



## Five decades of research on export barriers: Review and future directions

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### ABSTRACT

Although research on export barriers spans five decades, no single prior study has systematically reviewed findings in this field. This study enriches the discourse on internationalization through a systematic review of the factors associated with export barriers, the theories underpinning this, and the exact nature of the relationships. Findings indicate the bulk of empirical studies focus on drivers of export barriers. The study identifies thirty-six such variables, falling in the categories of *firm demographics*, *export venture characteristics*, *managerial factors*, *environmental and operational factors*, and *international trading environment*. Smaller sub-streams of research investigate export barriers as predictors, mediators, and moderators. A vote counting approach dissects the associations (i.e. positive, negative, and weak) between the various factors and export barriers. Moreover, the study identifies four explicit (i.e. *resource-based view*, *incremental internationalization*, *network*, and *institutional theories*) and two implicit (i.e. *attribution* and *rationalization*) theories underlying the associations. Concerning research design and methodology, the study highlights the underrepresentation of emerging markets, longitudinal studies, cross-national comparisons, and advanced multivariate analytical tools. Finally, the study draws key implications for managers, policymakers, and educators, before setting an agenda for future research.

### 1. Introduction

The 800-plus export-focused (e.g. export performance, organizational determinants of exporting, export attitude/behavior, and export barriers) studies published over the past six decades, stress the importance of export development (see Chabowski et al., 2018; Leonidou & Katsikeas, 2010). More than 500 of these focus on small to medium-size enterprises (SMEs) Ribau, Moreira, and Raposo, 2016. The sheer volume of research suggests appraising accumulated knowledge “deserves higher priority now than adding a new experiment or survey to the pile” (Glass, 1976, p.4). Yet, the number of past reviews is skewed toward drivers and measures of export performance (e.g. Aaby & Slater, 1989; Chen, Sousa, & He, 2016; Katsikeas, Leonidou, & Morgan, 2000; Sousa, Martínez-López, & Coelho, 2008; Zou & Stan, 1998) and organizational determinants of exporting (e.g. Leonidou 1995a; Leonidou, 1998; Leonidou, Katsikeas, & Piercy, 1998). Two of the major sub-streams – export attitudes/behavior and export barriers, have received scant attention. This paper focuses on export barriers.

Leonidou (1995b) Leonidou’s (1995b) study, dissecting constraints frequently encountered, is the earliest review on export barriers. Further, Leonidou (2004) built taxonomy on impact and categories of export barriers. Tesfom and Lutz (2006) collated the barriers pertinent to emerging market firms, whereas Arteaga-Ortiz and Fernández-Ortiz (2010) focused on scale development. Kahiya (2017) and Morgan (1997) elaborated on conceptual boundaries and categories of exports

barriers. Two of the more recent reviews (i.e. Doern, 2009; Paul, Parthasarathy, & Gupta, 2017) examine generic barriers SMEs face. However, past reviews have overlooked factors associated with export barriers. To address this gap, a systematic evidence-based approach is adopted (see Greenhalgh et al. (2005); Jones and Gatrell (2014); Pawson, Greenhalgh, Harvey, and Walshe, 2005; Tranfield et al. (2003)). The search period is not bound by time, which enables this review to identify a much larger sample ( $n = 100$ ) of export barrier research, than used in any of the previous studies. For example, Leonidou (1995b, 2004) Leonidou’s (1995b, 2004) highly cited reviews employ sample sizes of 35 and 32, respectively. By including research published post-2000, and not captured in the earlier reviews, this study paints a comprehensive and up-to-date picture.

The review answers the following questions; (1) *what factors are associated with export barriers*, (2) *what theories explain this*, and (3) *what is the nature of the association?* Scholars study export barriers as outcomes, predictors, and mediators/moderators. The bulk of this literature (i.e. 91 studies) investigates export barriers as outcomes. There are 36 variables associated with export barriers. Four explicit theories (i.e. incremental internationalization, institutional theory, network theory, and resource-based view) omnipresent in IB, explain the association(s). The review opens avenues for additional research by suggesting two implicit theories – attribution and rationalization. Vote counting aggregates the nature of the relationships between these variables and export barriers. Moreover, bibliometric properties and methodological

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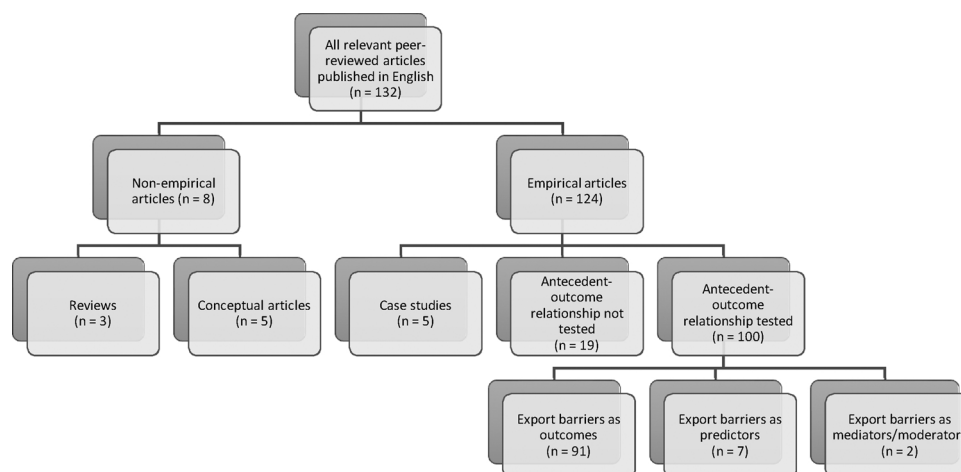


Fig. 1. Overview of the initial list of studies considered.

aspects of export barrier research are scrutinized using *historicity* and *plurality*. Thus, by assembling this fragmented literature into a coherent body of knowledge, this review helps eliminate “the misuse of existing research, the overuse of limited and inconclusive findings, and the underuse of research evidence with substantive implications” (Rousseau, Manning, & Denyer, 2008, p.477).

The review contributes to education, research, managerial practice, and policymaking on export development. It provides *educators* with a synopsis of thematic topics for inclusion in teaching and learning resources. For export *researchers*, it offers nomenclature and a reference point for future studies. Export *managers* gain insights on ‘coping mechanisms’ for overcoming export barriers. *Policymakers* rely on such knowledge to develop effective need-based export incentives. The next section provides context before elaborating on searching, coding and data extraction procedures. Descriptive results address the bibliographic and methodological profiles. A discussion follows from a synthesis of findings. Finally, conclusions and implications set the stage for charting directions for future research.

## 2. Background

The study of export barriers began in the late 1960s/early 1970s (see Groke & Kreidle, 1967; Pinney, 1971; Simpson & Kujawa, 1974), influenced in part by the nascent bodies of knowledge on *international trade* and *foreign direct investment*. While Groke and Kreidle’s (1967) research is the seminal article for this stream of research, Simpson and Kujawa (1974) Simpson and Kujawa’s (1974) paper is the first peer-reviewed empirical study. Research has grown substantially since, creating the need for integrative reviews. Past reviews (e.g. Leonidou, 1995b, 2004; Tesfom & Lutz, 2006) contributed toward the understanding of the nexus between barriers and internationalization, yet, they addressed fundamentally the same research question – *what are the common barriers encountered and how do they influence international activities*. Thus, export barriers affect internationalizing firms in four ways; (1) they discourage non-exporters from internationalizing, (2) inhibit the ongoing international expansion of current exporters, (3) induce de-internationalization, and (4) dissuade ex-exporters from re-engaging international markets.

None of the previous reviews examine the factors, which explain the differential impacts of export barriers, and the mechanisms by which this occurs. In addressing this gap, this empirical review helps “lower the production rate of isolated knowledge and (could) foster the harmonization of still partially fragmented elements of knowledge (Oesterle and Wolf 2011, p.742). The remainder of the review details the systematic evidence-based approach adopted, starting with a description of the literature search.

### 2.1. Literature search

Leonidou, Katsikeas, & Coudounari’s (2010, p.79) definition of export-focused studies, covering the cross-border buying and/or selling of goods/services using a direct or indirect export channel, is adopted. The review excludes economics and trade literature (e.g. Porto, 2005), modelling trade barriers as costs or distortions to market efficiency.<sup>1</sup> Omitted from this review are studies examining challenges unique to a specific mode of entry (e.g. international joint venturing).

#### 2.1.1. Search terms and databases accessed

The initial phase focused on identifying substitutes for ‘export barriers’. Search terms comprised “barriers to exporting”, “barriers to internationalization”, “export barriers”, “export challenges”, “export constraints”, “export hindrances”, “export impediments”, “export obstacles”, and “export problems”. Three scholarly databases; *ABI Inform*, *JSTOR*, and *Science Direct* were searched for pertinent literature. To supplement the search, publisher-specific databases (i.e. *Blackwell-Wiley*, *Elsevier*, *Emerald*, *Palgrave*, *Sage*, *Springer*, and *Taylor and Francis*) were included. The search encompassed keywords, abstract; and full text. A manual method was added to find older literature; some of which is yet to be fully digitized.<sup>2</sup> Finally, through an email request, 6733 scholars affiliated with the *Academy of International Business (AIB)*, had an opportunity to provide additional studies to those already identified.<sup>3</sup> These search procedures yielded 177 peer-reviewed journal articles. Disregarded on the grounds of pertinence, are forty-five articles, mentioning export barriers as a fringe construct. Fig. 1 provides a synopsis of the research on export barriers; whereas the subsequent discussion outlines the criteria adopted to qualify each study for inclusion in this review.

#### 2.1.2. Criteria for inclusion for further analysis

The validity of the resultant sample depends on the criteria for qualifying studies (Glass, 1976; Krippendorff, 1989). To be eligible for coding and analysis, four criteria were set:

- (1) Export barriers are a focal construct, and factors associated with them are identified.
- (2) A link between specific factor(s) and export barriers is hypothesized and tested.

<sup>1</sup> See Leonidou et al. (2010) for a similar approach.

<sup>2</sup> This was particularly the case for literature disseminated in *Emerald* journals prior to 1990.

<sup>3</sup> Based on confirmation from the AIB-listserve (10 November 2015).

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