



# The role of context in case study selection: An international business perspective

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## ABSTRACT

The extant methodological literature has challenged case selection in qualitative case study research for being arbitrary or relying too much on convenience logic. This paper aims to address parts of such criticism on the rigour of case selection through the presentation of a sampling framework that promotes contextualisation and thoroughness of sampling decisions in the study of international phenomena. This framework emerged from an inductive process following an actual case study project in international marketing and promotes the idea that context matters for sampling purposes, too. The proposed framework integrates methodological tools that complement the overarching principle of purposeful sampling and considers respective contextual challenges that the researchers encountered before and during fieldwork. It serves to highlight in an iterative fashion the role that context plays in the case selection process and the importance of contextualised sampling processes for qualitative case study research in international business.

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## 1. Introduction

The role of context and its implications for theorising has received increasing attention in various academic fields including strategic management (McKiernan, 2006), organisational behaviour (Johns, 2006), entrepreneurship (Zahra, 2007), and marketing (Arnould, Price, & Moisio, 2006). More particularly, various scholars have initiated a timely dialogue on the meaningful incorporation of context in the study of international business (IB) phenomena (Ghauri, 2004; Michailova, 2011; Tsui, 2007; Welch, Piekkari, Plakoyiannaki, & Paavilainen-Mäntymäki, 2011). Relevant theoretical and methodological articles dedicated to context(ualisation) challenge the current status quo in IB, which has largely treated context as a measurable and exogenous variable, which hinders theorising. As a result, IB is replete with *proof-driven* (and not *understanding-driven*) studies that are characterised by having ‘much of context assumed out’ (Redding, 2005, p. 123). Instead, these authors, with whom we join, suggest that context is complex, dynamic and multi-dimensional, and most importantly, explicitly related to the methodological choices of researchers (Michailova, 2011). As Buchanan and Bryman (2007, p. 483) suggest, the “choice of methods is shaped not only by the research aims, norms of practice, epistemological concerns but also by a combination of organisational, historical, political, ethical, evidential and personally significant characteristics of the field of research”.

One may assume that IB research suffers from an explicit treatment of context as it has mainly employed quantitative tools that capture context “as a set of interfering variables that need controlling” (Harvey & Myers, 1995, p. 17). Interestingly,

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while qualitative research is considered to be context-sensitive, a strong trend towards de-contextualisation has in fact prevailed in practice. Welch et al. (2011) observe that the rich context, which is the essence of qualitative case-study research, is often missing in IB accounts as case-study authors are still puzzled about contextualisation issues. We suggest that qualitative researchers may come to appreciate context by treating case sampling and contextualisation as a joint decision rather than as two separate tasks in case-study research. Such an approach renders case-study selection an emergent process captured in Ragin's (1992) process of casing, where the boundaries of the case are shaped by a dynamic array of contextual factors. Despite the potential of such a context-sensitive and emergent logic of sampling for IB, though, this has been largely under-appreciated in case-study research, leading scholars to question whether respective IB studies can use the term case study (due to lack of contextualisation; Piekkari, Welch, & Paavilainen, 2009). These remarks are important because such criticism against IB case research is not a peripheral issue of concern but rather a challenge that reflects on the overall appreciation of qualitative case-study researches by the IB community (a research body which is arguably limited; Yang, Wang, & Su, 2006).

Based on the above, we argue for a deeper consideration and incorporation of context in IB research and highlight its importance for case-study selection. In line with Alvesson and Sandberg (2011) and Bamberger and Pratt (2010), we seek to challenge the current status quo around the role of context in IB research and problematise for its importance. We approach context as a multi-dimensional array of phenomena, sites and events that have the potential to inform methodological choices and, more specifically, case-selection practices. We draw on various IB studies and our experience from the field and present an iterative process that we followed in order to integrate context in an international marketing study. The emergent framework highlights context learning and context-focused selection of case studies by employing pilot cases, direct observation, analysis of secondary data and the overarching principle of purposeful sampling as a means for dealing with the contextualisation challenges encountered before and during case fieldwork. Viewed in this light, our approach is linked to the central but neglected role of context in case selection in IB, the emergent nature of case selection that highlights the uniqueness of context for IB investigations, and the criticism that sampling processes attract in the overall qualitative research. To the best of our knowledge, there is a scarcity of studies that integrate diverse methodological tools and ideas as a way to tackle sampling challenges in IB case research (cf. Chau & Witcher, 2005; Halinen & Törnroos, 2005; Wilson & Woodside, 1999).

The paper's structure is as follows. Section 2 elaborates on the relevance of context in IB scholarship through several empirical and conceptual studies. Following that, Section 3 puts forward a sampling framework that promotes contextualisation and thoroughness of sampling decisions in IB following an actual case-study project. The concluding sections highlight the importance of contextualised selection of case studies in IB research and clarify the contribution of the paper while suggesting further research steps.

## 2. The relevance of context for international business

In IB, most studies treat context as a monolithic, homogeneous construct based on a single dimension. There are, however, a few insightful (yet fragmented) qualitative studies that illustrate the role of context as a complex, multi-faceted element. For example, Geppert, Williams, and Matten (2003), in their case-study research, illustrate how a variety of social and organisational contexts in home and host countries construct the options allowing subsidiaries to exercise strategic choice in the face of pressures from headquarters. Ferner (2000), in a similar case approach among British and German multinationals, showcased how cultural and organisational contexts help in exploring the deeper relationships between management control systems and power resources in MNEs. Prime, Obadia, and Vida (2009), in their grounded theory study, stress the role of macro-economic or organisational contexts, concluding that diversity in these contexts has a consequent effect on how psychic distance is perceived by exporters. Ferner, Quintanilla, and Varul (2001), in a multiple case-study approach, illustrate how the subtle interplay between home and host country national and institutional contexts affects international human resource management practices by MNEs, while Salk and Shenkar (2001) through a longitudinal approach explore diverse environmental and structural contexts to draw conclusions about the key role of national social identities in making sense of international joint ventures. Meyer and Tran (2006) through a single case study of a large multinational brewery across four countries delineate local idiosyncrasies across these countries, illustrating how these lend themselves to different market penetration and acquisition strategies in emerging economies. Lastly, Poulis, Yamin, and Poulis (in press) through paradigmatic cases explain how a contextualised approach that focuses on the market and competitive contexts can more meaningfully assess the relative usefulness of ownership advantages for MNEs.

Several authors have also conceptually illustrated the role of context for IB. In reviewing the seminal work of Lyles and Salk (1996), Meyer (2007) illustrates the role of the national and the organisational context as crucially influential on processes of organisational learning. Zaheer and Zaheer (2006) call for a fresh approach to examining the role of trust across borders, a concept which has been routinely perceived as a universal construct (Muethel & Hoegl, in press). These authors argue for a context-embedded re-conceptualisation of international collaborations that more carefully considers the various natures, levels and degrees of trust across contexts. Last but not least, Yildiz and Fey (2012) revisit the liability of foreignness for MNEs by proposing how idiosyncratic institutional contexts engender varying needs for gaining legitimacy in transforming economies.

Several empirical and conceptual articles thus point out that the national, organisational, economic or competitive contexts analytically matter in IB and that an understanding of them has the potential to assist in a re-conceptualisation of

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