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Assessing the use of External Grand Theories in Purchasing and Supply Management research

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ABSTRACT

The paper examines the extant management literature on Purchasing and Supply Management (PSM) to assess the underpinning role of External Grand Theories (EGTs) – i.e., established theories drawn from other areas of economics, management and other social sciences. We perform an extensive and systematic literature review of 1055 papers in the 20 top management journals for the time period 2002–2010, bypassing a keyword search in favour of a complete scanning of a total of 14,943 articles. Results show an analysis and classification of the most commonly used EGTs borrowed to underpin research on PSM. We also match research topics, methodologies and unit of analysis with EGTs. Finally, we investigate what is the nature of the research – exploratory, theory building and theory testing – supported by EGTs. Analyses find PSM to be poorly rooted in EGTs, which confirms PSM relatively lower theoretical maturity when compared with other disciplines. Transaction Cost Economics and the Resource Based View prove to be the most frequently adopted frameworks. Other theories emerge as interesting opportunities in combination with specific topics and methodologies.

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1. Introduction

For more than two decades, Purchasing and Supply Management (PSM) has gained significant academic interest (e.g., Harland et al., 2006). More and more research, both conceptual and empirical, has been performed, and the focus of investigation has continued to broaden, including contractual relationships, partnership development, portfolio management, vendor assessments, vertical integration and the make or buy dilemma and organisational issues for purchasing functions.

The surge in academic interest is caused by the growing strategic relevance of the purchasing function as a consequence of various trends, including increasing outsourcing, the globalisation of trade and the advent of electronic procurement (e.g., Ramsay and Croom, 2008). In addition, PSM has drawn specific attention from business schools, and various topics are taught more frequently in both open enrolment programmes and corporate training courses. In short, from the “real world” perspective of practitioners, PSM certainly appears to be a field, a body of expertise and maybe a discipline. However, this is not automatically true from an academic perspective because unless the theoretical foundations of PSM are solid and extensive enough, it is difficult to

qualify the field as an established scientific discipline. Indeed, the need for wider and more substantive use of theory in the broad field of operations management, including PSM, has long been suggested (Schmenner and Swink, 1998).

In this study, our primary aim is to assess and profile the theoretical foundations of the impressive amount of academic contributions in the field of PSM over the last decade.

In order to approach this stream of research, we ground on two underlying assumptions. The first one is quite obvious or at least widely recognised: good research in management fields must be theoretically rooted (see e.g., Mentzer, 2008), and, more generally, theories are necessary to create frameworks capable of both describing and predicting phenomena in a certain field (Hunt, 1991). The second assumption refers to the seminal contributions of Kuhn (1962) about “paradigmatic sciences”: a body of knowledge turns into a scientific discipline – a so-called “normal science” – only if and when it is rooted in theories.

Considering PSM research so far, we acknowledge – firstly – that other relevant studies (e.g., Harland et al., 2006; Chicksand et al., 2012, see below for more) testify a lack of internal theories. By internal theories (IR) we mean theories based on new constructs specifically developed for the PSM field, to create frameworks capable of both describing and predicting purchasing behaviour and supply management of firms. As a matter of fact, despite the abundance of conceptual models developed within PSM and Supply Chain Management at large (SCM), the diffusion

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of IR that are recognised and widespread across the research community is negligible. In fact, theories internal to PSM are still under debate, they do not usually have standard labels, and they are partially untested. Ultimately, the evidence of theories internal to PSM is debatable.

Secondly, as happened for other emerging managerial disciplines (e.g., Stock, 1997; Baskerville and Dulipovici, 2006; Caniato et al., 2010; Kauppi et al., 2013), theories originally developed outside the research domain represent a potential boost for the development of the PSM discipline. Therefore, we expect that in order for PSM to become an established discipline, it would be a natural path to borrow *External Grand Theories (EGTs)*, i.e., established and highly abstracted theories already developed in more mature fields of management, economics and other social sciences.

The concept of grand theory is not new in management research: Swamidass (1991) defines grand theories as general or unified theories that are able to provide a comprehensive view of reality, typically solving conflicts arising from middle-range theories or empirical generalisations. The author also identifies specific characteristics of grand theories in operations management: (i) they explain phenomena by explaining interactions of variables in the system, and consequently they can predict the value of one or more variable in the system; (ii) they allow to piece together various parts of evolving knowledge into an organised whole; (iii) they stimulate new research; and (iv) they have practical implications. Similarly, Wacker (1998) defines a theory based on four criteria (i.e., conceptual definitions, domain limitations, relationship-building, and predictions) and identifies the characteristics of a good theory.

The use of EGTs should be seen positively for a relatively young field of knowledge. In fact, EGTs, when used properly, may allow scholars to develop empirical investigation in new fields for which IR are not established yet. By adapting concepts and capturing connections between socio-economic and organisational concepts applied in other managerial and economic fields EGTs may underpin a process of knowledge extension and differentiation which may help the evolution of a body of knowledge into a discipline (Harland et al., 2006; Halldorsson et al., 2007; Luzzini and Ronchi, 2010, 2011; Chicksand et al., 2012).

Following this line of argument, we believe it is important to assess which EGTs are used in PSM and for what purpose. In this regards, we intervene in a scientific debate initiated by Harland et al. (2006), whose contribution, published in *IJOPM*, has the following evocative title: “Supply management: is it a discipline?” It is not our purpose to follow up this issue and to determine whether or not PSM can be considered an established discipline. Rather, we do intend to assess the level of maturity (in theory terms) of PSM, focussing on EGTs, given the virtual absence of IR developed within the PSM field (confirmed by the aforementioned studies as well as our evidence).

The debate on the use of theories was recently extended to adjacent fields by two other contributions – Defee et al. (2010), who focused on both Supply Chain Management (SCM) and logistics, and Chicksand et al. (2012), who focused on purchasing and SCM.

Following our objective, we start by investigating the extant literature dealing with the use of theories in PSM. This directly leads us to identify research gaps and consequently frame our research questions (see Section 2). The rest of this article is organised as follows: in Section 3, we analyse previous literature reviews on PSM to understand why further investigation is needed; in Section 4, we introduce and discuss the most commonly used EGTs; in Section 5, we present our methodological approach for this study, including criteria for selecting journals and extracting and coding articles; in Section 6, we present and discuss the

findings; and in Section 7, we present our conclusions. In Section 8, we assess limitations and possible avenues for future research.

2. Overview of PSM theoretical maturity

Harland et al. (2006), based on an analysis of a limited number of papers – only 41 – concluded that, though the internal coherence of the field is high, supply management was still immature and not yet established because there was not enough evidence of a robust theoretical debate. Six years later, Chicksand et al. (2012) tried to assess theoretical perspectives in purchasing and supply chain management by analysing the 16-year production of three top journals in the field – *JSCM*, *JPSM* and *SCMIJ*. They concluded that purchasing and supply chain management – as an integral and broad field – has not fully developed a robust and rich theoretical base because less than 40% of the total papers are more or less theoretically grounded. Looking at their data, we calculate that the percentage drops to 19% if only EGTs are considered. On the basis of a much more extensive literature review, they draw conclusions in line with Harland et al. (2006): essentially, there has not been much progress toward the maturity of the discipline in the second half of the past decade.

Defee et al. (2010) examined an adjacent area mostly focused on logistics and found that half of the scientific production reported in five top academic journals – *IJLM*, *IJPDLM*, *JBL*, *JSCM* and *TJ* – from 2004 to 2009 is theoretically grounded. However, from their data, it is impossible to derive the percentage of papers based on EGTs.

Focusing on PSM, a previous work of ours (Spina et al., 2013) confirmed that only a minority – approximately 10% of research papers in a vast sample of 1,055 papers from 2002 to 2010 – shows a clear and explicit theoretical background.

In this study, we regard these findings as starting points for our analysis. In particular, with regard to Chicksand et al. (2012), we grant that the field on the whole is still in its infancy. They contend that PSM and SCM taken together do not pass Fabian's tests for considering a discipline mature (Fabian, 2000) – coherence, quality as measured by methodological standards, and breadth and depth as measured by the prevalence of deductive approaches over induction and inference. Their overall conclusion is that PSM and SCM still have a way to go to gain the status of a fully established academic discipline.

However, beyond the general conclusion about the immaturity of the discipline, we think that there are at least three main issues that deserve further investigation.

First, the existing literature reviews (LR) aimed at assessing theoretical foundations focus on a broad field with continuously expanding and blurring boundaries, which includes extremely diverse subjects from purchasing to supply chain management and logistics. Obviously, there are good reasons to assume a broad scope, and some of the renowned academic journals in the field indeed show a broader and combined scope intentionally. However, LRs that assume a broad scope may fail to capture the evolution of a specific part of the field. In particular, we think that PSM deserves a specific LR assessing its theoretical foundations, distinct from supply chain management at large and even more from logistics. Therefore, we make a distinction between PSM and the wider concept of Supply Chain Management (SCM) defined by Metz (1998) as “a process-oriented approach to managing product, information, and funds flows across the overall supply network, from the initial suppliers to the final end consumers”. Instead, following Monczka et al. (2010), we refer to PSM as the “strategic approach to planning for and acquiring the organisation's current and future needs through effectively managing the supply base”. In fact, PSM has increasingly been consolidated as an autonomous

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