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Qualitative comparative analysis, crisp and fuzzy sets in knowledge and innovation[☆]Kun-Huang Huarng^{a,*}, Norat Roig-Tierno^{b,**}^a Feng Chia University, Taiwan^b ESIC Business & Marketing School, Spain

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ABSTRACT

Studies indicate that the academic management and social science studies are of low relevancy and impact and even limited in usefulness. Some other studies point out that qualitative comparative analysis (QCA) and fuzzy set qualitative comparative analysis (fsQCA) are more advanced approaches for data analysis and theory construction. To promote the concepts and approaches of QCA and fsQCA, this special issue of *Journal of Business Research* collects articles regarding "Qualitative Comparative Analysis, Crisp and Fuzzy Sets in Knowledge and Innovation." The authors of these studies presented them at the 2016 Global Innovation and Knowledge Academy Conference, in Valencia, Spain, from March 20 to March 23. After double blind reviews, only 59 articles appear in this special issue.

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1. Introduction

Scholars point out the low relevancy/impact of most articles in leading journals in marketing and consumer research (Inman, 2012; Mick, 2006; Pham, 2013). Pham (2013) reports that less than 10% get a considerable number of citations, and roughly 70% hardly ever get citations, in a study of the articles appearing during 2004 to 2008 in the *Journal of Consumer Research*. Further, Cummings (2007) and Van de Ven and Johnson (2006) challenge the usefulness of academic management and social science research in dealing with real-world issues. Hubbard (2015) proposes that the future success of academic management and social science research relies on ensuring that the research-based knowledge is relevant and useful.

Woodside (2014) points out 16 issues relevant to the research in business, contrasting bad and good practices. The bad practices include (1) mismatching/ex ante modeling/controlling by adding terms into regression models, (2) testing fit validation only, (3) ignoring contrarian cases, (4) reporting findings using t , p , F , r , R^2 , (5) focusing on findings

of net effects of variables, (6) using only/ 5- and 7-point scales to measure processes, (7) conducting only cross-sectional studies, (8) modeling using symmetric data, (9) advocacy hypothesis testing, (10) using one dependent/outcome variable, and (11) creating inductively using stepwise regression for modeling/forecasting.

The same study points out the good practices, including (1) matching/a priori modeling/controlling by examining different recipes, (2) testing for fit and predictive validity, (3) recognizing and modeling contrarian cases, (4) reporting consistency and displaying XY plots, (5) focusing on the findings of recipes of antecedent conditions, (6) with observation and non-obtrusive methods/natural responses, (7) with longitudinal study, (8) with asymmetric modeling separately of high and low outcomes, (9) with recipe outcomes, (10) with multiple hypothesis tests, and (11) modeling/forecasting by a priori modeling using theory.

Woodside (2014) indicates that complexity theory is proper for theory construction and data analysis for a number of reasons. First, listing the tenants for complexity theory including a simple antecedent condition is rarely sufficient for predicting a high in an outcome. Second, a complex antecedent condition of two or more simple conditions is sufficient for a consistently high score in an outcome condition (the recipe principle). Third, a model that is sufficient is not necessary for an outcome having a high score to occur (the equifinality principle). Fourth, the causes of acceptance often tell very little about the causes of failure (the causal asymmetry principle). Fifth, an individual feature in a recipe can contribute positively or negatively to a specific outcome. Sixth, for high scores of an outcome, a given recipe is relevant for some but not all cases. Finally, a few exceptions occur for high scores of antecedents for a given recipe that works well for predicting high scores of an outcome. Studies show that qualitative comparative analysis (QCA) (Ordanini, Parasuraman, & Rubera, 2013; Ragin, 2000) and fuzzy set

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qualitative comparative analysis (fsQCA) (Ragin, 2008; Woodside, 2015) are more advanced approaches.

The objective of this *Journal of Business Research* (JBR) special issue is to publish articles carrying out the above tenants to analyze data and to create theory. JBR has been supporting special issues on QCA and fsQCA for the articles presented in the Global Innovation and Knowledge Academy (GIKA) Conference for years. This special issue continues to collect quality studies using QCA and fsQCA from 2016 GIKA Conference.

The 2016 GIKA Conference takes place in Valencia, Spain, from March 20 (Sunday) to March 23 (Wednesday), 2016, attracting more than 540 submissions but only accepting 250 presentations. The double blind reviews recommend only 59 of those articles for this special issue.

2. Introduction to the article within the special issue

The first article of this special issue is by the guest editor: Kun Huang Huarng. In 'Qualitative analysis with structural associations', Huarng summarizes how the fsQCA technique differs from other statistical analysis with its advantages and its faults. Huarng offers an extension on the fsQCA technique. However, to determine the success of this approach more studies need to use this technique.

The rest of the section divides the articles in four big subjects: alliances, strategic performance, technology, and business management.

2.1. Alliances

Scholars describe the use of alliances to acquire capabilities from alliance partners, and an extensive literature discusses the features of alliances and their participants that facilitate the flow of capabilities and other knowledge among partners (Bouncken & Fredrich, 2015; Gudergan, Devinney, & Ellis, 2015; Hamel, 1991). Alliances may also serve other purposes and recent research on alliances and the role of knowledge in firm strategy suggests additional motives and effects of alliance formation.

In their article "The determinants of government-sponsored R&D alliances," Lin, Wu, Hsu and Perng probed into the causes and motives of enterprises to participate in R&D alliances specifically in R&D Consortia receiving subsidies from the government, and firms' performance after joining an R&D Consortia. They find that participating in R&D Consortia enhances enterprises' operational performance. In the next contribution, Bouncken and Fredrich write about "Good fences make good neighbors? Directions and safeguards in alliances on business model innovation" and deliver insights about configurations of BMI, ROE, firm size and age, as well as the firm's previous alliance experience and the alliance duration. Their results show different configurations to low, medium, and high value capture for firms from BMI in alliances. Cheng, Cai and Jin in their article "The effect of parental opportunism, IJV's autonomy and tacit knowledge on IJV instability: A comparison of multi-variate regression and fuzzy-set qualitative comparative analysis" aim to advance an agency theory perspective on how the factors that influence principal (IJV Parents) and agent (IJV) relationships may affect IJV instability in emerging economies. The results from multiple regressions show that parental opportunism and IJV's autonomy have a positive effect on an IJV's instability and that the interaction of autonomy and tacit knowledge moderate the effect of principal opportunism on IJV instability. The next contribution, by Xie, Fang and Zeng, is "Collaborative innovation network and knowledge transfer performance: an fsQCA analysis". The authors study four factors of collaborative innovation network that affect the level of knowledge transfer performance of firms, viz., network size, network heterogeneity, network tie-strength, and network centrality. The findings reveal that the presence of network size, network tie-strength, and network centrality determines the level of knowledge transfer performance. In their article "A configuration approach in network topology design for product innovation," Ozkan-Canbolat and Beraha exploit a novel approach on technological companies to investigate the effects of topology of

networks on innovation with the assumptions of configurational theory. Their results demonstrate the role of small world innovation configurations fostering product innovation. In "How knowledge sharing and business process contribute to organizational performance: using fsQCA approach," Oyemomi, Liu, Neaga and Alkhuraji carry out a comparative analysis of organizational operation factors that are inherent to knowledge sharing and business process, and how these factors ultimately contribute to the improvement of organizational performance. Their results demonstrate the important role of organizational operation factors in knowledge sharing and business knowledge process, which directly contribute to the improvement of organizational performance. In her article "Factors leading to foreign subsidiary ownership: A multi-level perspective," Lo helps MNEs clarify the theoretical framework when deciding their ownership percentage in foreign investment by discussing factors of influence at various levels, including the subsidiary level, the parent company level, and the dyad level between the subsidiary and its parent company. Her results show that subsidiary capabilities and resources have a negative relationship with subsidiary ownership, whereas those of the parent company have a positive relationship with subsidiary ownership. Conceição Santos, Brochado, and Esperança, in their article "Foreign direct investment patterns of global hotel chains" focus on the largest hotel chain worldwide—Accor—to shed new light on the determinants of Foreign Direct Investment decisions by these players. The results confirm that the number of French tourists in a given market influences Accor's choice of locations. These findings show that international hotels should not focus on market size alone, but rather in exploiting their competitive advantages in a given location. The next contribution by Baltazar Herrera deals with "Social innovation for bridging societal divides: Process or leader? A qualitative comparative analysis." The author examines two process factors: stakeholder engagement (SE) and formalization, and three individual factors: formal authority, formal influence, and personal experience, and their effect on BSD activities. The study concludes that process factors are most significant in creating positive impact. Formal authority and formal influence both play roles in success configurations. She concludes by highlighting implications for managers for future research. In their article "The generation of virtual needs: Recipes for satisfaction in social media networking," Krishen, Berezan, Agarwal, and Kachroo argue that much like many technological advances in the past and present, social media developments run the risk of increasing the generation gap by decreasing communication. The general vision of Baby boomers often depicts them as focused on themselves, the gloomiest generation, and the sandwich generation because they are either supporting their parents or children or both. This generation finds great satisfaction in interactivity, belonging, and affinity in social networks. The aim of Novais Santos and Sales Baptista's article "Information exchange within horizontal relationships: a fuzzy-set approach to companies' characteristics role" is to explore the causal link between information exchange and companies' characteristics in horizontal business relationships. A multiplicity of factors, including the number of employees, the annual turnover, and the companies' age, can affect information exchange. Therefore, firms should consider establishing horizontal relationships and exchanging information, regardless of the organization characteristics of size and age. Further investigation may explore how other contextual characteristics intrinsic to the firm affect the information exchange within horizontal relationships. Contextual characteristics can also encompass market and relationship features. Mozas-Moral, Bernal-Jurado, Medina-Viruel and Fernández-Uclés, in their article "Factors for success in online social networks: An fsQCA approach," attempt to identify explanatory factors for success in online social networks. Their findings show that that factors such as human resource capabilities (specifically management training), the intensity of the firm's social network activity, and the experience the firm accumulates in these virtual media are key factors for social network success, measured by the ability to attract a high number of followers. Finally, in their article "Global Innovation Index: moving beyond the

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