**Advancing Empirics and Theory on Inclusive Innovation and Research**

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**Special issue information:**

**Background to the research problem**

While business research has increasingly addressed ethical issues, particularly regarding social entrepreneurship (Murphy and Coombes, 2009) and responsible research and innovation (Van de Poel et al., 2020), only little has been done regarding inclusive innovation and research (e.g. Mortazavi et al., 2021). Making innovation and research inclusive means that processes and outcomes of innovation and research should include everyone, and thereby reflect the diversity of the population regarding characteristics such as gender, age, race, language, income, and disability. When innovation and research are not inclusive, this has severe consequences, e.g. when crash test dummies used in the process of developing cars only reflect the body shape of the average male passenger, resultant car safety systems do not sufficiently protect women nor men who are taller, shorter, thicker or thinner than average (Perez, 2019). In fact, with their innovations, businesses might even risk to increase existing inequalities between mainstream groups and marginalized groups of consumers in the population (e.g. Visser, Benschop, Bleijenberg, and Van Riel, 2019).

Innovation, research, or technology development in general, are first and foremost interactive processes, where various actors are involved and where communication and collaboration help to combine different knowledge bases. Hence, to fully exploit the potential of said research and innovation, it is paramount to involve individuals from every part that society has to offer (gender, ethnicity, age, socio-economic background, etc.). This type of inclusivity may broaden the search horizon, may help to develop insight and solutions that can be more responsible, more ethically and at times even more socially acceptable. Aiming for example at gender balance or the equal representation of minorities in business activities means to fully exploit the talent pool and to fairly distribute opportunities. When the process itself is more inclusive, so will be the final solutions that are developed. Whereas the reasons for more inclusivity are manifold, our understanding of how to overcome exclusionary practices in innovation and research is still in its infancy. This puts a research opportunity in front of very many business researchers, with implications for theoretical, empirical, and practical research.

This special issue focuses on the role of inclusivity at the intersection between innovation and research in business research. It particularly considers how these activities can be organized and managed in inclusive ways to result in inclusive and more broadly applicable outcomes, that are not limited to privileged subgroups of the population. Broadly speaking, research refers to the process by which new knowledge and understanding is generated (e.g. basic research resulting in fundamental scientific discoveries), whereas innovation refers to the process of turning such knowledge and understanding into marketable products and services (e.g. applied research for new product development). Both, in isolation and at their intersection, have major societal implications while at the same time they carry the potential to advance scientific discourse in meaningful and relevant ways (Ooms, Werker, Caniëls, and Van den Bosch, 2015; Stokes, 1997). The problem of overlooking the importance of inclusivity affects the genesis of appropriate research questions/problems but may also impact on the application of innovative results. That is, whether it was autonomous vehicles hitting the road even though their ability to accurately detect people with darker skin colors was substandard or drugs being approved that turned out to have negative side effects for certain groups of patients that could have been better understood at the outset if only research had tested the drugs on a more diverse group of subjects, it is these examples with sometimes grave consequences that emphasize the need for inclusive innovation and research (Werker, 2021). In all of these situations, innovation and research led to an outcome for the ‘mainstream’ and thus failed to treat people and their needs equally. Responsible research and innovation can endorse these relevant values and viewpoints already during the research process. This may range from making AI applications less racist to including more female-centered views when developing algorithms (e.g. Fu, Huang, and Singh, 2021).

Inclusive innovation is defined as “innovation that benefits the disenfranchised [and] is a process as well as an outcome” (George, McGahan, and Prabhu, 2012, p.661). To treat people equally in innovation and research will – at times – actually mean to treat them differently. Yet the question of how to organize and conduct innovation and research in an inclusive way, and how to promote it, is largely unaddressed. Recent studies have begun to explore the problem of, and the need for, inclusive innovation and research (George et al., 2012; Mortazavi, Eslaim, Hajikhani et al., 2021), but this research has had quite particular conceptual and empirical foci, thus leaving ample room for synthesis of other, fragmented works in other research areas and for considerable empirical advances on inclusive innovation and research.

We outline three problems with existing literature on inclusive innovation and research that point to research areas (literatures, research methods, and empirical settings) in which significant advances could be made when developing and applying the lens of inclusive innovation and research to business research. The first problem is that many studies exercise the use of narrow definitions of the concept, such as those focused exclusively on the inclusion of specific disenfranchised groups, thereby obstructing the inclusivity of the scientific understanding about inclusive innovation and research itself. The most extensive research has been on groups in/of underdeveloped countries (e.g. Mortazavi et al., 2021; Kaplinsky and Kraemer-Mbula, 2022), where studies have focused on concepts such as grassroots innovation (Pansera and Richards, 2018; Tan and Zuckermann, 2021) and reverse innovation (Malodia et al., 2020). In yet other studies inclusion is treated as a dimension of broader concepts, e.g. in works on responsible innovation (Stilgoe, Owen, and Macnaghten, 2013). In both cases, the foci of concepts and empirics lead attention astray from yet other relevant groups of disenfranchised then those at the bottom of the pyramid and in underdeveloped economies or from inclusivity in particular. Notwithstanding the importance of inclusion of any group studied to date, the common characteristic for the majority is clearly that they are low-income groups that require affordable innovation tailored to their circumstances (e.g. Heeks et al., 2014; Mortazavi et al., 2021; Malodia et al., 2020), but there are many others who are not always considered in mainstream innovation and research either, and for whom income is not necessarily what differentiates them from the mainstream.

A starting point to solve the first problem addressed are the UN’s Sustainable Development Goals (SDGs) which offer a non-exhaustive overview of other groups that are at risk of being marginalized, even within particular countries, such as: women, migrants, indigenous people, elderly, people with disabilities, and even children (UN, 2020). Although research exists about inclusion of some, if not most, of these groups in innovation and research (on gender for example Bell, Berry, Leopold, and Nkomo, 2021; Van Hagen et al., 2020; Vida, 2020), synthesis of such research through the lens of inclusive innovation and research is missing. We may be able to apply the same theories as were used before to some of these disenfranchised groups. These groups share a low-income character as the root cause of their marginalization, and therefore the resource-based view, the notion of bricolage, network theories and several others could provide fitting perspectives (e.g. George et al., 2012). Here, the question rises to which groups such theories could apply.

Yet there is a considerably larger opportunity for significant empirical and theoretical advances particularly for those groups that have not received much research attention to date or for whom we may need different theoretical perspectives altogether, because the cause of their marginalization is not low-income per se. Considering the example of inclusion of women in innovation and research again, issues that are linked to their disenfranchisement are generally biases and perceived threats to identity or status quo (e.g. Bell, Meriläinen, Taylor, Tienair, 2020; Kelan, 2018; Nishii, 2013), and thus their inclusion in innovation and research needs to be understood from different perspectives than those that lend well for understanding the low-income issue. A potential starting point could be studies covering the inclusion of some of these groups from another organization and management studies perspective, particularly those about gender and race. There is plentiful research on inclusion of the aforementioned groups in the domains of organizational behavior, organizational change, and human resource management (e.g. Van Laer and Zanoni, 2020; Nishii, 2013), focused on inclusion in the workplace. Although such studies are not related to innovation or research per se (with few exceptions, e.g. Visser et al., 2019), these advances might still inform theoretical perspectives on inclusive innovation and research, via perspectives such as that of intersectional equality (Woods, Benschop, and Van den Brink, 2022), social innovation (Alkan, Ozbilgin, and Kamasak, 2022), hybrid inclusion (Dobusch, Holck, and Muhr, 2021), and indigenous inclusion (Pio, 2021). Other potential approaches to conceptualizing inclusion for one or more hitherto overlooked disenfranchised groups might be in (extended) applications of lead user theory to elucidate how different kinds of users and firms can work together to tailor innovation (e.g. Franke et al., 2006), legitimacy theory to understand how disenfranchised groups may seek to become part of mainstream innovation and research (Suchman, 1995), self-image theories to understand how inclusivity feeds back to the individual (Martin and Honig, 2020), social entrepreneurship perspectives on effectuating social and institutional changes to reduce inequalities (Saebi, Foss, and Linder, 2018), ecosystem perspectives as an extension of network theories that proved useful to understand inclusivity before (Jacobides, Cennamo, and Gawer, 2018), or an open innovation in science perspective to understand inclusion of specific groups in scientific research (Beck et al., 2020), and yet other approaches are possible.

The second salient problem that hampers the understanding of inclusive innovation and research is the dominant focus on problems and outcomes in existing studies. At the same time, the processes of innovation and research received much less attention. In other words, while many describe, map, and explain the (extent of the) problem of inclusive innovation and research in detail (e.g. Kaplinsky and Kraemer-Mbula, 2022; Pansera and Owen, 2018; Van Hagen et al., 2020), few go as far as studying and testing approaches and processes to actually doing inclusive innovation and research and then getting it right (Andries, Daou, and Verheyden, 2019; Mortazavi et al., 2021; Woodson, Hoffman, and Boutilier, 2021). A focus on process aspects would also augment internal validity and ecological validity of findings in the field (George et al., 2012). A combination of empirical work and theorizing may be the missing link here. Using empirical studies to conceptualize and theorize about the factors and mechanisms that drive disenfranchisement would give future empirical research (exploratory and explanatory) a point of reference to depart from. This also calls for attention to research methods that could advance a process perspective on inclusive innovation and research. What data and what research designs could serve to explore and unravel the causal chain that leads up to inclusive innovation and research? How can data collection be made tailor to reach under-represented groups, how do experiments with excluded individuals foster our understanding of management phenomena at hand?

The third problem is related to the positioning and scope of management research regarding inclusive innovation and research, which is taking place in silos, an issue that exists in business research at large (e.g. Breslin, Gatrell, and Bailey, 2020). In this particular case, the reason is not just that publishing science is organized largely within disciplines, but also simply because the phenomenon of inclusive innovation and research is relevant within the scope of many disciplines. The number and diversity of disenfranchised groups, for example, makes it such that the scientific discourse on inclusive innovation can happen in international business journals (e.g. Malodia et al., 2020), innovation and technology management journals (e.g. Woodson, Hoffman, and Boutilier, 2021), and more generalist business journals (e.g. Mortazavi et al., 2021) to name but a few, all at the same time yet potentially without referencing or informing each other. Similarly, discussions on inclusive research take place in innovation and technology management journals (e.g. Kaplinsky and Kraemer-Mbula, 2022), science and engineering journals (e.g. Mejlgaard et al., 2019), journals focused specifically on issues of inclusion (e.g. Bell et al., 2021), but also in quite different places, such as *Nature Human Behavior*(e.g. Nielsen, Bloch, and Schiebinger, 2018), a journal that operates at the intersections of social, biological, health, and physical science. Hence, to fully comprehend the problem of inclusivity and its potential solutions, contributions are called for that dare to transcend disciplinary boundaries, and that seek to come up with research agendas for the integration of ideas on inclusive innovation and research in these fields.

**Special issue themes**

This special issue invites papers that make empirical, conceptual or theoretical advances on inclusive innovation and research. We are open to receive quantitative and qualitative empirical works of different kinds, conceptual papers, systematic literature reviews, but also papers that review or put forward appropriate research methods to study inclusive innovation and research.

The special issue call is open to contributions about the inclusion of marginalized (groups of) researchers in academia or in R&D and innovation, as well as the inclusion of marginalized (groups of) subjects (i.e. users, consumers, patients) in academic research or in R&D innovation processes. More precisely we look for contributions within the following broad themes, including examples of potential topics:

*Inclusive innovation and research for hitherto overlooked marginalized groups*

· Empirical studies of inclusive innovation and research for under-researched marginalized groups (e.g. women, ethnic groups, migrants, indigenous people, elderly, people with disabilities, children, illiterate)

· Synthesis of fragmented works on innovation and research for marginalized groups that make conceptual and theoretical advances

· Empirical studies seeking to understand the interaction of different causes of disenfranchisement in innovation and research

*Applying, extending or developing theoretical perspectives on inclusive innovation and research*

· Empirical studies on inclusive innovation and research applying theoretical perspectives used to understand inclusion in other research fields (e.g. intersectional equality, hybrid inclusion)

· Empirical studies extending existing theories used for innovation and research to capture inclusive innovation and research (e.g. ecosystem perspectives, lead user theory, self-image theory, social entrepreneurship perspectives)

· Exploratory empirical studies (e.g. case studies, grounded theory) aimed at developing novel theoretical perspectives on inclusive innovation and research

*Beyond problem- and output-focused studies: Processes of inclusive innovation and research*

· Empirical studies to conceptualize and theorize the factors and mechanisms that drive disenfranchisement and to unravel the causal chain leading up to disenfranchisement in innovation and research

· Contributions outlining the use of original methods and techniques for research to understand processes of inclusive innovation and research

**Manuscript submission information:**

The journal's Guide for Authors on how to prepare a paper is available at <http://www.elsevier.com/locate/issn/0148-2963>. Papers must be submitted electronically via the Elsevier Editorial System site for the Journal at <https://www.editorialmanager.com/JOBR/default.aspx>.
To ensure that all manuscripts are correctly identified for inclusion into the special issue, it is important to select ***“VSI: Inclusive Innovation”*** when you reach the “Article Type” step in the submission process.

**Submission deadline: September 1, 2023**

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