

The Case Study as Disciplinary Convention: Evidence from International Business

1. Introduction

Case studies have been described as ‘an increasingly popular and relevant research strategy’ (Eisenhardt & Graebner 2007, p. 30). Yet despite this popularity, the case study is not well understood. Perhaps one reason is that, as an edited book on the subject has pointed out, deciding ‘what is a case?’ – and consequently ‘what is a case study?’ – generates a host of answers from social scientists (Ragin & Becker, 1992). Another complication is that, as Platt (1992) has shown, conceptions of a case study have evolved over time: thus, she argues, Yin’s definition (first proposed in 1984) is clearly distinct from accepted usage of the term in the inter-war period. A final complication is that views on the case study are ‘skew[ed]’ by different disciplinary traditions: ‘writers tend to have in mind ... the sort of case and the sort of method most salient in their own intellectual setting’ (Platt, 1988, pp. 161, 163).

In management studies, Eisenhardt (1989) and Yin (2003) have provided influential answers to the questions of what a case study is and should be. They have not only legitimized the use of case studies for theorising, but also provided researchers with specific guidelines for conducting rigorous case studies. The dominance of these two methodological authorities has perhaps obscured the fact that a range of often opposing perspectives exists on how to conduct case studies. This contested nature of the case study is little acknowledged in management research. We would argue this provides a strong justification for promoting a debate on case studies that has yet to be seen in management journals.

A reconsideration of the case study is also warranted by fact that we have little knowledge of how the case study has actually been applied by management researchers. Yet there is evidence that approaches to the case study are very much influenced by the prevailing disciplinary norms (Platt,

1988). Published case studies in respected and widely circulated journals become exemplars of good practice and shape conceptions of what the case study should be. If we accept that the case study is a disciplinary convention, it is meaningful to analyse how it is used within a particular field. Such an analysis of case studies in use would allow us to identify the limitations of common practices, as well as any innovations that have been made by authors who are confronted by the challenges of fieldwork. As Platt (1992) has warned, there is no reason to assume that methodological theorizing and research practice coincide: her review of sociological research in fact identified a gulf between how case studies were conceptualized by key writers on methodology and how they were practised by researchers in the field.

Our paper therefore revisits the case study by posing the question: how has it been used in a particular management discipline? How does its use compare with conceptualizations of the case study in the methodological literature? We draw our evidence from the field of international business, reviewing 134 published articles that use the case study approach in key journals over the period 1995-2005, as well as 22 from 1975-1994. We contrast the diversity of methodological perspectives on the case study with the rather narrow range of case study approaches used in the articles included in our review. In this way, we challenge the notion there is one single approach to conducting case studies, and argue for a more differentiated and finely grained understanding.

In this paper, we explore the case study as a convention within a specific management discipline, that of international business. International business has distinctive traits stemming from its roots in economics; its genesis in post-War academic institutions in the USA; and the multiple linguistic and cultural settings, as well as the organizational complexity, that it seeks to explain. We use international business as an example, without claiming that it is typical of management research generally. In fact, we would anticipate that other disciplines within management and organization

studies would have their own characteristics, due to different intellectual heritages, interdisciplinary influences and empirical phenomena.

The paper is organized as follows. We proceed by examining the methodological literature in order to identify the main points of contention surrounding the design and use of case studies. We then introduce our review of 134 empirical case studies published in four major international business journals during the period 1995-2005, supplemented by an analysis of one of these four journals that extends to the preceding 20 years, 1975-1994. Thereafter, we use these published case studies to identify the conventions that have surrounded their use in the period under analysis. Our review does not seek to catalogue best practices in the field; nor, given the time period, is it designed to be a historical analysis of methodological trends. At the same time, our paper amounts to more than a 'state of the art' review: rather, in the conclusion we use our findings to suggest what we term a more differentiated approach to understanding the case study.

2. Literature Review: Debating the Case Study

The methodological treatments of the case study found in Eisenhardt (1989) and Yin (2003) are prescriptive in nature, advocating particular approaches to design, data collection and analysis. They do not seek to reflect the multiple perspectives on case research that abound. Accordingly, our aim in this section is to pinpoint those dimensions of case research to have provoked ongoing debate in the broader methodological literature, which crosses the boundaries of several disciplines such as sociology, political science, education and ethnography as well as management. We classify the main areas of controversy as follows: paradigmatic foundations, the process of theorizing, degree of replication, data sources and boundary setting. We are not seeking to provide an exhaustive review of the methodological literature on case research, which can be found elsewhere (e.g. Gomm, Hammersley & Foster, 2000).

Paradigmatic foundations

Case studies vary depending on the philosophical and epistemological approach taken (whether explicitly or implicitly). Eisenhardt (1989) and Yin (2003), who are the main reference points for management scholars (see e.g. Ghauri, 2004 for an example in IB), take a positivist¹ approach that has been challenged by others. Stake (1994, p. 238), identifying himself as a constructivist, criticizes scholars who downgrade ‘intrinsic study of a particular case’ in favour of the pursuit of generalization, of treating a case as the ‘typification of other cases’. He characterizes case research as ‘the study of the particular’, whose primary aim is to understand the uniqueness and holism of a single case. Another alternative to ‘positive science’ can be found in Burawoy (1998), whose critical, ‘reflexive’ approach embraces rather than denies context effects. According to this ‘extended case method’, the researcher can never be a detached observer but is part of the social world being studied, knowledge is unavoidably situational, and a single case cannot be understood isolated from the broader social forces and regimes of power in which it is embedded. Differences in paradigms therefore affect judgments about the quality of case research, with evaluation criteria not value-free but rather ‘constituted by particular philosophical conventions’ (Johnson, Buehring, Cassell & Symon 2006, p. 133).

Theorizing

Authors are not unanimous about how to use case studies for relating theory and empirical observations. Yin’s (2003) categories of exploratory, descriptive and explanatory case studies are perhaps best known to management researchers: another, more finely grained, typology, based on a case study’s ‘utility’ in theory building, has been suggested by Eckstein (1992, p. 130; see also George & Bennett, 2004). Accordingly, a case study may take the form of a configurative-

ideographic study, aiming at understanding (*Verstehen*) rather than prediction and control; a disciplined-configurative study, in which an existing theory is used to explain the case; a heuristic study, that suggests new problems, hypotheses and constructs; a plausibility probe, which is a preliminary step towards more extensive testing of theories; crucial case studies, which are tests of theories (for example, cases that are ‘most likely’ and ‘least likely’ to confirm or disconfirm a theory, and ‘negative’ or ‘deviant’ cases, in which an outcome predicted by the theory does not occur; for a discussion, see Emigh, 1997). Eckstein (1992, p. 133) did not believe that a configurative-ideographic case study ‘add[s] up to theory’, a view which would be challenged by interpretive or constructivist scholars.

Degree of replication

Perhaps the most prominent difference to have emerged in the methodological literature is the debate over the degree of replication desirable in case study designs: in other words, whether single or multiple cases should be incorporated. Eisenhardt (1989) is perhaps the most influential advocate of the multiple or comparative case study design for the purpose of theory building, and is one of the few authors to specify the ideal number of cases (4-10 cases) in a comparative study. However, her argument that a study of fewer than four cases is unlikely to be sufficient for theory building has provoked some criticism. Dyer and Wilkins (1991) label her design a ‘hybrid’ or ‘surface’ case study which, given its ‘thin’ description and lack of context, can do no more than build on existing theory. This contrasts with what they term the ‘deep’ or ‘classic’ single case study, which, due to its rich, contextual insights into the dynamics of phenomena, has the capacity to be ‘paradigm creating’ or ‘paradigm challenging’.

¹ As our focus in this paper is not on paradigmatic differences, we shall simply refer to the ‘positivist’ paradigm rather than distinguishing between different positivist or post-positivist traditions.

Despite this criticism, which can be linked to a non- (or even anti-) positivist viewpoint, there may be a temptation on the part of scholars to include more rather than fewer cases in empirical research. Lillis and Mundy (2005, p. 127) identify a type of study in the management accounting field that is characterized by the nonrandom selection of a large number of research sites, with data collected by means of ‘relatively short’ interviews. They argue that this kind of ‘limited-depth cross-sectional field study’ can be positioned between an in-depth case study and a survey; in other words, they distinguish it from a case study. This then begs the question of where the boundaries of a case study lie: at what point does trading off depth for breadth mean that the research can no longer be considered a case study? The boundaries between the case study and other forms of research are not necessarily clearcut and remain an unresolved issue in the literature.

Data sources

As well as exhibiting these philosophical and design differences, case studies can vary in terms of the data collection methods they use. Feagin, Orum and Sjoberg (1991, p. 2) define a case study as an ‘investigation ... using qualitative research methods’, but acknowledge that ‘some case studies have made use of both qualitative and quantitative methods’ (see Hurmerinta-Peltomäki and Nummela 2004 for an analysis of mixed-method approaches). While some scholars specify that case research entails the use of ‘a variety of data collection procedures’ (Creswell, 2003, p. 15), this does not necessarily happen in practice: a review of published case studies in leading information systems journals found that, of those articles that specified the data collection method, 88% had primarily used interviews (Dubé & Pare, 2003). The dominance of interviews in this field contrasts with the strong association that case studies traditionally had with participant observation (Platt, 1992), and which has continued among ethnographers (for a description of an ethnographic case study conducted in an organizational context, see Brewer, 2004).

Boundary setting

In the process of defining and investigating their cases, researchers set boundaries, either implicitly or explicitly. The boundary to have received most attention in the methodological literature is that of temporal scope. Jensen and Rodgers (2001) distinguish between ‘snapshot’, longitudinal (focusing on the dynamics of change) and ‘pre-post’ (before and after an event) case studies. Other authors point out that longitudinal studies themselves vary, depending on whether they are conducted in real-time or retrospectively (see Buckley & Chapman, 1997 for a discussion and example). Leonard-Barton (1990) shows that the two can be usefully combined; her innovative design coupled a real-time study with retrospective cases.

However, boundary setting raises more fundamental issues than that of delimiting the temporal scope of the case. Ragin (1992) has argued that the process of boundary setting amounts to deciding ‘what the research subject is a “case of”’. In contrast to authors such as Eisenhardt (1989), who emphasizes the value of *a priori* specification of constructs to the greatest extent possible, Ragin (1992) warns that ‘casing’ – deciding what the research subject is a case of – is an evolving process during fieldwork and ‘may not be known until after most of the empirical part of the project is completed’ (Ragin 1992, pp. 8-9). He warns against confusing the empirical unit (i.e. the research subject) with the theoretical unit (i.e. the case), with the theoretical unit possibly ending up being something different to what had been anticipated at the start of fieldwork. Thus, there is a difference between those methodological authors who argue in favour of fixing the boundaries as early as possible, and those who argue that flexibility is intrinsic to case research, given that the research question and boundaries of the case ‘co-evolve in the course of the research’ (Dubios & Araujo, 2004).

3. Review of International Business Journals

In order to examine the use of case studies in IB research, we undertook a comprehensive and systematic review of four core IB journals in the period 1995-2005.² Due to the interdisciplinary nature of the field, IB articles are published both in IB-specific journals as well as in various functional journals such as the *Journal of International Marketing*. For the purposes of this review, we decided to focus solely on IB-specific journals. Although it cannot be assumed that major journals ‘contain a representative cross-section’ of all journal articles, they do however ‘tell something about disciplinary standards and ideals’ (Platt, 1996, pp. 123, 126). We chose the following four journals: the *International Business Review (IBR)*, *Journal of International Business Studies (JIBS)*, *Journal of World Business (JWB)* and *Management International Review (MIR)* (for similar journal selections see Hurmerinta-Peltomäki & Nummela, 2006; Welch & Welch, 2004). They represent the key IB-specific, rather than functionally oriented, journals, thus providing as with an insight into disciplinary practices. They do, however, differ in terms of ranking (with *JIBS* ranked more highly than the other three), origins (*JIBS* and *JWB* are based in the US, the other two in Europe) and editorial policy (for example, unlike *JIBS*, *JWB* does not cover economics and finance) (Dubois & Reeb, 2000; Harzing, 2005; Chan, Fung & Lai, 2005).

In the first stage of analysis, we categorised every one of the articles (excluding editorials, commentaries and notes) published in these journals as quantitative, qualitative (other than case studies), mixed method, non-empirical/non-research or case study (see Table 1). Most of these categories are self-explanatory, except ‘non-empirical/non-research’, which included any articles that were conceptual, practitioner oriented, pedagogical, methodological or reviews. Case studies are not limited to qualitative methods so were classified as a separate category rather than as a

² With the exception of the *JWB*, for which the period 1997-2005 is analysed. The *JWB* was relaunched under a new name in 1997 to reflect a substantial change in editorial policy, thus making it a more meaningful starting point for analysis than 1995.

subset of ‘qualitative’. As Table 1 shows, quantitative research clearly dominates the issues of all four journals, accounting for 731 out of the total number of 1288 published articles (57%); at the same time, case studies overshadow other forms of qualitative research.

Table 1 about here

In order to identify case studies systematically, we applied a definition that we derived from the literature: a case study is a research strategy that examines, through the use of a variety of data sources, a phenomenon in its naturalistic context, with the purpose of ‘confronting’ theory with the empirical world. Rather than extracting the research subject from its context and ‘decomposing’ it into variables, as is the practice in ‘variable-oriented’ research, the case study takes a holistic approach, seeking to understand how processes and causes ‘fit together’ in each individual case (Ragin, 1992). Through this process, the relationship between theory and the empirical world is explored, destabilised, and reconstructed (Dubois & Gadde, 2002). We term the case study a research strategy because it is not limited to, and it involves more than, the choice of method for data collection or analysis (see e.g. Hartley, 2004).

Despite the application of a single definition, articles were not always straightforward to categorise, for a number of reasons. First, some articles did not include a section or even a paragraph on research methods, thus omitting details which would have aided our categorization. Ultimately, the accuracy of our classification was very dependent on that of the authors’ own reporting. Second, we found articles that satisfied our definition even though their authors had not explicitly labelled them a case study. These we included in our analysis. Third, while authors might have labelled their study a ‘case study’, it did not necessarily meet our definition. In particular, some studies lacked a clear linkage between theory and empirical evidence, the case was decontextualised, or the case was an illustration or example rather than constituting the focus of the

paper. Such articles were therefore categorized as ‘marginal case studies’ (see Table 1). Overall, since our primary aim in this paper lies in understanding case study conventions (i.e. how case studies are used, rather than how they should be used), we were deliberately inclusive in our approach. Most notably, we found many instances of ‘case studies’ that used what might be judged a rather narrow range of data sources (interviews with a small number of informants per case); we nevertheless included them in order to capture research practice in the field rather than insist on a strict interpretation of our definition.

In the second stage of the analysis, we content analysed the case studies that were identified in Stage 1. We performed frequency counts as well as a qualitative content analysis, using a standard set of codes. The coding template encompassed the following key features of the research design: research topic; research purpose; number of cases included; unit of analysis; data collection methods; amount of data; language used in data collection and analysis; location of research sites; reporting of the case; method of data analysis; validity and reliability checks; epistemological assumptions underlying the paper; and the methodological literature cited by the authors.

The process of reviewing was iterative, as emerging findings were incorporated into the coding template in the course of the study. Some new codes were added, while others were combined or changed due to limited information provided in the articles. When attempting to identify the research purpose of case studies, we noted that it was not always stated, and even if stated, it was sometimes expressed vaguely. Also the meaning of the different codes such as ‘sampling strategy’ and ‘sampling justification’ was frequently discussed among the team of three researchers. The involvement of several persons in the content analysis allowed us to effectively contrast and compare the results of the coding and develop new categories, i.e. ‘investigator triangulation’ (Denzin, 1989). Moreover, the broad coding template permitted a holistic analysis of the articles going beyond the mere focus on data collection methods (cf. Scandura & Williams, 2000).

Since our review reports on the period 1995-2005, we would characterize our study as a snapshot of methodologies-in-use, rather than seeking to trace the development of a discipline over time. However, in order to provide us some basis for contextualizing the time period we were analysing, we also conducted an analysis of the articles published in the preceding 20-year period of *JIBS*. The analysis of this period 1975-2004 proceeded in the same manner: each article in this time period was categorised in order to identify the case studies, which were then content analyzed using the same template. We restricted this historical analysis to *JIBS* in light of the fact that it has the longest and most consistent history of the four journals in our review.³ The proportion of case studies in this early period compared to the later one is fairly similar, forming 6.4% of empirical articles in 1975-1994 and 6.9% in 1995-2005.

 Table 2 about here

4. Findings

The findings of our review are structured according to the key themes identified in the literature review: paradigmatic foundations, theorizing, degree of replication, data sources and boundary setting. Overall, we found the convention in IB journals to be exploratory, interview-based multiple cases studies based on positivist assumptions and conducted at a single point in time. In this section we also contrast this with alternative practices that we found during the 1995-2005 period, as well as the case study approaches we identified in *JIBS* in the preceding 20-year period (see Table 3 for a summary of major findings).

 Table 3 about here

Paradigmatic foundations

³ While the JWB's predecessor, the *Columbia Journal of World Business*, was founded in 1965, its editorial policy has shifted considerably, as already discussed. *Management International Review* is the oldest of the journals, having been

In most articles, the philosophical assumptions were implicit and not clearly articulated. This is not a surprise; as Platt (1996) points out, ‘most researchers do not provide general statements of their philosophies; it is not the convention that this is required in empirical articles or books’ (p. 108). In the general absence of a discussion of epistemology or ontology, however, implicit positivism was the convention (Table 3), which most likely is a reflection of the dominance of quantitative research in the IB field that is clearly seen in Table 1. This finding also held for the earlier period of *JIBS*. In the period 1995-2005 implicit positivism may also be attributed to the influence of Eisenhardt (1989) and Yin (2003), whom we found to be by far the most commonly cited methodological authors (40 authors cited Yin and 34 cited Eisenhardt, although the first reference to Yin appeared in *JIBS* only in 1990 and the earlier case studies contained fewer citations to methodological sources).

In several instances we detected internal inconsistencies concerning the epistemological approach adopted by the authors (see also Gephart 2004 for a discussion). For example, Wang, Tong and Koh (2004) refer to Yin (1994) and Eisenhardt (1989) in their section on data analysis (p. 171) and carry out a quantitative analysis of the interview data. In the following section on the theoretical model (p. 173) they refer to grounded theory, which does not fit the deductive and positivistic approach adopted earlier in the paper or the pre-designed interview protocol provided in the appendix. Perhaps one explanation is that authors felt they needed, or were asked in the review process, to conform to the traditional quantitative structure of an article which starts with a theoretical framework – not a format that is well suited to an inductive or even abductive approach. However, two case studies did manage to find alternative structures for reporting. Cannice, Chen and Daniels (2004, p. 135) include the theoretical discussion and findings in the same section to reflect the fact that ‘we developed most of our viewpoints ... after we completed our interviews’. In

founded in 1960, but until a change in editorship in 1980 it had a broader scope than that of IB (personal

the article by Dahlgren and Söderlund (2001) on international projects, the iterative analysis and interplay between data and theory is even reflected in the structure of the paper, which switches from data ('The case') to theory ('A theoretical interpretation') and back to the data ('Case revisited').

Alternative perspectives were hard to find, with no article explicitly adopting a critical or postmodern perspective. One exception to implicit positivism was Trimarchi & Tamaschke (2004), who refer to the critical realist Bhashkar and use his concept of 'generative mechanisms'. Five authors either explicitly described themselves as interpretivist (although we would disagree with claims made in two of the articles) or were clearly influenced by interpretive approaches. One of the articles most faithful to an interpretive approach was by Risberg (2001), who succeeded in her aim of understanding the multiple experiences that employees (not just managers) have of acquisitions.

Theorizing

Of the 134 case studies reviewed, 51% had an exploratory purpose and 39% a theory-building or developing purpose. The theoretical purpose of the paper was not necessarily clearly stated, however, and a number of case studies had two, even three, purposes, such as a theory-building and descriptive objective (e.g. Sunaoshi, Kotabe & Murray, 2005) or even theory testing and exploratory purpose (Engelhard & Nägele, 2003). In practice, we did not detect a clear distinction between these categories. One explanation for this could be that 'exploratory' seemed to be used as a synonym for qualitative research in general, a practice which was also common in the earlier years of *JIBS* that we reviewed. Another reason is that theory-building could take many forms; for example, propositions could be posed at the start or come at the end as an outcome of the empirical study. The degree of theory building was often modest, as articles with this as an explicit objective

communication with Klaus Macharzina, former editor, 7 June 2007).

were in fact developing or refining existing theory (e.g. Buckley & Carter, 2003) rather than building new theory *per se*.

In line with the conventional view that case studies are suited to exploratory research, the most common mixed-method design was for a qualitative case study to form a pre-study to a survey (for similar findings see Hurmerinta-Peltomäki & Nummela, 2006). For example, in Knight and Cavusgil (2005), an interview-based case study of 24 firms generated a model that was then tested in a survey. However, in many of the mixed-method studies, the qualitative and quantitative parts were quite separate, rather than mutually supportive, and the emphasis was placed on reporting the quantitative rather than qualitative findings (e.g., Delios & Beamish, 2004).

The least common purpose (11%) was that of theory testing or explanatory research (e.g., Crick & Spence 2005; Engelhard & Nägele, 2003; Gomez, 2004). In a small number of articles the boundaries of the theory were tested by selecting, explicitly or implicitly, a ‘deviant’ or ‘negative’ case (e.g. Gomez, 2004; McGaughey, Liesch & Poulson, 2000; Michailova, 2002). A very few mixed designs used case study as a follow-up stage to a survey, rather than forming the exploratory phase, in order to verify and expand on the quantitative results. Such an alternative mixed-method approach can be found in Bradley & Moles (2001) and Chetty and Wilson (2003), who used the case study to confirm and expand on previously generated survey findings.

Degree of replication

The dominance of multiple cases (99 as compared to 35 single case studies) is perhaps unsurprising, given the popularity of Eisenhardt (1989) as a citation (see Table 3). In single case studies, ‘single’ tends to refer to the study of one company (Buckley, Clegg & Tan, 2005; Dickman & Harris, 2005; Lagerström & Andersson, 2003; Marschan-Piekkari et al., 1999). For example, a case study of a formerly state-owned Polish conglomerate, Beiersdorf-Lechia S.A. Poznan, looked at how the

management team effectively applied power-based change instruments in organisational transformation (Blazejewski & Dorow, 2003).

In 37% of the multiple case studies the design involved a considerably large number of cases (more than 10, the maximum number recommended by Eisenhardt 1989) which we have labelled 'large-*N*' cases. For example, Mascarenhas (1999) included 41 case companies of large and small international specialists. Engelhard and Nägele (2003) examined organisational learning in 22 subsidiaries of MNCs in Russia. Wang, Toh and Koh (2004) studied 62 firms in order to develop a model of knowledge transfer from the MNC parent to the Chinese subsidiary. These authors refer to Eisenhardt (1989) in the context of multiple case studies but do not necessarily acknowledge that the number of cases clearly exceeds the level she recommended (between 4-10 cases). Large-*N* cases posed a considerable challenge in the reporting of results, so typically featured limited quantification of data and sophisticated data displays (e.g. Wong & Ellis, 2002). Large-*N* case were also found in the earlier period of *JIBS*, where case studies seemed to be the label used for studies in which the number of observations was not sufficient for statistical analysis.

An innovative form of multiple case study design was the matched pair case (Buck & Shahrim, 2005; Buck, Filatochev, Nolan & Wright, 2000) The case researchers aimed at identifying 'a pair of Russian/Chinese cases' which 'was chosen carefully to hold many factors constant' (Buck et al., 2000, p. 286). Another multiple case study design involved the use of so-called 'dual track cases' (Buck & Shahrim, 2005, p. 50), which consisted of combining different case designs within the same study: longitudinal with matched-pair cases (Buck & Shahrim, 2005); in-depth with limited depth cases (Schweiger, Atamer & Calori, 2003); in-depth 'main' cases with 'adjunct' cases used to validate emerging findings (Berdrow & Lane, 2003); cases based solely on secondary data with interview-based cases (Mascarenhas, 1999).

Data sources

A strong trend emerging from our review is that interviews are the dominant source of data in IB case studies (see Table 3). The following quotations typify our findings: ‘The research method was mostly based on interviews with key members of these teams’ (Lunnan & Barth, 2003, p. 114); ‘Semi-structured interviews were the principal means of data collection...’ (Danis, 2003, p. 231). Our review of the earlier period of *JIBS* shows that personal interviews have always had this central position in IB journals (including the use of personal interviews in administering surveys). Yet despite the widespread dependence on interviews, including interviews that involved crossing language boundaries, language was seldom discussed as a methodological issue (for exceptions, see e.g. Lagerström & Anderson, 2003).

The 99 interview-based case studies (in which interviews were the sole or main data source) we found were not comparable in terms of the depth and variety of the interview data, although most would struggle to be classified as ‘classic’, rich case studies, to use Dyer and Wilkins’s terminology (1991). Some studies used only one informant per case, while others (including some of the early case studies to be found in *JIBS*, which were the result of extensive, multi-country fieldwork) involved multiple informants in data collection. In a few studies, these multiple informants also represented a range of hierarchical levels (Blazejewski & Dorow, 2003; Hoon-Halbauer, 1999) or groups of employees such as expatriates and local personnel (e.g., Michailova, 2002). In some studies, both internal and external informants to the case company – such as subcontractors and customers (Nguyen, 2005), stakeholders and industry experts (Barclay & Gray, 2001) – were included. The depth of primary interview data was also enhanced through so-called ‘unit triangulation’ (Marschan-Piekkari et al., 2004, p. 254) which refers to contrasting the perspectives of multiple organisational units. For example, some case studies of MNCs covered both headquarters and subsidiary units (e.g., Birkinshaw & Ridderstråle, 1999; Marschan-Piekkari et al.,

1999). Others shed light on both the acquirer and acquired companies' perspectives (e.g., Bresman, Birkinshaw & Nobel, 1999), both JV partners (e.g., Danis, 2003; Danis & Parkhe, 2002; Hoon-Halbauer, 1999) or the franchisor/ee relationship (Szulanski, Jensen & Lee, 2003).

Case researchers may have collected other material alongside interviews such as internal documents, memos, letters, annual reports etc., or organised a one-day workshop for research participants, but these were seldom described in more detail, nor was their value added in relation to the interview data discussed (for exceptions, see Blazejewski & Dorow, 2003; Danis & Parkhe, 2002). On the other hand, we also found case studies based on secondary documents only (e.g., Lawton & McGuire, 2001).

Few case studies actively employed observational data, and only six studies were explicit about their use of extensive participant observation (e.g. see Chevrier, 2003; Moore, 2003; see Table 3). For example, the owner and key managers of the Vietnamese case company allowed Nguyen (2005) to 'shadow' them for 25 days and gather observational data. Sunaoshi et al. (2005) examined in depth how technology transfer really occurs on the factory floor in the context of a Japanese company and its American subsidiary. They conducted what can be labelled a form of ethnographic case study, with one of the researchers a participant-observer in the American-based factory. Thus, participant observation was the main method of data collection involving, among other things, fieldnotes, videotaped interactions and interviews. The observational data are effectively reported in the article to demonstrate the difficulties of transferring technological knowledge between the Japanese and the Americans who do not share the same working language.

Data sources for cases were not necessarily exclusively qualitative, also in the earlier period of *JIBS* that we analyzed. As well as mixed method designs where the case study formed a distinct stage either pre- or post-survey, quantitative as well as qualitative sources could be brought to bear on the same case. This design can particularly be found in studies on MNCs, where mixed methods

are required to understand large, dispersed operations (see e.g., Bresman, Birkinshaw & Nobel, 1999). A small number of case studies drew solely on quantitative data (e.g., Chakrabati & Scholnick, 2003; Spencer, 2003). For example, Joshi, Labianca and Caligiuri (2002) conducted a quantitative social network analysis of one international team consisting of 22 human resource managers.

Boundary setting

Our review revealed that there was some confusion over what the authors defined the case to be, and that the emergent nature of case research was not necessarily acknowledged in case research (for an exception, see Ferner, Almond & Colling, 2005). The *de facto* boundary set for the case was that of the company's boundaries. Equating the empirical unit with the case might have been appropriate in some studies, but in others it was a limitation, resulting in lack of focus and theoretical insight. Part of the confusion seemed to stem from the embedded nature of case studies, which results in several levels of analysis that were not always clearly specified. An exception was Goodall and Roberts (2003), who drew on data from two teams belonging to one multinational corporation but specified that they had conducted two case studies. Similarly, Birkinshaw and Ridderstråle (1999) clearly distinguished between two levels of analysis: 44 subsidiary initiatives that took place within 7 companies. While the most common level of analysis was the firm, other levels were also present. Calori et al. (2000, p. 336), for example, used four industry cases to classify innovative international strategies: 'We studied four cases, that is, four industries'. Carr, Inkson and Thorn (2005) in turn provided a case study of New Zealand to support their arguments on 'brain drain' and the concept of 'talent flow'. At the other extreme, individual entrepreneurs constituted the case in Harris and Wheeler (2005, p. 191), who explicitly state that '[o]ur focus of analysis is not the organization, but of the internationalizing entrepreneur as an individual'.

In terms of the temporal scope of the study, only eight of the qualitative case studies could be categorised as longitudinal (and it was not always clear that authors were justified in their claim their study was longitudinal). Longitudinal studies were retrospective, real-time, or both. For example, Blazejewski and Dorow (2003) created a retrospective ‘case history’ of their Polish case company. Hoon-Halbauer (1999) investigated retrospectively and in real time the management relationships of two Sino-foreign joint ventures. The two joint ventures were established in 1983 and 1984 respectively and the author made four separate field trips in 1986, 1987, 1988 and 1989 to collect data. Bresman et al. (1999) conducted a real-time longitudinal study of patterns of knowledge transfer in international acquisitions that took place in 1988 or 1989. They collected data in 1991 and 1996 in order to examine patterns of knowledge transfer over time. Szulanski et al. (2003), in turn, collected data during a period of five years in order to explain the adaptation process of US franchising know-how in Israel.

5. Conclusions

Methodologies cannot be understood in vacuum: rather, one needs to turn to research practice in order to gain insights. Scholarly conventions and traditions very much influence prevailing approaches to the case study (Platt, 1988). Therefore, our starting point in this paper was to view the case study as a disciplinary convention, rendering it meaningful to explore case studies in use within a particular management discipline, that of international business (IB). Our findings show the disciplinary convention in international business journals to be exploratory, interview-based multiple case studies based on positivist assumptions and cross-sectional designs. This form of case study is a long way from the ‘classic’ single case study defended by Dyer and Wilkins (1991), leaving us with the question as to whether such studies should be termed case studies at all. Has depth has been sacrificed for breadth to such an extent that they can no longer lay claim to a holistic

perspective? As our literature review showed, Lillis and Mundy (2005) suggested the term ‘cross-sectional field study’ to denote a study similar in design to our ‘large-*N*’ case study. On the other hand, the authors, reviewers and editors involved were all comfortable with the use of the term ‘case study’ in this context. The case study as it has evolved in international business would therefore appear to be one example of how disciplinary conventions can diverge from the very methodological authorities (especially Eisenhardt, 1989) that authors themselves invoke.

Our cross-disciplinary review of the methodological literature in this paper demonstrated the existence of several opposing views on how to conduct case studies. However, this debate is not reflected in the rather narrow set of approaches commonly used in the field of IB. We did find alternative approaches to case study design and some innovations in terms of multiple case study designs: interpretivist, ‘negative’ or ‘deviant’, theory-testing, ethnographic, real-time and retrospective, matched pair and dual track case studies. Given that all research designs involve tradeoffs, we would argue that such diversity should be encouraged, and the fact that interview-based multiple case studies are so dominant is perhaps cause for concern. At the same time, we are not suggesting that ‘anything goes’. Although this was not the primary objective of our paper, our review did uncover some ‘best’ practices, such as the use of unit triangulation when selecting interview informants, the specification of the documents that were collected, and consistency in one’s epistemological and philosophical approach.

Our review showed that the concept of a ‘case study’ is somewhat ill-defined, inconsistent and unstable. This is perhaps inevitable, given that, as Ragin (1992, p. 2) has pointed out, to some extent all research is a case study in that it is an analysis ‘specific to time and place’. Drawing the boundaries between case research and other types of studies, such as qualitative interview studies or conceptual papers, was not easy to do. Moreover, authors themselves were not necessarily consistent with their use of the term. On the basis of our findings, we suggest that a more

differentiated understanding of the case study would not only remove some of this confusion, but would also acknowledge the existence of multiple approaches to case research. By this, we mean that case researchers specify more precisely the type of case study they are conducting: for example, whether their study is an ethnographic case study, a negative case study or an interview-based multiple case study.

Our findings have implications for quantitative as well as qualitative researchers. In our review we also identified quantitative studies that collected data in a single or limited number of empirical settings, such as one or few firms, but did not designate this setting a 'case'. For example, Lovett, Coyle and Adams (2004) surveyed the employees of two factories owned by the same company. Their account reveals considerable contextual knowledge about the factories in which their survey was conducted, as well as the country setting, that remains underutilized. Yet by discussing the implications of using such an empirical setting quantitative researchers could turn their case into a case study. This was possibly an opportunity missed, and a sign that quantitative researchers may not realise the potential of the contextual data that they collect. Thus, it may be that more quantitative studies of this kind could be expanded into mixed-method case studies.

Our review, by examining research practice in the field of IB, has therefore opened up a range of issues for further consideration in management studies generally. We have argued that our findings show that the case study in IB differs in significant ways from the templates recommended by the methodological literature. At the same time, IB researchers have to date used a fairly narrow selection of possible case study approaches. There is perhaps a danger that a disciplinary convention becomes a disciplinary cage, and scholars start to assume that the dominant approach to case research is the only approach. We would therefore argue that further discussion about multiple approaches to case research, and innovations in case study design, would benefit management research.

Acknowledgements

We would like to thank Lisa Rudner and Ana Thomat for their assistance in compiling the review.

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Table 1: Categorization of Journal Articles 1995-2005

Journal	Year	Quantitative	Mixed	Qualitative	Case	Marginal case	Cases % of Empirical	Cases % of Total	Articles per volume
IBR	1995	10	1	2	-	-	-	-	28
IBR	1996	14	1	5	6	1	22.2	16.2	33
IBR	1997	18	5	-	3	1	11.1	8.1	33
IBR	1998	23	4	1	-	-	-	-	32
IBR	1999	18	2	-	7	-	25.9	1.9	29
IBR	2000	19	3	2	6	-	20.0	1.6	37
IBR	2001	20	3	1	6	-	20.0	1.6	34
IBR	2002	21	3	-	1	1	38.5	2.7	36
IBR	2003	19	3	2	3	-	11.1	8.1	36
IBR	2004	23	1	-	3	1	10.7	8.1	36
IBR	2005	24	1	1	4	-	13.3	10.8	36
TOTAL		209	27	14	39	4	13.3	10.5	370
JIBS	1995	23	1	-	2	-	7.6	0.5	31
JIBS	1996	26	2	-	3	-	9.6	0.8	36
JIBS	1997	25	-	2	1	-	3.5	0.2	30
JIBS	1998	19	1	-	-	-	-	-	32
JIBS	1999	22	-	-	2	-	8.3	0.5	31
JIBS	2000	26	3	-	1	-	3.3	0.2	30
JIBS	2001	27	1	-	2	-	6.6	0.5	39
JIBS	2002	25	-	-	4	-	13.7	1.1	32
JIBS	2003	26	-	-	1	-	3.7	0.2	35
JIBS	2004	16	-	-	2	-	11.1	0.5	23
JIBS	2005	24	-	-	2	-	7.6	0.5	33
TOTAL		259	8	2	20	0	6.9	5.6	352
JWB	1997	6	1	1	3	-	27.2	1.3	22
JWB	1998	7	2	3	-	-	-	-	24
JWB	1999	8	2	5	2	1	11.1	0.8	25
JWB	2000	8	-	1	4	-	30.7	1.7	23
JWB	2001	7	3	3	4	-	23.5	1.7	23
JWB	2002	15	-	2	4	1	18.1	1.7	27
JWB	2003	7	-	3	12	-	54.5	5.2	27
JWB	2004	3	1	2	5	1	20.0	2.1	30
JWB	2005	8	-	6	6	1	28.5	2.6	28
TOTAL		82	9	26	40	4	24.8	17.4	229
MIR	1995	20	3	2	2	-	7.4	0.5	37
MIR	1996	13	1	-	2	-	12.5	0.5	21
MIR	1997	13	4	-	4	-	19.0	1.1	33
MIR	1998	12	2	-	1	-	6.6	0.3	18
MIR	1999	15	3	-	1	1	5.0	0.3	42
MIR	2000	13	2	-	3	-	26.6	0.8	21
MIR	2001	11	1	1	2	-	13.3	0.5	16
MIR	2002	21	-	-	1	1	4.3	0.3	29
MIR	2003	17	4	1	9	-	29.0	2.6	38
MIR	2004	22	2	1	4	2	12.9	1.1	40
MIR	2005	24	4	-	6	-	17.6	1.7	42
TOTAL		181	26	5	35	4	13.9	10.3	337
GRAND TOTAL		731	70	47	134	12	13.4	10.4	1288

Table 2: Categorization of Articles in *JIBS* 1975-1994

Journal	Year	Quantitative	Mixed	Qualitative	Case	Marginal case	Cases % of Empirical	Cases % of Total	Articles per volume
JIBS	1975	5	2	-	-	-	-	-	11
JIBS	1976	12	2	-	-	-	-	-	16
JIBS	1977	10	3	-	1	-	7.1	0.2	16
JIBS	1978	16	2	1	1	-	5.0	0.2	26
JIBS	1979	14	-	1	-	-	-	-	20
JIBS	1980	17	2	1	1	-	4.7	0.2	22
JIBS	1981	6	-	-	1	1	12.5	0.2	25
JIBS	1982	14	2	-	4	1	19.0	0.8	26
JIBS	1983	15	2	1	2	-	10.0	0.4	28
JIBS	1984	12	3	-	3	1	15.7	0.6	34
JIBS	1985	13	2	1	-	-	-	-	20
JIBS	1986	12	1	-	2	-	13.3	0.4	22
JIBS	1987	12	-	-	-	-	-	-	16
JIBS	1988	12	1	-	3	-	18.7	0.6	19
JIBS	1989	13	1	-	-	-	-	-	23
JIBS	1990	24	-	-	1	-	4.0	0.2	27
JIBS	1991	21	2	-	1	-	4.1	0.2	29
JIBS	1992	17	4	-	-	-	-	-	27
JIBS	1993	24	-	-	1	-	4.0	0.2	29
JIBS	1994	13	-	-	1	-	7.1	0.2	23
TOTAL		282	29	5	22	3	6.4	4.7	459

<i>Case study dimension</i>	<i>Disciplinary convention across four IB journals during 1995-2005</i>	<i>Alternative approaches across four IB journals during 1995-2005</i>	<i>Historical use in JIBS during 1975-1994</i>
Paradigms	<ul style="list-style-type: none"> - implicit positivist tradition (qualitative positivism) - dominant methodological authorities Eisenhardt and Yin 	<ul style="list-style-type: none"> - interpretive tradition - absence of critical or postmodern approaches 	<ul style="list-style-type: none"> - positivist tradition - Yin first cited in <i>JIBS</i> in 1990 - early case studies often lacked citations to methodological literature (perhaps not available)
Theorizing	<ul style="list-style-type: none"> - exploratory case studies (term often used as a synonym for qualitative research more generally) - case studies used to refine or develop theory 	<ul style="list-style-type: none"> - case studies used for explanatory theory testing purposes - case studies used to build new theory 	<ul style="list-style-type: none"> - case studies mainly regarded as exploratory
Replication	<ul style="list-style-type: none"> - multiple, shallow case studies - large <i>N</i>-case studies (qualitative surveys) 	<ul style="list-style-type: none"> - classic, rich single case studies - matched pair cases - dual track cases 	<ul style="list-style-type: none"> - multiple case studies - case studies as 'second best' option to be used if the number of observations not sufficient for statistical analysis
Data sources	<ul style="list-style-type: none"> - interview-based case studies (interviews as the sole or dominant data source) - often one informant per case 	<ul style="list-style-type: none"> - greater depth of interview data (multiple informants per case, unit triangulation, internal and external informants for the case) - effective use of non-interview data (documents, letters, annual reports, workshops, archival material) - ethnographic case studies 	<ul style="list-style-type: none"> - some earlier case studies benefited from extensive, multi-country fieldwork
Boundary setting	<ul style="list-style-type: none"> - boundaries of the case defined <i>a priori</i> - case refers to the empirical unit of analysis, mostly the firm - cross-sectional case studies 	<ul style="list-style-type: none"> - boundaries of the case emerge during the research process - case refers to the theoretical unit of analysis, may be the individual, team, industry, country or the firm - longitudinal case studies (retrospective, real time or both) 	<ul style="list-style-type: none"> - boundaries of the case defined <i>a priori</i>

Table 3: Summary of major findings