# Social Innovation in Theory and Practice: European Policies, Strategies and Experiences

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**Abstract** Despite the substantial knowledge accumulated over the last years about social innovation, this concept is still under construction. If, on the one hand, reflections and discussions enable maturity on the subject, on the other hand, it is also its practice that may allow a deeper consolidation. In order to solve social challenges and to achieve an effective transformation of the society, social innovation has varied strategies, according to specific problems and social, economic, political, historical and cultural contexts. Therefore, there are no generic best-practice models, as social innovation cannot be replicated, but transversal aspects may be taken into consideration, respecting the territory and the community involved, to design and implement concrete actions for change. Recognising the relevance of social innovation, this chapter addresses the topic from theoretical and practical perspectives, presenting several characteristics that frame the debate, as well as examples of social innovation strategies, incentives and supports in the European Union and its member-states. Emphasis is given to Portugal Social Innovation, which is a recent and exploratory initiative to induce social innovation using the European structural and investment funds, as well as the Fourth sector, which is referred to from the social innovation discussion and European context perspectives.

**Keywords** Social innovation · European Union · Social transformation · Fourth sector

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# 1   Introduction

Challenges are far from being extinguished in contemporary society. In fact, the current pace of change and disruptions with their related emerging risks require the search for other answers and solutions to old and new problems. Social innovation (SI) arises with its focus on social transformation. Different fields, sectors, organisations and individuals are increasingly interested in the construction and promotion of SI.

SI is aiming at social change with a new approach to innovation, leaving aside purely economic and technological aspects which are more consolidated in the literature but also in policy-making. SI's main goal is to bring effective alternatives in order to deal with the countless adversities faced by contemporary society.

Given its specificity, social innovation has been gaining conceptual and practical diffusion. In the theoretical aspect, there are many reflections and discussions on the subject. Although it is not a new topic, it is often disregarded as scientific concept, having diverse definitions. As practice, SI can be seen in the multitude of initiatives around the world. As a consequence, the European Union (EU) and its member-states are beginning to structure a more coherent framework for social innovation. This is reflected in many plans, projects and support schemes, especially coming from the European Commission (EC), which is recognising and valuing the importance of social innovation.

This chapter aims to present theoretical contributions on the topic of social innovation, underlining the enabling character for transformative actions in society while also presenting the Fourth sector as a favourable domain for social innovation initiatives. It is therefore organised as follows. The next section is dedicated to social innovation, highlighting the diversity of definitions, historical shapes and approaches, its phases and social actors, together with a presentation of the Fourth sector that has the aim of presenting an overview of the subject. In the following section, it is possible to get familiar with some of the social innovation practices in Europe, starting with examples that show how important is the support of the European Commission towards social innovation. In addition, some European initiatives are explained, thus highlighting, among them, the Portugal Social Innovation Program. In the final section, conclusions are drawn, showing how transforming social innovation and the Fourth sector may be instigated.

# 2   Social Innovation: Theory and Practice

## 2.1   The Concept

Social innovation is having a growing attention. Nevertheless, its definition still creates a great challenge for researchers on the subject. The inaccuracies and doubts about the conceptual delimitation of this term do not arise from the absence of

research, but from the plurality of approaches and traditions in which the theme is found. Thus, in addition to the difficulty of conceptualising social innovation, there is still a lack of clarity about the area, field, discipline and approaches that structure a better understanding on this topic.

SI experiences are crucial for achieving the conceptualisation of this field. They occur in several ways: ideas, actions, structures, models, systems, processes, services, rules, regulations, forms of organisation and activities (Murray et al. 2010; Nicholls et al. 2015; The Economist Intelligence Unit 2016). Some demands end up being answered more quickly, but others still have a deficit in innovation practices, such as some challenges that the elderly population faces, the increase in chronic diseases, crime and punishment and climate change, among others (Mulgan 2006).

Given the plurality of the theoretical contributions that surround social innovation, it is worth pointing out some practices and experiences as a form of exemplification and inspiration. The first example is from 1976 and concerns microcredit, a form of loan through which Professor Muhammad Yunus, who won the Nobel Peace Prize, granted credits to poor people without requiring guarantees, thus founding a bank dedicated to the promotion of this system (Cajaiba-Santana 2014). Another inspiring SI practice is the Bolton Design Council project that sought to help patients with diabetes in changing their habits through the use of letters written by professionals, where they expressed their experiences with diabetes and through which they were able to assist the patients in healthy practices and disease management (Murray et al. 2010). Another admirable example comes from Brazil, with the energy company Light Recicla that offers an exchange service, consisting in giving energy credits in return for recyclable materials, therefore assisting local residents of the Santa Marta slum located in Rio de Janeiro in the reduction of electricity expenses and also in the pacification of the relationship between residents and commercial companies (Cipolla et al. 2015).

It is relevant to emphasise that SI practices and actions seek more than immediate and palliative results, but rather a deep and meaningful change in society and its patterns, habits, knowledge, values, relationships, purposes and structures. Due to the complex process that a change requires, it ends up being carried out more slowly, because it requires, in fact, willingness, context and other factors to be accomplished.

In this sense, when dealing with social complexities and recognising the lack of framing of the term social innovation in specific disciplines, the interdisciplinary and transdisciplinary nature is perceived. Following the reasoning of Moulaert et al. (2017), which adopts interdisciplinarity and transdisciplinarity as characteristics of SI research, it is clear that the first allows interaction between various areas, such as the humanities, administration, economics, health, science, among others; and the second, the inclusion of actors who are not researchers but often stakeholders, thus also involving people who are able to contribute to the process of reflection and problematisation of the topic with a practical insight from the field. In fact, aggregating different areas and people brings more wealth in the production, diffusion and dissemination of knowledge, which is essential when it comes to social innovation.

Nevertheless, given these circumstances, there is a diversity in the concept of SI. Murray et al. (2010) define it as new ideas capable of meeting social needs

and providing collaboration and new relationships, being a way to improve society and its actions. Mulgan (2006), instead, claims that SIs are innovative activities and services that seek to satisfy social needs and are generally disseminated through organisations with predominantly social purposes. Moulaert (2009), on the other hand, conceptualises it as a perspective capable of satisfying human needs through the transformation of social relations involving governance systems, considering an essential factor the transformation of the context and of the relations in a given location. SI can still cover different means to solve the demands and problems of a society, through practices, methods, processes and regulations, which do not need to be new, but which at least are a way of improving what already exists (Howaldt et al. 2015).

A fundamental point of SI is its manifestation in social change, whether through a material dimension, such as a product, or an intangible dimension, with the transformation of behaviours, attitudes and perceptions. These changes involve the interaction between people and the creation of new institutions and social systems (Cajaiba-Santana 2014). Therefore, new arrangements are the result of new practices, which enable much more than just solving demands and problems, but rather lead to an effective social transformation.

It is also worth mentioning that not every process of social change is necessarily associated with a SI. For this to happen, it is essential that an element of novelty is present as well as actions oriented towards change that have a meaningful social impact in the future (Cajaiba-Santana 2014).

Only few definitions of SI were mentioned, but it is already possible to see how broad the term can be and that there are many correlations of its understanding with specific geographies and economies. In general, without making much harm to the current literature, in this chapter we understand social innovation as new or improved practices that seek to meet society's demands and problems, providing some type of social transformation.

## 2.2   Approaches and Shapes of Social Innovation

In addition to the definition of the term, another very contested point on social innovation is about its disciplinary approach, once SI is not presented in a homogeneous fashion but it is treated through different perspectives (Backhaus et al. 2018). As a matter of fact, the concept firstly appears in the social sciences, but it is then dispersed in the most diverse areas, such as public administration, management, history, social psychology, economics, social movements and social entrepreneurship (Cajaiba-Santana 2014).

Social innovation is sometimes associated only to the economic approach because of the influence of Schumpeter's (1982) thought, but reducing this concept only on this tradition is limited, as its purpose is not restricted to an economic nature. According to Moulaert et al. (2017), social innovation cannot be summarised in a specific field or sector of the economy, since it is essential to understand the most

varied practices to address social problems and needs. In this sense, sociological approaches proved to be significant in bringing the social perspective to innovation and reducing the term's dominant connection with economics.

In order to identify the different approaches to social innovation, Jessop et al. (2013) point out the following fields: management science and corporate organisation, arts and creativity, governance and public administration, and local development. The first field involves SI through the social capital of organisations, that is, the way organisations work better and influence the promotion of social innovation. Still related with this aspect, SI is also established from loan micro-communities, sustainable entrepreneurship, social economy networks and other forms of social enterprise. In the area of arts and creativity, the focus is on creative actions that generate SI, as well as the reinvention of the arts' contribution for social change. The field that involves public administration and governance points to social innovation for its role in modifying systems that involve bureaucracies and hierarchies, aiming at simplification, transparency and regulations in initiatives. Finally, SI is also recognised for its practices and processes that influence local development, as all its practices are deeply territorially embedded (Jessop et al. 2013).

Despite the growing publication on output trends in SI research around the world, the concept, even if it is not new, it is still under construction. There are events of the past that represent the first SI initiatives, as well as several present or planed experiences today. If, on the one hand, the spread of SI projects and actions is in evidence, on the other hand, some initiatives are still not recognised as SI. In this sense, it is essential that this concept becomes sufficiently clear for the (existing or future) initiatives to identify themselves and be identified as social innovation by stakeholders, researchers and policy-makers, when appropriate.

It should be noted that this clarity of the term does not mean indisputability regarding what SI can be but only that more translation is desirable to facilitate both research, policy and practice. In fact, there is an evident growing interest in the investigation around this theme in the most varied fields. Accepting that knowledge is a constant construction and stems from multiple historical-socio-cultural factors, thus denying the fact that a common ground is needed to avoid a conceptual framework that is excessively permeable would mean that, at the end of the day, almost everything could be qualified as social innovation, therefore leading to a devaluation of the concept itself.

For a better comprehension of it, it is relevant to make a brief journey to understand its evolution. Some theorists point out that social innovation does not present a historical landmark as it is inherent to the history of humanity, resulting from people facing social change over time (Mcgowan and Westley 2015). For other authors, it presents highlights which mark its origins. According to Mulgan (2006), social innovation emerged in the nineteenth century with the problems resulting from fast industrialisation and urbanisation processes. In this historical period, many enterprises related to philanthropy, unions, cooperatives and microcredit, among others, were influential examples in responding to social needs. It was the time when SI had a diversified use in religious, socio-political and ideological debates, as well

as it was gaining two meanings, one related to politics and the other to social concerns, thus emphasising social change (Moulaert et al. 2017).

This conceptual lack of definition continued during all the nineteenth century because social innovation carried a pejorative aspect for conservative thinkers as it was associated with socialism, causing opposition in relation to the term. This antagonism persisted until the twentieth century (Godin 2012; Moulaert et al. 2017) when the same term began to be understood in a positive way because it was then linked to social reform, reporting on improvements in the social condition of humanity through rights and equality (Godin 2012).

From the twentieth century onwards, social innovation emerged with a variety of new practices and behaviours related to different aspects of the society, such as gender relations, education, governance and culture, among others. The governments have also demonstrated to be active in the SI agenda when building social welfare states in order to meet the needs of society (Howaldt and Hochgerner 2018; Mulgan 2006). In the 60s and 70s, with the presence of many emancipatory movements, social struggles and participation in debates, it was possible to make SI more tangible, starting from bottom-up grassroots movements and rethinking its socio-political meaning (Moulaert et al. 2017). Still in the twentieth century, new conceptions about SI were developed, when the term ceased to be assimilated to social subversion, but began to be seen as an opposition to traditional methods (Godin 2012). In this sense, it comes close to the definitions currently recognised and accepted.

Nowadays, in the twenty-first century, this term is adopted more widely around the world, especially through policy programmes related to combating poverty, social exclusion and empowering minorities, among others, being universally associated with the phenomena and processes of change (Howaldt and Hochgerner 2018; Moulaert et al. 2017). It is in the current context that social innovation is gaining prominence, not only in a theoretical way but for the development and recognition of its practices as tools that can mitigate or solve many of the challenges faced by the contemporary society.

## 2.3   Phases and Actors of Social Innovation

Separating the means from the ends is not a characteristic of social innovation, since it links social needs and social relationships (Moulaert et al. 2017). The recognition of the real needs of a group or part of society is crucial for SI to be effective, and the diligence to deal with changes in demands, including those resulting from the transformation itself, is also important. That said, it attests to the essential character of participation and interaction by both practitioners of social innovation and recipients.

The SI initiatives come from different parts of society. The public sector generally performs actions that promote SI through availability of resources, support networking, research and other structures; companies act through the development of

business models and other resources; and civil society gets involved because it is the main element of social innovation, standing out through the fight against social exclusion, the search for rights and social movements, among others (Butzin and Terstriep 2018).

According to Mulgan (2006), the social innovation actors can be observed from two perspectives: individuals and movements. The first way perceives social transformation as being led by few individuals, who are characterised as heroic, energetic and impatient. Examples are politicians, bureaucrats, intellectuals, entrepreneurs and activists from non-governmental organisations (NGOs). Through the optic of the movements of change, instead, there are thousands of people involved and dozens of intellectual and organisational leaders focused on transforming public consciousness. In addition to the feminist and environmentalist movement, cited as models, there are other movements such as the ones related with social and solidarity economy, LGBT, students, anti-racism and anti-xenophobia, among others.

Another categorical division of social actors is presented by Butzin and Terstriep (2018). According to them, there are developers, who initiate, develop and implement the idea for a social innovation; promoters, who are responsible for the procedural part (dealing with equipment, infrastructure, financing and connections); supporters, who allow the dissemination and diffusion of the social innovation idea; and knowledge providers, who grant relevant knowledge to enrich the SI development.

Avelino and Wittmayer (2018) state that any individual can get involved with initiatives that contribute to social innovation (projects, programmes, partnerships or networks), no matter the level of aggregation or motivation presented. The authors present a multi-actor perspective (Fig. 1), inspired by Evers and Laville (2004), in which there are different models of social order (the State, the market and the



**Fig. 1** State–community–market and the emergence of a hybrid domain. Source: inspired by Avelino and Wittmayer (2018)
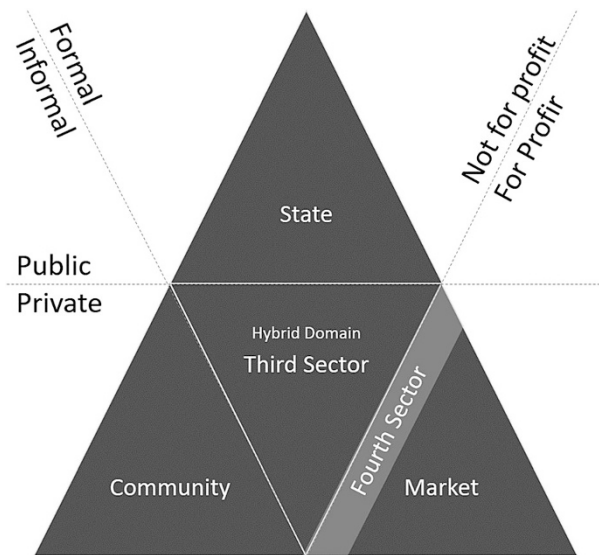
community) and three axes (formal/informal, non-profit/for-profit and private/public). According to this perspective, the State is characterised by being a formal public and non-profit organisation. In this sense, the State involves the work of political actors, bureaucrats, voters and policy makers. The market, on the other hand, is classified as formal, private and for-profit, basically covering the people who consume and who produce. The community is represented as private, informal and non-profit, and composed by residents, neighbours, family and friends. For these authors, the Third sector is seen as an intermediary space, a hybrid domain, between the previous three; in fact, despite being included without a focus on profits, there are no precise delimitations as to the aforementioned axes, and how the characteristics of any of them may be manifested (Avelino and Wittmayer 2016, 2018). The notion of Third sector used by these authors includes many of the activities closer to the market, which are being understood as an autonomous and emerging Fourth sector in this chapter.

In each of these sectors, the role of the actors corresponds to their place of performance, that is, a voter can be a businessman, neighbour and volunteer of an NGO, but tends to act in each space according to his role. However, in addition to the individual performance of an actor, there are also organisational actors, represented by institutions, groups and networks, among others, which are examples of the social movements, firms and authorities (Avelino and Wittmayer 2016). A collaborative activity between the different actors and sectors is complex, but very important to enrich the theoretical, methodological and practical reflections on SI. In fact, a broader and deeper understanding of this term can enable a more effective implementation.

Murray et al. (2010) present a slightly different perspective about the actors, listing them individually, as teams, hubs, institutions, networks or platforms. The first involves individuals who work within or through organisations, such as social entrepreneurs. Innovation teams, instead, are multidisciplinary and can work within or between organisations or departments to encourage collaborative work on SI issues. On the other hand, innovation hubs are the spaces where the most varied social innovators come together to share and exchange learning, favouring mutual support. Institutions that deal with SI are varied, and refer in their vision mainly to brokers as incubators, accelerators, development agencies, funding bodies, research centres and universities. In the case of networks, they are shown as alternatives to the rigid structures of formal organisations, allowing actors to be broader, faster, adaptive and fluid, due to their configuration. Finally, platforms can be exemplified as social networks, collaborative sites and blogs, with a wide-reaching potential and greater social impact because of the large number of people involved.

The participation of different actors, including the users of a SI, allows the promotion of a common understanding of a specific innovative practice, reducing resistance at the time of its implementation (Sørensen and Torfing 2015). For this reason, the idea of the need to interact with different actors tends to contribute to social innovation as it provides opportunities for collaboration, sharing and connection.

To achieve change through a social innovation, Murray et al. (2010) presented the renowned social innovation spiral process in six steps: prompts, proposals, prototypes, sustaining, scaling and systemic change. The first stage aims at making a diagnosis to identify the causes of a social problem and the need for innovation. The second stage involves the means that allow the creation of ideas which, after being approved, advance to the third stage to become prototypes, pilots and tests. In the fourth stage, it is time to sustain the tested and approved idea, seeking its improvement or simplification. Before the last phase, there is the scaling up of the initiative and its growth and diffusion. Finally, the last stage refers to the contribution towards systemic change, that is, the interaction of several elements promoting new structures of long duration in the different public, private and domestic sectors.

The transformation achieved with any SI is not definitive as it involves a range of components that are complex, such as people, organisations, government, public policies and culture, among others. In this way, social innovation manifests itself as a constant reassessment that accompanies the changes in needs and values (Mcgowan and Westley 2015).

The social innovation spiral process underlines SI as a non-linear process with a beginning, middle and end; but also as open, continuous and constructivist, as its phases do not need to follow a specific order and can still occur concurrently instead. Therefore, besides the importance of reaching the goal of a SI, the process must also be conducted carefully, since the final result cannot be achieved in an imposing way, from the top to the bottom. As a matter of fact, the success of a social innovation in producing systemic change is a path resulting from a collective construction.

## 2.4 The Fourth Sector

The social innovation cannot be understood only through a combination of efforts from a variety of sectors. It is important to highlight the particularities of each sector in terms of their respective social contribution. The private sector enables improvements in the quality of life by creating and distributing goods and services, besides also encouraging and improving investments in innovation and entrepreneurship. On the other hand, the public sector ensures and protects society interests through a legal structure, such as public and social politics. The social sector, instead, works to meet social demands; to ensure physical, mental and spiritual developing opportunities; and to protect the environment (Jiménez and Morales 2011). Nevertheless, the differences between the sectors are not clear, and existing organisation models are classified as hybrids.

The Fourth sector includes organisations that adopt a business model which is not focused only on profits but it aligns with a social and sustainable purpose. When dealing with this theme, it is crucial to point out the publication about the emergence of the Fourth sector made by the Aspen Institute (Sabeti 2009). Here, this sector is understood as a combination of the other sectors (public, private and social) and is constituted by several types of organisations. The alignment between economic

interests and the purpose of the search for social benefits denotes an organisational change based on the emergence of sustainable companies, cooperatives, social businesses, social economy companies and social ethics institutions, among others. As a result, society's problems leverage these organisations to act more consciously in the search for solutions and not only profit (Sabeti 2009).

According to Jiménez and Morales (2011), the Fourth sector presents the best of each of the traditional sectors, aiming at reconciling economic stability and efforts for the general good, using participatory and collaborative strategies to deal with social problems. In addition, it is the way in which the sector acts to align organisations that face great challenges in their communities or countries and even achieves the 2030 Agenda Sustainable Development Goals (SDGs) (The Fourth Sector 2020).

The main characteristics of this emerging new sector involve social purpose, business method, inclusive ownership, stakeholder governance, fair compensation, reasonable returns, social and environmental responsibility, transparency and asset protection (Sabeti 2009).

In this sense, the Fourth sector is favourable to contribute to social innovation initiatives. In addition to the contribution for sustainable development in social and environmental terms, social innovation is also important to promote economic growth (Jiménez and Morales 2011).

Social innovation, besides enabling products, services and methodologies relevant to respond to social demands, can also be manifested in new organisational models which, according to Jiménez and Morales (2011), are types of organisations linked to a social purpose or with structures capable of acting in favour of the resolution of demands, thus resulting in hybrid organisational models as social innovation entities.

Jiménez and Morales (2011) also mention that any organisation can be innovative in presenting creative and new responses to problems, but what distinguishes a business and a social organisation is that the former only serves the benefits of its creators and seeks to guarantee the exclusive use of the company to improve its positioning. In social innovation, on the other hand, products, processes and services must be available, according to their embedded purpose, to all those who are interested in their use.

Therefore, social innovation is suitable for developing in the Fourth sector due to its own organisational structure, as well as to the culture of such sector where social purpose is indispensable. Nevertheless, it is important to recognise the challenges of this emerging sector, as the line between economic and social interests is still a fine one.

According to Sabeti (2009), organisations in this area still need to face institutional and structural impediments for their progress and, because of that, they still need to count on the support ecosystems of other sectors. According to this author, there are some important elements for an ecosystem to support these entities in the Fourth sector. In this sense, it is worth highlighting, among others: the financial markets for obtaining capital; the legal framework and regulations, mainly for the legal creation of these hybrid organisations; education and training to work in this

type of entities; the connection and representation between different people and sectors; academic research to understand this new area; and assessment and certification standards so that organisations generate more trust and credibility.

Despite the great challenges in the Fourth sector, the future prospects are interesting. According to the report by the Center for the Governance of Change (2019), there are three moments related to the consolidation process of this emerging sector. In the creation phase, marked between the years 2000–2020, the mapping, measurement and analysis of the sector, which are linked to the search for regulatory frameworks and support for financing and fomentation, are carried out, thus denoting strategies to build on. The next moment refers to the following 10 years, and it is known as professionalisation, a step that will be characterised by the seeking of greater support from other sectors, the integration in the area of academic research, new networks and the dissemination, until the point that entities from other sectors will migrate to this new ecosystem. Finally, the years 2030–2050 are recognised as mainstreaming, that is years in which the Fourth sector will be already dominant and the economic sector will turn more sustainable and inclusive. For the prosperity of hybrid organisations, there is a need for this ecosystem to adapt and grow according to the social purpose of these entities. Therefore, it is clear that the Fourth sector is still interdependent with some support for its consolidation, as it is impossible for social transformations to happen without any kind of aid.

## 3 Social Innovation in Europe

### 3.1 Strategies, Incentives and Support

Social innovation is becoming an increasingly relevant topic on the European agenda. According to Maduro et al. (2018), the growing interest in SI policies comes from the initial view of the report published by the Bureau of European Policy Advisors (BEPA) in 2014, which contains several practices on the potential of IS, this report being a consequence of a workshop on social innovation occurred in 2009 and held by BEPA itself. Social innovation is understood here as involving new ideas that seek to satisfy social demands more effectively, as well as creating other forms of collaboration and relationships, and for this purpose, products, services and models are created. Still, SI aims at systemic change in combating the causes of social problems and not just in a palliative way (European Commission 2019a, b, c, d, e; European Commission BEPA 2014).

In addition to this workshop, another significant event was related with the Program for Social Change and Innovation proposal and, although such proposal was not fully adopted by the EC, it meant a leap to think and discuss social innovation (European Commission BEPA 2014; Instituto et al. 2015). The European Commission has developed several policies, programmes and initiatives concerning innovative practices to deal with social challenges. In order to better understand how the EC has been perceiving and promoting SI, it is important to

present some developed policies in a synthetic way (European Commission BEPA 2011).

The first to mention is the Lisbon Strategy, which is one of the main development plans to shape EU policies and initiatives in the fight against low productivity and economic stagnation in Europe, whose focus was on innovation, social and environmental renewal. Launched in 2000, this Strategy lasted 10 years and included actions in line with sustainable development. It is in this context that the EQUAL Community Initiative is implemented. Financed by the European Social Fund and by the EU member-states during the 2000–2006 period, EQUAL presented a strong focus on social innovation to tackle discrimination and disadvantage in the labour market. Nevertheless, its implementation went often beyond the theme of employability, also prioritising working in partnership, empowerment, gender equality, transnational cooperation and dissemination (Vale et al. 2010; Centro De Estudos Sociais 2019). This experience proved to be very relevant to consecrate social innovation, showing efforts, lessons, and learning during the effective process and allowing the expansion of new IS initiatives. In order to complement the Lisbon Strategy, the Renewed Social Agenda was elaborated in 2008, presenting a basis for social innovation due to its demand in the reform of social policies and the search for greater social inclusion.

An incipient idea of SI was also observed in the following plans: Integrated Lisbon Guidelines for Growth and Jobs; and Strategic Guidelines and Regulations on Cohesion Policy. While the first requested the expansion of social services and the social economy in order to increase the participation and inclusion of people excluded from the labour market, the second emphasised knowledge, innovation and the optimisation of human capital. The EC also adopted a Sustainable Development Strategy for an Enlarged EU which presented objectives and actions to tackle environmental and social problems of global or internal nature. The SI perspective in this Strategy stands out for being an important element in the strategy to address social demands and challenges, as well as systemic changes.

Finally, the Europe 2020 Strategy for the period 2014–2020 came to replace the ideas in the Lisbon Strategy, consisting in three main priorities: smart growth, that seeks the development of an economy based on knowledge and innovation; sustainable growth, to enable a more efficient, ecological and competitive economy; and inclusive growth, to encourage an economy with high employment rates, linked to social and territorial cohesion. This Strategy also has seven emblematic initiatives to reinforce the joint activities of the EU member countries, and among these initiatives, it is worth highlighting the Innovation Union (European Commission 2010; European Commission BEPA 2011; Eurocid 2019).

The Innovation Union introduced social innovation, presenting important social issues and elements to solve them in an innovative way. Therefore, this movement of the European Commission, that started in the middle of the 2000s, allowed an opening towards new perspectives on the theme of SI, which matured with the time and the relevance gained by the subject.

As important as the policies and plans of the EC to promote SI are the forms to support it so that SI is developed and implemented. Some of the main European

financial instruments—such as the European Regional Development Fund, the European Social Fund, the Cohesion Fund, the European Agricultural Fund for Rural Development and the European Maritime Affairs and Fisheries Fund—enable new ideas, practices and projects to become achievable (Maduro et al. 2018; European Commission 2019a, b, c, d, e).

Other key financial instruments are the European Union's Research and Innovation funding programmes, such as the Horizon 2020 (H2020), which is central to the Europe 2020 Strategy. This is the EU's largest research and innovation programme and is guided by scientific excellence and industrial leadership to overcome social challenges. The H2020 supports innovation through prototypes, tests, demonstrations and pilot activities, among others, to be developed, also covering modalities of innovation in the public sector and social innovation (European Commission 2019a, b, c, d, e).

The European Commission's SI actions were also influenced by the Innovation Union initiatives and the Social Investment Package. The first refers to a policy of research and innovation, with a plan consisting of more than 30 actions and whose main objectives were related with the improvement of Europe's visibility worldwide among the sciences, while also removing obstacles to innovation, and changing the working method between the private and public sectors through a perspective on different partnerships (European Commission 2013a, b; European Commission 2019a, b, c, d, e; European Social Network 2019). The Innovation Union is one of the seven emblematic initiatives of the Europe 2020 Strategy, with the main objectives of stimulating SI as a resource for growth and jobs, promoting and sharing information about SI for its diffusion and supporting socially innovative projects (Parlamento Europeu 2019). The second, the Social Investment Package, regards a series of non-binding documents, adopted by the European Commission in 2013 as a response to the crisis that threatened EU2020 poverty and employment targets. It aimed to stimulate member-states to keep the investment in social policy despite the existing negative economic climate and to modernise social protection systems, implement active inclusion strategies and invest throughout individual's life.

The European Commission's role in encouraging SI is based on seven pillars: network, competition, financing, ecosystems, impact, incubation and exploitation. The network takes place through the Social Innovation Community portal, whose aim is to facilitate the connections between European organisations in sharing experiences. The competition aspect refers to the institution of some competitions, such as the European SI Contest which seeks to support innovators and make society aware of the topic of social innovation. The financing is directly related to specific funding programmes and also innovative ideas that are part of the Social Challenges Platform. In the ecosystems, the objective is to bring improvements in the conditions of social enterprises and SI, as well as to help attracting more investors. In the case of impact, the focus is to disseminate and measure benefits from SI, enabling the reporting. The incubation involves networks to support SI creation and development. Finally, the exploration aims at discovering new fields, applications or ideas for SI (European Commission 2019a, b, c, d, e).

Corroborating the importance of these types of support and the institutional and political assistance of the EC, that had a significant implementation in the last 15 years, many European countries currently show good results in the Social Innovation Index 2016 edition (The Economist Intelligence Unit 2016), which measures the capacity for social innovation in 45 countries. One factor that led to the increased attention given to SI is related with the period of financial and economic crisis at the end of 2000s, which requested innovative actions as a strategic way of positioning the EU to face the crisis in the most varied territories. This interest and concern of the EU in actions involving SI denotes its driving role and enables the establishment of a socially innovative culture in Europe, helping to disseminate and reach new forms of social transformation.

According to the Social Innovation Index, it is important to observe the pillars that constitute the final score of these results. The first one involves political and institutional aspects, denoting the importance of public sector action to support social innovation initiatives. The next pillar refers to the financing which, as already mentioned, can come from the private sector or the Fourth sector. Regarding the entrepreneurship pillar, it is linked to the encouragement of risk taking, which is the predominant characteristic of an entrepreneur. However, this is more remarkable in less developed countries, with the appearance of some African countries among the top 15, while other countries have fallen in some minor positions of this classification. Finally, the last pillar is about the involvement of civil society in the social innovation, thus evidencing the relevance of support from citizens and the Third sector. Besides knowing the countries that stand out in the practices of social innovation, these data show the ecosystem that surrounds SI is key, confirming the contribution of different actors and sectors, including those from the Fourth sector.

It is reiterated that social innovation is not an isolated approach, requiring several interactions oriented to the complex problems of society. In this sense, major global challenges need to be mitigated by 2030 and social innovation is important in this process. For the next 10 years, the THINK 2030 2020 report presents 30 actions towards a more sustainable Europe, based on aspects of well-being, prosperity, peace and security, and protection of nature. Despite not mentioning social innovation in the report, there are actions capable of integrating social innovation to achieve the objectives, as well as an opening for the performance of the Fourth sector, through the prioritisation of the guidelines oriented to this purpose and also the recognition of the numerous challenges, without forgetting to identify the opportunities for actions capable of generating major changes in the social, environmental, economic, security and sustainability aspects. Complementing future perspectives, in 2016 the United Nations Development Program (UNDP) indicated that innovation can contribute to the 2030 Agenda by working in favour of the 17 United Nations Sustainable Development Goals (SDGs). In this sense, innovation must add value and bring a positive change in people's lives. For that to happen, UNDP points out six ways to leverage innovation for the coming years. They are: (1) to invite external experts to contribute to the Open Innovation Challenges, aiming at promoting and rewarding innovative solutions to social problems; (2) to focus on change and impact and not only on the solution; (3) to forget creativity while prioritising formulas and

hypothesis tests so that the projected ideas become viable; (4) to implement fewer pilots with more scale, capable of replicating the model and reaching more people; (5) to embrace politics, as it is essential for change to be sustainable, systemic and real; (6) to make systemic thinking practical so that goals are not addressed in isolation and change is far reaching. Observing these notes and even mentioning only innovation, it is clear that the concern with the social aspect and complex problems are exposed, and therefore, social innovation is certainly an essential element to work in favour of the SDGs.

It is undeniable that, even without mentioning it directly, there is a strong propensity for the practical dissemination of social innovation in the coming years in Europe. Nevertheless, in a more specific way, the Social Innovation Academy (2020) published a document on the trends for the next decade including SI in its considerations (from 2020 to 2030). In fact, besides mentioning the importance of social innovation to meet the SDGs, the document has 13 more trends in which the performance of the social innovation will be essential. The followings stand out: demographic challenges regarding population ageing and the adversities resulting from this phenomenon; urbanisation and unbridled growth of cities; migration, mainly because European countries are one of the main destinations and the integration of these people is essential; education, especially with regard to social innovation knowledge and its development; climate change and the search for sustainable alternatives; technological development; circular economy; future of work, due to the constant changes in society and the need for new skills; social impact, which is directly linked to the social innovation, since its objective is social transformation; democracy and greater participation and inclusion of citizens in the public arena; gender equity, health and social assistance; social distance, mainly because of the pandemic situation of the coronavirus (COVID-19). Therefore, by offering different perspectives for present and future social problems, social innovation has been able to face not only the demands of society but mainly the potential for transformation through awareness, training, inclusion and new possibilities to mitigate major global challenges.

## 3.2 Social Innovation Projects in Europe

There are many projects, practices and ways of supporting social innovation in the European context that could be presented. This section highlights some initiatives and projects that are merely exemplificative of different practices on social innovation in order to show the performance and commitment of the EU regarding SI and its impacts.

The EU presents several contributions and incentives, according to the well-known BEPA report (2014), which fall under programmes and instruments in the SI area, such as the European Platform against Poverty (European Platform against Poverty and Social Exclusion), the Innovation Union, the Social Business Initiative, the Digital Agenda for Europe (Digital Agenda for Europe) and the Innovation

Partnership for Active and Healthy Aging (Active and Healthy Aging), among others (Maduro et al. 2018; European Commission 2013a, b).

Along with these more transversal initiatives mentioned earlier, many relevant projects were implemented in the last years within this topic.

In an attempt to expand and disseminate SI in Europe, an initiative was launched by The Social Innovation eXchange (SIX) and Rede Euclides (Euclid Network), which are, respectively, a global community that promote SI and a community of professionals seeking to create connections capable of strengthening society in an innovative and sustainable way. This initiative pointed out that there is an abundance of social innovations in Europe, of engaged actors and of drivers of SI practices (European Union 2010).

TRANSIT, TRANsformative Social Innovation Theory, was sought to develop a theory on transformative social innovation. The relevance of this project, financed by the European Union's Seventh Framework Programme for research, technological development and demonstration, is immense due to the efforts to present a robust theoretical–methodological framework that also makes sense in practice, observing how SI provides empowerment and generates transformation. The project lasted from 2014 to 2017 and brought together 20 transnational partners from 25 countries. The presented definition of transformative social innovation is one of the key results, referring to a process of changing social relations, which challenge, modify or replace the dominant institutions in a given context (Transit Social Innovation 2019).

A very significant project in Europe was SIC, Social Innovation Community. Financed by the Horizon 2020 research and innovation programme, it started in 2016 and ended its activities in 2019. It is a network that unites Europe's social innovators to enable connections and expansion of the most diverse SI communities. Its goal was to support the knowledge and growth of networks, besides supporting public sector decision makers and others interested in working on social innovation (SIC Europe 2019). This project served as a bridge to unite ideas, knowledge, experiences and people engaged in changing society, making the development of socially innovative projects more stimulating.

Another interesting project is the ASL, Atlantic Social Lab, Atlantic cooperation for the promotion of social innovation, which is co-financed by the INTERREG Atlantic Area and seeks the development and promotion of social innovation in the Atlantic regions of EU in four areas: welfare services, active public engagement, green inclusive economy and social responsibility in the private sector. In this initiative, nine partners from public, regional and local entities, universities and Third sector organisations from Portugal, Spain, France, United Kingdom and Ireland, promote integrated strategies through methods and practices that address social problems in their territories, assessing, implementing and evaluating new solutions (Atlantic Social Lab 2019).

Despite the existence of several social innovation actions spread across Europe, the SI field is not yet mature enough to face the many and extraordinary challenges of contemporary society. Furthermore, even with so many initiatives, unfortunately there are projects and programmes that are not sustainable and effective or that are small and underfunded. For these reasons, SI development is limited and its impact is

restricted, lacking of a greater visibility of transformative practices (European Union 2010). Nevertheless, even if the SI field is not prepared to deal with the high demand for social problems, it is important to realise that as society changes, the challenges also change, and consequently, the solutions to these problems will not always be the same. Thus, it is unlikely that SI reaches a stabilised and closed understanding, as it is in constant transformation and expansion given that it follows the dynamics of society. Europe is a great example in social innovation, either due to the many projects and practices developed or due to the support that the countries are devoting to SI. Considering the examples mentioned earlier, it can be identified that social innovation relevance both in practice, theory and policy, is expanding.

## 3.3 Portugal Social Innovation Programme

A very notable exploratory programme in the European Union for the utilisation of the European Structural and Investments Funds for social innovation is the Portugal Social Innovation (*Portugal Inovação Social*). This is a national government initiative to finance social innovation projects and focuses on promoting social innovation and social entrepreneurship, as well as boosting the social investment market and training innovative actors and social entrepreneurs.

According to Portugal Inovação Social (2019), social entrepreneurship is understood as a process of implementing and developing innovative ideas to respond to community problems, aiming at a social and often also economic goal, while social innovation is the successful result of the social entrepreneurship process, that is when a different solution from the conventional ones is achieved and it is able to solve a delimited social problem.

Projects that are financed have to intervene in an innovative way and have a positive impact in relation to social problems, while still being able to promote change in society. The financing is destined to Social Innovation and Social Entrepreneurship Initiatives (SISEI), which are characterised as projects with the objective of implementing and developing an innovative solution for one or more social problems, that is, initiatives seeking to resolve or mitigate a risk of inhibition or effective inhibition of the quality of life or development prospects of one or more social groups to come (Portugal Inovação Social 2019). For an initiative to be considered as an SISEI, it is important that it has the following requirements: identification of the effective existence of a social problem; a proposal for a differentiated solution; and potential for social impact. Therefore, for a social problem to exist, there must be a target group with current or potential vulnerability; the proposed solution must be different from conventional solutions; and finally, the project must positively intervene in the quality of life or the prospects of development of the target group (Portugal Inovação Social 2019).

The financing of the projects is carried out in four different ways, each one corresponding to the respective phase of the cycle that the project is undergoing. In this way, Portugal Inovação Social (2019) presents capacity building for social

investment, partnerships for impact, social impact bonds and the social innovation fund, which follow in more detail below. The capacity building for social investment is centred on a training that focuses on the development of competences related to project management, so that it can be successfully implemented. For this type of support, only social economy entities with developing SISEI or whose experience has already been tested can fit. Partnerships for impact are aimed at private, public or social economy organisations and seek to offer support through partnerships with investors regarding the creation, implementation and growth of projects. The social impact bonds, instead, are suitable for projects in the priority areas of public policy: employment, social protection, education, health, justice and digital inclusion. The selected projects are contracted and paid according to their results, while only social investors or implementers from the private sector or the social economy can apply for this financing. Finally, the social innovation fund allows easy access to credit and co-investment for organisations that implement SI and social entrepreneurship projects, supporting initiatives in the consolidation or expansion phase.

Currently, there are 465 social innovation projects[1] financed by Portugal Social Innovation, distributed across the Portuguese regions, and which fall into one of the following areas of intervention: citizenship and community, education, employment, social inclusion, incubators social innovation, justice and health (Portugal Inovação Social 2019).

Many of the projects emerging from *Portugal Inovação Social* were worth mentioning as they are excellent examples of territorially based SI. An example is the Regional Social Innovation Incubator (IRIS) that aims at capturing ideas and projects in the North region, as well as support the creation, development and acceleration of SI initiatives. It also seeks to contribute to the development of society in social, economic and cultural terms. It currently has 16 incubated SI projects and 12 acceleration projects (IRIS 2019).

Portugal Social Innovation, in addition to financing, provides a partnership relationship between government, investors and social entrepreneurs, also allowing direct or indirect influence on public policies. Even though it is in a phase of experimentation, there are many positive results and a great demand for funding applications, denoting the visibility of the projects regarding the dissemination of the concept of social innovation, which is becoming more visible and understandable for people in general.

## 4   Conclusion

Social innovation has a distinctive transformative character. If, on the one hand, SI points to a structural transformation, enabling emancipations, rights, incentives for specific groups or society in general, on the other hand, there is an internal change in

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[1]Cf. recent data at https://inovacaosocial.portugal2020.pt/projetos/

the individuals in relation to their values, beliefs, habits and knowledge. The impact of these transformations may go beyond the social aspect, considered in a strict perspective, thus covering the economic, cultural, environmental and scientific aspects.

It is crucial to stress that the SI actions demand to be carried out together, that is, with IS implementers and recipients, as observing and listening to the latter is crucial for an effective change and, consequently, the success of a social innovation. Murray et al. (2010) mention that new combinations of diverse elements enable the most transformative innovations and call them systemic innovation, since they involve change in people's concepts and mentality. It is with this internal change in the perception of individuals that systems may change.

The growing interest in social innovation in Europe is reflected on the diversity of existing programmes and initiatives. In the face of multiple social challenges, such as population ageing, climate emergency, unemployment, inequality and disruptive events as the outbreak of Covid-19, among others, many societies and countries have been changing deeply their structures, in a way that is not yet completely visible.

Countries that value social innovation validate not only their concern about social challenges but also their willingness to solve these problems. In this regard, the European Union certifies the Europe's traditional values that aim at quality of life, education, solidarity, inclusion, interaction, welcoming and new opportunities for transformation for people in a community, group or society in general.

Considering the EU's future prospects by thinking about social innovation seems to be inevitable. The economic development without harnessing its social dimension is a real lesson that SI has to offer for inspiring and driving towards a better world. There is no transformative change with simplistic or imposed solutions. It is necessary to respect the heterogeneity of the people, the receiving groups, the place, the historical-cultural-political context, the existing values, the real needs and choices. And despite the social innovation fashion around the world, without a more consolidated, shared or stabilised framework, it is necessary to be extraordinarily careful to classify a specific social practice as a social innovation. That would be important to avoid the trivialising of the term and its way to becoming irrelevant.

However, to think about social innovation is also to understand its current and future performance spaces. In this sense, the Fourth sector presented itself as very promising in the European context. Despite being characterised by an emerging ecosystem, in which there are still challenges regarding the support of hybrid organisations due to the very new factors that this sector presents, as well as the lack of legal support frameworks and theoretical confusion about the specificities of the sector, this novelty factor is also a peculiar element capable of generating competitiveness and inspiration for other organisations and countries.

Even if they combine characteristics from other sectors, the Fourth sector organisations are not easily replicable, as each context is unique. Furthermore, although they have similar purposes, it is not standard the way in which they create value for people. Each country, community and culture has unique characteristics, and even though the social problems are the same around the world, the ways to solve them are

diverse and impact in different ways. Despite the obstacles that the Fourth sector has to get consolidated, it demonstrates potential for growth thanks to the emergence of organisations more adept in crossing institutional borders. This is crucial form responding to social and environmental problems.

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