Co-creating social value through cross-sector collaboration between social enterprises and the construction industry

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ABSTRACT

Emerging social procurement imperatives are driving new forms of cross-sector collaboration between private, public and social enterprise sectors in the construction industry. Yet there is little understanding of how and why social enterprises and private construction firms collaborate in meeting new social procurement imperatives and of the institutional and organizational factors shape these practices. Drawing on theoretical insights from governance, management and policy studies and three case studies of major organizations from across the construction social value chain, the organizational and institutional factors that drive cross-sector collaborations are explored. Documentary analysis of social procurement strategy and policy, non-participant observation of social procurement initiatives in action and in-depth interviews with senior social procurement champions suggest that existing processes of social value co-creation through supply chain relationships more closely reflect a cooperative than a collaborative model, are largely driven by commercial concerns and influenced by industry norms and institutional imperatives. It is concluded that there are significant differences in experience and opportunity for collaboration based on supply chain position and organizational scale and that these have notable effects on the co-creation of social value and the legitimacy of different social benefit providers in the construction industry.

Introduction

In many countries, emerging principles of "New Public Governance" are driving the development of social procurement policies and regulations which require the co-creation of social value through new cross-sector collaborations between construction, government and third-sector organizations (Osborne 2006, Patapas et al. 2014, Loosemore and Higgon 2015). This new collaborative approach has developed in response to reducing welfare budgets and the resistance of many social problems to traditional public sector interventions and a growing appreciation that they are often "wicked" in nature and best resolved by cross-sector partnerships, rather than governments working alone (Roberts 2000, Kolko 2012, Selsky et al. 2014, Barraket et al. 2016). As Keast and Mandell (2014, p. 10) point out, "Increasingly, governments, community-based organizations and, increasingly the business sector must work together, share resources, expertise and knowledge to produce public value". For example, in the UK, the introduction of the Public Sector (Social Value) Act 2012 encourages consideration of social value criteria in public sector construction procurement processes (on top of the traditional construction project deliverables of cost, time, quality and safety), although the take up so far has been slow (Burke and King 2015, Farag et al. 2016). Similarly, in Australia, where there is a more targeted and mandatory approach which draws on North American experience in minority supplier development (McCrudden 2004, Mah 2014), new social procurement regulations such as "The Commonwealth Indigenous Procurement Policy (2015)" (IPP) commits Australian Government Agencies to a goal of 3% of all Commonwealth construction contracts to be awarded to Indigenous businesses by 2020 (Commonwealth of Australia 2015). This means that construction firms tendering for public construction and infrastructure projects will need to demonstrate as a condition of being allocated work that they have diversified their supply chains by both directly and indirectly engaging third-sector organizations which contribute social value to the communities in which they operate. These third-sector organizations are highly varied in focus and structure and include social enterprises, Indigenous businesses, disability enterprises, minority owned enterprises, enterprising not for profits/charities, social businesses, cooperatives, enterprising charities, Local businesses, organizations

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certified as ethical, socially/environmentally responsible and fair trade etc.

This paper focuses on social enterprises since recent growth of social procurement as one institutional lever to address disadvantage has been linked to the growth of the social enterprise sector (Barraket and Weissman 2009). While a precise definition of social enterprise is still contested, according to Doherty *et al.* (2014, p. 420) the defining characteristic is its dual mission of combining "some sort of commercial activity to generate revenue; and the pursuit of social goals." Social enterprises operate hybrid business models, trading in the open market to create both social and economic value and reinvest the vast majority of their profits or surplus in the social causes they are set up to serve (Nicholls 2009, Trivedi and Stokols 2011, Floyd 2012, Agafonow 2013, SEUK 2014a, 2014b).

The growth of social enterprise is a global phenomenon covering many industries (see for example, Buckingham and Teasdale's (2012) survey of 655 social enterprises across eight countries). However, recent research shows that social enterprises are under-represented in the construction industries of many countries compared to its economic size and that most are micro organizations operating at the end of the supply chain in a high-risk and low-margin environment on small tokenistic contracts in low value areas such as landscaping, general maintenance, waste management, security, concierge furniture and general admin supplies (Loosemore and Higgon 2015). According the Loosemore and Higgon (2015), the relatively few social enterprises working or seeking to work in the construction industry face an intimidating array of barriers to entry, both formal and informal in addition to those faced by the many other traditional small-to-medium sized enterprises working in the industry and these barriers appear to be even greater for social enterprises working with certain disadvantaged communities – such as Indigenous Australians (see Denny-Smith and Loosemore 2016). Recent research by Peterson and Kadefors (2016) has argued that the effective integration of such organizations into the construction sector requires the effective management of new cross-sector collaborations between government, private and third sectors which are creating new organizational arrangements, relationships and power structures which are not yet articulated and understood. Given this current gap in construction management knowledge and the vast array of potential new relationships which could potentially emerge in collaborating with such a diverse third sector, the aim of this paper is to focus on collaborations between social enterprises and private construction firms as the two main actors in the emerging social procurement market. More specifically, in seeking to respond to the limitations of functionally driven cross-sector collaboration research identified by Huybrechts and Nicholls (2013), this paper address two key research questions: Why and in what ways do social enterprises and construction firms collaborate to create social value?; and, what organizational and institutional factors drive cross-sector collaboration?

Cross-sector collaboration and social enterprise

While the nature and characteristics of cross-sector collaboration are both underspecified and contested (Keast and Mandell 2013), we adopt Grudinschi *et al.'s* (2013) definition of cross-sector collaboration as a process where autonomous actors from fragmented sectoral systems negotiate to share power and resources, leverage core capabilities and create rules and structures governing their relationships with the purpose of addressing multi-faceted social concerns to create and capture social value. According to Keast and Mandell (2014) the key elements which define collaboration are the formation of stable long-term and high trust relationships characterized by high levels of reciprocal interdependency, open and frequent communication, shared risk and power, dense relationships, commonly recognized goals and a recognized need to collaborate for mutual success. In contrast, the related notions of "cooperation" and "coordination" which sit at lower ends of the relational spectrum involve shorter term, more informal, temporary and largely involuntary low-trust relations between people and organizations driven by individual or semi-independent goals. In their analysis of eight social initiatives over a period of ten years in Queensland Australia, Keast and Mandell (2014) found that what distinguished collaborative initiatives from conventional networked organizational models were:

- Common governance, management and leadership structures that change organizational norms and cultures to support cross-sector power and risk sharing, build mutual trust and information sharing.
- Collective systems and procedures that can facilitate shared decision-making, pooled resources, dense relations, thick communication flows and collective action between organizations with different goals and ways of operating.
- Integrative competencies that can build coalitions, commitment and connections across organizational boundaries and sectors.
- New inter-organizational languages that can build cohesion by facilitating effective cross-sector communication and tacit and explicit information sharing.

Conceptually, insights into how organizations from different sectors develop these core elements of collaboration can be found in management and entrepreneurship

studies in the business and third sectors which have promoted concepts such as "blended" (Emerson 2003) and "shared" value (Porter and Kramer 2011). Cross-sector collaboration is presented in each of these literatures as a mechanism through which new forms of social or public value are co-created with mutual interests in mind. Conceptually, principles of cross-sector collaboration have also been central to the emerging concept of "collective impact" (Kania and Kramer 2011) in third-sector management studies. Notwithstanding recent criticisms of this approach as being a non-evidence-based, over-simplified, top-down approach to cross-sector collaboration (Himmelan *et al*. 2017)**,** the core principles of collective impact (a common agenda; a consistent process for measuring results; a clear plan of action that outlines and coordinates mutually reinforcing activities; open and continuous communication; and a backbone organization) have been presented as an antidote to the fragmented, disparate and often competitive way in which many social benefit organizations from different sectors work to resolve a common social problem – often to the detriment to the very groups they seek to help. As Kania and Kramer (2011) point out, most of today's social problems are too complex for one organization to tackle alone and require multidimensional, multi-sectoral and multi-organizational approaches to resolve. In policy studies, conceptions of network governance (Rhodes 1997, Kooiman 2003, Considine 2005, Sørensen and Torfing 2005) also reflect this collaborative approach and have placed increasing emphasis on the role of private actors in generating public value (Moore 1995, Bozeman and Johnson 2015).

The small but growing literature on cross-sector collaboration and partnerships involving social enterprises has examined partnership as resourcefulness behaviour (Di Domenico *et al*. 2010, Sakarya *et al*. 2012, Shaw and de Bruin 2013), as opportunity recognition (Henry 2015), and as the dialectic of social exchange (Di Domenico *et al*. 2009). Studies have also focused on higher order collaborative efforts, including social alliances (Sakarya *et al*. 2012), joint ventures (Di Domenico *et al*. 2009, Henry 2015), and new venture co-creation (Henry 2015). Other studies tracing the emergence of partnerships in the context of new public governance (Carmel and Harlock 2008) have examined the emergence of social enterprise–government alliances (Simmons 2008). This theoretical and empirical literature is almost universal in finding that the local responsiveness and community legitimacy of social enterprise is its central source of value in cross-sector collaborations (Haugh 2007, Sakarya *et al*. 2012, Henry 2015). These studies variously find that the exchange-value of corporations in such arrangements is their access to resources and market reach, and the market legitimacy they signify (Huybrechts and Nicholls 2013). However, there has been

little intersection between the literature on cross-sector collaboration and social enterprise and the wider literature on social entrepreneurship practice (Nicholls 2010, Desa 2012, Mason 2012, Teasdale 2012, Barth *et al*. 2015). An exception to this is Huybrechts and Nicholls (2013) single case study of the role of legitimacy in cross-sector collaboration between a fair trade social enterprise and a corporation in the UK. They found that organizational legitimacy – particularly practical and moral legitimacy (Suchman 1995, Dart 2004) – was a key driver of cross-sector partnership formation, and that industry and national context had a significant effect on shaping practice. Building on Porter's (1985) early work on value chains, Barraket *et al*. (2016) have promoted the idea of "social value chains" as a valuable conceptual framework to explain the processes by which organizations seek to generate progressive social outcomes through the value chain. Barraket *et al*. (2016) have observed that this involves embedding collaborative activity related to social value creation in the routines of business operation, including supply chain decisions, customer interactions and operational practices. From a construction industry perspective, this idea appears to have some relevance since it closely reflects how commercial construction organizations are increasingly looking for competitive advantage by collaborating with social enterprises and other third-sector organizations to comply with growing social procurement directives and non-price criteria in bids (Loosemore 2016). Conversely, the social value chain concept also closely reflects how social enterprises in the construction sector are also seeking to scale-up their operations by working with bigger businesses (Loosemore and Higgon 2015).

Methodology

To explore why and in what ways social enterprises and construction firms collaborate to create social value and what organizational and institutional factors drive cross-sector collaboration, we conducted numerous in-depth semi-structured interviews with three senior managers from three major organizations, which were chosen as being representative of the spectrum of businesses trading in the construction social value supply chain and as having engaged in cross-sector relationships in both the supply and demand for social procurement initiatives (Independent commercial building contractor; Social enterprise owned by an independent commercial building contractor; Independent social enterprise) (See Table 1).

The semi-structured interviews with each senior manager in the case study organizations were conducted by the researcher in person and at the respondent's place of work and by Skype where this was not possible and

Table 1. Case study descriptions.

Governance	Description	Respondent
Case One: independent commercial building contractor	Case One is one of Australia's largest international contractors, which operates at the very top of the construction social value chain. It works directly for major public sector and private sector clients, managing projects on their behalf and subcontracting the vast majority of up-front design and onsite work to its extensive supply chain of consultants, subcontractors and suppliers. Case One operates in seven countries and employs approximately 4600 people, specializing in creating large-scale and complex landmark buildings, commercial structures and infrastructure projects with major growth markets in the UK, Middle East, India, Asia, Europe and Canada	Senior Manager responsible for the development and implementation of social procurement policy across the business – male
Case Two: social enterprise owned by an independent commercial building contractor	Case Two is a medium sized UK social enterprise which specializes in providing employment, education and on-the-job skills training opportunities to the local long-term unemployed in the communities in which it builds. While an independent contracting company, Case Two is a commercial joint venture between a city council through the trading arm of a community generation charity and a large UK urban regeneration company. Incorporated in March 2006, 50% of Case Two's shares are owned by the regeneration company and 50% by the community generation charity. Case Two has six board members, three from the city council and three from the regeneration company. 100% of Case Two's profits are returned to the community regeneration charity. Case Two acts as an independent contractor, delivering construction trades services such as external wall insulation, plastering, tiling, painting and more latterly, general contracting services. It tenders for general contracting construction work on the open market and acts as a subcontractor with larger developers including its parent regeneration company, a relationship which has proven important in the highly cyclical construction market	Managing Director (and past Director of parent company) responsible for leading the social enterprise and reporting to parent company board on results – male
Case Three: Independent social enterprise	Case Three is a small UK social enterprise which specializes in alleviating poverty through providing employment and training in the construction sector. It is an independent company established as part of the a larger skills and training Group, which includes a charity and training organization. Case Three started as a contractor employing local people from a major housing estate and grew to provide contracting and subcontracting services to both the public and private sectors, paying a contribution to its parent charity from any profits it makes. Case Three does not have the corporate safety net that Case Two has	CEO and founder of the social enterprise – female

typically lasted between one to two hours. Several interviews were undertaken with each respondent over a period of several months to explore different collaborative practices as described in our literature review. Several separate interviews were conducted with the respondents over this period of data collection because during the interviews respondents often provided documentary information and other unexpected insights which raised further questions around their collaborative practices and processes. Such documents included: business strategy documents highlighting strategic partnerships and collaborations with other organizations; social impact studies of social procurement initiatives; annual reports which included social reports and descriptions of cross-sector partnerships; publicity around social procurement initiatives which involved social enterprises; media reports; and marketing information which described collaborations and social initiatives put in place. In case studies one and two, the researcher also attended a number of meetings with clients, subcontractors, third-sector organizations and beneficiaries to observe the firm's collaborations in action.

The case study company representatives we interviewed were purposefully sampled on the basis of their ability to provide information-rich answers to questions about the nature of the business and the collaborative activities undertaken to generate social value. Each person interviewed was a senior executive in the case study company and had been intimately involved in the leadership and establishment of their organization's social missions, in establishing and managing cross-sector collaborations and in both creating and responding to social procurement policies as both buyers and sellers of social benefit services and products. This background ensured that they could talk in an informed way about the initial and evolving drivers, processes and challenges involved in forming their collaborations.

The employment of semi-structured interviews using a number of open questions as our main data collection technique was important for a number of reasons. First, semi-structured interviews allowed the informants the freedom to express their views in their own terms and where relevant to ask questions of the interviewer (Taylor *et al.* 2015). Semi structured interviews also allowed the researchers to engage in a two-way communication with the respondents, following unexpected leads not anticipated in the original interview schedule in an informal atmosphere, enabling the researchers to combine and cross-reference responses into a coherent story about their collaborations to create social value (Taylor *et al.* 2015). Given the collaborative struggles our respondents had experienced and the emotive nature of the social value creation process, their stories provided us with powerful narratives about their interactions, relationships and experiences, providing contextual insights and understanding that could not be directly observed or quantified. As both Wilkins's (2004) and Keene *et al.*'s (2016) research shows, semi-structured interviews which enable respondents the flexibility to move outside narrow question frames and tell their stories are a powerful way for researchers and respondents to collectively make sense of complex interconnected situations with multiple actors like the phenomenon we were studying here, which can often be difficult to describe through other means. According to Kendall and Kendall (2012), the value of stories in organizational research is that they are expressed in narratives which typically include multiple parties, timelines, sequences of events, plots, goals and quests, challenges, setbacks, lessons, characters and ultimately successes and failures. Each of these elements were evident in the data we collected during our interviews which were analyzed using Reissman's (2001, 2008) approach to narrative analysis. As Riessman (2001) points out, there are three main ways in which researchers conduct narrative analysis: first producing an account of an entire life story through an amalgam of autobiographical materials which merges the analyst's interpretation of accounts with the respondent's, sometimes to the point of being indistinguishable; second producing brief, typically specific stories organized around characters, setting, and plot, in response to single questions; third extended accounts framed in and through interaction developed over the course of interviews which are distinguished by the presentation of and reliance on detailed transcripts of interview excerpts, attention to the structural features of discourse and analysis of the co-production of narratives through the dialogic exchange between interviewer and participant. We adopted the third approach, following Reissman (2008) advice that the key skill in good narrative analysis is an ability to produce a good narrative account of a phenomenon, using theoretically informed open-ended questions. As described above, the questions used in this research engaged explicitly with collaborative value chain constructs but were deliberately broad to allow respondents to follow their own individual and "instinctive" path through their experiences. The collection of interview, story and documentary data was then analyzed using an adaptation of Reissman's (2008) approach to narrative analysis which utilized three different analytic approaches: thematic analysis; structural analysis; and dialogic/performance analysis.

The thematic analysis involved keeping our respondent stories intact and using their narratives in pure form to address the questions we asked in their own words. The focus of thematic analysis is the "content" of the text ("what" is said more than "how" it is said) and the process of analysis involved us "structuring" the narratives by inductively pinpointing, examining, and recording common

patterns or themes within the data across the three case studies and around our two research questions: why and in what ways do social enterprises and construction firms collaborate to create social value?; and, what organizational and institutional factors drive cross-sector collaboration?. Our inductive thematic analysis comprised two stages which started with an initial analysis by an "insider" with experience of the construction industry, who passed their initial thematic codes to a second researcher who was an "outsider" without any experience of construction but an expert in social enterprise. This insider/outsider approach is widely used in psychology and social sciences research to provide different perspectives on data (see for example, Hayfield and Huxley 2015). Instances of disagreement in coding were resolved through repeated discussion, a process which ensured that the outcomes reported below had a high level of "fit" with the data we collected and the theoretical constructs that informed our research questions. For example, in one theme which emerged around the claimed adoption of a "collective impact" model by a respondent in Case Study 1 (see results), the benefits of a more nuanced interpretation of the data that can emerge from different perspectives was evident. Here, the outsider brought a more qualified interpretation of collective impact approaches from a "community development" tradition, while the insider saw it more from an industry perspective, seeing it as a positive "business focussed" solution to structural barriers posed to collaboration by a highly fragmented construction industry.

In addition to thematic analysis, our "structural analysis" sought to provide us with insights beyond what was simply said in our interviews, by considering "how" the stories were told through the genre, larger storyline and linguistic form (emotional, syntactic and prosodic features of our data). Given the significant struggles and challenges which the respondents described having to overcome in establishing social procurement as a definable feature of their organizations, this aspect of the analysis was important as is illustrated in the quote below where the respondent emotively communicates, with an ironic sense of humour, the barriers she encountered due to stark power differences, commercial drivers, prejudices (and in other quotes "sexism") that appear to exist in the construction industry's culture and social value chains.

> Social value has absolutely worked against us … no one wants a bunch of hippies from the [name of social housing estate] on their project or new extension. So I don't tell them I am a social enterprise … I find that people don't like to pay to help others if it's their own money … Being a social enterprise does not bring us any social advantage in the market place. …Case Study 3

Finally, our dialogic/performance analysis focused on the "performed" accounts of the initiatives that were described. As Riessman (2001) notes, personal narratives contain many performative features because when people tell stories they portray a particular identity by positioning characters in relation to one another, and in relation to themselves. This aspect of the analysis was important given the focus on collaborative relationships and social value chains and enabled us to explore, understand and describe the main characters in the respondents' stories, what types of relationships they had, and what roles they played in the social value chains they described. The following quote from one of the case studies illustrates vividly the types of performative features which we found in our narratives which clearly indicate the relative identities, positions and levels of resources, risk sharing and trust which our respondents perceived to exist in the social value chains they participated in construction projects.

> We don't really collaborate with other social benefit organisations. We would like to in an ideal world but the problem is that there are not many other organisations like us … so we would do it if there were some social benefit organisations to sub contract to or buy products from. But we are generally the end of the supply chain and at this level we are all in competition with each other for a very small pool of money. So there is not enough to go around. We would like to collaborate but what will happen is that we will have to take all the risk and they will then get the best bits. – Case Three

Although there is some debate among researchers who conduct narrative analysis about whether the results should also be presented as a narrative (Clandinin and Connelly 2000), we present our analysis below in narrative form supported by selected quotes. Clearly, it is not possible to recount everything respondents said, so our results use selected representative quotes from the main themes emerging from the data. Like Riessman (2001) we acknowledge that in the interpretative tradition, it is important to recognize that in the construction of narrative accounts the researcher inevitably plays a role in what is presented. However, as described above, the comparative process of cross-checking between and insider and outsider and the employment of theoretical constructs (collaboration and value chains) to guide analysis helped in our reflexivity and in minimizing any potential bias in this process. Furthermore, in presenting our results we have sought to present the exact words used by our respondents without our interpretation so that readers can judge for themselves that our interpretation is correct.

Results

Research question 1 – Why and in what ways do social enterprises and construction firms collaborate to create social value?

Social value creation was principally depicted by participants from each case as being about creating employment and employment pathways for those highly disadvantaged in the labour market.

> We are most structured around Indigenous employment outcomes because of the [name of company Foundation] … we established in 2013 which is a partnership between [names of Indigenous community organisations, and company]. – Case 1

> Working with our parent group and other clients … The primary aim of [name of company] is to provide employment, education and on-the-job skills training opportunities to the local long-term unemployed and to people from disadvantaged backgrounds .– Case 2

> [name of social enterprise] supports the regeneration of the [name of social housing estate] by employing and training people from the area. Working in partnership with [government housing department] and other private clients. – Case 3

Mutually beneficial relationships with other forms of organization were further articulated as both a goal and a function of social value creation. For example, in Cases One and Two, supporting the sustainability of third-sector organizations with which they work was explained to the interviewer as one of the ways they meet their social purpose goals. In Case One, this was characterized by the business acting as lead agency in large contract opportunities and partnering with or sub-contracting to large third-sector providers. In Case Two, contributions to third sector sustainability were purposefully made by: lending staff to social enterprises (including to Case Study Three) to help with labour shortfalls that came up at short notice; sharing supplier advantages by on-selling goods purchased at competitive rates; and providing mentoring and support to other social enterprises. Respondents stressed mutuality of benefits in these arrangements, suggesting that they enabled the lending organization to retain staff through lean times when it would otherwise have to lay people off.

> we are trying to deliver as much social value back to the community as possible … this involves assisting those cohort groups that are finding it hard to get jobs (Indigenous, disabled, long term unemployed, refugee background etc.) and helping those organisations that are finding it difficult to deliver employment services because they are under resourced. – Case 1

> [name of company] creates value in numerous ways: [name of company] collaborates with social purpose clients such as Housing Associations and Social Investment groups who want to develop a social enterprise themselves … [name of company] also lend/provides previously unemployed labour (who have learnt a trade through us) to other social enterprises. This network helps the other social enterprises but also helps us to keep its staff employed. It also procures products from other social benefit organisations such as a timber recycling social enterprise and not for profit tile companies …

> we have to look for the best prices … in searching for the best prices and in searching for social value providers we can bring benefits to everyone up and down the supply chain. – Case 2

The structure of mutually beneficial relationships differed across cases. In Case One, the respondent described a "collective impact" approach to create a new cross-sector governance structure, housed within a dedicated facility to foster collaboration between what the corporation saw as a highly fragmented and competitive employment services sector and an equally fragmented construction supply chain, both of which had little previous experience and contact with each other. In an example of pooled resources and cross-sector collaboration beyond the immediate confines of individual construction projects, this facility was funded by the contractor and staffed by a third-sector organization and used by numerous community groups in the vicinity of a project for community functions.

> Collaboration is the key to everything we do … bringing together a fragmented employment sector and construction industry to create employment opportunities for the country's disadvantaged. We are very selective and only work with those who we have established proven and effective relationships with over the years … There is a lot of risk in this area … These relationships often revolve around individual rather than organisational relationships … Not all have the expertise to work with industry and deliver what they say they can deliver … so you have to be very strategic and careful about who you work with … – Case 1

While all respondents identified clear substantive social objectives related to their organization's corporate goals, they also described the nature of their social value creation strategies shifting over time. These shifts were typically described as a function of the changing socio-economic needs of the communities in which they built, and the project-based nature of the construction sector. The construction sector is unique in that its production environment changes from project to project, which means that the socio-economic environment in which work takes places is constantly changing. Construction organizations' clients and their corporate social responsibility priorities thus change from one building to the next, and our respondents articulated a need to strategically identify and respond to these changes in tenders in order to win projects.

> Some of our major private clients also have a strong social procurement focus on certain cohort groups and this obviously shapes the focus on what we do on a project-by-project basis. – Case 1

> Our focus shifts in response to where we build and the needs of the local community and we seek to give them the skills they need to work in those communities. We wont win jobs if we don't respond to these local needs. – Case 2

> However, it's not straight forward. With the changing economy there are changing questions and challenges to address all the time … – Case 3

In addition to social value creation embedded in supply chains, all three companies were linked to charities in some way. Case One owns a charitable foundation focussing on Indigenous employment; Case Two is co-owned by a charity; and Case Three has a charity within its training group to which it contributes revenue. However, the role of the charity in the business was structurally different in each case. In Case Three, the charity was at the heart of the business because a charity was the parent entity, whereas in Case One, the charity was independent of the business although Directors from the business also sat on the collaborating charity's board.

When collaboration was discussed, the subject of supply chain risks featured prominently in responses, although it was notable that the nature and types of collaborations with which our respondents were involved depended on their position in the construction supply chain and their organizational size. For example, while Case One (the largest organization at the top of the industry supply chain) reported collaborating significantly with social benefit organizations through joint ventures and alliances with large charities (as noted in the quotation above), it also noted that it had not yet significantly collaborated with its supply chain of subcontractors due to difficulties in sourcing suitable social benefit suppliers to fit into supply chain needs, perception of risk associated with breaking existing supply chain relationships and their reliability and resource constraints and potential impacts on supply chain productivity.

> the big challenge is that not many people in these organisations have the expertise to manage the process and deal with industry and they are under–resourced. These agencies have a precarious existence … they are severely under resourced. The reality is that often don't have the capacity to deliver what they say they can deliver. The bottom line is that we have learnt from this and we are now doing this ourselves … We don't use social tendering because we don't know who is available in that space and there are very few social benefit organisations who can compete with our incumbent subcontractors and suppliers. – Case 1

Interview reflections also suggested that opportunities for collaboration in social value creation were dependent on the organizations' supply chain positions and their ability to leverage unique social capital. Case One described in some detail the processes of leveraging its long standing, broad and unique connections in establishing collaborative activities. This narrative was rich in detail of multiple relationships, projects and joint initiatives between supply chain actors and across sectors, with a strong emphasis on both direct (commercial and/or social) benefits to the participating organizations, and the social value they co-created for the wider community. Case Two identified mutual benefits flowing between it and its parent organization in mobilizing collaborative opportunities. This narrative was somewhat more instrumental, emphasizing direct transactional benefits to the partner organizations and their shared social and commercial goals. Case Three reported having relatively fewer inter-organizational relationships upon which to draw and "located" itself as struggling at the bottom of the supply chain and lacking power to influence its strategic partnerships. More often than not, social procurement initiatives being promoted by the head office of its clients was not being enacted at the site level at which they had to operate, indicating a significant gap between the rhetoric and reality of social procurement at the top and bottom of the construction supply chain. Case Three discussed risk much more frequently than other cases, describing itself as subject to a high level of risk, passed down by organizations higher in the supply chain.

> Initially, [name of social enterprise] grew and developed as a sub-contractor to [its parent company] which had been appointed one of the five Partnering Contractors to the Council for the Decent Homes Program. It was also anticipated that similar work opportunities would be developed with the other Partnering Contractors. [name of parent company] as the driving construction industry partner would bring business and commercial expertise to the company and provide infrastructure and operational support during the first four years, giving it time to develop and grow its business without the initial burden of overheads. – Case 2

> We don't have any choice with who we work with … there are no margins to distribute and since we are at the end of the chain there is no one to collaborate with. It's very Machiavellian … if you can get the main contract and get the management fees and then subcontract the work. The subcontracting relationship is not a partnership … it's born entirely out of the transfer of risk … It's just the nature of the way the contracts come. – Case 3

Research question 2 – What organizational and institutional factors drive cross-sector collaboration?

Factors driving social value chain creation in the narratives of all of the cases examined can be clustered as *organizational*, *commercial*, and *institutional* (including both industrial and political) factors.

Organizational factors driving social value chain practices articulated by our participants included: senior staff who were champions of social value creation; the breadth and accessibility of organizational networks; and the organization's core purposes. In Case Two, the social enterprise's Managing Director was a former Regional Director in its commercial parent company and had chosen to resign from that position to grow the social enterprise, driven by his passion for providing employment

opportunities for disadvantaged people. In Case Three, the primary driver was described as being the global financial crisis, which resulted in the elimination of funding for a program which the CEO was managing for a charity, which then spun-out into a social enterprise. In Case Study 1, the identified driver of social procurement had an employee and industrial relations background and had voluntarily assumed the role of social procurement champion out of involvement in past social initiatives which had relied on collaboration with charities and other not-for-profit organizations and in the absence of expertise to respond to new social value requirements in bids.

> This question has a number of dimensions: At one level we are responding to increasing social procurement requirements of our clients (particularly government clients). At another level it is being driven by a few senior people in the company who really care about disadvantage and they are in sufficiently influential position positions to direct the company to do some good things. Our official policies and procedures talk about social procurement but the end results are the result of influential people in the company. – Case 1

Commercial considerations also appeared in case narratives as drivers of practice, although the further down the social value chain the less our respondents described or saw competitive advantage in delivering social value. Competitive advantage was frequently referred to within Case One, while Cases Two and Three less frequently narrated their practices in terms of competitive advantage and were less able when asked to identify competitive benefits that accrued to them from collaborative activities due to their positions in the construction supply chain. In Case One, senior interest in social value creation was described as being driven by both commercial imperatives and altruistic values associated with a history of connection with Indigenous employment and literacy and other social issues, formalized through its charitable foundation. These factors drove the corporation's practices, both in terms of initiating cross-sector collaborations and selecting the social issues or demographic groups to which the corporation sought to respond. In Case Three, the smallest organization, social value creation was described as being driven directly by the passion of its founder, who had established the social enterprise as a mechanism for extending the charity's work and impact into the community. In Case Two, the social enterprise clearly provided commercial benefits to its parent organization.

> In terms of commercial results, … this was not the case in the past but increasingly there appears to be a commercial advantage which is based on our experience of more and more clients asking for this and our belief that this subject will get larger and larger as governments have no money to spend on social welfare and expect the private sector they do business with to take the lead and responsibility … And we have won jobs purely on this basis.

> When our price has been the same … this has been the differentiating factor in our bid. – Case One

> There are some commercial benefits in doing this work, particularly when tendering on projects for social benefit organisations like Housing Associations which value the extra social value which [name of social enterprise] brings. However, in the vast majority of tenders on the open market, social purpose brings no commercial advantage. – Case Two

> Social value has absolutely worked against us … no one wants a bunch of hippies from the [name of social housing estate] on their project or new extension. So I don't tell them I am a social enterprise … I find that people don't like to pay to help others if it's their own money … Being a social enterprise does not bring us any social advantage in the market place. – Case Three

Practices in social value chain creation and participation were also described by our respondents as being influenced by organizational scale and structural positions within the construction supply chain. The emphases in different case narratives suggest that the lower down the supply chain an organization works, the less social procurement is used and the more direct employment solutions are used to generate social value. This is because the lower in the supply chain a firm resides, the fewer firms it has to procure from. Furthermore, the resources and power to initiate manage collaboration were understood in Case Three as being largely unavailable to them.

> We don't really collaborate with other social benefit organisations. We would like to in an ideal world but the problem is that there are not many other organisations like us … so we would do it if there were some social benefit organisations to sub contract to or buy products from. But we are generally the end of the supply chain and at this level we are all in competition with each other for a very small pool of money. So there is not enough to go around. We would like to collaborate but what will happen is that we will have to take all the risk and they will then get the best bits. – Case Three

Industry-specific factors also seemed to affect our cases' approaches to social value creation through collaborative activity. Most notably, all respondents described the construction industry as being highly customer-driven, with social value priorities and social procurement practices predominantly driven by explicit customer needs. Regulatory and political factors were also understood by our participants to be driving practice. All participants demonstrated awareness of new public governance trends and described their organizations as purposefully positioning themselves to respond to increasing social and governmental expectations around collaboration between sectors in future welfare provision.

> Yes we have responded to our clients (private and public) who have social procurement requirements and we are working with them to learn together about how best to deliver these requirements … The Indigenous

Procurement Policy with government clients is also a major driver of social procurement in our business. – Case One

Yes we have responded to social procurement opportunities but they are a waste of time and we never win work because the reality is that many clients who don't have a like mind do it to please their clients and stakeholders and don't really care … It never eventuates on site. – Case Two

Social procurement is not common in the organisations we tender for work with … I meddle with social procurement of my clients where ever I can find it … to try to create a market for social impact … and I do a lot with influencing the audit process because often its not audited. All social impact stops with the quantity surveyor at the moment since they don't have those skills … quantity surveyors are good representatives of the companies that employ them … the issue is not with quantity surveyors but with the buyer wanting social impact. When they ask for it … quantity surveyors will start measuring it. – Case Three

Consistent with other studies of value chain creation, we also asked participants whether and how they utilized social enterprise or social value certification schemes – such as the UK Social Enterprise Mark and relevant ISO standards – as we were interested in whether these formal institutional policies played a role in social value chain development. It was interesting that such certifications were generally constructed by our respondents as being of little worth unless they were industry-legitimized. Cases Two and Three in particular described the risk that these certifications would single them out as having mixed loyalties and expose them to the potential stigma of "social value" in the construction industry. The lower in the supply chain, the more strongly this problem was emphasized in depictions of organizational risk associated with social value creation. The people we interviewed described being focussed on delivering commercial and social value on the ground, depicting social enterprise certification as being no help in this endeavour, either in delivery or in securing the work necessary to achieve social goals.

Its not really relevant to us since we are not a social enterprise but we have had awards … around innovation in finding employment solutions and we co-author research to promote the work we are doing. – Case One

[name of social enterprise] complies with all normal ISO standards as required to operate in the construction industry … Generally however we see little commercial value in these labels since they are not widely recognised within the price driven construction industry. – Case Two

It's a gravy train to be honest and which we have not bought … basically they are products and I don't know if they mean a damn thing and they are all very expensive… The only reason anyone will talk to me is if I am useful to them commercially … and if I walk in and say

I have all these other fluffy things … to be honest they are of no use to me at all … being a woman, with no experience in the industry, with no money and bunch of unemployed people behind me … I am already likely to be judged negatively … The main I want people to see is that 'we have actually done it' … all these labels are useless … if you are lucky to make any profits … what do you do with it … your label as a SE is irrelevant … its your impact that counts … frankly that's all that counts … – Case Three

The narratives presented in our cases point to a highly commercial and risk-averse construction industry, where there can be a significant gap between the rhetoric and reality of social value creation and cross-sector collaboration. The further down the social value chain one moves the greater this gap appears to be.

Up to this point in time we share the responsibility we get from our client to do things … so if our client uses social clauses in our contract we will do the same to out subcontractors on that project. Its about risk transfer. – Case One

Essentially while this gets us through the door and while they are very well meaning … we still have to then compete on low price and numbers in the open market like everyone else and they impose the same conditions as any other large builder they employ if we get the job. …The problem is that procurement people tend to be frightened by the law without really understanding the nuance or intention of the law. They tend to be junior or middle management who are right minded people but are not motivated by any other reason other than mitigation of risk and minimisation of costs … since that is their success criteria. – Case Two

We have been asked by other social benefit organisations to be a subcontractor for them … but not in a good way. In the competitive market place its ' who can get to be a main contractor first' … this position then allows them to get rid of their risk by handing it down to their supply chain. So the further down the supply chain you are … the more risk you get given … despite the fact that you are probably less able to manage it. – Case Three

Discussion

In responding to the need for more insights into the types of cross-sector collaborations, power structures, roles, networks and relationships that drive social value chain creation in construction (Barraket et al. 2016, Peterson and Kadefors 2016), our findings have provided numerous new insights into the construction sector's ability to collaboratively deliver social value by showing that this is determined by numerous institutional constraints imposed by the marketplace, government and by the nature of work and norms and organizational structures and practices.

Cooperation rather than collaboration

We found little evidence of the kind of deep cross-sector collaborations articulated by Keast and Mandell (2014) earlier in this paper. Rather, the collaborations that were described to us were in their early experimental stages of what Keast and Mandell (2014) describe as "cooperation" characterized by the traditional hierarchical power structures that define the construction industry's supply chains and by informal, temporary, unstable, low trust, voluntary and low commitment relationships which involve little sharing of resources, risk and reward. While Case Study One did provide some evidence of genuine collaboration through its "Connectivity Centers" such risk and resource sharing appear to be rare and the evidence we collected indicates that the construction sector has a long way to go in creating the types of high trust, stable, dense and interdependent cross-sector collaborations which are required for successful social procurement. According to Keast and Mandell (2014) and Mandell *et al.* (2016), this should not be surprising since the risks in collaborative networks are high because they depend on the willingness of participants to develop new ways of thinking and behaving, form new types of relationships and be willing to change existing systems of operation. The emerging literature on relational contracting and alliances within the construction industry indicates that such changes are difficult to bring about due to deeply confrontational ways of working and behaving which have been institutionalized over many decades (Davis and Walker 2004, Walker and Lloyd-Walker 2011). They appear to be even more difficult with social enterprises. Thornton and Ocasio (2008), p. 804) define these "socially constructed, historical patterns of material practices, assumptions, values, beliefs, and rules" as institutional logics and since the intermingling of institutional logics is a defining feature of social procurement and social enterprise (Battilana and Lee 2014), we would suggest that the mobilization of this theory might be a useful avenue for future research in this area. We also suggest that further research be conducted into how traditional subcontractors within the construction supply chain might collaborate with social enterprises since they were not part of our sample and might be called to do so as the growth of social clauses as tool of social procurement in the construction industry develops into the future (Reid and Loosemore 2017).

Transactional notions of social value

Adding to the work of Farag *et al.* (2016), we also found new evidence that notions of social value and the collaborations to achieve it, are shaped by a short-term compliance and transactional view of projects in meeting the needs of social procurement regulation and clients which require social value creation as part of their project performance indicators. Our findings also indicate that the co-production of social value through supply chain relationships in the construction industry is largely driven by commercial concerns and that the highly customer-driven and tight-knit supply chain relationships that characterize construction intimately affect how collaboration for social value creation is approached, what types of social value creation are prioritized, and the types of relationships organizations are able to draw upon. The further down the supply chain we went the less the arrangements looked like true partnerships and cross-sector collaboration (underpinned by trust and reciprocity) and the more they looked like "normal" subcontractor confrontational and commercial relationships. Concerns around social value became very much subsumed by concerns for competitiveness and delivery ability. In support of Close and Loosemore's (2014) analysis of community engagement practices in construction industry, our results indicate that new collaborative relationships formed to co-create social value creation are not well understood and that community-based organizations like social enterprises are often seen as a risk rather than an asset on the ground and must be seen to deliver shared value if they are to work effectively. Since the mutuality of interests between the community, social enterprises and construction firms lies at the heart of effective cross-sector collaboration, this is an important albeit not concerning finding. Social enterprises can expect no dispensation from construction companies and there is little willingness to break long established institutionalized practices in the pursuit of social value if it represents a risk to traditional measures of success in project delivery (cost, time, quality, safety). This finding reflects broader research in New Institutionalist Theory (Helmke and Levitsky 2004, Lowndes 2005), which shows how despite formal social procurement policies being implemented by governments, informal rules, practices and norms which exist and industry and organizational level can act to undermine their intent – a phenomenon which justifies further investigation in future research using new institutional theories. It is also notable that the more active experience of social value co-creation occurred at the top of the supply chain and in the more powerful and larger firms. The ability of our social enterprises to create social value seemed directly related to them being part of a nested business structure and on direct structural and interpersonal relationships with larger controlling interests and their ability to shape the procurement practices and requirements of potential clients. However, their lowly position in supply chains acts as a barrier to this happening – a problem which has been long recognized to apply

to many mainstream SMEs in the construction innovation literature (Sexton and Barrett 2003).

Supply chain position determines opportunities for collaboration

Our findings also suggest differences in experience and opportunity for collaboration based on supply chain position and organizational scale. While social value co-creation in the construction industry remains marginal and viewed by all participants as, at most, emergent activity, it is notable that the case where such activity was most widely practiced was in a large corporate firm operating at the top of the construction supply chain. Respondents from all three cases suggested that smaller social enterprises are least likely and least able to initiate social value co-creation through supply chain collaboration, because of their resource constraints and their supply chain positions. These findings somewhat qualify the characterization in the literature of social enterprises as having a high degree of collaborative agency and being network-oriented in their opportunity creation behaviours (Di Domenico *et al*. 2010), although this may reflect the industry specificities of our research focus. The structural and normative characteristics of construction industry practice with strong imbedded path dependencies and informal practice appear to create significant barriers for social enterprises entering that market. Many of these have been documented by Loosemore and Higgon (2015) and Denny-Smith and Loosemore (2016). Our finding that organizational scale and supply chain position are significant determinants of social value chain creation is also reflective of Di Domenico *et al.*'s (2009) proposition that organizational aims and priorities are key modifying factors in social value co-creation opportunities and practices. In contrast, our findings are consistent with Maltz and Schein's (2012) conclusions that shared value is best generated where there is capacity to do so, and that organizational capabilities such as supply chain expertise and social capital can be used in cultivating shared value.

It is also interesting that the largest firm in our sample which had the power and social capital to form effective social value chains sought stability in these collaborations, by maintaining a small number of scalable relationships with larger third-sector organizations, particularly welfare agencies that had some social enterprise capabilities embedded in their wider operations, which also had the skills and knowledge to manage the cross-sector collaborations which lay at the heart of its collective impact approach. While such initiatives could be construed by critics of collective action as a top-down approach which undermines true community development models of collaboration (Himmelan *et al*. 2017), our research shows that

as significant institutional actors in market relationships driven by new public governance (Bovaird 2006, Osborne 2006), such large firms are clearly now playing a critical role in delimiting the governable terrain (Carmel and Harlock 2008) of third-sector activity through their partnership choices.

The exchange value of social enterprises

In a new public governance context, where market drivers of partnership and collaboration are influenced by social procurement agendas, we also found – counter to the existing literature on social enterprise partnerships (Haugh 2007, Di Domenico *et al*. 2009, Henry 2015) – that the exchange value of social enterprises for corporate firms is less related to their local knowledge and legitimacy arising from community embeddedness and much more strongly related to their legitimacy as recognized service providers with governments and corporations under new social procurement policies and regulations. In the construction industry, this commercial exchange value favours larger and more established social enterprises which focus on delivering traditional construction products and services in a competitive way, over smaller and more locally embedded social enterprises which focus on the delivery of social services to communities as their main priority. It will also favour social enterprises which can provide independent verification of their social value status, although it was interesting that certification was seen as unimportant by our respondents in the current market, possibly because of the current lack of market recognition of and confidence in the veracity of such certifications and the lack of focus of UK social procurement policy on specific target groups. In Australia for example, a more focussed social procurement policy targeted at Indigenous Australians and businesses has led the government to endorse certain certifications of Indigeniety, which has created more of a market for certification.

The rhetoric and reality of collaboration in construction

Overall, in line with the literature on corporate social responsibility (CSR) in construction (Loosemore and Phua 2011), we also found a major gap between the rhetoric and reality of collaborative social procurement in the construction industry. According to our respondents, what is being espoused at Head Office is not always being delivered on site due to split organizational structures and significantly different pressures and priorities at these different levels of organization – a problem which has also been exposed in the construction human resource management (HRM) literature (Dainty and Loosemore 2013). These similarities

between the challenges faced in implementing CSR and HRM reforms in construction is an interesting finding that might enable the development of common solutions to the emerging contemporary challenge of implementing social procurement in the industry and vice versa.

Conclusion

In answering the need for more research around forms of cross-sector collaboration associated with social procurement in the construction industry, the aim of this paper was to begin to address the many unresolved questions around why and how different types of firms in the construction industry collaborate to create social value and what institutional and organizational factors shape these newly emerging value chains. While we recognize the limitations of any research based on three case studies, (albeit of major organizations from across the supply chain), our results provide little evidence of true cross-sector collaboration occurring in the social procurement practices of the construction industry. While there is some level of early tentative cooperation occurring, our results indicate that cross-sector collaborations in the construction industry are largely driven by commercial and institutional imperatives, as well as by organizational commitments to meet social missions. While governments are increasingly espousing the need for business and third-sector organizations like social enterprises to collaborate in creating social value, the construction industry's established governance, management, leadership, organizational arrangements, systems, structures and competencies are not conducive. In private for profit contexts, regulatory imperatives and customer demands to demonstrate a social bottom line and new business opportunities are the key drivers of practice. In social enterprise contexts, organizational subsistence and a desire to develop scale and increase social value through supply chain interactions play a stronger role. Our findings also indicate that the further down the supply chain organizations are positioned, the less they are able to collaborate with others through value chain creation, yet ironically this is where the majority of social enterprises and other community-based organizations will need to operate. They also highlight a new paradox that it is those least able to collaborate that may benefit most from such collaboration in terms of maintaining organizational sustainability.

From a New Institutionalist perspective, our findings also suggest that although formal social procurement policies do have direct influence on firm behaviour in social value creation, they can be undermined by informal industry practices, relationships and norms. In the jurisdiction where social procurement is legislated but not mandated, our research indicates that firms experience limited implementation or

competitive advantage arising from social procurement policy. In the jurisdiction where narrow but firm targets have been established in public policy, there was greater emphasis on the role of public policy in driving firm choices with regard to social value chain decisions. The potential for competitive advantage to be created by social value creation appears to be greater here as well. Given our small sample and different supply chain positions and business structures of our participating cases, further comparative research is clearly needed to understand the effects of stated rules and rules in use on collaborative relationships in social value chain creation. As well as exploring the informal rules, norms and practices which act to undermine the co-creation of social value in the construction industry, further research could examine if and how industry orientation and differences in types of social value influence collaborations in social value chain creation involving social enterprises and the wider social economy.

Disclosure statement

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