societal change and innovation in practice. The emerging idea that children can learn activated the process, which can later be labelled a social innovation. Nevertheless, it is impossible to track where it started. Moreover, it is essential to consider the historical and geographical context when examining social innovation. A comprehensive understanding of its meaning and content requires such contextual knowledge. In actual practice, analysing innovation can only be done retrospectively or after the fact. However, this approach may encounter resistance in practical situations, particularly within the public sector, where uncertainty regarding success and expected outcomes is typically not tolerated.

Social innovation as a transcendence of boundaries

What is challenging to the relational perspective of social innovation is how interactions and relations form networks or clusters and how the individual-level transactions are connected to upper levels in societal organisation. While social innovation aims for systemic change toward a more sustainable combination of relations, it raises the question of why did these insufficient relations emerged in the first place. Social problems do not arise spontaneously from the air but result from previous choices and behaviours. They signify the shortcomings of certain systems, structures, understandings, or actions. This dynamic interaction connects present circumstances with past decisions - underscoring path dependency and rendering it challenging to discern where this process begins and ends. The boundaries of the social innovation process are complex and multifaceted.

By the essence of relational ontology, the systems and structures we witness in our everyday lives should be explained as clusters of interactions and relations between different actors and entities. Therefore, they emerge from and formed by relation, not as a pre-given condition. That means there should be boundaries where one cluster or network of relations goes over another and overlaps and interacts with it. Therefore, we can assume that relations are not free and open to any interaction. Somewhere, there are limiting conditions that protect against endless possibilities of combining different scenes and experiences, which could be one reason that led us to insufficient relations that manifest as social problems. These limits go beyond spatial-temporal conditions and include historical, cultural and value-based factors as well. I would argue that acknowledging these visible and invisible limiting conditions for diverse interactions helps us address these limitations and purposefully improve the diversity of scenes and life experiences to foster social innovation that transcends boundaries. As humans, we seek companies of similar individuals who share our values, beliefs, and experiences because it serve our eagerness to belong and create a safe space around us. This way, it is easier to live today, but it limits us from valuable relations that occur beyond today's borders that create conditions for long-term survival. This tendency to cluster and seek similarity can limit our ability to think innovatively and create meaningful change. We must break free from these boundaries and embrace diversity in our interactions and relationships for survival and progress.

Social innovation as a transcendence of boundaries refers to the idea that it has the power to break through traditional constraints and challenge established norms and structures by aiming and acting for positive social impact. This form of innovation is not limited to specific sectors or disciplines but rather encompasses a wide range of areas, including education, health, well-being and so on, penetrating different societal coordination spheres like market, community networks and governmental hierarchies. It goes beyond traditional approaches and seeks to address societal problems by finding new relations and creative ways to improve the diversity and quality of interaction. It recognises the interconnection between social, economic, and environmental issues and seeks to address them holistically and in an integrated manner, aiming for broader social impact.

Concluding note: From the grass-roots to systematic change

Social facts or phenomena, such as the belief that all men should read the Bible or that children are naturally good learners, may start initially with the education of a few. The various possible trajectories of how change on a small scale becomes systematic change along which an innovation develops may take very different directions. Successfully adopting the new routines can lead to the wide diffusion of innovation (Courvisanos 2007). There are challenges with assessing those dynamics. From an ontological and also historical perspective, the distinction between innovation and social innovation is not easy because, in the end - any innovation, from art and culture to high-tech, aims for a more wealthy, sustainable, fair and peaceful society and involves novelty resulting from the change.

The conceptual framework discussed here highlights the importance of co-evolution as an important step in crafting of accordingly dynamic case study designs. A further step is to embed the four 'shades' and (dis)empowerment concepts in a more fully developed theoretical framework that specifies transformative social innovation in terms of complex, multi-layered processes of institutional change, including further empirical exploration of specific mechanisms and process stages in ongoing and historical cases of social innovation (Haxeltine et al., 2016). As such, further research is challenged to specify the co-evolving shades of change and innovation and the (dis)empowerment dialectics as they unfold over time and space (Avelino et al., 2015).

Secondly, these challenges of developing process theory also indicate a need to pay more explicit attention to the cultural, geographical, political and social contexts of transformative social innovation initiatives. As the three cases substantiate, national and regional path dependencies matter greatly. Transformative social innovation theory should develop the capability to explain how differences in context influence the dynamics of how social innovation unfolds over time and space (Jørgensen et al. 2015). Such theory should, for instance, account for the implications of welfare state arrangements being dismantled in some places, whilst being developed further and extended in others.

A third challenge for future research lies in making this co-evolutionary understanding productive for actors. We assume that actors can increase the transformative potential of social innovations by playing into such co-evolutionary processes; cleverly playing into apparent 'game-changers', connecting to ongoing (calls for) 'system innovation', and linking up with multi-layered 'narratives of change' in both mainstream and grassroots movements. This can be further developed in terms of

specific sets of practical challenges, such as governance, social learning, resourcing, and reflexive monitoring (Avelino et al. 2014, Pel and Bauler, 2014). In line with our understanding of distributed agency, such empowering insights should serve the full range of potential social innovation agents, including social entrepreneurs, activists and policymakers.

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