

THE SOCIAL DIRECTION OF ENTERPRISES' INNOVATION ACTIVITY

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Abstract. Nowadays the emphasis on the social component in the general mainstream of innovation activity is one of the strongest grounds for the successful functioning and development of enterprises. The aim of this paper is to analyze the theoretical and applied foundations of social innovation activity (SIA) with special attention to the peculiarities of this phenomenon in terms of enterprise activity. The logical order of the paper is divided into two main parts. The first part is theoretical and is based on secondary research methods. It provides general conceptual points of the SIA of enterprises, including its concept, functions and a conceptual model of realization. The second part reflects empirical research, as a result of which the main aims that stimulate enterprises to conduct SIA are determined.

Key words: enterprise; social innovation activity; socially innovative projects; integrated indicators

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Introduction

The term “innovation” is a common word both in the scientific communities and in business. Joseph A. Schumpeter is regarded as the originator of this notion; having claimed in the 1930s that innovation has a much greater impact on economic development than capital, and defined this term as the critical dimension of economic change (Schumpeter, 1934). In economics, innovation is often regarded as a precondition for higher productivity and sustained competitive advantage, as well as a prerequisite for boosting growth, especially during financial crises (Ciani et al., 2016). Though there are a variety of definitions of this concept, it may be understood as an innovative business approach to the choice of objectives, methods and ways to fully utilize and develop the innovative potential of the company. Although it is widely known that innovations are very important, there still exist a number of questions about the best activities for bringing inventions and innovations to business (Varmus and Lendel, 2015). The concept of "innovation" is characterized by evolution, which makes it possible to refer not only to products, companies and services, but also to non-productive aspects. The term "innovative" relates not only to new products, but also to the new application of existing ones,

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and a new way of managing business processes (Hamel, 2009), or organizational innovations (Wolfe, 1994). Moreover, the importance of other types of innovation has also recently been recognized. For example, Rennings (2000) drew attention to eco-innovations, and Foley and Kerr (2012) to ethnic innovation.

Furthermore, since the beginning of the 1990s, social innovations have also attracted the attention of researchers. This was due to the need to seek ways of addressing social problems, such as social inequalities, rising unemployment, the aging society, social exclusion, climate change and increasing environmental pollution. Traditional forms of action are being exhausted or failing. Therefore, this relatively new conceptual category has been inscribed not only in the field of research in recent years, but also in initiatives and programs of the European Union (Wronka-Pośpiech, 2015). Innovation in the social sphere means accomplishing more with less, working together, leveraging resources, sharing data, and creating sustainable models for change. Examples of social innovations may include when a nonprofit barter with a business to trade the excessive donations of goods it receives for alternative goods that are normally used by their clients. Another example may be when several nonprofits consolidate their purchasing for a reduction in the cost of goods through economies of scale (Nandan et al., 2015).

One of the main elements in the general ecosystem of social innovations is an enterprise, as it is a main linkage between the other elements such as government, non-profit organizations and society. The operations of social enterprises are aimed at both making profit and addressing social and (or) environmental issues (Urmanaviciene and Cizikiene, 2017). This increases the importance of the development of social innovation activity on a micro-level that in turn will extend the possibilities of social innovation activity (SIA) activation, increasing the scale of this type of activity in general. Thus, as our research attempts to answer the question of how to increase SIA on a micro-level, we focus on enterprises whose main activity is connected with common business aims, but not with specific social orientation (as with non-profit organizations). Its main purpose is determined by the fact that the majority of enterprises tend towards profit opportunities or business benefits, while the number of narrowly social enterprises that concentrate on social benefits without appreciating financial profit is lower.

Considering the phenomena of social innovations, it is important to underline the principal features that determine the common and different features of social innovations and innovation activity, particularly in terms of enterprise activity. It is well known that the innovation activity of enterprises may concern the sphere of production (new types of goods or services, often with a new quality, new production technology), new marketing strategy, new supply policy, and new means of business and management (Lisetchi and Brancu, 2014). The same refers to SIA. Furthermore, the development of SIA also demands reasonable investment decisions. It may be supposed that such a decision may be derived on the basis of general diagnostics of SIA. Given these facts, the aim of this paper is to analyze the

main theoretical and applied foundations of SIA in entrepreneurial practice and determine the key points of investment support.

Literature Review

Extensive literature concerning innovations has been dominated by economic perspectives and discourse on the relationship between innovation and economic growth. However, innovations (not only social ones) are created for people and by people, and therefore their social determinants should be considered as equally important as (or even more important than) economic ones. These include the community members' ability in terms of social participation, participating in different social networks, or – more broadly – the potential of their social capital (Zajda, 2015). In the existing research, there are plenty of definitions of the concept of social innovations that reveal different features of this phenomenon. According to the main approaches to its definition, the concept of social innovation concerns societal and economical references. Generally, one may state that social innovation is a novel solution to a social problem which is more effective, efficient, and sustainable. Young (2011) is of a similar opinion, defining social innovation as *“a novel mechanism that increases the welfare of the individuals who adopt it compared with the status quo”*. Social innovation incorporates both the generation of ideas and socially sustainable outcomes (Phills et al., 2008). Innovative programs are *“a new or different way to address a societal problem or pursue a charitable mission that is more effective, efficient, sustainable, or just than the prevailing approaches”* (Salamon et al., 2010).

The societal role of social innovation is represented in the TEPSIE approach, according to which *“social innovations are new solutions that simultaneously meet a social need and lead to new or improved capabilities and relationships and better use of assets and resources. In other words, social innovations are good for society and enhance society's capacity to act”* (TEPSIE, 2014). According to this definition, social innovation is correlated with the solution to social problems, bringing together social actors from different backgrounds in order to handle crises or social problems and to tackle the new needs of citizens. Mulgan et al. (2007) consider social innovation to be *“innovative activities and services that are motivated by the goal of meeting a social need and that are predominantly developed and diffused through organizations whose primary purposes are social”*. It is also worth noting that, from the societal approach, social innovations play an important part in improving social relations, defined as new ideas (products, services, and models) that simultaneously meet social needs and create new social relationships or collaborations, enhancing society's capacity to act (BEPA, 2010). The European Commission defines social innovation as: *“the development and implementation of new ideas, i.e. products, services and models, to meet social needs and create new social relationships or collaborations”*. Their goal is to improve the quality of life of individuals and communities. Social innovation includes (Guide to Social Innovation, 2013): social demand innovations which

respond to social demands that are traditionally not addressed by the market or existing institutions and are directed towards vulnerable groups in society. They have developed new approaches to tackling problems affecting youth, migrants, the elderly, the socially marginalized etc.; innovation for society as a whole through the integration of the social, the economic and the environmental; innovation concentrated on organizational changes to relations between institutions and stakeholder groups. Moulaert et al. (2013) define social innovation along with the satisfaction of human needs, changes in social relations at the micro level (between individuals) and the macro level (between classes and social groups). Stanford Social Innovation Review defines social innovation as *“a novel solution to a social problem that is more effective, efficient, sustainable or just than current solutions, and for which the value created accrues primarily to society as a whole rather than private individuals”* (Phills et al., 2008).

The economical role of social innovation is strengthened in the definition of the OECD LEED Forum on Social Innovations, which adopted a relevant working definition: *“Social innovation can concern conceptual, process or product change, organizational change and changes in financing, and can deal with new relationships with stakeholders and territories”* (Baturina and Bežovan, 2015). In certain research, it is underlined that the aim of social innovation highlights the economic sector where it should arise: either the private sector, public sector or a third sector (Social innovation research in the European Union, 2013). In turn, Munsch (2010) claims that a goal of social innovation is to meet social needs while innovation is developed and diffused through organizations, whether new (social entrepreneurship) or existing (social intrapreneurship). The economic role of SIA may be enlightened by the place of enterprise within it. Providing SIA enterprise follows certain social aims; although it is worth noting that, according to the position of several researchers, social enterprise may also have dual aims, including economic and financial benefits, such as the formation of market strategies for accomplishing social or environmental missions or generating profit through focusing on social goals and reinvesting it, fully or partially, into the company (Landabaso and Liesbet, 2013; Volynets, 2015; Gidron, 2014; Harji et al., 2014; Hardi et al., 2013).

The presented definitions of social innovation present the most popular approaches which are observed in the literature. It is obvious that social innovation combines the economic and social impacts, meaning that both should be highlighted in the concept of social innovation.

Methods

The results of the research are divided into two main parts, of which the first concerns the theoretical points of SIA in order to understand it as a phenomenon in terms of the activity of enterprises. The second stage focuses on investment support of SIA, based on the results obtained. In order to provide a theoretical basis for the research process, a literature review – as a method of secondary research – was an

important foundation of this paper. It consisted of a review and analysis of refereed articles and published reports on social innovation activity, its ecosystem and factors that influence it. Using these methods, the definition of SIA of enterprise was proposed, as well as a determination of its features and functions. Furthermore, the level of SIA in 23 countries was analyzed using a desk study approach that allows for the consideration of secondary statistical data. Finally, the conceptual model of SIA enterprise realization was derived.

The empirical stage involved the formation of a framework for expert evaluation of the background to SIA investment. To this end, semi-structured interviews were conducted with the managing directors of 15 Ukrainian enterprises. This semi-structured approach was chosen as appropriate because very little is known about the subject in Ukraine. An interview guide supported the interview process. All questions were open-ended, underlining the paper's explorative character. The interviews were conducted over the telephone.

Results

The main impact of social innovation concerns new answers to social challenges by identifying new services for the improvement of the quality of life for individuals and communities, as well as implementing new labor market integration processes, competencies, jobs and new forms of participation (OECD, 2010). According to the definition of Caulier-Grice et al. (2012), there are five core elements of social innovation: novelty in concept or application – new to certain fields, users, regions, or markets; real implementation – a practically implemented idea; effectiveness – social innovation is more effective than other alternative solutions; meeting of a social need, encouraging society to act – creating new roles, relationships, assets and capabilities, or making better use of assets and resources. A. Noya (2015) determines the following key points of social innovations: individual, collective and institutional creativity; the ability to mobilize different human and financial resources; ability to make a social impact and to change society, providing environment with the adequate incentives, finances, structures and drivers. In general terms, social innovations are characterized by the following criteria: novelty, multiple dimensions of improvement, sector neutrality, and the urgency of social needs, engaging beneficiaries, and the transformation of social relations (Howaldt and Schwarz, 2010; Lindhult, 2008; Krlev et al., 2014).

In general, the main spheres for social innovation are considered to be demography, environmental trends, new community trends, poverty-related trends, trends in health and well-being, and the trend towards ethical goods and services (Landabaso and Letter, 2013). According to Murray et al. (2010), within every innovation, there are no clear boundaries for social innovation as it can take place within the public and private sectors, either for-profit or nonprofit. In addition, Nicholls and Murdock (2011) draw a distinction between social innovation, identifying as either incremental (focus on products and services), institutional (focus on markets), or disruptive (focus on political or social levels).

Thus, in general one may define the following features of social innovation activity: orientation to solution of social problems; impact on economic development; novel and inventive character; determination of new and strengthening of existing linkages between the main groups of society; the possibility of acting in all spheres of enterprise activity: production, technology, management, marketing and so on. As for the form which social innovation takes, in terms of enterprise activity it may be implemented in new services and products; the production process, or technology; rules; practices; markets; organizational forms; business models; a principle; an idea or some combination of them (Baturina and Bežovan, 2015; TEPSIE, 2014; Landabaso and Letter, 2013; Krlev et al., 2014; Dainienė and Dagilienė, 2015; Caulker-Grice et al., 2012). Considering the activity of an enterprise, the main spheres of its SIA will concern environmental trends, ethical responsibility for goods and services and – partly - trends in health and well-being. Other trends may be achieved within the interaction with other participants in the social innovation ecosystem: non-profit organizations, government and so on.

Summarizing the achievements obtained during the research as well as analyzing the literature sources and applied practice of enterprises, we propose the following definition of the term ‘social innovation activity of an enterprise’ as a special component of the innovation activity of an enterprise that is characterized by direction on improvement of social factors for interested groups (consumers, employees etc.) that concern the environmental sphere, ethical responsibility for production and, in part, aspects of health and well-being as well as other spheres through the interaction with other participants in the social innovation ecosystem (non-profit organizations, government etc). In general, the ecosystem of social innovation includes four sectors: private, public, research, and non-profit (The Young Foundation, 2012). After an analysis of relevant literature sources, it may be discerned that one of the instruments which may characterize the level of the social innovation ecosystem is a Social Innovation Index (SII) (*Old problems, new solutions...*, 2016). In Figure 1 the dynamics of SII in 2016 compared to the level of GDP by country are shown.

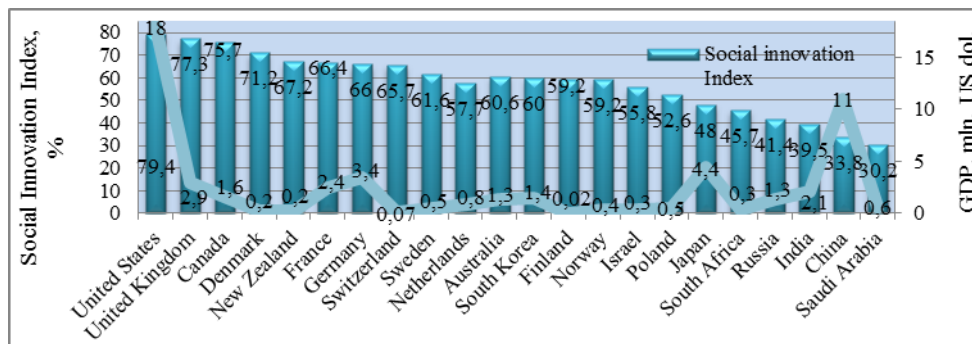


Figure 1. Social Innovation Index (SII) compared to the level of GDP

Countries from different territorial locations were selected for an analysis of SII (Western and Eastern Europe, Asia, Africa, North America), with different level of social innovation development and GDP. Figure 2 presents countries grouped by level and structure of SII according to the main components.

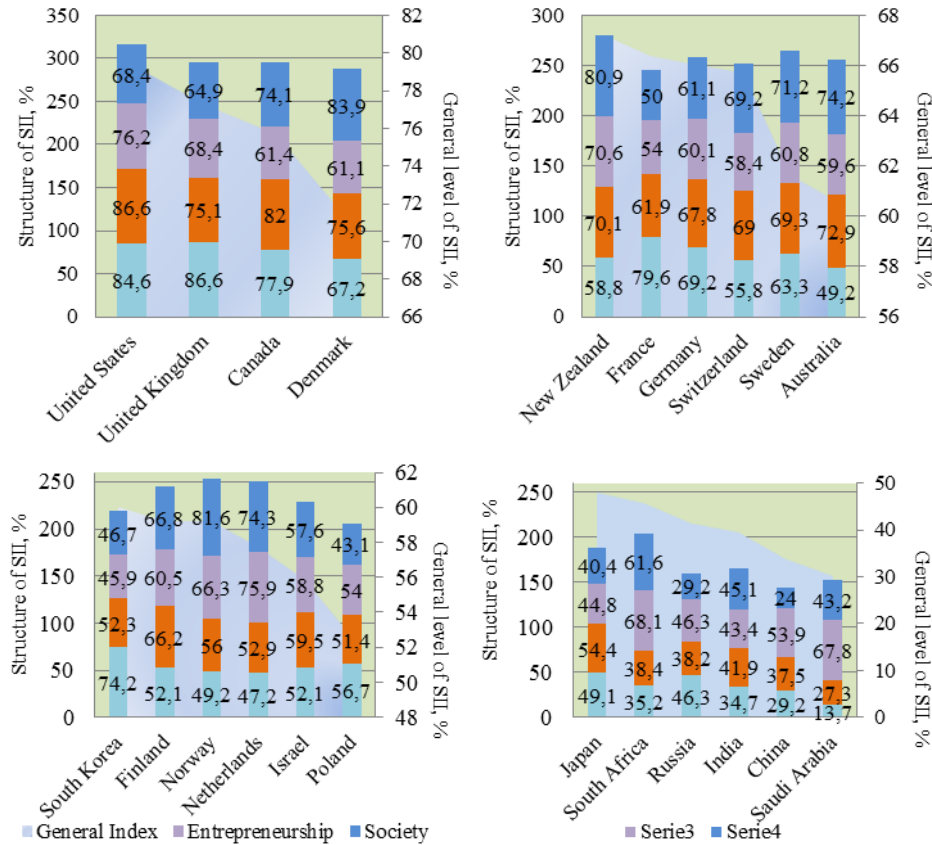


Figure 2. Structure of SII by country groups

MacCallum et al. (2009) propose to determine the following areas within which SIA may have its main impact: *management area* – impact on social capital that would allow for the production of positive effects on social innovation in both the profit and non-profit sectors, combining economic aspects of human development and an ethical and stable entrepreneurial culture; *creativity area* – increases the role of social innovation in social and intellectual creation and the development of new business practices; *territorial development area* – underlines the role of socio-political capacity (or incapacity) and access to the necessary resources in achieving the satisfaction of human need; *political science and public administration area* – promotes citizen access to governance, increases the transparency and

democratization of public administrative systems. Analyzing the impact of social innovation on enterprise activity, we propose the new functions of SIA (Table 1). Considering the proposed functions, it may be stated that SIA is realized through relevant projects. In turn, the realization of such projects and all processes connected with it demand investment resources. Investment support of socially innovative projects should be based on general diagnostics of SIA, which may determine its state, effectiveness, problems and prospects. Such diagnostics may become the basis for reasonable investment decisions.

Table 1. Functions of SIA

Function	Description (Interested groups)
Technological	Inducing the development of technical innovations; promoting creativity and new ideas in technical processes, as a result providing the economy with all types of resources and increasing the productivity of labor (Employees of enterprises, entrepreneurs).
Environmental	Reducing the negative impact on all spheres of the environment (Society).
Economic	Increases the economic benefits for enterprise through the activation of capital flows, advantages for the economy and implementation of new technologies, possibilities of obtaining tax benefits from government etc. (Entrepreneurs)
Investment	Stimulating impactful investment and, as a result, activation of private investment and development of investment funds (Entrepreneurs, government, financial institutions)
Cultural	Changing personal values as well as increasing the feeling of responsibility (Society).
Normative and regulatory	Evolving the administrative and legislative base for the support and stimulation of social innovations (Entrepreneurs, government).
Science and development	The development of social innovation demands the development of scientific progress in all spheres (Society, government, scientific and research institutions).
Collaborating	Social innovation determines collaboration within different elements of its ecosystem: public and private sector, scientific institutions, financial system, non-profit organizations (Entrepreneurs, society, government, scientific/research and financial institutions).

Such a diagnostic process should be based on the analysis of the macro- and micro-environment of enterprise SIA which determine the possibilities and risks of SIA as well as its strong and weak points. Taking these facts into consideration, we will propose the stages of the SIA realization process (Figure 3).

According to previous statements, SIA is affected by factors of macro and micro-environment. These factors are set by the interaction of elements within the macro and micro-environments and define the development of SIA of enterprises. We propose the conceptual model of the realization of enterprise SIA (Figure 4).

The peculiar feature of the proposed model is that the development of SIA concerns the two main stages of its realization. The first stage consists of the previous diagnostics of the factors of SIA and the formation of relevant strategy according to the results of these diagnostics.

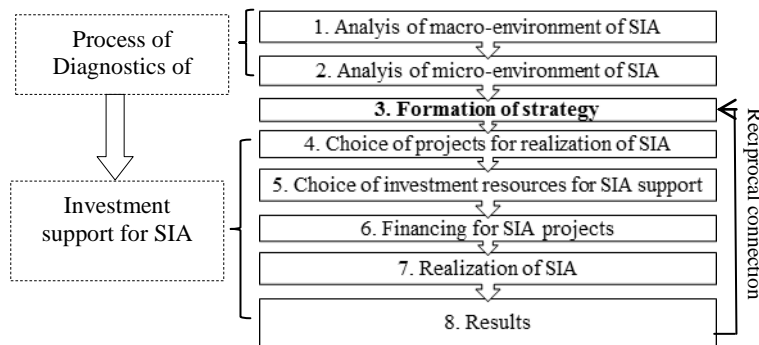


Figure 3. Process of enterprise SIA realization

Such diagnostics should be based on the analysis of the macro- and micro-environments within which an enterprise conducts SIA. The second stage previews the investment support of SIA within the determined strategy. Oriented on the main characteristics of SIA, framed by the strategy determined, the enterprise evaluates and involves the closest corresponding projects through which it will finally realize its SIA objectives. These projects will determine the necessary amount of investment resources.

According to the stated concept, the main subject of the research is an enterprise with dual economic and social purposes, which undertakes its business operations in order to maintain its commercial position in the market, yet at the same time cares about the effect it may have on society and thus attempts to maximize the benefits of its activities on society.

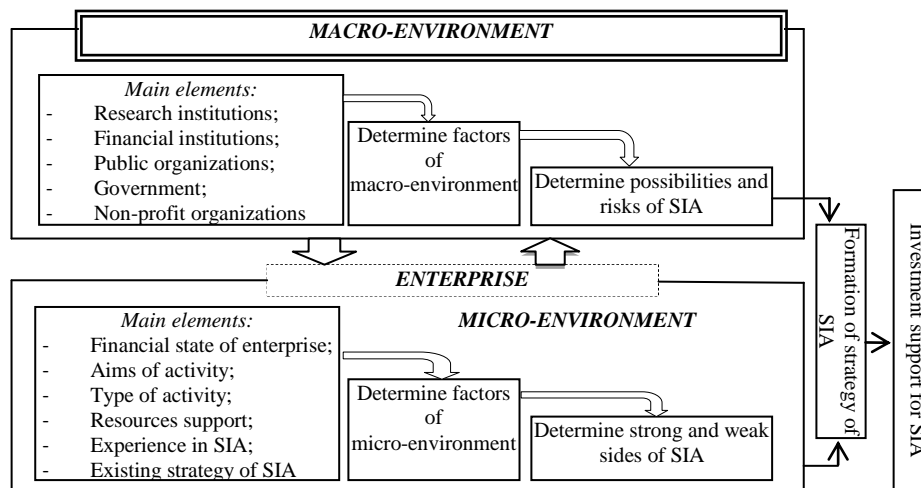


Figure 4. Conceptual model of SIA realization

This dual approach in turn determines the dual aims of SIA. A semi-structured interview was conducted in order to find out what social and economic aims determine the SIA of enterprises. 15 Ukrainian enterprises of different size and type of activity were chosen, in order not to concentrate on certain domains at the expense of the validity of the results, but rather obtain a result applicable to all enterprises in general. After the generalization of the results, obtained during the interview, there were determined the complex aims that are considered by Ukrainian enterprises to be most important for SIA were determined.

Additionally, in order to make the results clearer and show the priority of each complex aim, the coefficients of validity for each of them were formed: development of corporate relations (0.05); development of consumer segment and increase in market share (0.06); support of financial stability (0.08); increase in production (0.08); involvement of new technologies (0.12); reduction of negative emissions into the atmosphere (0.13); economy of resources (0.15); economic development and competitiveness (0.15); innovative development (0.18).

It may be surmised that enterprises indicate both economic and social aims. This means that investment support for SIA should be directed to projects that allow enterprises to achieve these aims, combining social and economic needs. Integrated indicators were proposed that, reflecting the relevant spheres of enterprise activity, retain the complex aims of enterprises within SIA: indicators of financial stability, profitability and marketing efficiency, investment efficiency, technological progress (including resource savings), production (including product quality), employment, and ecological factors.

Additionally, the aspect of investment expenditures should also be considered. This means that the decision on investing in socially innovative projects should concern the impact of these projects on changes to the following integrated indicators. In other words, the investment decision should correspond to the following optimization problem (Formulas 1-9).

In the proposed optimization problem, those indicators that were determined as a result of empirical research were represented. Nevertheless, the model is dynamic and its parameters may be changed, taking into consideration the peculiar characteristics and demands of certain enterprises. In turn, the integrated indicators may be calculated through the aggregation of certain quality and quantity indexes which allow for the calculation of components that determine certain spheres.

Conclusions

Nowadays the emphasis on social components in the general mainstream of enterprise innovation activity is one of the strongest grounds for its successful functioning and development. It may even be stated that today one needs social innovators who not only create new ideas but also change the larger context to provide the conditions for innovation to prosper, with macro practice skills, such as administration, policy practice, and community organizing, and who are equipped to change systems and contexts.

$$\sum_{j=1}^m d_j X_j \leq I; \quad (1)$$

$$\sum_{j=1}^m F_j X_j \geq \Delta F \min; \quad (2)$$

$$\sum_{j=1}^m P_j X_j \geq \Delta P \min; \quad (3)$$

$$\sum_{j=1}^m In_j X_j \geq \Delta In \min; \quad (4)$$

$$\sum_{j=1}^m T_j X_j \geq \Delta T \min; \quad (5)$$

$$\sum_{j=1}^m R_j X_j \geq \Delta R \min; \quad (6)$$

$$\sum_{j=1}^m E_j^i X_j^i \geq \Delta E_{\min}^i, (i \in \overline{1;n}); \quad (7)$$

$$\sum_{j=1}^m EC_j X_j \geq \Delta EC \min; \quad (8)$$

$$X_j = \{0;1\}, \quad (9)$$

where d_j - the relative share of expenditure on the realization of a certain project; I - amount of investment resources; X_j - variable which characterizes a project (Boolean variables X_j may obtain the value $X_j=1$ and $X_j=0$, if the project is accepted or denied respectively); m - number of alternative projects; F_j - relative growth of integrated indicator of financial stability after the realization of j -th project, %; $\Delta F \min$ - predicted minimum growth of integrated indicator of financial stability, %; P_j - relative growth of integrated indicator of profitability and marketing efficiency after the realization of j -th project, %; $\Delta P \min$ - predicted minimum growth of integrated indicator of profitability and marketing efficiency, %; In_j - relative growth of indicator of investment efficiency after the realization of j -th project, %; $\Delta In \min$ - predicted minimum growth of integrated indicator of investment efficiency, %; T_j - relative growth of indicator of technological progress after the realization of j -th project, %; $\Delta T \min$ - predicted minimum growth of integrated indicator of technological progress, %; R_j - relative growth of indicator of production after the realization of j -th project, %; $\Delta R \min$ - predicted minimum growth of integrated indicator of production, %; ΔE_{\min}^i - predicted minimum growth of integrated indicator of employment, %; E_j^i - relative growth of indicator of employment after the realization of j -th project, %; $\Delta EC \min$ - predicted minimum growth of integrated ecological indicator, %; EC_j - relative growth of ecological indicator after the realization of j -th project, %.

Social innovators could ultimately function like social intrapreneurs or social entrepreneurs, depending on how they implement innovation. Hence, the main outputs of the results determined in this paper concern the possibility of providing a fuller understanding and thus give a more complete background for the determination of relevant social innovation strategy for certain enterprises, particularly in terms of investment support.

First of all, the paper provides an understanding of the phenomenon of social innovation activity within the prism of enterprise activity. Analyzing the main impact of SIA on enterprises, its functions are proposed and the conceptual model of realization is determined. The results obtained give the basis for the determination of the main points on the path to enterprise SIA development, which

concern the previous diagnostics and reasonable investment support. The paper also represents the finished toolkit for determination of the investment strategy. It is based on the evaluation of the impact of socially innovative projects on the development of those areas of enterprise activity that are mostly considered by enterprises. For this, seven integrated indexes that measure these areas are proposed.

One plans to implement the results obtained within the activity of Ukrainian enterprises for the popularization and spreading of SIA in the domestic economy, so that their activities will be adjusted according to the new trends and challenges of investment and innovation activity. The possible outcomes may provide a positive economic and social impact upon enterprise itself and, as a result, upon macroeconomics in general. Nowadays, social innovations have become a product of usual business activity with its profit targets.

Enterprise engagement in social innovation activity may provide the background conditions for the creation of additional profit opportunities while generating social value; the possibility of obtaining tax benefits from government; and the receipt of benefits from the public and private sectors (mainly by involving the additional investment capital). It is also worth noting that a high level of social engagement allows enterprises to create new goods and services, develop new technologies within cooperatives, mutual enterprises, and form new methods to create and redistribute wealth.

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SPÓŁECZNY KIERUNEK DZIAŁALNOŚCI INNOWACYJNEJ PRZEDSIĘBIORSTW

Streszczenie: W dzisiejszych czasach nacisk na czynnik społeczny w ogólnym nurcie działalności innowacyjnej jest jedną z najsilniejszych podstaw pomyślnego funkcjonowania i rozwoju przedsiębiorstw. Celem niniejszego artykułu jest analiza teoretycznych i praktycznych podstaw społecznej działalności innowacyjnej (SIA) ze szczególnym uwzględnieniem specyfiki tego zjawiska w zakresie działalności przedsiębiorstwa. Część pierwsza, teoretyczna opiera się na metodach badań wtórnych. Przedstawia ogólne punkty koncepcyjne społecznej działalności innowacyjnej przedsiębiorstw, w tym jej koncepcję, funkcje oraz koncepcyjny model realizacji. Druga część odzwierciedla badania empiryczne, w wyniku których określono główne cele, które stymulują przedsiębiorstwa do przeprowadzania społecznej działalności innowacyjnej.

Słowa kluczowe: przedsiębiorstwo, społeczna działalność innowacyjna, innowacyjne projekty społecznie, zintegrowane wskaźniki.

企业创新活动的社会导向

抽象。如今, 强调创新活动一般主流的社会成分是企业成功运行和发展的最有力的依据之一。本文的目的是分析社会创新活动(SIA)的理论和应用基础, 特别关注这一现象在企业活动方面的特点。论文的逻辑顺序分为两个主要部分。第一部分是理论性的, 是基于二次研究的方法。它提供了企业新航的一般概念, 包括其概念, 功能和实现的概念模型。第二部分反映了实证研究的结果, 从而确定了刺激企业进行新航的主要目的。

关键词:企业; 社会创新活动; 社会创新项目; 综合指标。