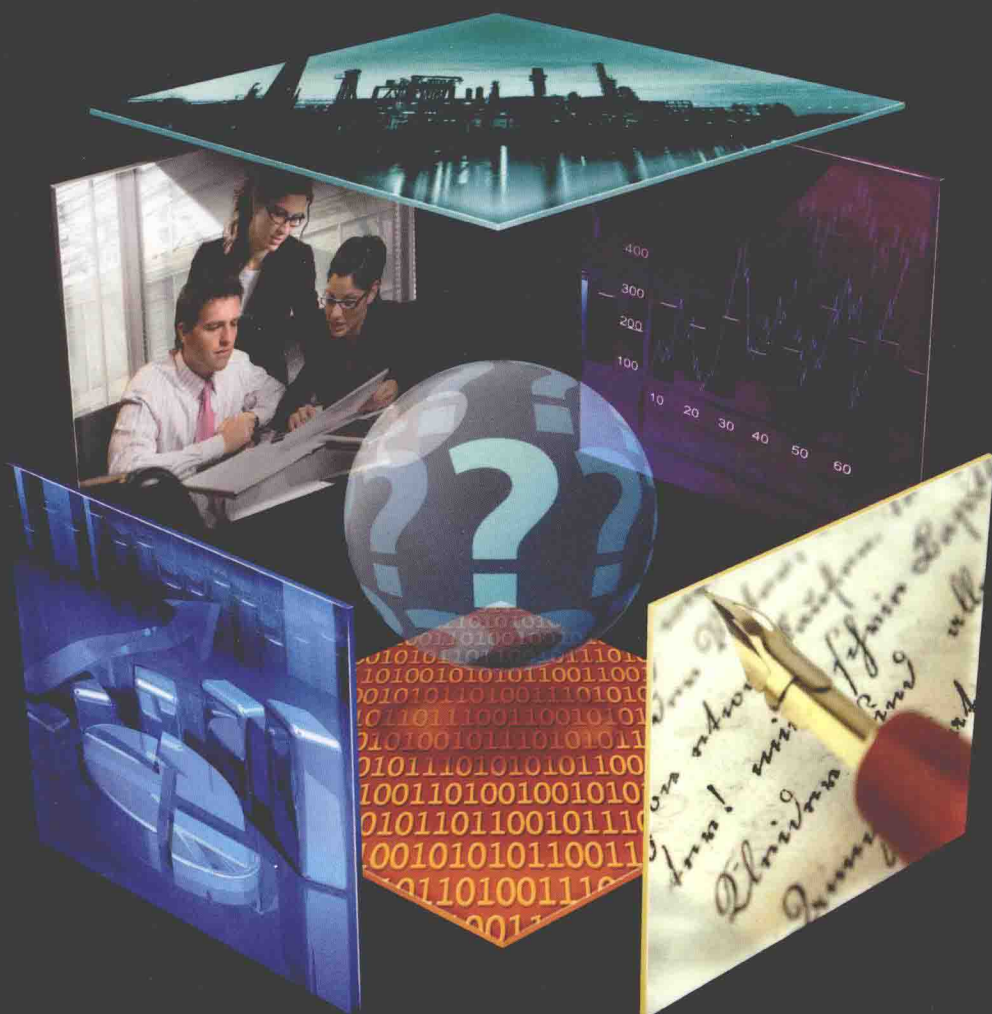


Rethinking the Case Study in International Business and Management Research

EDITED BY

Rebecca Piekkari and Catherine Welch



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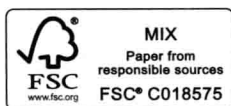
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Foreword

In my childhood there was only one variety of sports shoe, whose sole was made of rubber and the upper part of cloth, either white or dark blue. This was used for all sports, from football to handball, both indoor and outdoor. Product development has led to differentiation so that there are now numerous varieties of shoes for – to take an example – jogging, depending on the track or the floor, the weight of the individual and the jogging style. Ultimately, a person can have individualized shoes adjusted to his or her specific needs. We are moving in a similar direction with regard to case study methodology, which is differentiated to fit the objective and the context of the research. When I started to do research, there was only one way of doing case studies and the only acceptable motivation for doing them was to ‘dig up’ issues on which to focus ‘serious’ research.

This attitude, I believe, was based on a little-brother complex *vis-à-vis* the sciences – such as physics and chemistry – where large-scale data collection under strictly controlled circumstances allowed statistical analyses. That was research! We tried to imitate. Over time I think we have gradually dropped bits of that inferiority complex, realizing that the objects of study in business and management are quite different from those of the sciences, based as the latter are on ‘eternal laws’. However, I think we, as the collective of researchers in international business and management, still have some distance to travel before we are able to think completely independently about what constitutes high-quality research in our areas. This book adds to the knowledge of the repertoire we have. That is a great contribution.

‘Pluralism’, the first word of the title to the introductory chapter, sets a wonderful tone to this book. It signals an openness towards new ideas while acknowledging that some older thinking on case study methodology has merit, and that quality levels must be upheld. I believe we must be generous to each other in judging the case methodologies that we apply. While there is a delicate balance between these two criteria, in my mind, we should err in the direction of generosity. I have attended conferences, not in international business I am eager to point out, where discussions have been destroyed by proponents for different methodologies accusing each other of ‘not sticking to the true faith’. So, sectarianism should not be mistaken for quality.

A number of years back, there was an evaluation made by American business and industry concerning activities performed by business school professors. It turned out that those in business, when responding to the survey, were pleased with the quality of the educational programmes offered. They were, on the other hand, very critical towards the relevance of the research produced at those schools. In my mind, there is something to that view and I believe that doing case study research will create an improved understanding of and interest in research into the realities of management, and stimulate more of us to think about relevance to practitioners. And the realities of management are exciting indeed!

At the annual meeting of the Academy of Management in 2004 I was asked to take part in a session to honour the memory of Sumantra Ghoshal by talking about how to produce pathbreaking research. Those of us who spoke were surprisingly united in suggesting that some of the secrets were: inductive case studies, working in a group of people rather than as individuals and staying with the research theme for a relatively long time. I take the opportunity to pass on this prescription, echoed in the objective of this book. Working inductively by no means implies that the researcher should be a-theoretical. On the contrary, in my opinion, the researcher should be well versed in the theory of the firm, and perhaps in some more specific theories, but staying open when interpreting what has been discovered.

This volume indeed brings insight into the large and complex area of case study methodologies. There will no doubt be numerous references to it, and it will raise the quality not only of the 'methodological chapter' of dissertations and reports but also of the research itself. Hopefully, that will be true also for articles in journals, which we must ensure publish case study research.

I would like to congratulate the editors as they have been able to find and enlist so many skilled authors to produce insightful chapters on various aspects of case study methodology.

Jan-Erik Vahlne
Gothenburg, November 2010

Acknowledgements

Early career researchers are often advised not to waste their time on book chapters, not to mention editing or writing entire books. Given that books or chapters in books do not count in academic career progression, they are often regarded as activities that simply distract our attention from what we should be focusing on, namely getting published in top-tier refereed journals. We have already challenged this view once by editing the *Handbook of Qualitative Research for International Business*, published in 2004. Now we are following it up with what is not a second edition of the *Handbook*, but rather a more focused volume devoted solely to the most popular qualitative research strategy in international business (IB), namely the case study.

In retrospect, what have we gained from the two book projects? We believe that the two books have opened up a new debate about the (mis) use of qualitative methods in IB and international management (IM) research. We are very pleased to see that this debate continues and gains prominence at international conferences and in special issues of journals. This would not have been possible without the support of contributors to both the previous and present volumes. They did not just write their individual chapters, but also, in the case of many, attended panel sessions at various conferences. We would also like to thank the conference audiences who provided us with feedback along the way, as well as those who were involved in the conference sessions as participants or conference chairs.

Specifically, in 2006, at the annual conference of the European International Business Academy (EIBA) in Fribourg, Switzerland, Stephen Young chaired a session in which we presented the initial idea of the case study as a disciplinary convention. Emmanuella Plakoyiannaki, one of Stephen's collaborators, was in the audience and this encounter marked the beginning of our very fruitful research partnership with her. We are extremely grateful to Stephen for connecting us with Emmanuella and for his support and encouragement in our efforts to raise the profile of qualitative methods in IB in general and case research in particular. In 2009, Stephen organized and co-hosted the annual conference of the Academy of International Business (AIB) UK and Ireland Chapter at the University of Glasgow in Scotland. Thanks to Stephen, we were allocated an entire

track devoted to case study methodology together with Emmanuella, and in our sessions several book contributors presented their work: Margaret Fletcher, Leila Hurmerinta, Fiona Moore, Niina Nummela and Ayse Saka-Helmhout.

In a Professional Development Workshop of the Academy of Management (AOM) in Philadelphia in 2007, Raza Mir presented an early version of his chapter. We would like to thank Stuart Macdonald for coming up with a catchy title for this workshop, namely 'Making case study research count: best practices and future directions'. Later in the same year the EIBA conference was organized in Catania, Italy; Ricardo Morais as well as Asta Salmi took part in our special session on case studies. At the following year's EIBA conference in Tallinn, it was the turn of Ed Clark, Margaret Fletcher, Emmanuella Plakoyiannaki and Anna Soulsby to present their work.

In 2008 the annual conference of the AIB was organized in Europe, this time in Milan, Italy. Our panel – entitled 'How to theorize from field-work?' – turned out to be an important theme for our book, for teaching and for later publications. As well as Mary Yoko Brannen and Gabriel Szulanski presenting their chapters, Lorraine Eden, then Editor-in-Chief of the *Journal of International Business Studies*, shared her experiences and observations about publishing qualitative research, particularly case studies. In this session, she announced that *JIBS* would have a special issue devoted to 'Qualitative Research in International Business', for which Mary Yoko Brannen became one of the guest editors. Yves Doz acted as discussant of the panel and reflected upon the panellists' contributions in the light of his career as a prominent case researcher.

The AOM held its annual meeting in Chicago in 2009 and, in response to an initiative from Jane Salk, we co-organized a panel entitled 'Making the case: rhetoric, rigor and "getting it right" with case study research'. We would like to thank her for her passionate presentation on how much the case study has lost during the process of making itself 'legitimate' as a scientific research strategy. We would also like to thank her for the opportunity to develop, in the panel proposal, many of the ideas that we later fleshed out in our introductory chapter to this book.

The last session associated with the present book took place at the EIBA annual conference in Porto, Portugal 2010. Our special thanks are due to Ana Tavares-Lehmann, the EIBA President, who accepted our panel proposal out of the many that she received from the IB community. We would also like to thank our book contributors who were willing to present the final versions of their work at EIBA 2010: Susanne Blazejewski, Ed Clark, Margaret Fletcher, Martin Johanson, Jon Erland Lervik, Emmanuella Plakoyiannaki and Anna Soulsby.

We were very fortunate that both our home institutions, Aalto University, School of Economics (formerly Helsinki School of Economics), and the University of Sydney are academic members of the Global Alliance in Management Education (CEMS). This alliance provided financial support to our PhD courses in Finland and brought some additional students from other CEMS partners into the classroom. Our course, entitled ‘CEMS Doctoral Course on Case Studies in Management and Business Research’, was an excellent forum for refining our ideas for the book. It soon became very obvious to us that these bright students were not just a passive audience on whom we could test our emerging ideas. On the contrary, they kept challenging us during the critical ‘product development process’ and helped us communicate in an accessible way the more complex themes of the book, such as the practical relevance of different philosophical assumptions for the case researcher. As most students were very receptive to our emerging ideas, we found them a source of inspiration and energy. We were also able to give seminars on the case study to PhD students at the University of Leeds. We owe this opportunity to our colleagues at the Centre for International Business at the University of Leeds: Peter Buckley, Malcolm Chapman, Jeremy Clegg and Hanna Gajewska-De Mattos. We wish to express our gratitude to them for making this possible and for being such generous hosts.

We very much appreciate that Jan-Erik Vahlne accepted without hesitation our invitation to write a foreword. In a book that is looking to the future of case research, we are grateful that he – along with Christopher Bartlett and Yair Aharoni – could ground this vision in the achievements of the past. We would also like to thank Malcolm Cunningham, another researcher who recognized the potential of case studies early on, for his kind encouragement.

During the editing process, we have been assisted by others. Julian Birkinshaw facilitated the interview with Christopher Bartlett. We would like to thank Geoff Easton, Joel Hietanen and Kalle Pajunen for their expertise on critical realism and their helpful comments on Ricardo Morais’s chapter. Mika Skippari, a specialist in historical longitudinal research, provided us with insightful views on Susanne Blazejewski’s chapter. We are indebted to Fanny Salignac for her expertise in translating Philippe d’Iribarne’s chapter from French to English, and to Martin Fougère for turning the French references of this chapter into English at very short notice. Fanny’s assistance was instrumental in overcoming the language barrier that would have prevented us from fully appreciating the contribution of d’Iribarne’s chapter.

The two books that we have edited have both been published by Edward Elgar. We have very much enjoyed working with the Edward Elgar team

and we would like to extend our thanks to Edward Elgar himself who has during his regular trips to Sydney always taken the time to visit Catherine and express his support for our endeavour. We have been blessed to have had as our editor Francine O'Sullivan, whose professionalism and extensive knowledge of IB as a field have been an important resource for us.

In 2007 Catherine spent a one-year sabbatical in Finland at the Hanken School of Economics and Business Administration. We would like to thank Ingmar Björkman for inviting her to the Department of Management and Organization and for his generosity and support towards this project. We also gave a seminar to the PhD students of the Nordic Research School of International Business (NORD-IB) programme, of which Ingmar is a founding member. Catherine's sabbatical enabled us to have regular meetings with Eriikka Paavilainen-Mäntymäki, with whom we have collaborated for several years. We would like to thank Eriikka for sharing our journey through the case study literature.

Rebecca came to Sydney to work on the book for a month during Christmas and New Year in 2008–09. We very much appreciate the financial support granted by the following foundations: Helsingin kauppa- ja kauppakorkeakoulun Tukisäätiö, Ella and Georg Ehrnroothin säätiö, Liikesivistysrahasto, Marcus Wallenbergin säätiö and Jenny and Antti Wihurin rahasto. The confidence that they expressed in our work enabled us to be physically co-located for at least part of the editorial process.

We would also like to thank Galina Velikodnaia, who provided meticulous assistance in formatting the 25 book chapters under a tight schedule. Bea Alanko also became involved in the book project when we needed her excellent computer skills to handle the lay-out and visualization of complex figures in the chapters.

Ben Aveling, Catherine's husband, has been an irreplaceable resource during our two book projects. This time he played the roles of technical support and graphical designer, among others. Lauri Piekkari, Rebecca's husband, has been very patient and understanding during the long project. However, what has puzzled him as a business practitioner is the strong motivation that has kept us going for so long without foreseeable monetary rewards. The answer lies in the pleasure of working closely with a great colleague and friend, and of making discoveries, even small ones, along the way. That is what we have gained from embarking on book projects.

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PART I

Past, present and future of case studies in
international business and international
management research

