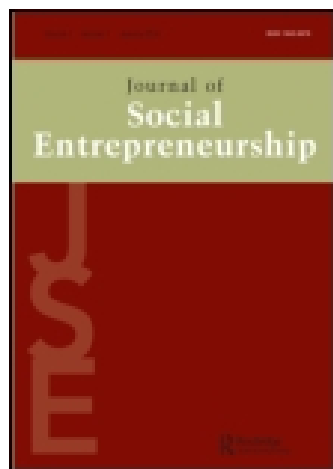


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An Exploratory Study to Understand the Internationalization Strategies of Social Enterprises

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An Exploratory Study to Understand the Internationalization Strategies of Social Enterprises

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ABSTRACT *The aim of this paper is to explore the internationalization behaviour of for-profit and not-for-profit social enterprises. The paper argues that the process of internationalization has at least three aspects, namely operational modes, product preferences, and expansion strategies. Two organizations, Motherhouse and World Bicycle Relief, are used as examples.*

KEY WORDS: Internationalization, social enterprise, entrepreneurship

1. Introduction

There is growing interest in academia in social entrepreneurship studies. More than 600 book titles related to social entrepreneurship are listed on the Amazon website, and academic journals such as the *Journal of Social Entrepreneurship* and *Social Enterprise* are dedicated to the topic. Two ongoing debates in this research area are particularly salient, namely the definition of social entrepreneurship (Dees 1998; Haugh 2005; Mair and Martí 2006; Peredo and McLean 2006; Martin and Osberg 2007; Dacin, Dacin, and Matear 2010) and the typology of social entrepreneurship (Tan, Williams, and Tan 2005; Zahra et al. 2009; Smith and Stevens 2010; Defourny and Kim 2011). However, despite the growth of social enterprises beyond national borders (Zahra et al. 2009), discussions about international social entrepreneurship or international social enterprise (hereafter ISE) are rather limited.

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ISE is a relatively new concept and can be defined as follows:

The process of creatively discovering and exploiting social entrepreneurial opportunities overseas with the application of business expertise and market-based skills, with innovation social goods and services, either with or without profit orientation, but with the pivotal objective of creating societal value rather than shareholder wealth in the overseas territories where the enterprise functions. (Tukamushaba, Orobia, and George 2011)

ISE is also considered ‘a dynamic process undertaken by individuals who are proactive, risk-taking, and mission-oriented leaders who pursue global or internationally directed initiatives that catalyse societal and policy reform through entrepreneurial mythologies that are anchored on innovation and adaptive spirit’ (Munoz 2010). Two comments could be made about these definitions. First, they both emphasize the adaptation of business and entrepreneurial methods for creating social value or social change in foreign territories. Second, whereas Munoz’s (2010) definition focuses more on the personal characteristics of international entrepreneurs, Tukamushaba, Orobia, and George (2011) emphasize the different orientations of for-profit and not-for-profit social entrepreneurs. This suggests that there are different types of ISE, for instance, for-profit and not-for-profit social entrepreneurs (Marshall 2011).

Regardless of type, when a social enterprise expands internationally it faces a more complicated operational environment. Obstacles may arise from factors such as different cultural, social, economic, legal, and governmental systems, and as a result appropriate international strategic solutions are required. Munoz (2010), for example, proposed a framework based on international business literature to discuss potential internationalization challenges and strategic solutions. However, he does not differentiate and explain if the strategies are equally applicable to all types of ISE.

In response to this shortcoming, the key research question asked here is how for-profit and not-for-profit ISE responds to internationalization challenges. The paper attempts to answer this question by suggesting research propositions related to three aspects of internationalization issues, namely ISEs’ operation modes, the market ISEs choose to enter when they first start, and ISEs’ preferred target countries for international expansion after successful start-up. These research propositions will be further explained by two empirical cases.

2. Literature Review

To the best of our knowledge, the emergence of the term ‘social entrepreneur’ (or ‘social entrepreneurship’) can be traced back to Waddock and Post’s (1991, 394) work, which characterized social entrepreneurs as ‘private citizens who tackled a public issue from the perspective of those private sector resources that they could command’. Later on, the term was used in Emerson and Twersky’s (1996) work on the creation of non-profit enterprises and

Leadbeater's (1997) documentation of the rise of the social entrepreneurs. A more comprehensive definition was further suggested by Dees (1998), who regards social entrepreneurs as individuals who attempt to make changes in society by (1) adopting a mission to create and sustain social value; (2) recognizing and relentlessly pursuing new opportunities to service that mission; (3) engaging in a process of continuous innovation, adaptation, and learning; (4) acting boldly without being limited by resources currently in hand; and (5) exhibiting heightened accountability to the constituencies serviced and for the outcomes created. Since then, the topic of social entrepreneurship has attracted much attention from academia in different research domains, which has subsequently led to various approaches to defining the term. These definitions, according to Dacin, Dacin, and Matear (2010), have four main focuses. First, many definitions emphasize the social entrepreneurs' qualities and behaviours. For instance, Tan, Williams, and Tan (2005) categorize different types of social entrepreneurs based on their tendency toward altruism. Second, other definitions focus on the operating sector and/or the processes and resources used by social entrepreneurs. Zahra et al. (2009, 522), for example, suggest that social entrepreneurship involves the activities and processes undertaken by entrepreneurs to discover and exploit opportunities to enhance social wealth. Third, social entrepreneurs can also be defined based on the processes and resources they use when entering into a venture. They use and combine resources in innovative ways to pursue opportunities to catalyse social change and/or address social needs (Mair and Martí 2006, 37). Finally, a common theme across most social entrepreneurship definitions is the emphasis on creating social value by providing solutions to social problems. Regarding the creation of social value, this is arguably the most important feature of social enterprise that differentiates it from a normal business entity. As argued by Martin and Osberg (2007), what distinguishes social entrepreneurship is the primacy of social benefits.

Based on the definitions reviewed above, two interrelated issues considered critical for making sense of social enterprises can be pointed out. First, the use of 'social' can mean different things for different authors. It can be an exclusive social goal for an organization to treat the gaining of profit as merely a means to an end, as described in Dees's (1998) definition. Alternatively, it can also be an inclusive situation where both social and economic goals are given the same weight and are achieved at the same time. From the perspective of altruism, if being social refers to the altruistic motivation of bringing benefits to underprivileged populations, helping people might also result from the goal of personal fulfilment, which is less altruistic (Mair and Martí 2006). This variation leads to the conceptualization of different forms of social enterprise in a spectrum, based on the extent to which they prioritize a social goal against an economic one (Peredo and McLean 2006) or whether society profit is regarded as more critical than individual gain (Tan, Williams, and Tan 2005).

Second, it is pivotal to recognize that the coexistence of social and economic goals may result in conflicts within and outside of social enterprises. For instance, a case study on the staff of microfinance banks in Bolivia has

shown that when choosing clients for loans, the staff struggled to decide between using regular commercial banking criteria or relatively lower standards (Battilana and Dorado 2010). Conflicts arise in a social enterprise because it is a typical hybrid organization in which different, if not opposite, logics or operating norms are at work (Battilana and Lee 2014; Doherty, Haugh, and Lyon 2014). Specifically, social enterprises exist in a 'plural' environment in which different stakeholders hold different beliefs and have different expectations regarding the organization. As a result, organizations have to manage these conflicts caused by pluralism to gain 'legitimacy' and justify their existence to gain stakeholder support and resources for ensuring their survival (Kraatz and Block 2008; Greenwood et al. 2011). For example, based on the experience of the Grameen Foundation's social businesses, Yunus, Moingeon, and Lehmann-Ortega (2010) concluded that it is critical for social entrepreneurs to clearly define what social benefits they offer to enhance their social enterprises' sustainability.

Subjectively speaking, the legitimacy of social enterprises also comes from rectifying the problem of market failure where commercial market forces do not meet social needs. The reason for such failure is the inability of those who need the services to pay for them, as these people are usually from an underserved, neglected, or highly disadvantaged population that lacks the financial resources and necessary purchasing power to seek solutions in the market (Billis and Glennerster 1998; Austin, Stevenson, and Wei-Skillern 2006; Martin and Osberg 2007). Social entrepreneurs believe in using the market mechanism, rather than donations or government subsidy, to tackle such market failure, and this can be achieved by transforming underprivileged people from being consumers lacking purchasing power to being suppliers. To achieve such a transformation, international social entrepreneurs must seek potential markets for their suppliers. Often, the market they choose to enter is that of their home country, and not the foreign country they intend to help. This is for two reasons. First, foreign countries may lack sustainable consumer groups because of low-income populations, indicating a rather limited potential market for social entrepreneurs. Second, as the literature of traditional entrepreneurship points out, a key factor for successful entrepreneurs is their ability to leverage social networks to gain the necessary resources and assemble these resources for creating marketable outputs (Shapiro and Sokol 1982; Aldrich and Zimmer 1986; Alvarez and Busenitz 2001).

Arguably, it would be easier for social entrepreneurs to form such kinds of alliances through networking relationships in their home countries because of their familiarity with and embeddedness there (Kalantaridis and Bika 2006). For example, social entrepreneurs in Marshall's (2011) case studies of international for-profit enterprises rely on their social networks to form alliances with other organizations in order to gain information and expertise, and to build supply chain. As a result, social entrepreneurs would tend to choose their home countries as target markets and try to market goods or services provided by individuals located in foreign countries. Accordingly, the operational mode of for-profit ISEs tends to focus on product/service transactions between two or more countries. In contrast, because profit is not their first

priority, not-for-profit ISEs are less motivated to look for profitable markets. For such enterprises, interactions between countries tend to be the one-way delivery of financial help, services, or goods to people in need. Thus, this paper argues that there are different operational modes for different types of ISEs, as stated in Proposition 1.

Proposition 1: *Because of the transformation from a consumer to supplier role, operational modes of for-profit ISEs tend to focus on product/service transactions between countries. In contrast, not-for-profit ISEs tend to be involved with the one-way delivery of aid in various forms.*

After choosing their target country and operation mode, what social entrepreneurs need to do next is identifying potential areas or goods and services they intend to be involved with. In this respect, the choice of for-profit ISEs is largely related to searching for marketable goods/services for target market at home. To make transactions occur between countries, international social entrepreneurs need to mobilize the existing assets of marginalized groups with creativity and to identify what these groups can offer to the market as qualified suppliers (Alvord, Brown, and Letts 2004). In addition, they need to identify potential markets they can enter by determining what the demand is in the home countries. In other words, they need to match supply and demand across countries, and build a sustainable operational model for the benefit of themselves, local social groups, and consumers. This is where the entrepreneurial spirit of innovative ideas is realized. The success of for-profit ISE may be rather limited if there is only a small domestic demand for what the disadvantaged population from a foreign country can offer. For example, in Marshall's (2011) case study, Spanish was identified as a marketable service, in which Americans could learn the language through online tutorial courses offered by people from Guatemala and Nicaragua. In another case, CafédirectTM, a for-profit coffee brand in the UK, managed to help coffee growers in Africa, the Caribbean, and Latin America by satisfying a niche market where customers believe in the quality of coffee beans grown by small farmers under the FairtradeTM system (Thompson and Doherty 2006). It is argued in Proposition 1 that not-for-profit ISEs tend to be involved with the one-way delivery of aid in various forms to foreign countries. Therefore, social entrepreneurs' choice of area in this type tends to be motivated by responding to particular social needs (Diochon and Anderson 2009), so that the purpose of the aid may be regarded as legitimate. In other words, the social value created by the aid will be rather limited if it does not help to solve local social problems. Thus, this paper argues that the criteria for choosing products are different for different types of ISEs, as stated in Proposition 2.

Proposition 2: *With for-profit ISEs, the choice of products tends to be based on matching demand and supply across countries; with not-for profit ISEs, choice tends to be based on responses to the particular social needs of foreign countries.*

Once social enterprises have successfully built operational processes in a particular country, they may or may not want to expand to other countries. In this regard, Zahra et al. (2009) argued there is a variation in the

geographical scope for social enterprises' internationalization activities. In particular, expansion of this scope is related to social opportunity's pervasiveness, relevance, urgency, accessibility, and radicalness of the solution sought. For example, social entrepreneurs' backgrounds, knowledge, skills, and experiences positively influence the expansion of ISEs' operational and geographic scope because they help to lower the perceived risk and accessibility of foreign operations. Similarly, based on the theory of the entrepreneurial event and the theory of planned behaviour, Tukamushaba, Orobia, and George (2011) identify perceived desirability, the propensity to act, and perceived feasibility as critical factors affecting social entrepreneurs' intentions to expand internationally.

Both of them try to differentiate themselves from the dual taxonomy of economic and non-economic social opportunities by focusing on the criteria social entrepreneurs reference when they make decisions. However, these criteria are largely related conditions in which disadvantaged people are embedded, and how social entrepreneurs perceive those conditions. Consequently, decision-making criteria related to practical business norms and practices in international market operations are largely ignored. It is posited that potential new target countries should at least demonstrate similar product preferences, or have similar cultural backgrounds to the countries in which the entrepreneurs currently operate, so that the chance of success for their international expansion is higher as the cost of adapting to local environment is lower. This is particularly important because many social entrepreneurs do not have sufficient financial strength to support large-scale marketing campaigns to overcome cultural and social differences. As for not-for-profit ISEs, international expansion may tend to focus on the countries with similar social problems and needs because expertise learnt from solving problems in one location will be more effectively deployed and utilized in tackling similar situations in other places. Thus, in terms of an international growth strategy, this paper proposes the following.

Proposition 3: *For-profit ISEs tend to expand their operations to countries with similar cultural and product preferences; not-for-profit ISEs tend to expand their operations to countries with similar social problems and needs.*

3. Example Cases: Motherhouse and World Bicycle Relief

The propositions were examined using the case study research method (Yin 2014) for building a theory (Eisenhardt 1989) on the internationalization of social enterprises. Unlike a survey investigation, this method may not have the advantage of statistical generalization, but it can provide a means to explore the internationalization behaviour of ISEs which serves the research purpose as an exploratory study. The selection of social enterprises for this study was based the principle of 'confirming sampling' where cases are chosen to confirm the importance, meanings, and viability of possible patterns (Miles and Humberman 1994; Coyne 1997). This sampling strategy is not only more rigorous and intellectually creditable than 'convenience sampling', but also

particularly suitable for an exploratory study as it helps to support emerging explanations (Marshall 1996). However, in comparison to ‘maximum variation sampling’ that covers a broad range of cases, including outliers, it is less useful in documenting variations and identifying common patterns among potential case subjects (Miles and Huberman 1994). Cases of the study are selected according to three criteria closely related to the theoretical propositions. First, their operations must be involved with at least two countries for them to be qualified as ISEs. Second, they could be identified as for-profit or not-for-profit social enterprises through either their mission statements or governance mechanisms. Third, they must have experience in expanding operations beyond the original areas. In the end, Motherhouse and World Bicycle Relief (WBR) were selected to represent for-profit and not-for-profit ISEs, respectively.

Through professional relationships, managers from these two organizations were accessed for interviews. Four interviews were conducted, including Motherhouse’s Taiwan director, marketing analyst, and business operations manager and WBR’s project manager. The interviews were semi-structured in which interviewees were asked questions such as the following: Why and how did your company/organization come to be involved with the present business/operation? How did your company/organization make the decision to expand your operations internationally? What are the criteria for choosing new markets/countries to enter? These interviews were conducted between September 2012 and January 2013, and were complemented by secondary data, including articles published in newspapers, magazines, and a social enterprise portal website called ‘Social Enterprise Insights’, text and videos officially released on the company/foundation websites, blogs, and a book written by the founder of Motherhouse. The interviews were then transcribed into text documents and analysed along with the secondary data to achieve triangulation (Yin 2014). The case study findings are presented below.

3.1. Operational Modes

Motherhouse is a Japanese social enterprise which produces fashion handbags. It was founded in 2006 by a Japanese designer, Eriko Yamaguchi, who was formerly an intern with a US-based charity administering projects in Bangladesh. When Yamaguchi visited Bangladesh, the experience made her realize that to improve conditions in developing countries it is not enough to rely on aid from international charities. She began to search for a more fundamental and sustainable approach to helping the Bangladeshi people. She came up with the idea of making high-standard products in Bangladesh which attract customers because of their quality and design rather than cheap prices. In this way, the Bangladeshi people are no longer passive recipients of international aid and donations; they can actively participate in international trading activities.

WBR is a not-for-profit charity based in the United States. It was founded in 2005 by F.K. Day, the executive vice president of a bicycle company named SRAM, in response to the previous year’s Indian Ocean tsunami. WBR

donated more than 20,000 bicycles to Sri Lanka. Since then, by relying on financial donations from developed countries, the charity has delivered bicycles to 13 countries across Africa and South-East Asia. It has also trained local mechanics to repair these bicycles so they can be used for a long time. Apart from its donations, the charity gave microloans to local entrepreneurs and family business owners to purchase bicycles to improve the efficiency of local transportation.

3.2. Products

A bag made of jute caught the attention of the founder of Motherhouse, Eriko Yamaguchi, while she was searching for a sustainable way to help the Bangladeshi people. Jute is a popular fibre in Bangladesh; according to the Motherhouse website, India and Bangladesh are the two largest jute exporters in the world. However, the fibre is generally used to make bags for agricultural products such as coffee beans and flour. Yamaguchi was able to use her talent for fashion design and transform locally grown jute into stylish handbags which have proved hugely popular in Japan.

The founder of WBR chose bicycles as a charity not only because of his involvement in bicycle manufacturing. F.K. Day was also aware that when the tsunami damaged the transport infrastructure in South-East Asia, bicycles became an effective way for people to move around. For example, children could ride to school and merchants could transport products such as fish and coconuts to markets by bicycle. In a subsequent African project, bicycles from WBR also helped to improve local health conditions by increasing the mobility of AIDS-care teachers between villages.

3.3. International Expansion

After its successful establishment in Japan, Motherhouse began to look for opportunities to grow overseas along the same lines as non-social enterprises. In 2011, Motherhouse's first overseas store opened in Taipei, Taiwan. The first reason for this expansion is that Japanese and Taiwanese customers have similar tastes and preferences, and the Taiwanese generally admire Japanese products. The second reason is that, to some extent, the Taiwanese are idealistic and aware of social problems in the same way as Japanese customers, which means they are more likely to support Motherhouse's mission to help disadvantaged people in Bangladesh.

The success of WBR in Sri Lanka caught the attention of World Vision, a charity which had already bought a thousand bicycles for a project in Zambia to send AIDS-care teachers from village to village. However, because of the rough rural terrain, which was similar to conditions in Sri Lanka after the tsunami, the bicycles frequently broke down. Consequently, Day was invited to visit Zambia in 2006. He engineered robust bicycles suitable for rough African roads and donated them to local students, farmers, and health, staff in many African countries facing similar transportation difficulties.

4. Conclusions and Discussion

The variations among ISEs were investigated with the aim of broadening the understanding of social entrepreneurship's international dimensions. It was proposed that the for-profit and not-for-profit ISEs tend to have different internationalization strategies in terms of their choices of cross-country operation modes, goods, and services involved, and new markets for expansion. The propositions laid down in this study were confirmed through the cases of two organizations, Motherhouse and WBR. The validity of the conclusions can be enhanced through further empirical case studies that achieve theoretical replication, as suggested by Yin (2014). Moreover, given the wide range of social enterprises listed by Alter (2007), there may be a case where the creation and consumption of products occur in the same locality, which is different from the first research proposition; for instance, the franchise of *The Big Issue*, a street magazine designed to help homeless people by hiring them as salespeople. Geographically, it is an international for-profit enterprise. However, its operation is rather localized: the magazine's content is created by and sold to locals instead of consumers in other countries. However, such cases are believed to be rare, as most ISEs, unlike *The Big Issue*, have limited involvement in locally oriented culture products.

An implication of the study is that it sheds light on the variations among ISEs. Accordingly, more attention should be paid in theory and policy discussions to ISEs' dissimilar natures and behaviours. In terms of localization strategy, for example, entrepreneurs constantly struggle between standardization across countries and adaptation to local environments (Bartlett and Ghoshal 1999). This is particularly important for ISE research because social problems and needs are often specific to local societies. Tailor-made solutions for local problems arguably cost more than globally standardized solutions. This seems to imply that for-profit ISEs, which usually have more diverse sources of income than not-for-profit ISEs, might have a better capability of adapting to local environments. Other questions to be explored in future studies include how the strategic foci of different ISEs differ in functional areas, such as international marketing and international human resource management, and what causes those differences.

Second, the study highlights the issue of 'double-embeddedness' in ISEs. The concept of embeddedness, usually understood as the degree of connection and interaction with local actors or stakeholders in the community, is allegedly critical for the success of entrepreneurs (Jack and Anderson 2002), as well-synchronized relationships help social enterprises gain necessary resources to sustain their operations (Kalantaridis and Bika 2006; Seelos et al. 2011). However, entrepreneurs have to persuade those stakeholders to believe that their organization's aims and operations are legitimate to win their support at the same time (Dowling and Pfeffer 1975). Both for-profit and not-for-profit ISEs are engaged in double-embeddedness because of their involvement in cross-border operations. As a result, unlike domestic social enterprises, ISEs are all obligated to face stakeholders (donors, government officials, consumers, and other social enterprises or professional groups) in

more than one country. This will inevitably create greater challenges for their businesses, and further studies will be needed to understand how they tackle the issue. Further studies should even explore how ISEs manage the varying requirements from stakeholders of different countries, particularly conflicting ones; how and why they prioritize particular stakeholders; and how they synchronize different resources gained from the double-embeddedness.

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