The Impact of the Third Sector on Social Innovation

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1. Executive summary

This document provides an overview of insights generated through ITSSOIN’s comprehensive and integrated research programme. The research performed by ITSSOIN was consecutive, each research step building upon the previous one, which is why the overview of results can only be presented now, at the conclusion of the project.

The project investigated the link between third sector and other organisations and social innovation (1) with regard to framework factors on the macro, meso and micro level; (2) across nine European countries (Czech Republic, Denmark, France, Germany, Italy, Spain, Sweden, the Netherlands and the UK); and (3) across seven fields of activity (culture & arts; social services; health care; environmental sustainability; consumer protection; work integration; and community development with refugees).

In this executive summary we provide spotlights on the main research results across a variety of levels that are relevant with regard to social innovation. The insights on points six and seven relate to ‘social innovation streams.’ The term refers to new approaches, principles of action, governance forms or modes of organisation that have fundamentally affected a field of activity, and already for a certain period of time (at least for five years back from today) and across national borders, so that they are not geographically restricted.

1. **Institutional structures**: Social origins theory, relating to the size of the third sector and civic engagement in a country, proved most useful in gauging national social innovation potential in relation to our in-depth tracing of social innovation streams and the insights aggregated therefrom.

2. **Policies**: Countries that showed more marked social innovation streams had policies that related the third sector and civic engagement to social innovation and focussed on the local rather than the national policy level. This link is weak and needs further testing, but was more clearly related to variations in social innovation across countries than for instance the prominence of social innovation as a concept.

3. **Media reporting**: The press deals with the third sector and civic engagement as potential remedies in times of crisis, but does not relate them to social innovation. Generally all these themes receive significantly less attention than business or politics and if there is media coverage, it is largely in line with government policies, that is non-contestant. There is thus a low degree of critical media reflection.

4. **Citizen perceptions**: Images that citizens might have in relation to social innovation are hard to impossible to trace, since they do not represent an established category in surveys. Some links can be drawn between trust (in third sector organisations) and some of the supposed societal effects of volunteering on the one hand side and social innovation on the other, but these are not robust and need further exploration.

5. **Volunteering**: Little is known about the specific roles of volunteers in social innovation and the different pathways that may lead to it. Our efforts to probe the link have revealed that the capacity of volunteers to unfold their innovative potential is mainly tied to finding an effective collaboration between professional staff and volunteers, and managing the translation of volunteers’ ideas into practice.
6. **Actor traits:** There is not one single formula that determines organisations’ social innovativeness. On the contrary, we have found that conditions enabling social innovation vary significantly across fields. Yet, there are some organisational traits that emerge against others. Most prominent among them are social needs orientation, external organisational openness and local embeddedness, and also but less uniformly pro-social values and voluntary engagement. All the latter proved more important than for instance variables of organisational structure (e.g., age or size), resource diversity or the ability to combine advocacy and service provision.

7. **Field conditions:** State prevalence and third sector prevalence emerged as stronger driving forces for social innovation at the field level than market prevalence. The importance of third sector organisations is further underscored by the fact that in our ‘open sampling,’ guided by independently identified social innovation streams rather than starting with a pre-defined organisational sample, the large majority of identified actors were from the third sector. At the same time and in line with previous social innovation research, actor collaboration across sector boarders was a significant enabler of social innovation. So were exogenous shocks in specific fields, such as the economic crisis or the refugee crisis that created a surge of needs and/or triggered the dispensation of resources, financial and otherwise.

Through its research programme ITSSOIN has contributed to pushing the boundaries in social innovation research and that of broader socio-economic development in several regards. It has also produced a variety of further learnings, open questions, and links for future research that will be discussed here.
2. **ITSSOIN and its research focus**

The aim of this deliverable is to summarise the insights gained in the empirical work performed in the ITSSOIN project as relates to the third sector and social innovation, and how both are related to broader socio-economic development across the EU, in response to a Call issued by the European Commission to this effect. It illustrates in-depth insights on seven different levels: (1) institutional structures; (2) policies; (3+4) perceptions (media and citizens); (5) volunteering; (6+7) social innovations across several fields relating to organisational traits and to field conditions. It is to be seen as information complementary to the one given in deliverable D 8.1, which has tested for organisational and field traits enabling social innovation in a (quasi-)quantitative fashion, building on coded data that was derived from the research presented below.

2.1. **Project background and research questions**

The ITSSOIN project has set out to investigate the contribution of third sector organisations to social innovation holistically and therefore takes the surrounding environment of these organisations into account in several distinct but interconnected ways. In view of its partner countries ITSSOIN in (Czech Republic, Denmark, France, Germany, Italy, the Netherlands, Spain, Sweden, and the UK) has:

1. Explored differences in *welfare state traditions* and *political economies* in order to derive a rationale as to where social innovation could be expected to be most pronounced;

2. Conducted a *policy analysis* to explore where social innovation is recognised as a distinct concept, what are its desired outcomes according to political discourses, and which entities are expected to be most engaged in fostering social innovation.

3. Analysed *media perceptions* of third sector organisations, since news media and specifically newspapers play a pivotal role in shaping public discourse. The image they convey of third sector organisations is therefore a good measure for assessing which country specific roles these organisations take on with regard to their social legitimacy, their primary functions, and their relation to social innovation.

4. Used available survey data to find out how *citizens perceive* third sector organisations, in particular with regard to their socially innovative capacity. It has, for instance, been explored how national levels of volunteering and general trust affect people's assessment of the sector or which type of organisations (small vs. large or local vs. national) are deemed more innovative."

5. Analysed the effects of *volunteering and civic engagement* on those engaged, in relation to organisations and on society more broadly.

6. Developed an inventory of recognised *social innovation streams* in seven fields of activity (culture & arts; social services; health care; environmental sustainability; consumer protection; work integration; and community development with refugees). These have each been studied across three to four European countries to arrive at pathways of their emergence and in order to identify the involvement and contribution...
of third sector organisations, firms and public agencies or political institutions therein. In other words they have been used to identify **actor involvement and actor traits**.

7. The social innovation streams\(^1\) have furthermore been embedded into and tested as regards the influence of **field/context conditions** on actor involvement in the innovation and the strength of the stream (profundness, scope etc.).

The analyses in the latter two areas have resulted in a qualitative, in-depth portray focussing on the above perspectives as well as in a (quasi-)quantitative testing by means of qualitative comparative analysis (QCA).

### 2.2. Hypotheses

For each of the above stated seven research perspectives we have developed a set of hypotheses that we derived from the emerging literature on social innovation, but more importantly on fields and theories with a longer tradition. The range of theories we have drawn on was very wide, covering fields as wide as: welfare state conceptions, classification of capitalist political economies, public policy and political analysis studies, communication theory, socio-economic statistics and surveys, psycho-social measurement of behavioural effects, technological innovation management, innovation economics and organisation theory.

The full set of hypotheses that have been developed are summarised in the ITSSOIN deliverable 1.4 (Anheier, Krlev, Preuss, & Mildenberger, 2014a). Only by empirical investigation of these hypotheses, is it possible to trace if, how and under which conditions third sector organisations contribute to social innovation and how their ‘performance’ therein relates to that of firms or the public sector. The empirical testing also shows how social innovation activity is embedded in a web of influencing factors ranging from institutional structures, policies, news reporting, perceptions, and field conditions pertaining to sector prevalence or dynamism. The insights generated in ITSSOIN on all these accounts are summarised in this document.

Since it will be important to understand the following perspectives on research results produced by ITSSOIN more fully, we repeat some of our key definitions here. First, we usually link social innovation directly to the organisational or institutional capacity to create it, which we label ‘social innovativeness.’ The term refers to:

> “The ability of organisations to contribute to or create solutions to previously inadequately addressed social needs—this solution shall serve both a functionalist (efficiency & effectiveness) and a transformationalist function (change) and primarily aim at improving the situation for the beneficiaries and actors involved. Increased social innovativeness is marked by a more frequent (overall or within the social innovation process) and more substantial (clearly recognisable or dominant) and more sustainable (lasting) involvement in the development of such solutions.”

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\(^1\) Social innovation streams are new approaches, principles of action, governance forms or modes of organisation that have fundamentally affected a field of activity, and already for a certain period of time (at least for five years back from today) and across national borders, so that they are not geographically restricted.
Our main propositions come in relation to this:

Main proposition I: Social innovativeness varies by organisational form and actor involvement, in the sense that the properties of third sector organisations and volunteering make its formation particularly likely.

Main proposition II: Against this background, social innovativeness further varies by framework conditions, that is by institutional and perception environments.

More details on the definition and proposition can be found in deliverable 1.4.

2.3. Project stages and links

The ITSSOIN project consisted of four phases and eight interconnected work packages, which are presented in the chart below. Work package 1 has laid the theoretical foundations for the entire work programme to be performed, including the formulation of hypotheses on all subsequent levels. Work package 2 was dedicated to framework conditions for social innovation at the macro level, pertaining to path-dependent and rather immobile institutional structures and more flexible and agile recent policies, which may also be more (organisational) field-related and therefore tend towards the meso level. It also comprised less formalised meso-level frameworks, such as media and citizen perceptions in relation to the third sector and social innovation. Work package 3 instead related to the micro level of individuals, namely volunteers, who were highlighted in the original EC Call for research as relevant subjects of the research and which we have identified as (potential) key enablers of social innovation in third sector organisations.

Figure 1 Project structure of ITSSOIN

Work packages 4-7 represented the main empirical body of the ITSSOIN research. One ‘social innovation stream’ each was identified and investigated in seven fields of activity, cross-nationally, involving 3-4 ITSSOIN countries per stream/field. The spotted social innovations were used to identify key actors and field conditions directing the development of the
respective social innovations. This enabled us to derive a set of organisational and field traits that were central supporting forces of social innovation.

The main methods and frameworks we used in this part of the empirical research were (1) field theory to illustrate and analyse the actor landscape (Fligstein & McAdam, 2012), (2) process tracing (Collier, 2011) to sketch the innovation pathway as well as milestones and actor involvement along the way, and (3) qualitative comparative analysis (QCA) (Ragin, 1989) to quantify results.

While D 8.1 presents results in a more abstract fashion, this deliverable provides more details. Both serve their function of condensing the knowledge generated in ITSSOIN. Each point discussed below is presented in more detail in the respective ITSSOIN work package, which we would like to refer readers to. For this very reason we do not provide much conceptual reasoning within this document but rather selectively draw on the conceptualisations previously drafted, hence the limited amount of references within this document.
3. **Capturing the Third Sector: Key findings on policy, media frames, citizen perceptions and the role of volunteering**

In section 3 we report on all research perspectives relating to general framework factors for social innovation, while section 4 is dedicated to actor involvement and field conditions promoting social innovation. Section three first focuses on national welfare and institutional contexts, then to policies relating to social innovation on the national and the EU level, before turning to media perceptions of the third sector and its presumed main functions and exploring similar perspectives as regards citizen perceptions, and finally analysing the effects and scope of volunteering in this thematic context.

The importance of these different frameworks and their exploration in relation to social innovation has been derived from previous EC-funded research on the subject, more specifically a model developed in the TEPSIE project:

**Figure 2 Framework model for social innovation (Krlev, Bund & Mildenberger, 2014)**

The model highlights different spheres of influence: (1) fixed and rigid institutional structures, which often have a long tradition and which may refer to the landscape and funding of welfare provision, governmental social welfare regimes and social structure, or directing principles in national political economies; (2) policy agendas and discourses that are more informal but shape future legislation and institutional structures; (3) the societal climate, comprising socio-political discourse in the broadest sense, including normative discussions of the 'good life' and who is responsible for shaping it. We discuss each of the levels in turn.
3.1. **The Third Sector and social innovation in national context: Theoretical and empirical insights**

With ITSSOIN’s general definition of social innovation and the properties of the third sector it was of high importance to study the sector’s peculiarities in context, that is: not disregarding its surrounding institutional and perceptual structures. Therefore focus was put on exploring the interrelations between social innovation and the third sector and how they are moderated by their embeddedness in national welfare states. Through this we intended to derive a rationale informing on where social innovation could be expected to be present most pronouncedly.

Literature – some dated, some recent and developing dynamically – showed a high degree of cross-national variation regarding welfare state conceptions and political economies at the macro level. A detailed review of literature on welfare state variances and their underlying conceptualisation enabled us to calibrate our research as to how constellations of actors and roles moderate third sector involvement in social innovation. We thereby took a system-based approach, which is receiving increasing importance in the study of innovation generally (Christopherson, Kitson, & Michie, 2008). At the macro level, three theoretical concepts were focused on: welfare regime typologies (Esping-Andersen, 1990), varieties of capitalism involved (Amable, 2005; Hall & Soskice, 2001a; Schneider & Paunescu, 2012), and the social origins theory of non-profit organisations (Anheier, 2013; Salamon & Anheier, 1992, 1998).

Despite the fact that these classifications refer to different concepts and aspects in their approach to observing nations, all of them are of relevance to the ITSSOIN project, as the different points of reference each can be linked to essential components of our research. These are, (1) the important role that the third sector and volunteering is being ascribed for social innovation (Anheier, Krlev, Preuss, & Mildenberger, 2014a); (2) the importance of context conditions for the way social innovation is shaped (Krlev, Bund, & Mildenberger, 2014); and (3) the strength of relation between different types of innovation and social innovation (Anheier, Krlev, Preuss, Mildenberger et al., 2014b).

The results of our theoretical and empirical research resulted in a systemised rationale of ITSSOIN countries and their excepted social innovation capacity. From a broader perspective, this research poses an important and timely contribution to social innovation research by adopting a cross-national comparative perspective and thereby paying attention to the most fundamental modifiers of third sector engagement and the way they might enhance or inhibit social innovation.

3.1.1. **A classification of national social innovation potential**

Based on the theoretical backdrop described above we carried out a theoretical and quantitative macro-level investigation aiming to answer the guiding questions referring to a) the expectations in terms of social innovation that arise from the above mentioned variety of theories; and b) the relation between size and scope of the third sector, including civic engagement, to social innovation.

The procedure in addressing these questions was the following: an overview of the state-of-the-art knowledge of the third sector from the perspective of comparative welfare state research was compiled. Against this background, the theories chosen for our framework were
discussed in more detail, thereby also giving attention to cross-national comparisons and taking into account country specific conditions when looking at the third sector and social innovations. Then, updated structural and empirical data were applied to these frames for each of the partner countries. The framework included, for example, (1) information on third sector expenditures, funding, or workforce; (2) state welfare spending and the analysis of social strata in the respective societies; (3) coordinative mechanisms in the national political economies and their relation to innovation capacity. These were combined with the outcomes of a conceptual discussion aiming at the identification of those factors which most probably would act as enablers of social innovation. This resulted in a theoretically-informed empirical mapping of social innovation potential for each of the countries, whose implications were used to formulate hypotheses.

With regard to theory and the question as to where the third sector is positioned when it comes to social innovation, amongst the three theoretical approaches towards welfare state and economic classifications mentioned, it is Social Origins Theory that most explicitly lent itself for analysis. Therefore, we put a focus on this concept in our empirical data collection. Besides this, it is more likely that changes in the classifiers used by the Social Origins Theory are affected by dynamic developments than that similar changes would affect the welfare regime classifiers or that of political economies (see below). The theory was developed by Salomon and Anheier to advance our knowledge on the role of the third sector in nation states by explicitly relating third sector size to social welfare spending of the state. As a result, four types of non-profit regimes were distinguished: liberal, social-democratic, corporatist, and statist (Anheier, 2010; Salamon & Anheier, 1998). However, since the third sector never exists in isolation and since it is highest explanatory potential in regard to the emergence of social innovation is offered by the interplay of sectors and actors, our analysis had to be broadened. We thus turned to consider a variety of moderators affecting social innovation from several directions.

In addition to social origins theory, we also adopted concepts of the welfare state defined in the ‘Three Worlds of Welfare Capitalism’ and developed further since. The variables proposed by Esping-Andersen (1990) such as ‘decommodification’ (as a proxy for market pressures) and ‘stratification’ (as a proxy for social pressures) are of relevance both to the policy which affects as well as to the type and strength of social innovation that can be expected to be evolving in the specific context of welfare state.

We further took into account innovation policies (Ramstad, 2009) and their effect on innovation potential, and looked at the question of whether the innovation in a national system would be likely radical or incremental (sort of innovation), drawing on the Varieties of Capitalism (Hall & Soskice, 2001b) approach to do this.

Our account on the third sector revealed the expectable outcome of the different theoretical concepts resulting in different predictions on the amount and strength of social innovation that could be expected. Nevertheless some countries were more distinctly and in greater frequency found than others. The following paragraphs give an overview of expected social innovation presence in the ITSSOIN countries analysed.

3.1.2. **Expected social innovativeness from the perspective of guiding theories**

Following Social Origins Theory and ITSSOIN’s main hypothesis, we expected social innovation to be highest in the context of large third sectors (with respect to share of GDP, workforce,
funding) and where there is a big amount of volunteering (related to paid workforce). The ITSSOIN country expected to be most innovative from this perspective would be the UK, with a group of Germany, the Netherlands, Denmark and Italy following. With respect to the implications of the Worlds of Welfare Capitalism and according to the logic that civic involvement and relatively weak market pressures and state coercion are most supportive for social innovation in general, we expect social innovation to be highest in states which are positioned at the intersection of the conservative and social-democratic welfare regimes, which are characterised by weak state influence and moderate market pressure. Corresponding countries within ITSSOIN are The Netherlands, Sweden, Denmark and Germany. Finally the Theory of Varieties of Capitalism proposed that in those economies would be most promising for social innovation where a certain amount of individual civic activity is possible and happening in relative independence from heavy state influence on the one hand and from the pressures of economisation on the other. Mostly, this is the case in ‘LME-like countries’. The approach furthermore suggests that countries which have undergone a dynamic transition towards being LME-like would be most promising. Within ITSSOIN these countries are The Netherlands, Sweden and Spain. Also hybrid countries in which national structures are in the process of change can be identified by using this theory. As the changes in state structures are expected to prevent the establishment of innovations these are expected to be least innovative.

Although the social origins classification offers good orientation as to in which contexts high social innovation activity can be expected, it turned out to be useful to draw on the alternative classifications offered by the theories described above. These too provide predictors for social innovation and promised to suggest additional rationales to complement our reasoning. Through this approach we hoped to keep up the possibility to prove that, for example, it might be the combination of structural, engagement, and framework factors that trigger social innovation instead of analysing these factors in an isolated fashion. Including additional rationales is necessary especially due to the ambiguities in classification and the wide range of medium social innovation potential which we discovered, for example in frameworks where third sector size and volunteer engagement are at moderate levels.

Given this reasoning, we carried out a comparative discussion of the insights that arose from all three classifications and combined the findings. This enabled us to make out connections between the conceptual accounts and put together empirical portraits of the third sector and social innovation. More precisely, these portraits included the third sector’s extent and form and focused on picturing the conditions for social innovation as a driving force of societal renewal, cohesion, and sustainability.

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2 The degree of stratification gives an estimate of inequality in the society and may thus serve as a proxy for solidarity, the involvement of civic engagement, and the third sector more generally in social innovation. (De)commodification can serve as an estimate of the influence of market forces on social innovation.
3.1.3. Gained insights: Hypotheses on national social innovativeness

In addition to the gauged social innovation potential the analysis gives us some insights on the connection between theoretical classification and empirical updates based on current data. The results show that there are differences in the clarity of classification. With regard to scale of third sector in cross-national comparison (using the three above mentioned indicators in that order), for example, we found that The Czech Republic (small) and The Netherlands (large) were easy to estimate. Other cases are unclear but show a distinct tendency, with the examples Germany and France tending to large and Denmark tending to small. Most controversial countries are Sweden (small; if we adhere to the proposed prioritisation of indicators), the UK (rather large; based on the same rationale), as well as Spain and Italy (rather small; based on the same rationale but with a more pronounced upward tendency for Italy, if all three dimensions are considered with equal weight). Estimating these outcomes it could thus be stated that the classification of examples mostly confirmed the country allocations, while some contradictions turned up during this process, due to the classification criteria applied.

Another outcome of the analysis was the insight in the relative instability or rather the flexibility of predefined types. For example, when applying the parameters of third sector size used here, the UK only would be classified solely as liberal, while in fact it is almost to be categorised a statist country\(^3\). Similarly in Spain, where we can find a slight tendency towards a liberal model due to the size of the non-profit sector which is slowly increasing in relation to the economy in combination with ongoing low government expenditure on social welfare we have a dual case. To assess the situation we would need more recent data, particularly with regard to the Spanish conditions during and after the economic crisis.

Thus, our analysis of theoretical traditions, empirical country profiles and the expected social innovation advanced two issues: we presented an updated picture of welfare and economic contexts in relation to social innovation and we provided illustrations of where classifications and their implications would produce contradictory indicators for social innovation. Through this, we managed to contribute to formulate conditional factors for social innovation.

3.1.4. Succeeding research steps

The classification of countries and estimations of the way in which social innovation was expected to play a role in these contexts formed an important preliminary step in the process of uncovering dominant innovation streams and indicating how and which actors have been involved in them across countries. Thus, the theoretical and empirical insights from the analysis prepared the qualitative in-depth analysis of social innovations in fields. It was important to additionally take this into account in our research since tendencies on the field level might counteract or level each other out at a higher level.

\(^3\) Since the third sector share of paid workforce and the third sector share of GDP in the UK are to be estimated rather low while its welfare state core activities expenditures regarding their share of the third sector are rather high, a large scale of the third sector is found. However, overall the third sector in the UK isn’t much bigger than in other countries.
Through field analysis, the structural accounts on the macro level were complemented by further conditional factors, including policy, public perceptions and citizen attitudes towards the third sector as well as the role of volunteering, in order to confirm or contradict our reasoning. By looking at these factors, we not only became able to contribute to the understanding of social innovation streams, but also successfully moved from a static to a dynamic analysis, allowing interconnecting welfare and economic contexts in order to provide a broader view on innovation developments. The corresponding research steps will be described in the following chapters.

Besides, the comparative discussion of insights arising from the combination of all three classifications enabled us to formulate macro-level hypotheses aiming at the explanation of cross-national variation in social innovation. This in turn became an essential requirement for country selection with regard to our case studies on social innovations, as it enabled us to identify criteria for particularly insightful cross-national comparisons, which had been fortified by the compilation of ‘country-vignettes’ that informed our empirical in-depth work.

Thus, all subsequent research of the ITSSOIN project started from the analysis presented, in order to move from the macro level of welfare regimes or political economies to more specific conditions at the field level.

3.1.5. Implications of the analysis beyond ITSSOIN

The classification of ITSSOIN countries and their expected social innovation potential showed the use of taking into account temporal developments in the classification of countries across authors as well as of drawing on a comparative analysis based on three different theoretical concepts. Of course however, we could not holistically account for overall social innovation potential within the frames of ITSSOIN research, but have only been able to create first insights that we can derive from cross-field comparisons of our social innovation streams. Each of the countries presented below has been studied in 2-4 different fields of activity.\(^4\) The positioning of the countries across fields has been used heuristically to produce Figure 3.

**Figure 3 Overall country comparison in relation to social innovation streams**

When we compare this relational rating with our initial reasoning, we can state that social origins theory, drawing on the size of the third sector and civic engagement is most (clearly) indicative of actual country ‘performance.’ The relevance of the two factors supports ITSSOIN’

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\(^4\) Sweden is not listed here, since due to resource restrictions it was only studied in one field of activity and insights are thus not considered representative.
main supposition that those two conditions are important for social innovation. We also see that the varieties of capitalism approach offers useful points of reference for gauging national social innovation. However, we had to revise our initial supposition that LME-like countries would be performing best, due to their mixing of coordinated and liberal forces, towards the influence of greater liberty as a stimulus, as found in LME-countries.

Still indicative, but less useful was the welfare regimes approach, in relation to which we had the significance of moderate levels of decommodification confirmed as favourable. We had to revise our initial thinking on a high degree of solidarity, and thus low levels of stratification, as favourable, towards moderate degrees in the latter and therefore a balance between solidarity and pressing social needs due to the existence of social strata. The limited usefulness of welfare regimes does not relate to this needed qualification though, but more to the ‘in-betweenness’ of social innovation as regards regime characteristics, so that no single context could be identified as more or less favourable. As regards regimes, the implications in relation to moderating factors rather than specific regime types seem a promising avenue for further research. Efforts aiming at driving the preliminary insights further will have to take a higher variety of aspects into account (Anheier, Krlev, Preuss, Mildenberger, et al. 2014b) and will certainly need more primary empirical research.

With regard to practical implications of our analysis the incongruences between country classifications turned out to be of interest. As these could be applied to assess national social innovation potential and thereby produce some differences, but also some overlaps in estimating European countries’ capacity to create social innovation.

However, more knowledge is needed on the conditions under which social innovation potential translates into actual innovations. We suggest policy makers stimulate in-depth research on social innovation streams and the processes that advance them. This turns out to be a more promising approach than merely looking at structural but superficial comparisons of sector characteristics. Such an approach would feature essential insights on successful incubation of social innovation.
3.2. Social Innovation in national and EU policies: Policy perspectives and country profiles

As ITSSOIN is aiming at holistically investigating how third sector organisations contribute to social innovation we take into account the surrounding environment of these organisations. One of these context factors are the policies that shape the field. We therefore conducted a policy analysis to identify whether social innovation is a pronounced concept on policy agendas or even legislation, and to describe the expectations that are posed towards its desired outcomes. We further were interested in the corresponding political discourses and the question of which entities would be most active in facilitating social innovation. What is important to mention here is that we had to distinguish between those documents and actors introducing the concept, e.g., by talking about 'innovation in the social sphere' – and those directly referring to the term 'social innovation'. Although the following overview will not go into much detail as regards this, the distinction was respected throughout the research.

In our study, we collected information on those policy frameworks on the EU and the ITSSOIN country level which bring together the concept of social innovation with the third sector and civic engagement, and the functions ascribed to them. This enabled us to draw an insightful picture of policy discourses on social innovation. In order to assess the relative importance of the third sector in social innovation we have had a particular focus at the interrelations between the third sector, the state and market actors. The policy analysis is thus tied to results from our previous theoretical research on the embedding of social innovation which showed that structures on the macro level influence a country’s capacity to innovate.

Policies and policy traditions such as those typical for LMEs and CMEs are part of these macro structures. We developed hypotheses that relate them to predictions on how innovation policies would be implemented in each of these countries. Thereby, the hypotheses focused on policies’ objectives (social vs. technological orientation), the policy’s approach towards social innovation (grass-roots or top-down involvement), and the level towards which policies are aimed (local vs. national) (Anheier et al. 2015). These suppositions included the assumption that it would mainly be policy approaches directed by social policy principles, directed by grass-roots involvement, and focussed at the local level that would favour social innovation.

Besides this, the analysis of policy perspectives on the country level drew on ITSSOIN’s findings on social innovation in EU policy. Earlier reports had highlighted that on this level it is mainly flagship initiatives that deal with social innovation and that only little research has until now been carried out on this topic (Eriksson, Einarsson, & Wijkström, 2014). Thus, our analysis provides a novel empirical approach to bringing together social innovation with country specific policy.

3.2.1. Document selection and analysis

One of the main focuses of the analysis of EU and country policies and their linkages with the concept of social innovation was the strength of such interconnections. Furthermore, guiding questions included asking for the (potential) reflection of EU policies at country level, and the role that policy documents attribute to social innovation and the third sector. These aspects were expected to highlight innovation policy and the hopes connected to it across countries. On these grounds we carried out a content analysis of five to nine policy documents on the EU
level as well as for all ITSSOIN countries (the Czech Republic, Denmark, France, Germany, Italy, the Netherlands, Spain, Sweden, and the UK).

The selection of relevant policy documents was based on a previous ITSSOIN deliverable that involved a screening of innovation policy at the EU level (Eriksson, Einarsson, & Wijkström, 2014). Focus was put on those documents that deal with social innovation as well as those addressing the role of the third sector in contrast to actors from other sectors. Through this selection procedure we aimed to assess aspects such as the estimated innovative capacity of the third sector in comparison to state and market, or the amount and type of support that government and policies offer to third sector and other actors. Overall we analysed as sample of 53 documents, originating from the years 2001-2014.

To support the content analysis of documents we developed an analysis guide. This guide contained criteria for analysing the selected documents, a code book of 25 predefined items and details to guide the coding procedure to allow for an in-depth and thus flexible, but also standardised analysis of country specific policies. Items included, for example, word counts on social innovation to assess whether social innovation is at all recognised as an important concept. Also, all project partners delivered qualitative insights, e.g., describing national variations in political structures and resulting particularities with regard to social innovation discourses. This information enabled us to take into account differences amongst policy frameworks across countries and comprehend the document selection. Within our analysis we thus focused on peculiarities in countries as well as the general aspects addressed in the code book, contributing to empirical openness. Also, throughout the coding procedure new codes were developed and included in the code book.

The results from the coding across countries were analysed in combination with qualitative insights on country level. For both steps, we were guided by key questions such as: "How are social innovations generally described in policy documents? How are social innovations embedded in the policy documents and how do different types of innovation relate to each other? What kinds of contributions are expected from social innovations in policy? What function is ascribed to the third sector by policy as regards social innovation?" (Anheier et al., 2015).

3.2.2. Outcomes: What relevance does social innovation have to policy makers and what do they expect of it?

The analysis of policy documents revealed that policy makers approach the topic of social innovation from a range of different perspectives. They have quite general and vague expectations and link social innovation to a great number of subjects. It is therefore difficult to generalise the results. Nevertheless we did identify trends and tendencies in some respects.

Looking at the actors which are involved with innovation policy we found a range of ministries from different areas. This applies to EU as well as country level. Most prominent are national level ministries engaged with economy, labour, and social affairs. Their focus regarding innovation policy lies in the empirical fields of ‘social services’ and ‘healthcare’, supplemented by ‘work integration’ and ‘community development with refugees’. Also, the interests associated with social innovations resemble each other across the ITSSOIN countries. Social innovations are expected to further a socially sustainable growth in the economy. These similarities across countries and different policy makers are best explained by influence of EU
policies. Some of the documents analysed also showed a strong reference to EU policy documents.

Social innovation is a recent concept in most countries. Due to that it was in some countries difficult to identify policy documents referring social innovation. These circumstances made us conclude that politics in general pay rather little attention towards social innovation. However, where policy makers do refer to social innovation, they do so with high ambitions and span all levels of potential interest: from individual, to organisational, and system level and with expected effects on the local, regional, and the national level of a country. It was hard to identify tendencies in this picture. However, when analysing the objectives of social innovation some tendencies could be identified. Organisational field transformations are central to policies in the Netherlands, the UK, and Germany, while Spanish, Swedish, Danish and European policies focus more on aspects such as the development of products, services, and processes. Equal relevance of all objects was diagnosed for policies in the Czech Republic, France, and Italy. The question of means and responsibilities for meeting these expectations remains unanswered. For example, the analysis of organisational forms that might be seen as especially equipped to foster social innovations did not yield usable outcomes. Hardly any of the policy documents addressed such relations.

Similarly, the role of the third sector turned out to be of no special relevance to policy makers. One of the basic and guiding assumptions within the ITSSOIN project is that the third sector to a certain extent is prone to initiate social innovations. However, this very reasoning cannot be found in the policy documents. In some countries’ policy documents, the third sector is not related at all to social innovation and neither is the concept of civic engagement. This is the case in the Czech Republic, Italy, and Sweden. This is not to say that the policy documents specify that the third sector is irrelevant for social innovation. More accurately one would have to say that the policy documents are neutral to sector affiliation. The third sector is ascribed some relevance in France, Spain, Germany, the Netherlands, and the UK. It must however be said that the market and state gain similar attention in these cases, or the third sector is related to particular subjects instead of being conceived in a generally innovative way.

What becomes relevant in estimating third sector relevance, however, are two additional aspects: time and actors. For example, the role of the third sector in the UK changed substantially over time and in response to prompts by powerful political actors. Depending on who is in power, the third sector was conceived to be or not to be a driver for social innovation to varying extents. The only exception is Denmark where the third sector is depicted as being particularly innovative. Also, when referring to its role as a service provider and advocate, the third sector is not given particular notice in policy documents. Country policies either do not pronounce any third sector function at all (Czech Republic, Italy), or they solely reflect on its function as a service provider (France and Spain, UK). In Germany and the Netherlands, if functions are mentioned at all, the way in which this is done is constrained by the subject discussed. Again Denmark posed an exceptional case where both functions are emphasised.

When moving from the level of EU policies and our focus on general objectives of innovation to more detail, we made the following observations. Social innovation policies are, on the one hand, referred to in a similar manner across countries. On the other hand, policy makers on the country level suggest very diverse approaches to bringing them to practice. Also, these approaches do not always correspond with the ways in which social innovation is assumed to work according to social innovation research. Similarity across countries is strongest with
regard to those policies that address the involvement of grassroots initiatives. The topic was present in all countries’ policies independent of their status as LME or CME. There is also a tendency towards top-down approaches in innovation policy in the UK, which corresponds with our predictions on characteristics of LME countries. This characteristic is however qualified by that UK documents also stressed the importance of civic engagement for social innovations.

Approaches differ regarding the objectives that innovations address, for instance equality, social cohesion, societal renewal etc. Also, the types of innovation (social, governance, or technological, see deliverable 1.1) that are addressed are not the same in all countries; neither is the level which is addressed in policies. Concerning the latter, differences are most obvious. Our theoretical concepts imply that CMEs would be prone to address multiple levels since the corresponding collaboration between actors from different levels matches CMEs’ corporatist nature. In contrast, in LMEs we would expect policies to focus solely on the national level. These assumptions were mostly confirmed. However, as also suggested in the literature LMEs concepts of innovation are sometimes used as bridges across levels (Anheier et al., 2014b) and would thus address the local level too. This points at the relativity of conceptions and the difficulty of arriving at neat classifications, which might not least be challenged by the encompassing nature of social innovation as witnessed in our case work (work packages 4-7).

In addition to the above perspectives we looked at the link of social innovation policies to traditions stemming from social policy in contrast to those emerging from technological innovation policy. The concept of social innovation is encompassed in social policies especially in LME countries. They do so to put objectives into focus which would otherwise be outside the traditional focus of their liberal market economies. The situation in CMEs was not as uniform. In Germany policy makers bring forward approaches that relate to social policy and make references to technological innovation with close links to economic policies at the same time. Again, this points at social innovation as often being used as a vague and general concept, which serves to legitimize policies as methods of solving societal problems across policy realms and traditions.

A final hypothesis looked at the estimated social innovative capacity in countries as implied by the concreteness of concepts of social innovation. Where these concepts are concise, distinct and elaborated in policies, social innovation would be expected to be higher. Since social innovation was not referred to in a concise way in any of the countries, we were not able to comprehensively test this hypothesis. Therefore, focus was put on estimating the relative distinction of the concept by referring to the significance that social innovation would generally have in country policies. The findings from this analysis suggest that social innovations would be more likely to develop in Denmark, France, Germany, Spain, and the Netherlands. In the Czech Republic, Italy, and Sweden social innovation is very weakly explicated in policy documents. Moreover, the qualitative country reports in these instances showed that the approaches taken towards the concept are almost non-existent. Positioned somewhat in between these two poles, the UK was pictured as providing a context of medium innovative capacity according to the specificity of the concept.

### 3.2.3. Summing up: Trends in policy documents across countries

The policies from EU and country level refer to a great variety of concepts of innovation. According to policy discourse, all levels spanning from individual and organisational to system level would be affected by innovation. It was further found to not be bound to the local,
regional or national level but potentially be present on all three of them – or at least
influencing them. Also concerning different types of innovation and the expectations towards
them, diverse understandings were identified. Taking into account the relative novelty of the
concept of social innovation to countries and policy makers, this plurality is of no surprise, but
still has implications on the need for coordination and cross-national exchange. The EU seems
already to have taken a lead role in this.

The concept of social innovation is fairly new to most of the ITSSOIN countries. Policy
implementations were found on the regional as well as at national level. Often, especially on
the national level, these policies mention innovation in a general way. This is the case in the
Czech Republic and in Sweden. Explicitly social innovations are mentioned in France, the
Netherlands, Spain, and the UK. Despite this accent on the national level, seven of the nine
countries refer to regional and local concepts of innovation too. These are the Czech Republic,
France, Germany, Italy, the Netherlands, and Spain.

Concerning the topics to which the concept of social innovation is linked in policy, mostly two
different discourses can be detected: the topic of volunteering and civic engagement, which is
linked to ideas of solidarity and/or social cohesion; and issues of economic developments,
which are focused on in connection to the promotion of social enterprises and/or social
entrepreneurship as well as technological innovation. A differentiation of this kind can be seen
in Denmark, France, Germany, Italy, and the Netherlands, although it must be said that the
topics of discourse in detail vary across countries.

In addition to the mentioned variations of topics addressed by national social innovation
policies we were also able to detect a particular focus on EU regulations in some countries.
Especially the Czech Republic, Spain, and Sweden emphasise its implementation in national
contexts. Similarly, policy frameworks referring to EU regulations that are already existing were
analysed in Germany, the Netherlands, and Spain. From this circumstance it becomes obvious
in what way and to what effect EU policies can shape national policy frameworks on social
innovation. Subsequent research should look at these relations in more detail, evaluating the
processes and outcomes of such influences.

The policy analysis in combination with insights from the national institutional framework
analysis has contributed not only to develop our understanding of how social innovation is
perceived. It has also provided some rationale on which countries to choose for the empirical
examination of social innovations relative to the detected variance in the concepts’ standing
within national policy.

3.2.4. Limitations of the analysis and need for further research

While the results from the policy analysis revealed similarities across countries in some
respects, these findings at the same time need to be interpreted with caution. For example, not
all policies draw clear distinctions between technological and social innovations but handle
these differences vaguely, or rather generally refer to the idea of ‘innovations’. This might
comprise very different concepts and approaches, without clearly mentioning them. Also,
results are fuzzy when it comes to the identification of the specific policy streams regarding
social innovation. Several policy approaches might deal with the concept without
systematically relating to each other, thereby merging or loosely coupling established policy
traditions, for instance in social policy and technological innovation. The effects of such coupling or (the existence of) the intention behind it are unclear to date.

On a more practical level, our research was impeded by difficult access to comparable types and numbers of policy documents across the countries. Thus good comparability was not always given. Although qualitative country reports showed that social innovations are in fact a topic in most countries, they also indicated that concepts relating to it are very new. It therefore was difficult to compile a profound selection of social innovation-related policy documents. The same goes for the comparability of the content of policy papers. Some bias might result from the different connotations that the term 'social innovation' might carry in different languages.

3.2.5. Implications for policy formation around social innovation

The analysis of European as well as national and regional policy documents showed that the concept of social innovation is still relatively new to most of the policy makers. Policy discourse only scarcely refers to its potentials. However, where social innovation in fact is mentioned, ambitious and high expectations are uttered. Policies around social innovation are thus characterised by a high degree of openness. This similarly applies to definitions of the concept as well as to the sphere of potential actors and agencies involved with regulating the field. Such openness might result in redundancies, coordinative disorders, overlapping competencies and imperfect allocations. There still is no clear concept of what social innovation comprises, what results it can offer, and what actors might be involved with it. The trickle-down effect of European regulations leading to national or regional policies and programmes is incomplete and there seems to be no concise understanding of these processes.

Therefore, policy makers need to become clearer about their expectations towards social innovation and define these by creating precise approaches to its regulation. A clearer understanding of the primary actors of social innovation needs to be developed. Thereby, attention should be directed towards the different sectors and their role in the development of social innovation. The general presumption of cross-sector involvement must be tested. Finally, particular focus should be put on the processes through which EU level programmes are translated to the national level and the potential ways to facilitate these.
3.3. Media Framing of Third Sector Activities in Europe

The contributions related in this chapter are based on the ITSSOIN-deliverable D2.3 ‘Images of the Third Sector’ conceptualised to evaluate perceptions of media and citizens attitudes towards the third sector. The two perspectives are published as distinct and independent papers. Readers also interested in the citizen perception find more insights in the publication ‘Empirical analyses of citizen perceptions of the third sector in Europe’ and chapter 3.4. of this report.

It is to be noted that the study we report here is in scope and scale more explorative than explanatory. The limited amount of data available therefore implies that caution should be taken in drawing general conclusion. We appeal to undertake more research, empirical and comparative, that will involve a broader variety of media platforms spanning electronic and social media likewise.

3.3.1. Starting point and guiding questions

Highly credited research has shown that the power of news media is not primarily their direct influence on what people think, but more concerning the way in which journalism indirectly determines the things that decision makers take as important to act upon (Scheufele, 1999). In this respect, relevant media research that is dealing with third sector activities related to social innovation and civic engagement is scarce. Extensive yet somewhat dated literature on media perception of advocacy, originating from the cultural studies tradition, does exist (Halloran, Elliott & Murdoch, 1970; McLeod & Hertog, 1992). Few studies, however, have been performed in relation media perception on third sector service provision (Fletcher et al. 2003; Hale, 2007), and a focus on social innovations can be found in even fewer (Brink Lund, 1999; Rogers, 2005).

Media scholars have proven that ideas and, particularly, specific innovations spread depending on the editorial selection of news and the concepts of professional criteria which professional journalists define (Reese, 2001; Rich, 2007). The framing paradigm has become central to a more general agenda setting theory since the 1980s and demonstrates the way in which routine perception of relevance and irrelevance does not only define the content of the mass media, but also often becomes the premises for political debate and public opinion forming (Norris, 2000).

By spreading news and views, news media influence public perception and political decision making. Beyond that however they do so by eliminating claims and events that do not fit into pre-determined frames. Denotative processes in civil society may become neglected by media. A phenomenon in theory called the ‘spirals of silence’ (Noelle-Neumann, 1984). This negative form of agenda setting entails the potential exclusion of controversial as well as routine activities from public discourse, not because of their irrelevance to people’s lives but since the current professional journalism’s framework does not match with them.

Furthermore, framing of third sector activities is a continuous process instead of a privilege that could be taken for granted and would be associated with official authorities and membership organisations (Deacon et al. 1995; Schudson, 2003). Print and online newspaper journalists play a defining role within an ecology of professional media framing in most countries of Europe. In short, compared to other news providers (considered less serious and informed) newspapers still act as important agenda setters by framing public discourse (Brink Lund, 2015).
Now, having sketched agenda setting theory and thereby particularly emphasised on framing practices in relation to the diffusion of innovations, and having systematically collected empirical data from leading national and regional newspapers, publishing news and views in nine different European media systems (Hallin & Manchini, 2004) in order to conduct content and framing analyses, we can pose the research question: How are third sector activities and social innovation framed by European news media?

The content analysis included mediated discourse on third sector activities in the Czech Republic, Denmark, France, Germany, Italy, the Netherlands, Spain, Sweden and the United Kingdom 2003-2013. Each of the partnering countries have drawn a comparative data sample from media monitors, i.e. Europresse, ANOPRESS IT, Factiva, Infomedia, LexisNexis, MyNews, and Retriever, containing third sector related content from two leading national and two leading regional newspapers. We made these specific choices in order to increase plurality of editors of the media sampled. It is to be noted that the choice of newspapers as data sources has been dictated by practical reasons, and not because especially these news media are per se the most significant movers of social innovations and civic engagement.

The nine ITSSOIN-partners provided databases generated by searching for articles that mentioned at least one of six predefined keywords (‘civil society’, ‘associational live’, ‘non-profit sector’, ‘voluntarism’, ‘social innovation’, and ‘civic engagement’). The analysis of the articles was divided into two steps. Firstly, the media coverage was analysed quantitatively by comparing the frequency of these keywords between 2003 and 2013. Secondly, a qualitative analysis of 8,463 articles from 2013 was conducted to explore four central hypotheses of the ITSSOIN project. The content analysis reports on the trends in the third sector media coverage for each of the countries that participated respectively, spanning the years 2003-2013. On this setting we proceeded to a comparative framing analysis of the aggregated European data from the year 2013, testing four hypotheses.

3.3.2. Outcomes

The media analyses suggest that, in outspoken contrast to business and politics, third sector activities do not have high relevance as a source of news reporting as such. Mostly, the third sector is depicted in media with pin-pointed local references to specific organisations and individuals who and which perform advocacy and services provision on a non-profit basis. There are few instances where social innovation policy in a more general sense is related to the third sector media coverage. There, the reporting is overwhelmingly loyal to government views. These tendencies stand in relation with social innovation policy streams and document that the latter is covered only minimally. In all countries studied, journalism tends to ignore third sector performances of innovative nature. Doing this, it is not a direct influence that mass media may exert on public opinion but an indirect impact on public perceptions, as they indicate to those who are in charge of taking decisions what to focus on.

The general picture drawn by the reports from the different countries analysed is that third sector activities are primarily illustrated with referencing to local contexts, to specific organisations and to individuals who on a non-profit basis perform advocacy and service provision. There are relatively few cases where social innovation policy is related to the third sector activities in a more general sense. In these instances the reporting is framed as overwhelmingly positive. In line with this, the first media related hypothesis was directed at the possible bias in the media coverage detecting positive/neutral/negative coverage related to
the three levels of analysis employed by the ITSSOIN-project in general: micro/meso/macro. The media data, however, did not allow us to make reliable conclusions at the meso-level. Instead we reformulated the first hypothesis taking the regional press coverage as a proxy for micro-level reporting and having the national press stand for the macro-perspective (H1): *The press framing of third sector activities in regional media is expected to be more positive than in national media.* This claim was confirmed in all countries studied except for Sweden, where national media frame the third sector more positively than regional media. Our findings also indicate that newspapers – national as well as regional – are more positive when covering micro-level examples of third sector activities, e.g. specific cases with particular persons involved by name compared to third sector topics in general.

The second hypothesis has been focused more specifically on the comparative value of social innovativeness of the third sector as it is perceived and related by news media (H2): *Social innovativeness is expected to be relatively less pronounced in press coverage of third sector activities than a number of other civil society values, e.g. voluntarism and civic engagement.* The framing analysis confirms this and also shows that the concept of “social innovation” is rarely used in European journalism. Comparatively, we found that in the French and Danish media, third sector is regarded as relatively more innovative than in the rest of the countries. In Denmark, especially the fields of community development with refugees, environmental sustainability, and arts & culture are framed to be innovative. In France, especially work integration and arts & culture are framed as innovative. It should also be noted that no difference between news and views was obvious in data, and likewise national and regional media where similar when looking at framed innovativeness.

Our third hypothesis (H3) reads: *Press reporting on national social innovation is expected to be in line with the national policy discourse on social innovation.* Prior to drawing conclusions it must be pointed out that as concerning national and regional social innovation policy, the official policy documents are generally ignored by most European newspapers, and that informed or critical debate on these issues on the editorial pages is rare. As Noelle Neumann (1984) suggested, we may call this a ”spiral of silence” as media does not perceive third sector policy making as notable as such. This is not for reasons of irrelevance, but more because highest priority lies on consensus. Reference to policy streams is only made when voices of protest are raised. Therefore, as most advocacy of this type takes place on the local and regional level, third sector policy discourse is discussed at the national and international macro-level only scarcely. With this stated however, the inter-relation hypothesis is approved. Even if it is only a small number of stories that relate to social innovation policy as third sector activities, they are mostly matching government views. We stress, however, that there is a need for more research in order to draw general and reliable conclusions on the way that press reporting on national social innovation streams influences policy discourse on social innovation – and the other way round.

The fourth hypothesis deals with the framed roles of third sector (H4): *The main dimensions used by the press to frame third sector actors are expected to be roles of advocacy and roles of service provision.* Based on the data collected this claim was modified including hybrid-roles of “co-producers” and “self-actualizers”. The conclusions were qualified further by analysing the relation between countries and framed roles.

Looking at advocacy, the country of Germany strikes out in comparison to the general trend of analysis: advocacy is pronounced in app. 85% of the German items, while the Netherlands and
the United Kingdom diverge from this to the extremes, depicting third sector as advocates by less than 30% of their items. The most striking countries with regard to service provision are Spain and Italy, as here the aspect is emerging in app. 75% of their items. It is notable that at the same time, France and the United Kingdom have less than 40% items with pronounced service provision. Looking at co-producing, app. 50% of the French, German, and British items pronounce co-producing, while less than 20% of the Spanish and Italian items do so. With respect to self-actualisation, app. 50% of the French items and almost 45% of the Danish items frame third sector as self-actualizers while less than 10% of the Spanish items and less than 25% of the Czech items do so.

Figure 4 Share of field-items from each country with pronounced advocacy, service provision, co-producing, and self-actualisation (n=4187)

In sum, media framing of third sector activities is generally positive or neutral – especially at the local level. It is also clearly demonstrated that in the press coverage collected by systematic key word searches, social innovativeness gets less pronunciation than other civil society values such as civic engagement and voluntarism. There are few cases where social innovation policy is related to the third sector media coverage, and in these instances the reports are strongly loyal to government views. Most of the press coverage orients on consensus and thereby little room is left for frames against the establishment. These trends may indicate that “volunteering” and “civil society” have become political catchwords regarded by governments as well as journalist to be inconspicuous issues with little news worthiness in their own right. Finally, we observed an affinity between the media framing of different third sector roles. Matches are, for example, that advocacy is predominant particularly relating to environmental sustainability and community development with refugees. Service provision in contrast relates more to social services and healthcare.
3.3.3. **Focal points for future research**

Scarcity of existing research in the field of media coverage of third sector activities invites an almost unlimited variety of future challenges. First of all, it may be argued that more empirical research is urgently needed at the comparative, European level. Secondly, we find the framing perspective employed in the ITSSOIN-project particularly promising, drawing upon the growing literatures of agenda-setting and diffusion of innovation.

This being said, some methodological problems hamper this emerging field of scholarship. Differences in the meaning of third sector concepts must be kept in mind and addressed academically across language barriers. Even if operative translations may be accurate in a lexical sense, there is no certainty that a mediated use of key terms such as “civil society” in English has comparable connotations as does the German “Zivilgesellschaft” or the Czech “občanská společnost”. A direct translation of the concept of civil society which would capture a direct connection to third sector organisations is missing in some languages, e.g. in Spanish. Similar problems have been detected with other aspects of the vernacular and political vocabulary related to third sector activities.

With the aim of mitigating such methodological pitfalls of terminology, we have been reflexive in our approach encouraging self-critical evaluations on coding challenges by documenting inter-coder reliability in accordance with international standards from the field of content analysis. Coders kept individual logbooks addressing all doubts and ambiguities, especially those potentially bringing upon biases or misinterpretations. These logs might be of value for further research. It is for this reason that coders were elated to take note of general tendencies and observations, particularly interesting examples related to potential case studies, nationally distinctive features etc. Though coding was carried out digitally, central text elements were printed on paper in order to archive and document observations for further study. The news and views put together thereby added to the mapping of third sector fields which were mandatory for the case study deliverables.

Especially one variable – the distinction between macro-, meso- and micro-level of discourse – turned out to be difficult to handle in a comprehensive and comparative fashion. We have compensated this challenge by using local and national media coverage as proxy for micro- and macro points of view. But it leaves us with the meso-level somewhat under-represented in the sampling. This is not only a methodological weakness, but also a substantial one, because this is the very level on which third sector organisations operate on a day to day basis. The media, however, rarely relate these activities as “third sector innovation”, but rather as charitable performances. The only way in which this media coverage can be documented at this level is by sampling all major third sector organisations, e.g. The Red Cross, Greenpeace, and Caritas-chapters in every country compared – and this task has proved to go far beyond the resources allocated for the purpose at hand.

Accordingly, our sample may undervalue the third sector meso-activities offering gradual and path dependant innovation rather than disruptive change. Journalists – especially at local and regional newspapers – cover such activities not as third sector activities, but as a public service for the readership. On the other hand we may also miss more spectacular media coverage at the national level framing charities and voluntary organisations in the role of villains abusing the money and trust invested by the authorities and the general public. To a certain extent the two omissions may balance each other out. But more research is needed in order to solidify this conclusion.
In other words, the ITSSOIN media framing analysis is explorative rather than explanatory in scope and scale. Caution should be taken in drawing general conclusion from the limited amount of data available. We call for more empirical and comparative research involving a broader variety of media platforms that both include electronic- and social media. The emergence of so-called social media of the types of Facebook, YouTube and Twitter over the last decade increasingly influenced processes of mediated framing. The unedited gossip of informal grapevine communication might be bridged with authoritative and vetted media content by online framers of current affairs, which might change the premises of considering the relevance and legitimacy of news and views. However, as it is hard to document these virtual channels of communication, a challenge is to get valid and comparative data for systematic research.

None the less, we call for more empirical research relating social media to third sector activities. To a large extent, interactive channels have been innovated and developed by third sector actors, but increasingly been overtaken by market players and public service providers. On this backdrop, a proactive lesson to be learned from the media framing analysis is that co-created and user generated media content frequently fail to manage the policy agenda unless the third sector actors involved command professional means of media expertise. In order to make an impact, non-profit and non-government providers of information must command the uses and gratifications of social media, membership media, crowd sourcing, and in the final resort: the news media. How online media content frame and influence perceptions of third sector activities would be a very relevant and interesting subject for future research – especially at a comparative level involving a variety of European media systems.
3.4. Citizen perceptions of the Third Sector

3.4.1. Starting point and guiding questions

Citizen perceptions of third sector organisations and activities are important for social innovation for two reasons. First, they codetermine the level of engagement in third sector activities, and hence the scope of volunteering as a source of social innovation. Second, citizen perceptions of third sector organisations may reveal to what extent third sector activities contribute to social innovation.

Thus, we examined in WP 2.3 how positive citizen perceptions of third sector organisations are and whether they suggest that citizens think that third sector activities contribute to social innovation. Also we examined whether engagement in volunteering is related to citizen perceptions of third sector organisations and the benefits of volunteering.

We sought to test hypotheses on three levels of analysis: the micro-level of individual citizens, the meso-level of third sector organisations, and the macro-level of societies. Micro-level characteristics of citizens that are likely to be correlated with perceptions of third sector organisations include socio-economic position, personality, prosocial values, generalised trust, participation in third sector organisations and activities. Meso-level characteristics that are likely to be correlated with perceptions of third sector organisations include the age and size of organisations and membership of accreditation programs and accountability clubs. Macro-level characteristics that are likely to be correlated with perceptions of third sector organisations include legal requirements for third sector organisations, self-regulation efforts, government control, corruption, GDP, and the wealth of nations.

A major problem that we encountered in this effort is the lack of data on citizen perceptions of third sector organisations that cover relevant dimensions at all three levels of analysis. The data we have used in our analyses cover three areas: 1 – Trust in third sector organisations; 2 – The perceived impact of volunteering; 3 – The relation between volunteering and perceptions of third sector organisations.

We used data from various surveys: Eurobarometer surveys commissioned by the European Commission, the World Values Survey commissioned by the World Values Association, and the Giving in the Netherlands Panel Survey conducted by VU University Amsterdam. The three surveys cover different countries and different aspects of third sector.

We used the Eurobarometer surveys for a descriptive and a comparative analysis of citizen perceptions of third sector organisations and third sector activities. The advantage of the EB is that it covers Europe completely. A disadvantage of the EB, however, is that it does not include many characteristics of respondents that are correlated with perceptions of third sector organisations. The World Values Survey does not include many European countries, but it allows for a comparison of citizen perceptions in this selection of European countries with citizen perceptions in non-European countries. The EB62.0 covers 30 countries in Europe: the 25 countries that were included in the EU at the time, four candidate countries (Bulgaria, Romania, Croatia and Turkey), and the Northern part of Cyprus. In each country, at least 500 respondents were interviewed. In total, 29,334 persons participated in the survey. The fieldwork was conducted between October and November 2004. The data were weighted to be representative for the 25 countries that were EU members at the time of the survey.
The Eurobarometer and the World Values Survey include several questions that are very similar. They are both cross-sectional surveys, taken at specific moments in time. This is an advantage when we seek to establish trends. A comparison of the responses to these questions in two surveys conducted at different moments in time tells us how perceptions of third sector organisations have changed over time. However, the cross-sectional design of the EB and WVS data is also a disadvantage. Both surveys tell us how citizen perceptions are distributed over the population, but they do not enable an analysis of how these perceptions developed. It is not possible to see changes in citizen perceptions among the same respondents over time because all respondents in cross-sectional surveys were interviewed only once. Therefore we also analyse data from the Giving in the Netherlands Panel Survey (GINPS), which has tracked the same respondents over time. Another disadvantage of the EB and WVS data that the GINPS can repair is that it includes several questions on the effectiveness of third sector organisations in advancing social change. The comparative EU surveys do not include such questions.

### 3.4.2. Outcomes

**About two thirds of the population of Europe trust third sector organisations**

We know this from an analysis of the Eurobarometer 62.0, in which respondents were asked: “I would like to ask you a question about how much trust you have in certain institutions. For each of the following institutions, please tell me if you tend to trust it or tend not to trust it?” One last institution included in the list was ‘charitable or voluntary organisations’. The respondents could choose between three response categories “tend to trust”, “tend not to trust”, and “do not know”. Almost two thirds of the population in Europe (66.4%) responded that they tend to trust third sector organisations. About a quarter (25.3%) responded that they tend not to trust third sector organisations. The remaining 8% respond they do not know.

**Trust in third sector organisations is high compared to trust in other institutions**

The level of trust in third sector organisations is relatively high. We can see this from a comparison of the level of trust in third sector organisations with the level of trust in other institutions and authorities. Comparing the level of trust in third sector organisations to the level of trust in 14 other institutions and authorities, we see that citizens in Europe tend to have more trust in third sector organisations than in other institutions. Third sector organisations are the second in rank: only the level of trust in the army is higher. Trust in third sector organisations is substantially higher than trust in the national government (34%) or in big companies (51%).

**Trust in third sector organisations is widespread in most countries of Europe**

In almost all countries of Europe a majority of the population tends to trust third sector organisations. Trust in third sector organisations is highest in Malta (83%). Also citizens of Great Britain, Belgium and France have a high level of trust in third sector organisations: about three quarters of the population say they tend to trust charitable or voluntary organisations. In Cyprus, the Netherlands, Spain, Germany, Greece, Ireland, Austria, Estonia, more than two thirds of the population trusts third sector organisations. In Poland and Luxembourg it is close to two thirds of the population. We see somewhat lower levels of trust in third sector organisations in Scandinavian countries, in Italy and Portugal, and in most eastern European
countries. However, even in the country in which the lowest proportion of the population tends to trust third sector organisations the Czech Republic, it is still about half of the population.

Europeans do not have much more trust in third sector organisations than citizens from other parts of the world. We have tested this difference using data from the most recent (sixth) edition of the world Values Survey (WVS). The WVS contains data from 12,414 respondents in Europe.

In the past decade, trust in third sector organisations has probably not changed much. We can tell this from a comparison of the data from the Eurobarometer 62 with data from the World Values Survey (WVS). For a selection of countries in Europe we can see the development of trust in third sector organisations since 2004 by comparing the results with results from the most recent wave of the World Values Survey, collected between 2012 and 2014.

In D3.1, we found that the third sector is generally perceived as a positive and useful part of society, more trusted than the government and important in social service delivery that would not have been done by the state or the market. How people perceive third sector organisations is strongly related to the services they deliver. Problems with the image of the third sector occur when volunteers are perceived as people who mainly pursue their own careers or as people who substitute paid jobs. On the organisational level, controversies around poor management can affect confidence.

Trust in third sector organisations varies between social and demographic groups of citizens. We obtained this result from an analysis of the responses to the question about trust in third sector organisations in a large number of groups of citizens in Europe, again using the Eurobarometer 62 survey data. The results included information on the proportion of citizens who expressed trust in third sector organisations in the survey as well as information on differences among various groups of citizens. Such an analysis is important to rule out the possibility that differences between certain groups are caused by coincidental differences between other groups. The analysis shows that citizens of Eastern European countries have more trust in third sector organisations than citizens living in Scandinavian countries (i.e., Denmark, Sweden and Finland), but less trust than citizens of Western European countries. While the differences are not large, they persist when we take the differences in the composition of the population of countries into account.

When we look at social and demographic categories of citizens, we see that trust in third sector organisations is widespread. Even among very different social groups the level of trust in third sector organisations is fairly similar. The largest differences we see between age groups (5 percentage points), groups of citizens with different occupations (5 percentage points) and between citizens with different levels of education (8 percentage points). It turns out that younger citizens in Europe have more trust in third sector organisations than older citizens. We also see that more highly educated citizens have more trust than lower educated citizens.

The strongest predictor of trust in third sector organisations is satisfaction with life. Citizens who are not at all satisfied with life have a considerably lower level of trust in third sector organisations than citizens who are very satisfied. Trust in third sector organisations among citizens in the dissatisfied category is 26 percentage points lower than among citizens in the very satisfied category, of whom 70% trust third sector organisations.
Smaller differences we see between males and females, the employed and the non-employed, and between rural and urban residents. Females, the employed and urban residents have slightly more trust in third sector organisations than males, the unemployed and rural residents.

**Citizens perceive benefits of volunteering, but not so much related to social innovation**

Citizens of Europe recognise the societal impact of volunteering in many areas. Responding to the question in which fields volunteering plays an important role, respondents in the EB were most likely to identify humanitarian aid (39%) as an area in which volunteering matters, followed by health care (32%), the environment (23%), human rights protection (22%), social inclusion (22%), sport (16%), active aging (16%), and employment (15%).

We see a higher societal impact of volunteering in the Scandinavian countries, and in Austria, and the Netherlands. Based on the analysis carried out here, a lower societal impact of volunteering is perceived by respondents in the UK, Poland, Portugal and Spain, the Baltic member states, Romania, and Italy; although partly other statistics imply different estimations.

Unfortunately, responses to the questions about the areas in which volunteering matters do not give us much specific information about the role of social innovation. In each of these areas, social innovation by third sector organisations can contribute to a higher quality of life. We can assume that mentioning an area represents a general supportive attitude of volunteering and third sector organisations. We can get a little closer to the perceived impact of volunteering by looking at the responses to the question: “Which of the following do you think are the two main benefits from volunteering in the EU?” Respondents could give a maximum of 2 answers.

The benefits perceived by Europeans include a mix of societal and individual benefits. About a third of the respondents agreed that volunteering allows maintaining and reinforcing social cohesion (33%) and a little more than a quarter agreed that volunteering contributes to the self-fulfilment and to the personal development of volunteer workers (27%). A quarter agreed that volunteering strengthens fundamental values of solidarity of the EU (25%). Other responses included “It gives Europeans the opportunity to develop their civic participation” (22%), “It facilitates acquisition of knowledge and competencies which allow a good professional integration” (21%), “It plays an important role in the sustainable development and in the protection of the environment” (19%). Least popular was the option “It plays an important role in the economy of the EU” (13%).

Citizens in the Scandinavian countries mention more benefits, as well as citizens in Austria, Belgium, the Netherlands, and Greece. Fewer benefits are mentioned in Poland, the Baltic States, the UK, Spain and Portugal, and Hungary.

**Trusting populations do not necessarily volunteer more**

One of the striking findings in our analyses was that countries in which a larger proportion of the population volunteers do not have more trust in third sector organisations. There is simply no correlation between the two variables. A comparison of four countries provides a striking illustration. In Malta, 84% has trust in third sector organisations but only 16% volunteers, while in the Czech Republic, only 49% has trust in third sector organisations but 23% volunteers. At the same time, we see that 70% has trust in third sector organisations in the
Netherlands and 57% reports voluntary activity; while in Spain 69% has trust in third sector organisations but only 14% reports voluntary activity.

Clearly, our hypothesis H4.1 that higher levels of volunteering will transform to higher levels of positive attitudes towards third sector organisations receives no support in a comparison of countries.

However, the number of areas in which respondents recognise a societal impact of volunteering is positively related to the proportion of the population that reports volunteer work. We find this in an analysis of the relation between the proportion of the population reporting voluntary activities and the number of areas mentioned in which volunteering matters for society. The correlation is .49, which is relatively strong. We also see a clearly positive relationship between the number of benefits mentioned and the proportion volunteering. The correlation is .50.

3.4.3. **Focal points for future research**

A hindrance for the analyses of citizen perceptions of third sector organisations was that no data were available on social innovation aspects of volunteering. As a result, we were unable to determine to what extent volunteering actually contribute to social innovation by volunteering. We reverted to an analysis of what citizens believe to be contributions of volunteering to society. A complicating factor in this analysis was that we could only conduct it at the macro-level of nations. Future research could be improved greatly by asking questions on social innovation as motivations and benefits of volunteering in surveys that also include questions on volunteering activities.
3.5. Functions and scope of volunteering

Europeans engage in the activities of third sector organisations in various roles. They support the existence of organisations by paying membership dues. Sometimes they are engaged as charitable donors, by contributing money in the form of gifts, in excess of membership fees. In addition, sometimes citizens contribute time to third sector activities by engagement in informal grass-roots initiatives and in formal volunteering. In work package 3 we focus on formal volunteering, i.e., engagement in voluntary work for a third sector organisation. Volunteering is an intensive form of participation that constitutes an important part of the societal impact of the third sector.

3.5.1. Starting point and guiding questions

The starting point for the work on volunteering in the ITSSOIN project is the recognition that volunteers are an important source of labour for third sector organisations. Volunteers are a source of social innovation through their engagement in third sector activities, also before they are formally organised. Volunteers facilitate the emergence of new ideas, tools, technologies, and practices by initiating them, coordinating the efforts of others, advocating them, scaling them up, and by trying to finance them and mobilize support from private donors and the government.

Important questions about the contribution of volunteers to social innovation concern the impact of volunteering. How much do volunteers contribute to social innovation? How can the contributions of volunteers to social innovation be enhanced? These questions have proven to be very difficult to answer, for three reasons.

1. Previous research on volunteering has rarely focused on social innovation.
2. The methods used in almost all of the previous research on volunteering have not been stringent enough to allow for conclusions on the causal impact of volunteering on social outcomes.
3. Currently available data on volunteering do not include measures of social innovation.

We came to these conclusions in the first three work packages.

In D3.1, we provide an overview of previous research on volunteering. We conclude that social innovation as such has not been conceptualised as a main factor in volunteering. The desire to improve the lives of others – usually called altruism – and the belief that volunteering actually changes something and to have an impact on society – called efficacy – are mechanisms that in theory affect volunteering, but are not often studied. Most of the research on volunteering does not capture these motivations, let alone in conjunction. It is not clear why previous research on volunteering has rarely focused on social innovation. Most of the research has analysed differences between social, demographic and economic categories in the extent and type of volunteering, using survey questionnaire data obtained from large population samples. This research provides a detailed picture of who volunteers, but does not give us much insight in the social innovation potential of volunteering.

In D3.2 we provide an overview of the methods from the toolbox of quantitative social research that can be used to estimate the impact of volunteering on social outcomes. We conclude that the methods used in almost all of the previous research on volunteering have not been stringent enough to allow for conclusions on the causal impact of volunteering on social
outcomes. Most of the previous research has not thought through the pitfalls of using cross-sectional survey data to answer questions about causal influence. We discuss methods that improve the research design and their possibilities for drawing causal inferences.

A problem that cannot be solved within the ITSSOIN project is that currently available data on volunteering do not include measures of social innovation. Many social surveys conducted throughout Europe, some spanning more than 30 years of data, include measures of volunteer activity, but not measures of social innovation. With the data at hand it is virtually impossible to determine to what extent volunteering contributes to social innovation. Therefore the case studies in Work Packages 4, 5, 6 and 7 collected new data. They provide evidence that indeed volunteers can have important roles in various stages of social innovation, but do not allow for strong conclusions on the causal impact of volunteering.

The data that are available on volunteering, however, do provide us with excellent possibilities to estimate the potentially beneficial effects of participating in third sector activities for the volunteer. As the literature on volunteering clearly shows that volunteers have a higher level of well-being than non-volunteers, the exciting possibility emerges that volunteering may promote the well-being of participants. In this case, volunteering is not only good for society as a whole, but also for the individual who spends time doing good works. In D3.3, we conducted extensive quantitative analyses, to examine to what extent voluntary participation improves participants’ general life satisfaction, health, career outcomes and the scope and quality of their social networks.

If volunteering is crucial to producing welfare and social innovation, it is important to know how third sector organisations recruit, retain, motivate and mobilise volunteers. Therefore D3.4 examined the volunteer management strategies of third sector organisations across Europe. This deliverable reports findings from 26 semi-structured interviews with volunteer managers in six different ITSSOIN-countries.

### 3.5.2. Data and methods

**Review of research on volunteering**

In our review of published research on volunteering, we have relied primarily on reviews of the literature published earlier in a variety of social science disciplines: in sociology, organisational psychology, social psychology, and philanthropic studies. While a systematic review of the literature in economics is not yet available we have also included key studies from this discipline. In addition, we have used reviews commissioned by volunteer policy institutes in the UK and New Zealand. Finally, we have reviewed of the ‘grey’ literature in the national languages from the ITSSOIN countries that is not published in regular academic journals or books, relying on references provided by ITSSOIN country experts.

Using Google Scholar, we searched the academic research literature using a set of fairly narrowly defined terms. A simple search using ‘Effect of volunteering’ yielded 93,400 results. A specific search for “Effect of volunteering” still yielded 452 results. We investigated the 50 publications that were ranked as most relevant for both searches. In the second search, 26 of the top 50 results had also appeared in the first search. Some of these studies were not concerned with outcomes for individual participants and were disregarded. We analysed only those studies in which a measure of volunteering activity (yes / no or the number of hours
volunteered) as the independent variable and some benefit to the volunteer was measured as the dependent variable. The resulting list consisted of 33 studies. We consider these studies as the key academic publications on the effects of volunteering on volunteers. First, we classified the results of our search by identifying the nature of the outcome analysed. Next, we classified the quality of the evidence, according to the methods used in the research.

**Quantitative data on individual volunteering**

In our analyses we used six large scale quantitative surveys measuring current opinions and social participation in the past year. In total, we analysed 845,733 survey responses from 154,970 different respondents covering fifteen countries in Europe. The surveys include the German Socio-Economic Panel (GSOEP), the British Household Panel Survey (BHPS) and Understanding Society (US), the Swiss Household Panel (SHP), the Giving in the Netherlands Panel Survey (GINPS), the Survey of Health, Ageing and Retirement in Europe (SHARE) and the Longitudinal Ageing Study Amsterdam (LASA).

From these datasets we adopt dichotomous measures of volunteering. Four dependent variables were used. Subjective well-being is measured as life satisfaction or the CES-D depression scale, which was used as a reversed measure of emotional well-being. Subjective health measures are included in all surveys, typically with response categories on 5 points Likert scales. For the career measures, we used the items indicating whether respondents had a paid job and whether they were retired when taking the survey. Measures of social relations include the number social contacts or one’s satisfaction with social relations.

The data were analysed in three ways. First, we showed cross-sectional comparisons of mean scores on the dependent variables between groups of volunteers and non-volunteers. Such comparisons show the difference between people within and without voluntary engagement, but do not tell anything about causal relationships, because differences could very well be due to selection effects. Second, we graphically show how the mean scores on the outcome variables change over the years for four groups: (1) people who always volunteered in the period under investigation, (2) people who quit voluntary work somewhere in these years, (3) people who joined volunteering somewhere in these years, and (4) people who never volunteered during this time span. The time trends give us a better picture of the extent to which health, well-being, career status and social relations change over time as well as the extent to which this change differs for these four groups. Third, the relationship between volunteering and the dependent variables were formally tested using OLS regression models, adding fixed effects for respondents to rule out between-person effects.

**Qualitative data on organisations**

We conducted 26 semi-structured interviews with 5 volunteers, 1 former volunteer, 17 volunteer managers and 6 professionals with another kind of job in six different countries. For each ITSSOIN-country we interviewed one organisation representative from a large service provision organisation in the field of social services, either the Red Cross or the Salvation Army, and one volunteer manager in the field of environmental sustainability. The environment organisations (either Greenpeace, a branch of Friends of the Earth or a large foundation in the case of Spain) are all organisations that do mainly advocacy activities, promoting nature conservation and the protection of the environment. Additionally, we carried out an in-depth analysis of a large sports association in Sweden and a number of refugee organisations in the
Netherlands in order to get a full overview of the role of volunteering in different aspects of third sector organisations.

The semi-structured interviews took about an hour and were conducted either face-to-face or by telephone. All interviews were guided by a topic list.

### 3.5.3. Outcomes

**Social innovation rarely studied in research on volunteering**

Research on participation in third sector organisations and on volunteering in particular has a long tradition in the social sciences. How participation relates to characteristics of volunteers themselves and of the organisations in which they participate continues to be an important research question in a variety of disciplines, including sociology, political science, organisational sciences, (behavioural) economics and psychology.

**Who volunteers and why**

The extensive literature on volunteering provides a large number of insights on the barriers and facilitators of volunteering activity. Following a scheme developed to explain choices in philanthropy, we distinguish eight mechanisms that influence volunteer choices: 1 – Awareness of need; 2 – Solicitation; 3 – Costs and benefits; 4 – Altruism; 5 – Reputation; 6 – Psychological benefits; 7 – Values; 8 – Efficacy. We explained the nature of these mechanisms and how they affect volunteering. The eight mechanisms can be helpful for volunteer managers in designing interventions that change the conditions for volunteers in such a way that attraction, retention and motivation are enhanced.

Generally speaking, volunteering tends to be more common among individuals who are native citizens, who are older, who are married, have children, who have a higher level of education, who have paid employment (especially part-time), own their homes, who are more religious, who are children of volunteers and are in better health. As most of the research on volunteering does not take a longitudinal approach, it is difficult to say whether differences between volunteers and non-volunteers result from entry or exit, i.e. selection into or out of volunteering. Thus the differences between individuals can be understood as the outcome of a series of decisions about volunteering in situations where the eight mechanisms make entry into volunteering more likely and exit out of volunteering less likely.

**Quality of previous research can be improved**

In D3.2, we found that the field of research on impact of participation on participants is dominated by cross-sectional and quasi-experimental studies. Randomised control trials, which provide the best possibilities for causal inference, were seldom used. Most of the studies were focused on health outcomes and subjective well-being. Studies of social support, social networks, and occupational outcomes such as achievement in education, social status and income were rare.

**Weak but positive impact of volunteering on volunteers**
Volunteers generally show higher subjective well-being than non-volunteers. On average, volunteers rate their well-being to be 3.8% higher than non-volunteers. This difference is largely due to selection effects. If we introduce fixed effects in the regression models, changes in volunteering are only weakly related to changes in well-being. On average, volunteering contributes to a 0.7% increase well-being.

Consistent with the published literature on volunteering, the data we have analysed show that volunteers rate themselves to be in better health than non-volunteers. On average, volunteers rate their health to be about 8% higher. The regression models show evidence for the health hypothesis that volunteering improves health among volunteers. However, the magnitude of this improvement is small. Changes in volunteering are associated with a 2% change in subjective health at best.

Regarding differences in career status between volunteers and non-volunteers, the pattern is somewhat mixed. In most countries the employment rate is higher among volunteers, but in other countries it is higher among non-volunteers and in some countries there is no difference. On average, volunteers have a 3.7% higher likelihood to have paid work than non-volunteers. Results from the regression models are mixed, too. Findings from the BHPS, the GINPS and the SHARE point to a substitution effect between volunteering and paid work, while in the Swiss Household Panel (SHP) people who start volunteering are more likely to find a job.

Volunteers have a larger, more diverse and higher-quality network than non-volunteers. People who start volunteering increase the scope and quality of their network more strongly than those who remain uninvolved. The results confirm our theoretical predictions but the coefficients are quite small. There is no strong empirical basis to say that voluntary engagement has a huge impact on the social networks of participants.

Organisations ‘just do their work’

While many large third sector organisations have a written or unwritten volunteer policy, some organisations do not have a central policy because (1) they do not have the time to write policy documents, (2) they do not aim to work with many volunteers, or (3) they deliberately choose to leave autonomy to regional or local groups.

Besides well-known ways of recruiting and motivating, like personal requests, collaborating with other organisations and providing material and non-material rewards, an important strategy is to do relevant work with activities that suit (potential) volunteers. When the work is interesting enough, organisations attract volunteers. “If the task is designed in the right way it is motivating in itself”, a Red Cross officer said.

Some organisations indicated that they recruit and motivate volunteers just by doing their work. Appealing campaigns of Greenpeace and Friends of the Earth are examples of activities that attract volunteers without this being a primary goal. Different Greenpeace representatives stated that “we are fortunate to have a really big brand recognition” and that “people who want to participate will probably find their way”.

Providing local groups with much autonomy might help to motivate volunteers. The recruitment and retention strategies of BUND, the German organisation that is under the
umbrella of Friends of the Earth, are highly decentralised: “each local group is different, each subject is different and each place is different”.

**Social innovation often not an explicit goal**

Social innovation is not explicitly part of the routines and terminology in the third sector. Especially service organisations like the Salvation Army or the Red Cross mostly care about delivering stable service provision to their target groups. However, almost all third sector organisations see examples of social innovation in their work.

Innovations are (1) often a reaction on developments in society that induce changes in the social needs organisations are working on, (2) mostly initiated by professionals, and (3) almost always involve volunteers in the execution and implementation of new projects.

Rather than the degree of voluntary engagement and the level of ‘unengaged’ forms of volunteering, the organisational structure seems to be important in fostering social innovations. Decentralised structures where local groups have organisational and financial autonomy report lower barriers for novel ideas to be initiated developed and incorporated in the work of the organisation. A shared sense of ownership of the organisation and its mission stimulates bottom-up innovations.

### 3.5.4. Focal points for future research

The summary of previous research on volunteering that was provided in D3.1 clearly identified a need for a systematic review of the influence of conditions that affect volunteering. Most of the published research asks ‘who volunteers?’ and yields a social profile of volunteers, but it does not tell us much about the policies that can be implemented to affect volunteering and its impact on social innovation. A new initiative, inspired by the ITSSOIN work, seeks to address this need and was recently presented at an international conference for research on non-profit and voluntary action (Bekkers, Van Ingen, De Wit & Broese van Groenou, 2016).

In our review of methods to determine the impact of volunteering (D3.2), Our recommendations for research on the impact of participation on participants are the following: (1) conduct randomised control trials whenever possible; (2) analyse change in prospective longitudinal research designs, disentangling selection and causation; (3) control statistically for confounding factors; (4) identify the conditions that moderate the impact of participation; (5) use multiple measures of impact; (6) construct measures from multiple indicators. These guidelines allow for the best estimates of the impact of participation on participants possible. We followed the guidelines in D3.3.

The limitations we faced in determining the impact of volunteering on social innovation have led to a recommendation for future research. Social surveys that include measures of volunteering should also include measures of social innovation. These measures could focus on the desire to improve society and to meet societal needs as motivations for volunteering, as well as the efficacy of volunteering for social change.

In addition, future research could address the limitations of the quantitative analyses and the qualitative interviews. The quantitative datasets from different countries are collected at different points in time, with different survey modes and different questionnaires. The results
from these surveys are not easy to compare between countries. The development of a standardised methodology to measure volunteering is desirable. The ITSSOIN project has taken us one step closer to this end. In D3.3, we have harmonised the currently available data on volunteering as much as possible. This effort has provided an excellent basis for a mega-analysis of all the data on volunteering, which can demonstrate the effect of survey methodology on estimates of a phenomenon and its effects (Bekkers, 2017).

Also, while we looked at changes over time and thus rule out between-person differences in our dependent variables, the causality in the relation between volunteering and outcome variables runs in both directions. The analyses do not provide definite answers to questions about the causal effects of participation. Only randomised control trials can give definitive answers. Future research should employ such a design.

The qualitative data reveal some interesting strategies of third sector organisations, but cannot provide a comprehensive overview of organisations strategies. The mechanisms might be specific to certain organisations and contexts. The best practices that are defined in D3.4 might work in one context but not in the other and as such, they should not be adopted as one-size-fits-all solutions across the third sector. For example: although decentralised organisational structures seem to encourage volunteer motivations and bottom-up social innovations, there might be other (organisational) conditions that are necessary for a decentralised organisation to work in a fruitful way.

Further research should combine the best of both worlds. Large scale (survey) research among third sector organisations is required to identify effective volunteer management strategies. It is likely that the effects of participation for participants are dependent on personal characteristics and/or the type of voluntary work. Older volunteers seem to benefit more from social participation than younger volunteers. Also, social activities in service provision evoke more benefits because they are more likely to connect people. Further analyses should be more fine-grained to test such ideas.
4. Social Innovation Streams in Fields: Insights from case studies

4.1. Field Theory and Case study design

As we outlined in the preceding chapters, various steps within the ITSSOIN project served to determine conditions on the macro level that would render social innovation likely or improbable in different contexts. Theoretically informed country classifications as well as the circumstances pictured by means of the policy analysis and the insights into media and citizen perceptions and of the role of volunteering in the third sector informed the identification of conditioning factors for social innovation capacity. Beyond this however, part of the preceding review of literature on innovation showed that territories on the national as well as the regional level have an influence on social innovation, shifting focus to the meso and micro level of innovation developments. Furthermore, preceding innovation research implies that organisational settings and specific actors are highly influential on social innovativeness (Anheier, Krlev, Preuss, Mildenberger et al., 2014b).

Summarising these insights, tentative hypotheses on the social innovation potential based on organisational characteristics were formulated. According to these, social innovation would increase with a higher number of contacts to multiple and diverse stakeholders. Such contacts might include links of the third sector to different spheres such as to commerce and to the public as well as interconnections with the sphere of civic engagement. Furthermore it was suggested that the diversity of resources available to the actor would increase its social innovation potential. By resources we refer to financial sources as well as human capital such as access to voluntary work, expertise, and knowledge. Finally, a high importance of value sets to social innovation capacity was suggested. Through them, it was assumed, actors would increase their potential of connecting to others with the aim of social mobilisation and the dissemination of the social innovation. Consequently, literature on social innovation capacity regarding the meso and micro level implies an involvement of multiple stakeholders and the inclusion of diverse social spheres to be supportive for the development of social innovations.

As ITSSOIN is particularly interested in assessing the influence of such organisational aspects on the development of social innovations, a methodological transition from macro to the meso and micro level of analysis had to be performed. Field theory (Fligstein & McAdam, 2012) was identified as a methodological approach capable of integrating all three levels. The methodology takes a deductive approach and thereby allows for the conceptual connection of the macro, meso and micro level of analysis. Furthermore, a high number and diversity of research objects can be included within the approach, which enabled the study to maintain a high degree of empirical openness. The research object ‘social innovation’ served as the basis for field construction.

Field theory makes several assumptions on environmental influences on fields as well as the structure and dynamics within them. Its main idea is that actors such as third sector organisations, social entrepreneurs, social movements, policy makers, or firms each focus on their objects of interest and accordingly shape a field to exert influence. Thereby, actors avail themselves of resources such as intrapreneurship and management or mobilise new capabilities, e.g. through entrepreneurship. During this process, interests among actors may rival or contradict with field structures. For example, a social innovation might stand in conflict with welfare or economic structures. At the same time new approaches might come up and result in innovative approaches. By empirically describing such processes and constellations
field theory enabled us to address the micro level of relations amongst actors as well as to draw a conceptual picture of the institutional settings and power relations that shape the field.

Following the concept of field theory, cases were designed in such a way that they allowed answering key questions, such as: Who are the relevant actors for the social innovation in question? What are the interests these actors have with regard to the social innovation? What actions do the field members undertake to meet these interests and which resources do they dedicate to these tasks? We proceeded in the following way.

First, those innovation streams (recognised, cross-national phenomena that have gained ‘some tradition’, that is existed for some time) most dominant in each of the ITSSOIN fields of activity were identified by means of expert consultations and snowball sampling. The tracing of social innovation processes, across a sub-sample of countries for each field, was carried out following methods of process tracing originally used for analysis of policies or legislation in political science (Ford, Schmitt, Schechtman, Hults, & Doherty, 1989; Tansey, 2007). This served to add a dynamic perspective to the analysis, since temporal shifts in conditional factors that had spurred or impeded social innovation in a field were able to be detected. Analysing these innovation streams in more detail we then turned towards an evaluation of the relevance of characteristics of the structure and organisations involved with the development of these innovations. We studied a multitude of actors, looking at actors’ motivation, their images of innovation, and their expectations regarding the innovations impact. More detail on the theoretical considerations of field theory that led to these foci is discussed in Deliverable D2.1.

In combination with the insights from the policy analysis which led to the formation of a ‘field of politics’, results from the media analysis which led to a ‘field of public perception’ surrounding social innovation, and the analysis of the role of volunteering which shaped out ‘fields of engagement’ in which organisations or other actors might be active, the case studies within ‘strategic action fields’ provided substantial insights on how the factors identified to be influential on social innovation play out. Fields of activity (general settings in which more particular strategic action fields form) studied in ITSSOIN research were: culture and arts, social services, health care, environmental sustainability, consumer protection, work integration, and community development with refugees.

4.2. The processes of country selection and country-field attribution

As our pre-work with regard to differences in welfare regimes or national economies suggested we expected social innovation to vary significantly across fields. Therefore, in selecting countries and fields for the case studies much attention was given to conditional factors that shape innovation contexts. For comparability during the allocation process, short country vignettes of the meso characteristics of each of the above named fields were compiled and summarised into field descriptions. Knowledge from previous steps of research such as information on specific interests of policies revealed by the policy analysis, or of the public perception of the respective fields indicated by the media analysis, added to the country vignettes and the general field description.

Based on these overviews, empirical criteria for country selection were formulated and in turn reflected by work package leaders with regard to country selection. These considerations were discussed among all consortium members who then took a common decision on country selection. In addition the country vignettes, we also took into account macro perspectives derived from the theoretical concepts described in the preceding chapters in order to guarantee
good coverage of the diversity in terms of welfare concepts and capitalist variety across the European countries involved. Furthermore, this theoretical background informed the methodology guiding the design of the field vignettes for each country.

The so generated insights served for identifying the most informative field-country combinations, following the rationale of heterogeneity sampling (Patton, 2002). Beyond these considerations we explicitly included counterfactual cases, i.e. contexts where certain conditions might pose server hindrances to social innovation. Table 1 illustrates the final allocation of fields and countries in which the ITSSOIN case studies were carried out.

Table 1 Overview country selection for empirical case studies in accordance with country vignettes

<table>
<thead>
<tr>
<th>Field</th>
<th>WP4</th>
<th>WP5</th>
<th>WP6</th>
<th>WP7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts and Culture</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Social Serv.</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Health Care</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Environ. Sustain.</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Cons. Protect.</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Work int.</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Comm. Dev.</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Sum</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
</tbody>
</table>

Since to ITSSOIN the analysis of successful social innovations is particularly worthwhile, much attention was given to those countries where innovations were expected to be strong. Country allocation in the field of Environmental Sustainability illustrates this well, as here the theoretical framework suggests a high innovative capacity for almost all countries selected. Thus, the case studies in this field allowed for a comparison of relatively similar contexts when it comes to innovative capacity. At the same time, empirical settings across the countries allocated to the field strongly differ, allowing for the interpretation of the relevance of certain actor characteristics in fostering innovation in the field. Similarly, the fields of ‘arts & culture’ and ‘consumer protection in finance’ were analysed in countries with a high or moderate likelihood of social innovation, while context conditions within these countries in the respective fields vary.

Through allocations of this kind we hoped for insights on the interplay between country and field level, as these combinations allowed for looking at the effects of organisational characteristics within varying framework conditions. Counterfactual cases were included among cases in the fields of social services, health care, work integration, and community development with refugees as some countries selected here we expected to be weaker as regards innovation.
It is to be noted that the country-field allocation was not carried out without limitations at this phase of the project. As described earlier, it was carried out on the grounds of information from field descriptions as well as the theoretically informed classification of countries. However, while the former drew on qualitative information, the latter was based on country-level structural data. Also, the empirical fields described are not representative of the country in general but represent a subarea of each of them. Therefore we had to respect that country classifications may not conform to the characteristics of the respective empirical fields. To react to this, field vignettes included sections on structural data with regard to field level which would allow for some consideration and comparison. However, comparison of such data was rarely possible, if field level empirical data were available at all. Nonetheless, the selection represented a sensible diversity of empirical settings.

4.3. Results from qualitative fields reports

As a result of Work Packages 4 to 7 of the project, the characteristic structure and dynamic of strategic action fields were described in each of the countries that were allocated to it as a result of country-field combination. Besides this, particularities typical for the respective field from a perspective spanning across countries were analysed. Drawing on these insights, the following paragraphs serve to present highlights from the qualitative field reports and discuss and compare them to each other regarding the relevance of those organisational traits which appear to have been influential on the development of social innovation streams in each of the analysed fields. These come in combination with the results from hypothesis testing by means of a Qualitative Comparative Analysis (deliverable 8.1).

All observations relate to the following social innovation streams, which are each explained and discussed in great detail in deliverables D 5-7 .4 and .5, and D 4.3. The table is reproduced from its use in the QCA testing of D 8.1.

Table 2 Social innovation streams

<table>
<thead>
<tr>
<th>Field</th>
<th>SI stream</th>
<th>Countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts &amp; Culture</td>
<td>Arts for spatial rejuvenation</td>
<td>Italy, France, Spain, The Netherlands</td>
</tr>
<tr>
<td>Social Services</td>
<td>New governance arrangements for serving the most vulnerable</td>
<td>Italy, Spain, Sweden, UK</td>
</tr>
<tr>
<td>Health</td>
<td>The recovery approach to mental health</td>
<td>Czech Rep., France, UK, Denmark</td>
</tr>
<tr>
<td>Environmental Sustainability</td>
<td>Promotion of bicycle use in urban contexts</td>
<td>Czech Rep., Denmark, Germany, Italy</td>
</tr>
<tr>
<td>Consumer protection</td>
<td>Online financial education</td>
<td>Czech Rep., Spain, Denmark</td>
</tr>
<tr>
<td>Work integration</td>
<td>Cross-sector partnerships</td>
<td>Czech Rep., Germany, France</td>
</tr>
<tr>
<td>Community develop.</td>
<td>Self-organised integ. of refugees</td>
<td>Czech Rep., Italy, The NL, UK</td>
</tr>
</tbody>
</table>

First the aspect of sector affiliation, i.e. which was the sector that the actors in the field belonged to, shall be considered. Almost across all fields that have been analysed during the case studies, high relevance of the third sector was observed. Especially in the fields of Community Development with refugees and Consumer Protection the third sector plays an
important role. For example, in the field of Community Development with refugees, formal entities often only marginally exert influence on community organisation while the initiatives most active were found to stem from the (informal) third sector. In the field of Consumer Protection the third sector played an important role too: here, even though diverse involvement of actors from other sectors was observed, the magnitude of contribution of third sector organisations to the social innovation was especially high. An exception of this was found in the field of Consumer Protection in the Czech Republic where the market sector prevailed.

Next to these instances of third sector dominance, cross-sector partnerships or, less formalised, cooperative arrangements between actors from different sectors were observed. Again, the field of Community Development with refugees must be mentioned here, as in this field we found examples of the third sector receiving public support to some extent and found itself being invited to cooperate with state actors (i.e. the local government). Similarly the field of Environmental Sustainability displayed such cooperation. Here, both sectors were found to have been equally influential on the SI stream and seemed to be connected through their respective work with it. Some predominance of the state, however, was observed with regard to the creation of context factors, such as traffic planning, that allow innovative efforts to take root. In the field of Social Services, cross-sector partnerships even were of such dominance that the focus of investigation was moved to this field characteristic. These arrangements turned out to be set up in favour of the mobilisation of organisational resources and capabilities in order to provide social services to vulnerable groups in society.

As in all of the fields mentioned so far private commercial organisations do play a lesser role, the field of Arts and Culture stands apart. Although cross-sector cooperation is of relevance here too, we found private organisations in combination with the local public administration to be the most influential actors. Especially in the Netherlands and Italy they play an important role as private grant making organisations and, respectively, in the promotion of cultural entrepreneurship initiatives with social vocation. In Spain and France being the other countries analysed in this field no particular sector or logic (bottom-up or top-down) that would have influenced the development of the SI stream in a stronger way than the others was identified.

The analysis of social needs orientation and pro social value sets as drivers of SI streams in the various fields gives a similar picture to the one drawn in sector affiliation. Strong correlations were found between the importance of value sets to field actors and their affiliation to the third sector. For example, across the fields of Work Integration, Arts and Culture, and Consumer Protection, a strong social needs orientation was observed in all third sector organisations among all countries. However, firms too, especially in the field of Work Integration and Consumer Protection, were found to proclaim such values to some extent. Next to market objectives and the interest of making profit, values such as ‘solidarity’ and ‘care’ were uttered by these actors. Values do however not follow a simple sector dichotomy of being present in one sector and absent in the other and by means of that observation relevant or irrelevant to social innovation. Occurrence and influence of values was more complex.

While for example in the field of Work Integration again for some countries the third sector is ascribed the role of a driving force in establishing the social innovation due to its strong social needs orientation which firms and state started to follow (Germany and Spain), a focus on shared values as such – regardless of sector affiliation of the actors pushing them – was observed in the Czech Republic. Here, pro social values were the grounds on which the
partnership forming the SI stream was initially set up, and social needs orientation continues to be the main reason for cooperation between partners. In France in contrast, social needs orientation seems to have been one motivation amongst others for entering the field of work integration, and the impact of pro-social values on social innovativeness is estimated to be negligible.

The constellation in Environmental Sustainability was similar. Here, actors stated that social needs are in fact an orientation shared by all; however, the corresponding value sets did not appear to be a driving force for the SI. None of the actors, being them public or private, claimed pro-social values to be central to their work, although some differences could be observed regarding the relevance of these values to public institutions and business actors between countries. Besides this, the precise outline of value sets in this field differed a lot especially among third sector organisations. Overall, with regard to the relevance of social values to the development of the SI it became obvious that what is seen as the most important impact is the constitution of a common value system within society in order to reinforce innovativeness in the field.

Contrasting this more controversial link between social needs and pro-social values, a clear and strong influence of social needs orientation and pro-social values on the SI stream was found in the fields of Community Development with refugees, Social Services, and Health. In the latter, for example, all organisations that had implemented the SI shared a strong focus on social values and vulnerable groups. This does include organisations from different spheres as well as highly dedicated individuals who contributed to the organisations involved. However, as for example the field of Consumer Protection in finance might indicate, differentiation of the influence of social value set in relation to the SI stream can sometimes become somewhat blurred due to the overall importance of these motivation sets to the social innovation as such. As a consequence of the selected SI streams in these fields, all of the projects analysed respond to social and economic problems and the focus on ‘vulnerable groups’ might span a wide spectrum of people that cannot be easily categorised. Thus in these fields the exact influence of social values on the SI are difficult to estimate.

Regarding the factor of internal organisational openness, i.e. hierarchies and other aspects of organisational culture, the case studies revealed that the level of such characteristics among those actors most influential on the SI stream strongly varied across countries and fields as well as in relation to the different sectors involved. For example, in the field of Social Services it is mainly third sector organisations in Italy that exhibit an open organisational culture while in Sweden this was a feature especially found in public organisations. Organisations in Spain turned out to be highly decentralised territorially, while the openness concerning hierarchies varied according to the management level involved with different tasks (a feature shared by all countries that have been analysed regarding the field of Social Services). Similarly, the openness of organisations involved with, for example, Consumer Protection and Environmental Sustainability appeared to be varied across cases. Concerning the latter, what can be stated clearly here is that there however seems to be a tendency to extend and uphold openness among all actors involved.

Some contexts rather unmistakably suggest a favourable influence of organisational openness and low institutionalisation for the SI. This is the case for example in the field of Community Development with refugees in the Czech Republic, where many initiatives started as informal groups without much hierarchical structure and went on to achieve some but a limited degree
of formalisation, including formalised positions and roles within the organisation, during processes of application for subsidy or legal status. At least in the field of Community Development with refugees, this process seems to be a pattern rather common for the third sector. However, most explicit statements on the effect of organisational culture on the SI were made with regard to the inhibiting effects of ‘closed’ and static organisational contexts. In the field of Health, for example, organisational cultures of psychiatric institutions was not of any support for the SI in focus and seen as the biggest barrier to the dissemination of the innovation in all of the countries analysed. Similarly, actors from the UK and Spain in the field of Social Services lamented on lacks of participation, information, and training as a consequence of horizontal management structures to slow down processes of innovation.

In contrast to the other fields Work Integration did not suggest any link between internal organisational openness and social innovation at all – although, as mentioned earlier, again a relation between sector affiliation and open internal organisational culture can be assumed with third sector organisations being more strongly marked by it.

Aspects of **external organisational openness** came out as an even stronger driver of SI across the different fields and countries. Concerning Consumer Protection, for example, it was stated that all actors, regardless of their national context, are strongly open to their external environment, disposing of a high number of stakeholders and intense or at least frequent relations with them. Comparable tendencies were found in the field of Social Services, where actors from the public and the market as well as third sector and hybrid organisations turned out to currently focus on extending their relationships with external stakeholders. To somewhat varying extents across countries, external organisational openness in the field seemed to be high mostly regardless of the sector affiliation of the organisation in question.

Pointing in the same direction while contradicting the example of Social Services in the UK, other fields too again displayed some correlation between external openness and sector affiliation. In these cases, a predominance of stakeholder contacts of third sector organisations was identified. This is expressed for example in the field of Health where third sector organisations generally turned out to be more open externally than actors from other sectors. Here, much exchange between different groups was found and boundaries between them seemed to be kept at a minimum. Similarly, third sector actors in the field of Environmental Sustainability were found to be more active in exchange with external stakeholders than those from the public sphere.

However, the influence of external organisational openness on the SI is not entirely homogenous across fields. There is some evidence of irrelevance or for counter-productive effects. In Work Integration for example, relevance of the issue to the organisations’ impact on the SI has been very different. No clear tendency or relation of the factor with social innovativeness across countries could be perceived. Results from the field analysis in Community Development with refugees suggest that dense networks and active participation in stakeholder exchange might even hinder the operational capability of innovative approaches, as weaknesses in cooperation might result in the redirection of people to different services and thus cause inefficiency. Also, especially in the Czech Republic it was stated that external openness might increase competitiveness and the fear of losing funds, lowering social innovation capacity. The clearest statement on the positive effects of external organisational openness on SI is made in the field of Consumer Protection. Here, the trait is a key attribute of
all actors involved and was identified as one of the main factors contributing to the selected innovation activities across all three countries analysed.

Analysing the effects of the social capital available to actors across fields revealed a picture quite similar to the one concerning external organisational openness. Again it is actors from all sectors that make use of their social capital in fostering the SI stream, and again the organisations that were found to be particularly rich in social capital did not only come from the third sector but from the side of the market and the public sector too. Especially often aspects of building broad and heterogeneous networks were mentioned, spanning a range of organisations with various foci and capacities for further relationship building. For example, in the field of Arts and Culture such networks were used to establish links to local residents and to pursue social cohesion. Thus, here the most relevant factor seemed to be the quality of contacts – an aspect which was also found to be of relevance for cooperation in the field of Environmental Sustainability. A high level of trust is characteristic for many of the membership organisations involved. A slightly different situation is observed in the field of Social Services, where across countries the sector affiliation of organisations with high social capital varies. While it is the third sector that exhibits highest embeddedness in the local context and serves as a connection to other actors in Spain, in Italy the highest amount of social capital was stated for business organisations, and the public sector is most embedded in the social and/or local context in the UK. Similarly the field of Consumer Protection showed strong embeddedness of actors into society and local communities regardless of their country and/or sector affiliation.

Variance across fields was indicated in the way that social capital plays out for each of the organisations possessing it in different fields. Some fields call for great importance of the variable of ‘local embeddedness’ just from their number one objective. This is the case for example in Community Development with refugees, where the SI is supposed to establish and strengthen durable relations between refugees and members of the host society. Social capital therefore can be considered not only a prerequisite for the development, but more than that an essential part of the SI. In other fields the relevance of social capital depends on the main objective of each of the organisations analysed. For example, organisations in the field of Health that held strong contacts to local actors were more strongly focused on offering local and direct service related support, while those organisations with emphasis on advocacy or capacity building paid more attention towards the establishment of links with other organisations in the same field regardless of the geographical proximity.

Social capital turned out to be of differing relevance to the SI streams in different fields. In Work Integration, for example, high social capital of some third sector organisations e.g. in Spain and France was one of the aspects leading to the set-up of cross-sector partnerships, i.e. to the formation of the SI in the field. Cooperating partners here became interested in the partnership due to the potential profits of acquiring social legitimacy through the cooperation. In comparison, the field of Community Development with refugees did not reveal high relevance of the trait for setting up the SI, as here organisations usually already were well-established at the local level. Neighbourhood and local contacts were not the prime base of support for the innovative initiatives and projects studied. Rather, what became valuable in this field were networks spanning diverse levels of public administration as well as different groups in society. Summarizing the insights from the cases analysed across fields, the role of collaboration and networks paired with local embeddedness in driving the SI appears to have been strongest in the field of Health.
With regard to **resource diversity** among actors active with the SI across fields and countries, once more some correlation with organisations’ sector affiliation was observable. Concerning financial resources, third sector organisations turned out to draw on the most varied cash inflows, e.g. combining membership fees with public funding and donations, while the public sector displayed rather low resource diversity. This situation can be observed in several fields such as Environmental Sustainability, Work Integration, and to some extent in part of the countries analysed in Social Services. Likewise it is in these fields that the third sector draws on the most varied resources in terms of expertise and human resources. This is most clearly stated in the field of Environmental Sustainability, while with regard to Work Integration for two of the countries (France and Czech Republic) no conclusions about resource diversity could be drawn. As for Social Services, highest diversity in human resources was present in public authorities and in service provides, irrespectively however of them being third sector, business or hybrid organisations.

A severe lack of resource diversity and funding in general was found in the field of Community Development with refugees. Here, although most organisations active with the SI receive some sort of funding, financial security often is a serious issue. As in this field third sector organisations predominate and funding from the national government partly has become diminished, the effective continuity of the SI often is dependent on local or European subsidies, private foundations, or donations. At the same time, these precarious circumstances have an increasing effect on the side of human resources, as organisations and initiatives rely on the work of volunteers who in some cases go far beyond the number of paid staff. Similarly, very low diversity of financial resources characterizes the situation of all major actors in the field of Consumer Protection, while here too noticeable differences were identified between third sector and market organisations concerning human resource variety. Contrasting the field of Community Development with refugees however, third sector organisations active in the field of Consumer Protection in the Czech Republic and in Spain were characterised by less heterogeneity than market actors, especially with regard to professional experience and academic background.

As in all of the fields analysed, across countries and organisations no clear pattern of the overall degree of diversification of the funding structure or the diversity of human resources could be drawn, it is not possible to make a concise statement on the overall relevance of this organisational trait for the streams of social innovation analysed in each of the cases.

Turning to the degree of **volunteering** as an organisational characteristic potentially influencing the development of SI, examples from the fields of Consumer Protection and Social Services are most striking. In both of them voluntary engagement was found, while its relevance to the organisations involved greatly differed in regard to sector affiliation. Not very surprisingly it is third sector organisations that involve the highest amount of volunteering. This said however, marked differences were observable in terms of national contexts. In Consumer Protection, for example, voluntary engagement appeared to be a relevant factor in Spain and Denmark, while in the Czech Republic even third sector organisations mostly do without volunteers. A similar situation was observed in the field of Social Services, where voluntary engagement was found to be high in the Spanish third sector whereas Italian and Swedish organisations only to a minimal extent involve volunteers. In the UK, contexts involving some extent of voluntary engagement mainly were located at the non-profit side, e.g. social and local initiatives. A somewhat different case is positioned by the field of Environmental Sustainability as here differences between sectors and countries were small –
however, only in the sense that the amount of volunteering across the whole field in general was found to be marginal.

In assessing the relevance of voluntary engagement for the SI streams in the various fields two poles are identified. One is constituted by those fields and organisations that involve a high degree of voluntary engagement. Examples of these fields are Health and Community Development with refugees. Regarding the former, the case studies revealed that voluntary engagement, often in form of peer support, was an essential part of the work in all of the third sector organisations. These findings suggest some influence of this organisational characteristic on the development of SI in the field. Concerning the latter field of Community Development with refugees, although the roles of volunteers vary widely, it could generally be concluded from the field reports that they are indispensable to most organisations. As sometimes even members of the target group – refugees – were found among volunteers, this adds up to the impression of 'co-productions' of volunteers and members of the host society, which directly links with the idea and setup of the SI.

On these grounds, the contrasting pole regarding the influence of voluntary engagement is illustrated by those contexts in which voluntary engagement plays no or only a marginal role. An example of such a field is Work Integration. Here, only very few volunteers are engaged or informally active in the cross-sector partnerships, implying that voluntary engagement is not a key factor for social innovation in the field.

The influence of low transaction costs (in detecting societal challenges, acquiring information and resources, or turning ideas into action) on the development of SI in fields was not spelled out clearly in any of the field reports. No clear correlation was detected. Furthermore, for some fields the indicator was not consistently inquired in all countries (this is the case in Community Development with refugees) or no statement was made on the variable's general importance to organisations active in the field (as is the case in Work Integration). Nevertheless some insights informing on the amount of transaction costs faced by the various organisations involved within the different fields can be given.

Again turning to the case of Work Integration, most detailed information here was collected on the variable's effect in the case of Spain, where third sector and public sector actors deal with a medium level of transaction costs. It was further found in this field that private sector actors have higher transaction costs. Similar patterns were observed in the field of Consumer Protection where lower transaction costs in the third sector were identified in comparison to those faced by market actors. Transaction costs for third sector organisations in Environmental Sustainability too were rather low, although here it must be noted that for the public sector they turned out to be especially high. Finally, in Social Services again some country specific peculiarities were found. In Spain it was found that all organisations faced low transaction costs concerning the identification of societal challenges, but had to deal with high cost in complying with funders’ and legal requirements. While the situation in Sweden is comparable with this to some extent, transaction costs in Italy are low too although instruments to reach this, such as regular knowledge exchange with external partners, does not play an important role for the organisations analysed in the field. Although organisations active in Social Services in the UK do make use of such platforms for regular exchange, anyhow transaction costs are significant here in non-financial respects. For example, transaction costs hinder public organisations from easily moving between social and health organisations or pose obstacles to private providers when it comes to entering self-funded markets.
As expected the situation as regards transaction costs mostly mirrors that with regard to resources. However, the insights and applications across fields and countries are more marked and thus more informative, which should not cover the fact that the respective information is partly ambiguous and not uniform, for which reason closer attention would have to be given to the interaction of transaction costs and social innovation in the future.

Looking at the extent to which organisations are able to tie together advocacy and service provision no clear correlation could be identified regarding the development of the SI and this organisational characteristic. Concerning the field of Health for example, third sector organisations appeared to be more likely to successfully tie together the two functions than actors from the public sphere. Thereby strong interconnections and a good use of synergies were found to be typical for these organisations, possibly making it more likely for the SI to take ground. Likewise the field of Environmental Sustainability showed strong linkages between advocacy work and service provision especially of third sector organisations, as did those organisations engaged in Consumer Protection (with exception of the case in the Czech Republic). Here it is the market actors who were mentioned to be least able to link the two activities, focusing on service provision.

In the field of Community Development with refugees we found that organisations, although to some extent being engaged in advocacy, are generally more focused on service delivery. Some organisations stated the two functions to be interlinked, however, it became clear that thereby activities in advocacy and awareness raising mainly were carried out in order to change the conditions for eventual service delivery and to support the identification of needs. The UK with its focus on refugee integration might present a special case here, as the two functions too were found to be interlinked – however, mainly in financial regards. What is interesting here is that receiving funding from the private sector allowed for an intense level of lobbying in the non-profit sector, which would have been impossible if funding had come from the state. In Work Integration and in Social Services, the situation appeared to vary considerably across countries. In Work Integration, Spain and Germany showed almost complete absence of advocacy in all organisations involved, while in France the very function seemed to be considered a strong function of key actors. Differences among the countries analysed in Social Services are similarly spread. In this field, Spanish organisations focus on service delivery but link some advocacy and lobbying activities to them, while Swedish organisations involved mostly focus on advocacy. If at all, here it is only the volunteers at volunteer centres who are somehow able to connect both activities. In the field of Social Services in Italy, advocacy is not a role taken up by organisations at all, whereas in the UK both public and for-profit organisations try to carry out both functions in combination. It has to be noted however that what is referred to as “advocacy” here should not be understood in the ‘traditional’ way, i.e. as lobbying etc. Advocacy in this context rather refers to a supportive, capacity building role.

The extent to which organisations in a field were able to act independently from external pressures turned out to be key to social innovation capacity in the respective context. Looking for example at the field of Environmental Sustainability, gradual changes in public opinion and political will turned out to be crucial for socio-cultural and political developments favouring the SI. Furthermore we observed a general dependency on the state with regard to regulatory contexts in the field, although third sector and business actors experience external pressures of this and other kinds to varying degrees, depending on their type of organisation and main sources of funding. Common among all market actors in the field was a feeling to be exposed to pressures by external competition. The external pressures experienced by actors in the field of
Consumer Protection appeared to be differing regarding the selected country. The highest independence from external pressures was observed in Spain, while in the Czech Republic and in Denmark external pressures were considered as significantly influencing SI activities. High economic, competitive and regulatory pressures were identified to shape the field of Social Services. Organisations active in the field are affected by these influences to quite different extents, with marked out differences amongst countries and sectors.

Dynamics in the field of Work Integration give a good illustration of the way in which constellations of external pressures influenced the development of SI. In this field, exogenous shocks such as the financial crisis were identified to have propelled the public-private partnerships into developing. However, due to the high complexity of the organisations involved in this field, no statement on clear relations can be made. Contrasting those instances where external pressures supported the development of the SI, case studies in some fields also revealed the hindering effect of such dynamics. In Work Integration, there are some counter-effects to the ones just mentioned, such as strong influences in terms of negative public opinion, restraints in funding and competition for market shares or for resources which potentially weaken social innovation capacity. Similarly, although third sector organisations in the field of health appeared to be able to act rather independently of political or media pressures in comparison to public organisations, a major obstacle to SI in the field remained to be financial pressures.

The field of Community Development with refugees here takes an ambiguous role, since the influence of external pressures had effects in both directions: here, the policy context is crucial to understand the emergence of self-organised activities, since the past decade had been characterised by austerity and restrictive policy which had severely hindered innovative approaches. On these grounds, the work of many organisations studied in the field can be seen as a particular reaction to changes in policy framework. Other external pressures can be interpreted as acute triggers to the development of the SI. For example, new arrivals of growing numbers of refugees led to greater pressure on the system of dealing with refugees and at the same time increased public awareness for their situation. Similarly, public opinion in form of criticism in local areas encouraged local governments to develop better services to both refugees and inhabitants of the neighbourhood, preparing the context for the SI to originate.

It is interesting to note that the relevance of independence from external pressure did mostly not result as a relevant factor in our QCA performed in D 8.1, and if so its effects were varied. Thus, in relation to this factor in particular the analysis of dynamics between pressures and innovation need to be put into context and discussed in relation to concrete developments. An unusual factor in this regard is that two of our seven fields at least (community development with refugees and work integration; but also social services in relation to the economic crisis, or environmental sustainability face to international efforts against global warming), have been subject to exogenous shocks pushing issue or freeing resources.

Finally, to sum up the characteristics of organisations that turned out to be particularly driving the SI stream in the different fields, condensed insights from the respective perspectives will be presented.

In Arts and Culture, it is mainly those organisations that are strongly oriented towards social needs which positively influenced the development of SI. Further characterised by high
organisational openness and a focus on local areas they show strong social capital and are actively engaged in cooperation and projects with heterogeneous actors.

In the field of Health, our findings suggest that in all four countries the SI was found to be initiated and driven by pioneer actors on the national level and consequently taken up and implemented by individuals. Here, on the local level, organisations were founded by social entrepreneurs who started leading service-user and political movements to disseminate the SI. A high ability to tie together advocacy and campaigning abilities turned out to be of great advantage during this process.

No such general statement can be made regarding the field of Social Services as here no predominance of one organisational trait over another became obvious regarding the development of SI. Also, we cannot draw conclusions about which socioeconomic sector contributed the most to SI in this field. Evidence however seems to suggest that it might be the roles played by different actors and how they interact in the field rather than their belonging to a certain sector. The only aspect that undoubtedly strongly influenced the establishment of SI seems to be a strong social needs orientation of organisations: actors displaying this feature seemed to be most prone to finding solutions that fit the societal needs and problems typical for the field.

Taking different shapes in diverse national settings, it is also difficult to draw general conclusions on the aspects that led to the development of SI in the field of Consumer Protection. However, a common feature identified for all successful approaches compared has been the partnership principle among different actors.

Regarding the field of Environmental Sustainability, the aspect that turned out to be most influential was not an organisational trait as such but rather the change of mind-sets that raised public awareness and openness towards changing means of transportation in their everyday lives. Furthermore, investment in infrastructure has helped strengthening the SI stream across all countries analysed.

As mentioned earlier regarding external pressures, the factors that seem to have contributed most strongly to the development of SI in the field of Work Integration have been external events driving an emergent innovation.

A similar influence has occurred in community development with refugees. However, its effects depended greatly on pre-existing positive or negative inclinations towards helping refugees. Third sector actors, or rather individual and informal civil society actions were key in shaping the latter, partly against pre-dispositions in government and policy. Interestingly, boundary spanning collaboration and exchange was important for an innovation that is locally bound by definition.

4.3.1. Focal points for future research

Our results have provided the very first insights on broad social innovation trends across a variety of fields and national contexts. The qualitative insights have been largely congruent with the findings of our QCA testing (D 8.1). While the latter was able to abstract from particular details, the synthesising discussion of qualitative insights is useful for understanding
those factors that have come out as varied in their influence, such as transaction costs or independence of pressures.

Our work can of course only serve as a point of departure, but the way it has paved both in terms of generated contents as well as of methods, will likely prove valuable for future research in this area. The latter needs to produce more work in similar settings to confirm or relativise our findings. It can link neatly to the work we performed and enrich it by studying other fields or countries.
5. **Learnings from case work & themes beyond the ITSSOIN research framework**

Inspired by the experience made in the case and field work presented in this report, this chapter sets out to highlight some of the learnings that emerged from the cases out of the lines of guiding hypotheses, the method of process tracing, field theory and other settings. They reach beyond ITSSOIN’s original framework and research and may serve as enrichments for future research and policy making.

5.1. **Generalisation on innovation level rather than on field level**

First of all, throughout the research process we noted, in contrast to initial expectations that a generalisation of results is hardly possible across fields. The fields investigated in the ITSSOIN project are very different in character and the evolution, notions or logics underlying a field have been spotted as relevant factors shaping the studied innovations. Yet, these aspects are hard to capture and difficult to compare, in particular in view of the inchoate state of social innovation research. At present general statements abstracting from the specific SI streams, on fields of activity or across the latter, on the typical processes of social innovation development and capacity are hard to make. Yet, both the methods we applied and the insights we generated have highlighted promising lines of inquiry.

5.2. **Importance of collaboration and (cross-sector) networks**

Despite the previous point, some overall conditions turned out to be characteristic across all cases and fields analysed. One of them, and maybe the most remarkable one, is the importance of heterogeneous networks as a source of innovation. We hardly found any single actors that were involved in the SI stream. Mostly social innovation shaped and carried out by multiple actors at a time, which contribute to it in various ways, based on their individual capabilities.

Furthermore, they identified networks shared certain characteristics, which turned out to be crucial to the viability and spread of an SI stream. For example, actors engaged in those networks often stemmed from different sectors, and sector affiliation was blurred. Cross-sector engagement was a typical trait of collective entrepreneurship, which was not always free of conflicts though. Especially in the collaboration between formal and informal actors, where different logics were at play it wasn't always easy to arrive at a shared understanding of goals and ways to achieve them. However, the commitment to collaboration and an openness of organisations towards external influences often helped to find solutions in the longer term. Although collaboration trespassed sector boundaries, organisations which shared similar values were more likely to work together. Relevant values came in different shapes, ranging from pro-social values in some fields to a shared 'business' mind-set in others, for instance an orientation towards cost effectiveness in meeting social needs within the field of social services.

5.3. **Third sector organisations as ‘hubs’ and ‘brokers’ within networks**

Within the denoted networks, in many cases we could identify one or several organisations that acted as ‘brokers’ and managed to bring together actors from different spheres, both in terms of sector provenience and specific skills or expertise. Due to their traits, third sector organisations seemed to take on this role very readily. Favourable for taking this role were, among others their proximity to target groups, their long or specialised expertise in working with those groups, a sense of devotion to a cause, their trustworthiness, openness and high degree of social capital, in particular embeddedness. Such non-profit ‘hubs’ frequently invited partners...
to contribute and thereby acted as a bridge into a collaborative constellation. The ‘connective’ action of third sector organisations, which often seemed to even go beyond their ability to perform ‘collective’ action, deserves closer attention, in particular as regards their specific function in social innovation processes.

5.4. **The third sector’s strength lies in initiating social innovation**

In addition to their role as brokers and hubs, third sector organisations’ influence was found to be particularly strong in the early phases of the investigated SI streams. Third sector organisations were not only the ones to spot a need for action but also those to take initial actions. However, after this initial phase it often took other actors and their respective competencies to bring in further resources or scale the innovation. External shocks were found to act as triggers to multi-actor engagement, galvanising informal, isolated or loosely coupled initiatives into an alliance. It is to be remarked though that such alliances do not only have positive effects. Third sector organisations for instance often collaborated with governments. This created relations of dependency, letting formerly independent actors become cautious when it came to advocacy or political activism. Such dynamics in alliances, which are often more subtle and fluid than contracted public-private-partnerships, yet with material consequences, need more detailed inspection.

5.5. **Solutions to social problems in times of austerity: Social innovation or substitution?**

Finally, a debate which frequently came up during the ITSSOIN research centred on the impact of austerity measures and the (mis-)interpretation of a substitution of public engagement in the respective field and the taking over of state responsibilities by other actors as social innovation. We indeed often found that third sector organisations’ engagement in a field was driven by the ambition that the government should eventually take over the created activities. While those activities were clearly novel, we sometimes observed a reluctance of third sector actors to label them as ‘innovations,’ since they feared this would provide an argument for keeping them out of the competencies and responsibilities of the state. In some cases, respondents actively stressed that certain activities would be better positioned in the public sector. At the same time financial constraints and thus a lack of public commitment to tackling the social problem in question had important and often restraining effects on the social innovation process.

This underpins the importance of putting more emphasis on finding ‘better solutions’ than on finding solutions that are merely ‘new.’ Activities that had previously been performed by the state and then merely taken over or substituted by others due to cuts in public spending and a forceful termination of the previous activities, clearly wouldn’t satisfy the ‘better’ criterion. This brings us back to our definition of social innovation and social innovativeness, which has laid the ground for our hypothesis-based testing and further development of social innovation throughout ITSSOIN, and which we hope will be fruitfully translated into new and ever more tailored research.
6. References


