

Embracing Social Procurement: An Institutional Work Perspective on Implementation in Procurement Practices

Josephine Chikwana (Josephine.chikwana@cranfield.ac.uk)
Cranfield School of Management

Leila Alinaghian
Cranfield School of Management

Kamran Razmdoost
ESCP Business School

Abstract

Organisations are increasingly using their purchasing power to create social value, a practice known as social procurement. This involves adapting existing procurement practices to incorporate social norms and practices. However, this process can lead to tensions and conflicts, requiring organisations to balance the priorities of different procurement practices. This study uses an institutional work lens to examine how organisations change and alter existing practices to navigate the complexity of integrating social procurement and traditional procurement practices. An analysis of six case studies reveals that organisations use various strategies of institutional work, which are influenced by contextual factors.

Keywords: Social Procurement, Institutional Change, Institutional Work

Introduction

With the rise of complex societal challenges such as poverty, inequality, mental health, environmental degradation, and technological disruption, it's becoming increasingly evident that traditional supply chain practices and business strategies are insufficient (Agrawal et al., 2022). These issues are interconnected and require multifaceted solutions that consider their systemic nature in the ways that organisations operate. Social procurement has emerged as a strategic approach for businesses to address these societal challenges while also meeting their procurement needs (Loosemore et al., 2021). Social procurement involves intentionally sourcing goods and services from suppliers who have a positive social or environmental impact. This approach goes beyond traditional considerations such as price and quality and takes into account the broader social value created by the supplier (Loosemore, 2016; Razmdoost & Alinaghian, 2023).

Organisations engage in social procurement by sourcing goods and services from social enterprises which are entities that are driven by a social or environmental mission, seeking to address societal challenges while also sustaining themselves financially (Meqdadi et al., 2020). Alternatively, organisations engaging in social procurement may

also purchase from marginalised groups thereby providing support and creating a societal difference through their supply chain (Sodhi & Tang, 2016).

However, the inclusion of social enterprises and marginalised groups as suppliers represents a distinct approach to purchasing, one that prioritises social impact alongside economic considerations. The aspect of balancing between social impact and economic considerations adds complexity and depth to the procurement process (Meqdadi et al., 2020; Pullman et al., 2018). This balancing act requires organisations to weigh the potential social benefits of sourcing from social enterprises and marginalised groups against the economic factors such as price, quality, and reliability. Often this is coupled with the need to change procurement practices to normalise the inclusion of social enterprises and marginalised groups as legitimate suppliers (Pullman et al., 2018; Razmdoost & Alinaghian, 2023). This shift entails revisiting procurement policies and procedures to accommodate the unique needs and capabilities of these suppliers. As such scholars have shown that organisations can do this by engaging in purposive actions to aimed at implementing social procurement (Razmdoost & Alinaghian, 2023).

Despite the increase in knowledge on how social procurement practices are created, there is a dearth of knowledge on organisations' balance priorities from the two contradictory procurement practices (Razmdoost & Alinaghian, 2023; Wu & Pagell, 2011). Employing an institutional work lens, this study delves into the intricate interplay between existing procurement practices and social procurement practices during institutional change. By simultaneously exploring both institutions, we identify four distinct change strategies that explain how organisations can implement social procurement within their existing procurement frameworks. Furthermore, we proceed to make propositions that demonstrate factors that influence approach in implementing social procurement.

Literature Review

Social Procurement

Social procurement is a growing and recent phenomenon that sees profit driven organisations using their purchasing power to create a social impact by buying from social enterprises (Barraket & Weissman, 2009; Loosemore, 2016; Razmdoost & Alinaghian, 2023). Social procurement extends beyond the traditional notions of corporate social responsibility by integrating social and environmental considerations directly into the fabric of supply chain decision-making. It pushes organisations to challenge their existing procurement values and practices to consider how social values can be created and implemented (Razmdoost & Alinaghian, 2023). Through their procurement activities, organisations can wield considerable influence extending beyond transactional interactions with vendor suppliers to strategic partners in a shared commitment to societal betterment (Agrawal et al., 2022; Yawar & Seuring, 2017)

Traditionally, procurement has been considered as a function of the business that drives efficiency and aids the business in driving profitability through minimising costs. To do this, organisations have been known to buy from large suppliers that can offer services and products across all divisions of the business (Hammerschmidt et al., 2018). However, recent trends have shown that there is a demand for organisations to procure responsibly, by considering the impact their purchasing decision has on the society thereby causing them to shift from large key suppliers to smaller multiple suppliers who minimise negative impact in the supply chain (Marshall et al., 2019). As such social procurement comes as a tool that aid's organisations in their bid to procure responsibly by procuring directly from businesses that operate to serve a social cause (Loosemore, 2016).

Recent studies have sought to understand how organisations can implement social procurement practices. In their study of drivers and motivations of social procurement adoption in Australian construction industry, Loosemore and colleagues (2021) argue that social procurement should move beyond compliance structure of adoption to one that embeds into the overall procurement and supply chain norms. However, to date there is limited theoretical understanding of how social procurement practices are introduced to fit into existing frameworks where social procurement has not replaced the existing framework but has been integrated into it. Particularly a recent study from Razmdoost and Alinaghian (2023) studying how organisations create social procurement through the lens of institutional work reveals that social procurement involves an interplay between the existing procurement and the new social procurement framework.

Our study seeks to extend the findings in this debate by studying how social procurement is implemented in organisations and exploring the variations in the way it is implemented.

Institutions and Institutional Work

Institutional work is a pivotal concept in organisational studies, shedding light on the processes through which individuals and groups actively shape, maintain, or challenge institutional arrangements within organisations and broader societal contexts. At the heart of this concept lies the understanding that institutions are not merely formal structures or regulations but are deeply rooted in shared norms, values, beliefs, and standards that govern organisational behaviour (Scott, 1987). Barley and Tolbert (1997) defined institutions as the underlying frameworks of social order that provide stability and coherence to organisational practices. These institutions encompass a wide array of formal and informal rules, routines, and norms that guide the boundaries of acceptable conduct and shape the organisational behaviour.

Central to the notion of institutional work is the recognition that institutions are not static entities but are subject to ongoing negotiation, contestation, and change (Lawrence et al., 2011). Lawrence and Suddaby (2006, p.216) expressed that institutions are the ‘product of specific actions taken to reproduce, alter and destroy them’ and as such defined institutional work as ‘the purposive action of individuals and organisations aimed at creating, maintaining and disrupting institutions.’ The scholars shed light on how actors can achieve each of the intended outcomes. In institutional work aimed at creating institutions, actors may engage in activities such as advocacy, theorising, educating and mimicry in order to introduce new practices and rules. Whereas maintaining institutions involves efforts to preserve and reinforce existing norms, rules, and practices within organisations and broader societal contexts. This maintenance work is essential for upholding the stability and legitimacy of institutions over time. Finally, the authors argue that disrupting institutions involves challenging or undermining existing norms, rules, and practices within organisations and societies. However recent studies have argued that change is not always revolutionary thereby viewing it merely from its intended outcomes limits our understanding to instances where intended change has not occurred or is occurring at varying scope and pace (Micelotta et al., 2017). This notion implies the presence of multiple purposeful action involving preservation or disruption of existing institutions and the creation and legitimisation of the new institution over time. As such this implies continuous adaptation and possible integration of two institutions which does not fall under the three categories of creating, maintaining, and disrupting institutions. In addressing this, scholars have introduced the notion of “hybridization work” as an additional work of institutional work which aims at combining and adapting different institutional approaches (Acquier et al., 2018).

Similarly, in the context of social procurement, the introduction of this social procurement practice does not necessarily entail complete disruption of traditional procurement methods. Instead, it establishes a complex interplay between the new social procurement practices and the established norms of traditional procurement (Razmdoost & Alinaghian, 2023). Rather than the abrupt replacement of one institution with another, the introduction of social procurement involves a sequential process of alteration and negotiation with existing procurement through reducing institutional conflicts, legitimising the institutional change, spreading the institutional and finally crossing institutional boundaries (Razmdoost & Alinaghian, 2023).

Methodology

We adopted a case study strategy, a qualitative design in which the researcher explores in depth a phenomenon or one or more phenomena within its real-world context (Yin, 2013). A case study approach utilises multiple methods to collect comprehensive and contextually rich data, with the overarching goal of either building or extending theories, exploring emergent phenomena, or gaining a deeper understanding of contemporary issues in their natural settings (Barratt et al., 2011). As such to explore how social procurement is implemented in different organisations, we embraced a multiple-case study design, seeking to probe variations and commonalities across cases (Yin, 2018). With a case study explanatory lens, this study primarily endeavoured to explain the 'why' and 'how' of social procurement implementation (Yin, 2013).

Case Selection

Our qualitative research design employed a purposive sampling strategy (Gehman et al., 2018) to strategically select organisations actively implementing social procurement. We selected 6 organisations participating in a decade-long social procurement initiative facilitated by the UK Cabinet Office and a leading national advocacy body for the social enterprise movement in Britain. This transformative initiative has prompted these organisations to commit a portion of their procurement budget to social enterprises. The overarching goal of this challenge is to achieve a significant collective spend milestone by the end of the initiative. This initiative serves as an ideal context as it allowed us to explore the interplay between market-driven logics and emerging social imperatives within diverse organisational settings.

Data Collection

Data were primarily collected through in-depth internet-facilitated semi-structured interviews between October 2023 and January 2024. We conducted a total of 27 interview sessions, averaging 45 minutes each and yielding a total of 23 hours. The participants were asked to discuss how their organisations approach to embedding social procurement in relation to their existing traditional procurement practices, they were further prompted to candidly share challenges faced and strategies employed to overcome them and reflect on the evolution of social procurement practices within their organisations. The research was also coupled with additional data sources such as 54 hours' worth of observational data, which was captured by the first author, embedded in the national advocacy body for social enterprises from July 2022 to January 2024. This data included notes and recordings from quarterly check-in meetings, marketplace and pitching sessions with social enterprise suppliers, and award ceremonies. The longitudinal observational data offered a real-time perspective on the day-to-day dynamics in social procurement adoption. Furthermore, 55 secondary data documents were made available to us by the national advocacy body for social enterprises (see table 1 for full sources).

Table 1– Data Collection Sources

Interviews Data		
Case	Participants	Hours
MOSIAC (4 years of SP journey)	• ESG Responsibility Manager • Supplier Engagement Director • Divisional Procurement Manager • Supplier Engagement Manager (N=2)	3.5
ECLIPSE (7 years of SP journey)	• Sustainable Supply Chain Lead • Senior Sourcing Manager • Head of Sourcing and Procurement • Global Head of Procurement and Vendor Management • Senior Sourcing Lead • Head of Commercial and Sustainable Operations	6
OASIS (3 years of SP journey)	• Supply Chain Sustainability Lead • Environment and Sustainability Intern • Commodity Manager • Supplier Engagement Manager • Schools and Corporate Citizenship Manager	4.5
SAPPHIRE (1 year of SP journey)	• Sustainable Procurement and Operation Analyst • Environment and Sustainability Manager • Senior Procurement Manager	2.5
MARS (6 years of SP journey)	• Category Manager • Group Social Value Manager • Director of Social Impact • Procurement Manager	4
NEBULA (7 years of SP journey)	• Supply Chain Procurement Lead • Head of Social Value • Assistant Quantity Surveyor (N=2)	2.5
Total hours		23
Observation Data		
BSCC Corporate Partner Meetings (N=4)		8
Peer-learning Focus Group (N=1)		1.5
Meet the Supplier Meetings (N=8)		12
Social Enterprise UK Awards (N=2)		12
Meetings with Social Enterprise UK (N=15)		13.5
Social Procurement Meet-up event (N=1)		4
MOSIAC Social Value Christmas Market Event (N=1)		3
Total Hours		54
Secondary Data		Number
BSCC Impact Reports		7
BSCC Survey Data		14
Video library recordings of Quarterly BSCC meetings since 2022		9
Meeting minutes of Quarterly BSCC meetings from 2019-2022		13
Video library recording of Meet Supplier Meeting		9
Corporate Partner yearly spend records 2021-2023		3
Total number of documents		55

Data Analysis

The data was analysed using a thematic approach, inspired by Gioia and colleagues (2013) proposed approach, where emerging themes and patterns within and across cases were identified and systematically coded. Each case (organisation) was treated as a unique

unit for analysis. We first engaged in open coding of our interview data, generating first-order codes that reflected the change strategies and action of the organisations. The process initially yielded 64 first order codes. The codes were then revisited to remove duplication and similar codes were grouped together to a total of 33 first order codes. Thereafter 11 second order themes were then developed by grouping codes with similar meaning (Strauss & Corbin, 1990). In labelling our second order codes, we iterated between our first order codes and the theoretical concept of institutional work which resulted in creation of four aggregate dimensions (see figure 1). The authors then conducted a cross case analysis to explore the differences and similarities between the cases.

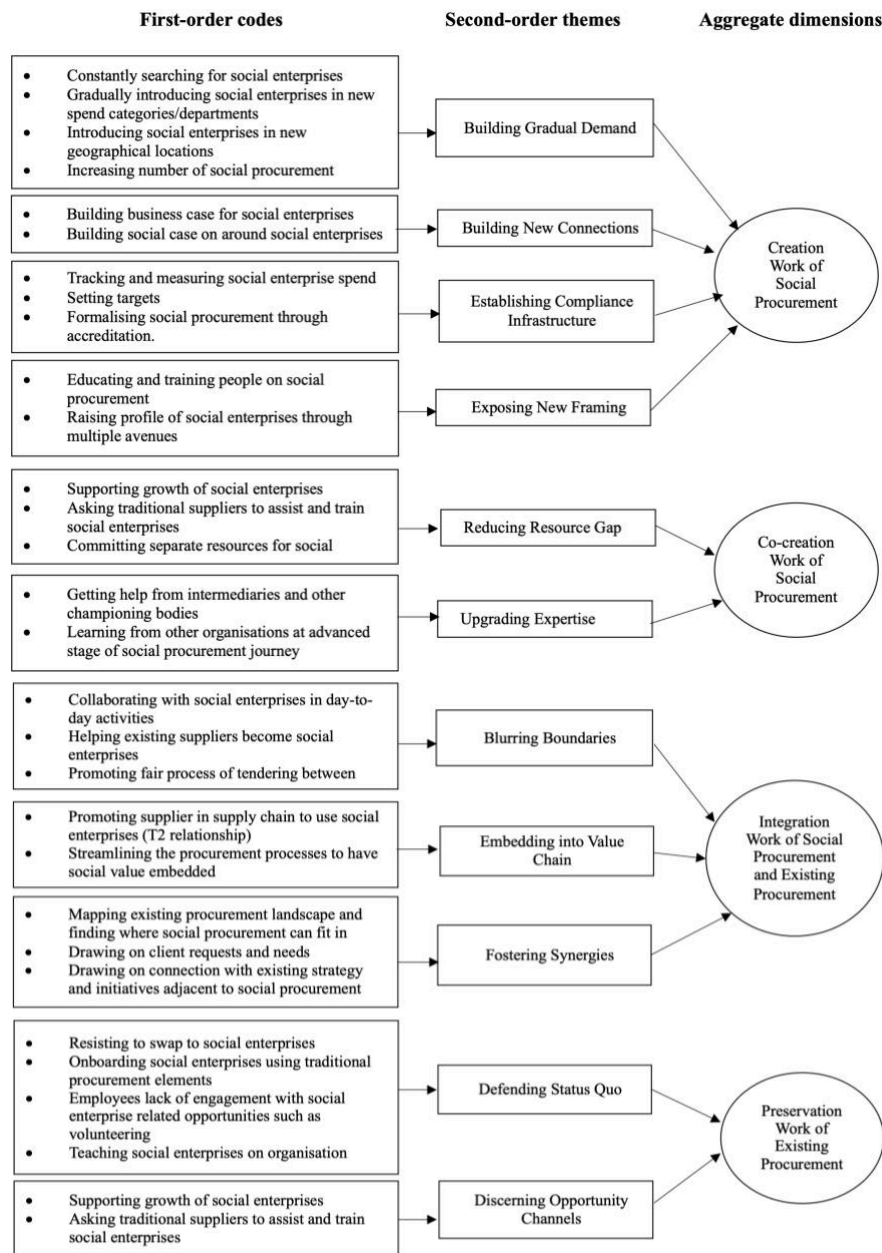


Figure 1 – Data Structure

Results

Our analysis resulted in the identification of four institutional work strategies that organisation adopted to implement social procurement into their existing procurement

structures: creation work of social procurement, co-creation work of social procurement, integration work of social procurement and existing procurement, preservation work of existing procurement.

Creation Work of Social Procurement

We found that organisations introduce social procurement within their organisations by engaging in creation work practices. One of the most prevalent practices across the cases was centred around finding and creating opportunities within existing departments to spend with social enterprises. To do this, organisations would pilot social enterprises into their spend categories then growing this spend to more locations or categories. For instance, ESG Supplier Diversity Manager states that MOSIAC offers social enterprises “one site to start with... to kind of roll them out gradually”. This approach allows organisations to build a relationship with the social enterprises and garner more support and interest from individuals within the organisation.

We also observed that organisations create social procurement by creating new goals and setting targets to promote employees to engage more with social enterprises in their purchasing decisions. For instance, OASIS engages highly in this practice and has created a formal framework that encourages departments to spend significant portions of their budgets with social enterprises. This framework began with their UK office and has been extended to be applied throughout their global teams.

Our findings also showed that organisations create social procurement by training their employees on what the meaning of social procurement and the benefits of it for the organisation. In particular, MOSIAC, ECLIPSE, OASIS, MARS, and NEBULA have in place regular training sessions that are offered to various part of their organisations. On the other hand, we observed that despite not having formal training in place yet, SAPPHIRE is building the scoping the existing knowledge of social procurement within the organisation and building a training programme to conduct with its employees. Furthermore, the findings showed that these training programs assisted in creating new ways that employees viewed social procurement. This was also coupled with building a case showcasing the commercial benefit and potential social impact of engaging with social enterprises.

Co-creation Work of Social Procurement

Another strategy that we observed from the cases was more externally oriented by collaboratively creating social procurement through developing and growing social enterprises capacity. Our findings show that all the cases engaged in practices that were aimed at assisting social enterprises to acquire corporate ready supplier skills. For instance, ECLIPSE commonly used the term “hand-holding” to describe the support during the tendering process. Particularly, MOSIAC’s supplier engagement team engages in feedback sessions with the social enterprises to show them areas of improvement for future tenders. Similarly, NEBULA created a special program aimed at supporting the growth and development of social enterprises.

Furthermore, the findings showed that all the cases engaged in activities to remove the barriers that social enterprises face when dealing with their organisations. For instance, SAPPHIRE hired a new staff member who is dedicated to supporting social enterprises and serving as a liaison. Similarly, MARS allocated this responsibility to the supplier engagement team, who go in-depth to understand what the social enterprise is offering and assist social enterprises in connecting with the right departments and people within the organisation. We also observed that all the cases provided preferential treatment to social enterprises during the tendering and on-boarding process. For instance, OASIS put

in place a 30-day payment structure to ensure social enterprises get paid faster than their conventional larger suppliers. In addition, we found that the cases sought external help to assist them in growing social procurement, for instance most cases engaged in peer-to-peer learning and relied heavily on expert knowledge from intermediaries that are championing social procurement.

Integration Work of Social Procurement and Existing Procurement

The analysis of cases showed that organisations engaged in practices to merge social procurement and their existing procurement. We observed various practices in which organisations sought to break down traditional distinctions between social enterprises and their conventional suppliers. For instance, majority of cases were found to use social enterprises to help them in running internal initiatives and events. This was done to help in showcasing social enterprise capabilities and potential impact.

The findings also showed that cases can also remove the traditional distinctions by helping their existing conventional suppliers on their social value journey. This was particularly evident from cases that are situated in industries where there are a limited number of social enterprises offering products and services for that industry. To overcome this, we observed that majority of the cases promoted the use of social enterprises in lower levels of their supply chain. For instance, OASIS and ECLIPSE, make specific requests to their suppliers to find social enterprises as part of their tender. Another practice we observed in majority of the cases was the integration of social value principles in the tendering process. This was done to ensure that all purchasing processes across the organisation have a social value weighting when selecting a supplier. Therefore, conventional suppliers are challenged to demonstrate their social value engagement in order to stand higher chances of winning the bid.

We also observed that majority of the cases sought to find synergies between existing similar initiatives and social procurement. For instance, some cases drew on the increase in client pressure to demonstrate social value engagement, whereas other cases drew on adjacent causes within the various departments to showcase how social procurement helped them in achieving their goals.

Preservation Work of Existing Procurement

Our findings also showed that implementation of social procurement involved cases engaging in work to preserve the existing procurement. This is particularly evident across the cases as social procurement was implemented with the intention of enhancing the existing procurement structure rather than completely replacing it. We observed that in most cases, employees demonstrated degree of resistance in swapping suppliers as they saw no problem with their existing suppliers. Majority of respondents from the cases mentioned that they could not “force” employees to use social enterprises. For instance, Procurement manager at MARS mentions being frustrated with the procurement process in the organisation as employees only include the procurement department at the end of the purchasing process where they have little influence of the supplier. This shows that despite the efforts to integrate social enterprises into the supplier selection, there are several occasions where employees prefer to keep their existing supplier. We also observed that other organisations intentionally limit the opportunities and contracts that are presented to social enterprises.

Discussion

The cross-analysis of the cases allowed us to observe patterns in how organisations implemented social procurement. One of the key observations we discovered was the

influence of contextual factors that promoted and limited the strategies which organisations used. The findings suggested that organisations in earlier stages of social procurement had high engagement in preservation of existing procurement (i.e. defending status quo and discerning opportunity channels) as compared to the other strategies where they had lower engagement. For instance, SAPPHIRE, has only been formally engaged with social procurement for a year and has little experience in working with social enterprises as such they had low engagement in practices falling under creation, co-creation and integration strategies. Whereas the other cases (MOSIAC, ECLIPSE, OASIS, MARS and NEBULA) demonstrated higher engagement across all the strategies as they have more experience dealing with social enterprises. Therefore, we propose:

Proposition 1. The stage of social procurement journey likely influences an organisation's strategy choice (i.e. creation work, co-creation work, integration work and preservation work) in implementing social procurement institution.

Another contextual factor that we observed was the presence of a strong existing sustainability strategy within some cases. These cases demonstrated high engagement in integration work strategy. For instance, OASIS, ECLIPSE and MOSIAC drew on synergies with their existing sustainability goals and connected social procurement as part of these goals. We therefore propose:

Proposition 2. Organisations with presence of highly embedded sustainability corporate strategy are likely to engage in high integration work.

Further we observed that organisations with large number of sustainability championing employees situated in different levels of the organisation (i.e. top management level and bottom level) demonstrated higher engagement with the creation work of social procurement. Therefore, we propose:

Proposition 3. The propensity of organisations demonstrating high engagement in creation work strategy is likely linked to the presence of larger number of passionate employees advocating for social procurement spread across all levels of the organisations.

Conclusion

Our findings have demonstrated that organisations engage in multiple strategies when implementing social procurement within their organisations. Particularly our findings show that social procurement is embedded within the existing procurement framework as such engaging with social procurement can be considered as a form of hybrid organising (Battilana et al., 2017). Furthermore, through our cross-case analysis, we observed patterns in the approaches of social procurement implementation which are linked to contextual factors. This has led us to present three propositions, demonstrating that stage of procurement journey, corporate sustainability strategy and employee engagement contribute to the implementation of social procurement.

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