

Breaking the vicious circle of subsidiary isolation: a meta-synthesis of subsidiary initiative-taking

Received
30th June 2020

Revised
20th July 2020

Accepted
15th October 2020

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Abstract

Purpose of the paper: We aim at contributing to the current controversial discussion on the vicious circle of subsidiary isolation. Therefore, we (1) strive for a better understanding of the different stages of initiative undertaking and (2) investigate how subsidiaries can make use of this process to attract HQ attention and break out of isolation.

Methodology: Building on Schmid et al.'s (2014) process model of subsidiary initiative development, we adopt a meta-synthesis as our research strategy and combine and interpret the findings from a set of systematically chosen case studies.

Results: Our findings suggest that the impact of subsidiary characteristics varies considerably over time during the process. For the case of isolated subsidiaries, we adapt Schmid et al.'s (2014) process model and show how an isolated subsidiary can attract HQ attention due to subsidiary initiative taking at the subsidiary level.

Research limitations: The included case studies have not been conducted to answer our research questions and our search strategy may have excluded further relevant studies.

Practical implications: While managers of less-embedded subsidiaries should be aware of possible HQ resistance and show persistence over time, HQ managers should use HQ monitoring and reporting to detect silent, but motivated subsidiaries. Further, HQ managers are challenged to balance their (positive) attention towards subsidiaries.

Originality of the paper: The paper is original in its use of a meta-synthesis that enables a more holistic and finer-grained understanding of subsidiary initiative processes and draws the attention to aspects that are underrepresented in the current body of subsidiary initiative research.

Key words: subsidiary isolation; subsidiary initiative; meta-synthesis; subsidiary entrepreneurship; process model

1. Introduction

Subsidiaries of multinational corporations (MNC) are expected to discover profitable business opportunities due to their embeddedness in host country environments (Dörrenbächer and Gammelgaard, 2016, p. 1250). Thereby they contribute to the global integration of locally embedded knowledge and worldwide learning (Young *et al.*, 2003, p. 36). Their role as “*contributors* to the development of firm-specific advantages”

(Birkinshaw *et al.*, 1998, p. 222) has gained increasing research attention over the past two decades (Schmid *et al.*, 2014; Strutzenberger and Ambos, 2014).

Some subsidiaries do not only substantially contribute to the development of competitive advantage, but also “drive the process through their own initiative” (Birkinshaw *et al.*, 1998, p. 222). Examples for these so-called subsidiary initiatives are new product development or process design projects that lead to change as they are disseminated throughout the MNC network (Strutzenberger and Ambos, 2014, p. 314; Dörrenbächer and Gammelgaard, 2016, p. 1250).

While subsidiary entrepreneurship is generally recognized as of paramount importance for the entire corporation (Schmid *et al.*, 2014 and there cited literature), previous research has shown that subsidiary characteristics determine the degree to which subsidiaries are able and willing to contribute to the knowledge development of the MNC (Schmid *et al.*, 2014; Strutzenberger and Ambos, 2014). More specifically, not only subsidiaries’ embeddedness in external business relationships (Almeida and Phene, 2004; Andersson *et al.*, 2002, 2007; Achcaoucaou *et al.*, 2014), but also their internal network embeddedness (Ciabuschi *et al.*, 2011; Achcaoucaou *et al.*, 2014), which is attached to the power or *weight* of the subsidiary in terms of their strategic significance for the MNC (Andersson *et al.*, 2007; Bouquet and Birkinshaw, 2008b; Ciabuschi *et al.*, 2011; Yamin and Andersson, 2011) as well as their *voice*, can help to capture HQ attention (Bouquet and Birkinshaw, 2008b; Ambos *et al.*, 2010; Gorgijevski *et al.*, 2019).

HQ attention generally appears to be critical to the success of initiative undertaking (Birkinshaw *et al.*, 1998; Bouquet and Birkinshaw, 2008b; Ambos and Birkinshaw, 2010; Bouquet *et al.*, 2016; Conroy and Collings, 2016; ul Haq, 2017; Schweizer and Lagerström, 2019), because the launch of initiatives often requires HQ approval or support in terms of resource remittance (Ambos and Birkinshaw, 2010; Strutzenberger and Ambos, 2014). It is therefore essential that headquarters’ management is aware of subsidiary potential (Birkinshaw *et al.*, 1998, p. 224) to be able to assess the value-creating potential of the initiative for the entire MNE network (Dörrenbächer and Gammelgaard, 2016, p. 1250).

This clearly shows the dilemma faced by isolated subsidiaries that literally lack HQ attention. The purpose of this paper therefore is to shed light on the dilemma of subsidiary isolation that has, despite its theoretical and managerial relevance, so far received only very little research attention (Monteiro *et al.*, 2008; Michailova and Mustafa, 2012).

The dilemma of subsidiary isolation can be illustrated by different roles that subsidiaries of MNCs can adopt: Receptive subsidiaries such as marketing satellites or branch plants are not embedded in the corporate strategic network (Bouquet and Birkinshaw, 2008a). Similarly, so-called “local innovators” (Gupta and Govindarajan, 1991, pp. 774-775) are isolated from the “in-crowd” and do not participate in knowledge-transfer activities within the MNC network (Monteiro *et al.*, 2008), because their knowledge is to a great extent perceived as site-specific and not transferable between countries (Gupta and Govindarajan, 1991, p. 775). Because of

their lack of communication with HQ and peer subsidiaries, such types of subsidiaries do not possess knowledge about the organization, which negatively affects their ability to bring their initiatives forward (ul Haq, 2017, p. 166).

The issue of subsidiary isolation has been subject to some controversy in recent literature: While Bouquet and Birkinshaw (2008a) argue that even low-power receptive subsidiaries “are not held hostage to their situation” (Bouquet and Birkinshaw, 2008a, p. 488) and can, by effort, change their network position, ul Haq (2017, p. 168) claims that isolated subsidiaries are not able to effectively use their voice. Instead, they would be ignored by HQ and “marginalized” from initiative taking trapped in a vicious circle (ul Haq, 2017). This is our starting point that also shows the research gap we address in this paper. By combining and interpreting the results from a set of systematically chosen case studies, we want to contribute to this controversial current discussion and show how taking initiatives helps isolated subsidiaries breaking this vicious circle to eventually change their role.

In this research, we therefore strive for a better understanding of different stages of initiative undertaking and the factors influencing them. On the basis of that, we investigate how subsidiaries can make use of this process to attract HQ attention and break out of isolation. Thereby we aim to contribute to the existing literature on subsidiary initiative (for a detailed literature review see Schmid *et al.* (2014)) by deepening the understanding of the evolution of the role of subsidiaries from internally isolated local innovators and low-power subsidiaries to contributors to knowledge development in MNCs. By bringing together findings from different context-specific investigations, we build on the strength of meta-syntheses to help explain the dynamic relationships among concepts in processes (Finfgeld-Connett, 2018).

The remainder of this paper is structured as follows: First, we briefly describe the subsidiary initiative process, which serves as an underlying skeletal conceptual framework for this paper. Next, we describe and justify our research strategy. We then identify factors that influence each of the process stages. It follows the synthesis of the findings from the included qualitative case studies. The result is a process model of subsidiary evolution that builds on Schmid *et al.* (2014). We conclude the paper after a discussion of the findings.

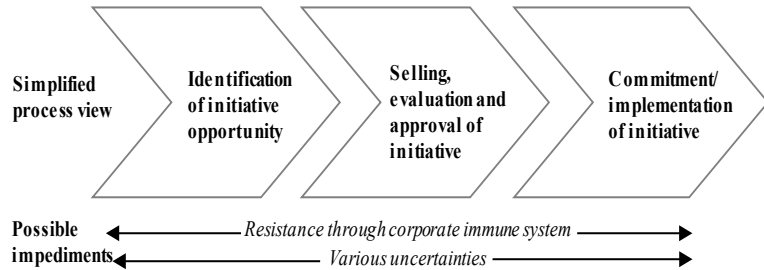
2. Our underlying framework: The subsidiary initiative process

Subsidiary initiative taking can be described as “an entrepreneurial process, beginning with the identification of an opportunity and culminating in the commitment of resources to that opportunity” (Birkinshaw, 1997, p. 207). When investigating such processes, it is useful to start with a conceptualization of the different process phases. We here identified Schmid *et al.*'s (2014) contribution “From rocking the boat to wagging the dog” as a fruitful starting point for our investigation. Based on a comprehensive literature review until 2010, the authors outline in

a convincing fashion a “simplified process view of subsidiary initiative development” (p. 207), which gives us a useful framework for our synthesis.

Schmid *et al.*'s (2014, p. 207) process model differentiates between three stages of the activities reflecting subsidiary initiative: (1) Identification of initiative opportunity, (2) selling, evaluation and approval of initiative, and (3) commitment/implementation of initiative which are affected by “resistance through the corporate immune system” as well as “various uncertainties” as “possible impediments”.

Fig. 1: Schmid *et al.*'s (2014, p. 207) process view of subsidiary initiative development



Source: Schmid *et al.* (2014, p. 207).

After having described our underlying framework, we explain our research strategy to adapt this framework in order to come to a more in-depth understanding of entrepreneurial subsidiary initiatives on the basis of qualitative case study findings.

3. Methods

In this section, we first give an overview of the methodology. We then describe our search strategy and give a summary of the used criteria to select the qualitative studies to be included in our research. Finally, we elaborate data extraction, analysis and synthesis.

3.1 The meta-synthesis as our methodology

Hoon (2013) defines a meta-synthesis “as an exploratory, inductive research design to synthesize primary qualitative case studies for the purpose of making contributions beyond those achieved in the original studies” (p. 523). Meta-syntheses are aiming at building theory.

Theories generated following the meta-synthesis approach help to explain the dynamic relationships among concepts in processes (Finfgeld-Connett, 2018). The basis for this lies in the strength of qualitative research to enhance our understanding of contextually embedded phenomena and processes. Among qualitative research methods, the strength of case study research is its capability to generate theory from the in-depth investigation of contemporary phenomena in their real-life contexts (Yin, 2014, p. 18).

Case study research is therefore particularly suited to explore dynamic organizational processes (Pettigrew, 1992) such as subsidiary initiatives that we investigate here.

Qualitative case study research has turned out to be a useful method for theory-building in the fields of international business and strategy, since it is claimed to be “one of the best (if not the best) of the bridges from rich qualitative evidence to mainstream deductive research” (Eisenhardt and Graebner, 2007, p. 25). Indeed, case-based works such as Bartlett and Ghoshal’s (1989) idea of the transnational firm and Birkinshaw’s (1997) observations on subsidiary entrepreneurship constitute landmark contributions to the field of international business.

As opposed to some very influential works, most primary case studies however tend to remain isolated and to “stand-alone” due to the difficulty of the interpretation and generalization of highly contextualized findings. In fact, it is rather the rule than the exception that their potential for theory building in the field is largely neglected (Hoon, 2013, p. 523). By bringing together findings from different context-specific investigations, qualitative systematic literature reviews can enhance generalizability to inform professional practice and policymaking (Finfgeld-Connett, 2010).

In summary, meta-syntheses add clarity and meaning to situations, so that more appropriate decisions and actions can be taken (Finfgeld-Connett, 2018, p. 13). This makes this approach particularly suitable for management research and appears to be an adequate research strategy to come to a better understanding of subsidiaries developing from isolated units to contributors to knowledge development in MNCs through initiative taking.

3.2 Search strategy and sampling as part of our meta-synthesis

To conduct a qualitative systematic review of the subsidiary initiative process, we searched literature in a two-step approach: In a first step, we identified the following key terms: subsidiary initiative, subsidiary innovation, subsidiary entrepreneurship, subsidiary entrepreneurial, entrepreneurial subsidiary, reverse knowledge transfer and combinations such as entrepreneurial behavior AND subsidiary.

We conducted the search in December 2019 using the databases Business Source Complete and Google Scholar in Anne-Wil Harzing’s reference management software Publish or Perish. The literature search in the former was restricted to title, abstract or keywords of peer-reviewed academic journals in English, the latter to titles. We then excluded books, book chapters, theses, conference proceedings and calls for papers in Publish and Perish, downloaded the results of both keyword searches to the reference management software Citavi and removed duplicates (n=139).

In a second step, we used the database Google Scholar to retrieve works citing Birkinshaw’s (1997) article “Entrepreneurship in Multinational Corporations: The Characteristics of Subsidiary Initiatives” (n=1506), as this seminal paper marks the beginning of research on subsidiary initiatives. We searched within citing articles using the search string “case study AND initiative” to optimize the results (n=343) and excluded patents

and citations, books, book chapters, working papers, theses, conference proceedings and non-academic journals (n=231).

We then exported the results of step two to Citavi (n=112), which led to a sample size of 251. Further, we reviewed the papers’ abstracts and excluded 171 articles that were no qualitative case studies. In addition, we excluded papers that belonged to fields such as higher education, economic geography and information systems research as well as articles exploring macro-level processes such as MNE evolutionary upgrading or host-country development, post-acquisition processes and removed duplicates, which brought our sample to 18 studies.

The exclusion of studies ranked C or lower according to both the 2019 ABDC Journal Quality list and the VHB-Jourqual ranking narrowed down the number of articles to our final sample of 10. Such a sample size is the norm rather than the exception when using the meta-synthesis as an underlying research strategy (e.g., Hoon (2013) includes seven studies in her meta-synthesis, Leick and Gretzinger (2018) make use of 13 qualitative case studies in their meta-synthesis).

Table 1 summarizes the inclusion criteria that have been applied to come to the sample of 10 qualitative studies to go into the synthesis with the aim of adapting the theoretical process model developed by Schmid *et al.* (2014) to our purpose.

Tab. 1: Summary of inclusion criteria

Inclusion criteria	
Coverage: Time period	1997 - December 2019
Quality	A*, A-, B- journal publications according to ABDC- and VBH rankings
Research method	Qualitative case studies
Research approach	Exploratory, theory building at micro- and meso levels
Focus	All types of subsidiary initiatives

Source: Own compilation.

3.3 Data extraction, analysis and synthesis

After reading the case studies, we summarized the characteristics of each study (i.e., purpose, perspective, theoretical framework/lens, number of cases and countries included in the study, industry/sector, data source(s), interviewee(s) and number of interviews) in a table (s. Table 2 and Table 3). We then (1) extracted qualitative findings from each study as raw data and (2) developed narrative within-study memos from the data. The memos were coded to the broad categories derived from Schmid *et al.* (2014) “identification of initiative opportunity”, “selling, evaluation and approval of initiative” and “commitment/implementation of initiative”. Cross-study memos were written to synthesize qualitative findings across the set of studies in order to detect patterns across case studies and served for the development of subcategories.

Content validity was ensured by including all qualitative case studies that were systematically identified by conducting a comprehensive

literature search using a range of keywords as well as searching citing works. Eventually, only articles published in peer-reviewed A*, A and B-journals were included into the set of studies. Moreover, this research is subject to data triangulation, which was achieved by synthesizing a set of qualitative case studies from different researchers (Fingeld-Connett, 2018).

This systematic qualitative review comprises a set of 10 qualitative case studies. Sample was varying from 3 to 34 interviewees. Excluding one case study in which sample size was not specified, our final set of case studies included 162 interviews.

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Tab. 2: Set of qualitative case studies: purpose, perspective, theoretical framework/lens, countries and industry / sector

Study	Purpose	Perspective	Theoretical framework / lens	Countries	Industry/ sector
Acquier <i>et al.</i> (2018)	Exploration of the practices that CSR managers from subsidiaries use in order to combine and adapt different approaches to CSR within the MNC	Micro / meso	Institutional perspective	Japan (HQ), EU (subsidiary)	Sports apparel
Boojhawon <i>et al.</i> (2007)	Exploration of entrepreneurial culture within subsidiaries as well as its global and local environmental determinants	Meso	International entrepreneurship & MNC and subsidiary management literatures	U.S. and France (HQ), UK (subsidiaries)	Advertising and marketing communications
Dörrenbächer and Gammelgaard (2016)	Investigation of the political manoeuvring that accompanies subsidiary initiative taking in multinational corporations	Meso	Power, issue selling & subsidiary initiative taking literatures	Germany (HQ), France (subsidiaries)	Manufacturing
Dörrenbächer and Geppert (2009)	Exploration of the role of subsidiary managers in the formation and the negotiation of subsidiary initiatives	Micro	Combination of different streams of literature (strategic and resource-based views, comparative institutionalist approaches, HRM)	Germany (HQ), France (subsidiaries)	Manufacturing & service
Dörrenbächer and Geppert (2010)	Exploration of the personal motives and behaviors of subsidiary CEOs in taking and negotiating initiatives	Micro	Staffing foreign subsidiaries and subsidiary initiative literature	Germany (HQ), France (subsidiaries)	Agricultural equipment & automotive
Hamprecht and Schwarzkopf (2014)	Exploring why subsidiaries of an MNC implement initiatives that deviate from organizational values of headquarters	Meso	Institutional Theory	UK, Spain and US (subsidiaries)	Automotive (car manufacturing)
Nadayama (2019)	Shedding light on how an isolated foreign subsidiary can initiate the internal knowledge transfer within the MNE and overcome the liability of internal isolation	Meso (-micro)	Knowledge transfer, subsidiary isolation and subsidiary initiative literatures	Japan (HQ), Finland (subsidiary)	ICT (manufacturing)
Saka-Helmhout (2009)	Exploration of how the actors' orientation to iterate, apply and project artefacts and the specific coordination structure in which this is embedded influences subsidiaries' learning patterns	Meso	Agency-based view of learning	UK & Germany (HQ), Poland, Italy & Germany (subsidiaries)	Chemical
Tippmann <i>et al.</i> (2012)	Exploration of the micro-level details of managers' actions and interactions	Micro	Non-routine problem-solving perspective	U.S. & EU (HQs), Ireland (subsidiaries)	ICT
ul Haq <i>et al.</i> (2017)	Exploration of the effects of attention dissonance on headquarters-subsidiary communication	Meso	Attention-based view of the firm	Sweden (HQ), emerging markets (i.e. India, Brazil) & advanced markets (Germany, UK): subsidiaries	Manufacturing

Source: Own compilation.

Tab. 3: Set of qualitative case studies: number of cases, data sources, interviewee(s) and number of interviews

Study	No. of cases	Data source(s)	Interviewee(s)	No. of interviews
Acquier <i>et al.</i> (2018)	1	Semi-structured interviews and secondary data such as company CSR reports, CSR team presentations, internal books, previous studies, press articles, industry reports and initiatives (e.g., Sustainable Apparel Coalition).	Key managers, including CSR and senior managers, who possess direct and indirect experience of CSR policy and initiatives	22
Boojihawon <i>et al.</i> (2007)	8	Semi-structured, in-depth interviews and secondary data such as annual reports, company homepages, promotional documents and industry-specific journals and magazines	Senior-level managers with an average of 11 years of employment with the agency, clients and industry experts	18
Dörrenbächer and Gammelgaard (2016)	6	In-depth interviews and secondary data such as annual reports, business directories, company press communiques, press reports and academic case studies	Subsidiary CEOs	1-2 per case
Dörrenbächer and Geppert (2009)	3	Semi-structured interviews and secondary data such as various documents	Subsidiary CEOs	Min. 3
Dörrenbächer and Geppert (2010)	4	Open-ended, in-depth interviews, company profiles and secondary data such as internal company documents, annual reports, press clippings and company handbooks	Subsidiary CEOs and members of the subsidiary management team	9
Hamprecht and Schwarzkopf (2014)	1	Ethnographic participatory observation, interviews, and analysis of document contents	Regional managers	26
Nadayama (2019)	1	Ethnographic fieldwork including participant observation, field notes, meeting documents, diaries, interview transcripts and supplementary documents	Top manager, project manager (subsidiary) and lean manager (HQ)	3
Saka-Helmhout (2009)	2	Interviews, factory tours, annual reports	Executives overseeing international operations at HQs and their counterparts at subsidiaries	31
Tippmann <i>et al.</i> (2012)	38	Semi-structured interviews, archival information	Subsidiary senior and middle managers (home, third and host country nationals)	34
ul Haq <i>et al.</i> (2017)	2	Semi-structured interviews, secondary data sources such as annual reports, company magazines, CEO video messages, templates and examples from the intranet	Representatives from HQs and subsidiary managers	16

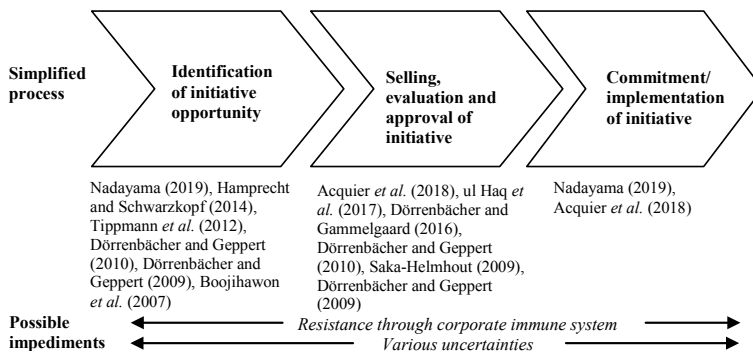
Source: Own compilation.

4. Findings

In the following section, on the basis of our sample of qualitative studies, we first describe the factors and contexts that influence the way (1) opportunities are identified, (2) initiatives are sold, evaluated and approved and (3) initiatives are implemented, before we adapt Schmid *et al.*'s (2014) process model to reach our research aim. Figure 2 assigns the identified qualitative studies to the different stages of the process model.

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Fig. 2: Assigning the set of qualitative case studies to Schmid *et al.*'s (2014, p. 207) process view of subsidiary initiative development



Source: Own compilation based on Schmid *et al.* (2014, p. 207).

4.1 Antecedents to the identification of initiative opportunity

Building on our meta-synthesis approach we elaborate the identified categories from the literature in the following:

External and internal pressures

Typically, subsidiary initiatives are driven by external factors such as pressures or opportunities. The local environment and situation a subsidiary is embedded into impacts opportunities and threats and the respective units react to their circumstances and actions of different stakeholders in a specific way. Host countries' stakeholders include national regulators and non-governmental organizations, but also wholesalers and end consumers, who can put pressure on subsidiaries (Boojihawon *et al.*, 2007; Hamprecht and Schwarzkopf, 2014; Acquier *et al.*, 2018). Competition on local or national markets is also triggering subsidiary initiatives (Nadayama, 2019). Employees who interact with external stakeholders are able to raise issues such as the urgency of climate change issue recognition (Hamprecht and Schwarzkopf, 2014, pp. 765-766).

The emergence of non-routine problems during for example a production process illustrates an internal impulse for subsidiary initiative-taking. Solution-finding activities may also result in the development of superior technological knowledge, which diffuses across the MNC network (Tippmann *et al.*, 2012).

While in the cases of global strategy initiatives such as CSR strategies the identification of opportunities was mainly driven by *external* pressures of the local environment (Hamprecht and Schwarzkopf, 2014; Acquier *et al.*, 2018), technological change also occurred as a consequence of the urgency to respond to *internal* pressures due to the emergence of non-routine problems (Tippmann *et al.*, 2012).

In summary, both external and internal forces can urge the subsidiary to change and therefore are important triggers for subsidiary entrepreneurial activities.

Institutional distance between HQ and subsidiary

The identification of initiative opportunity is also closely related to the degree of institutional distance between HQ and subsidiary. Subsidiary managers decided to proactively engage in (local) initiative-taking when they perceived large regulative, normative as well as cognitive differences between HQ and the host country's institutional contexts (Acquier *et al.*, 2018, pp. 633-634). This included differences between the organizational norms and values of subsidiary and HQ (Hamprecht, Schwarzkopf, 2014, p. 774). Institutional distance also resulted in subsidiary autonomy with low degrees of HQ control, which led to proactive behaviour of subsidiaries and facilitated entrepreneurial behaviour (Boojihawon *et al.*, 2007; Saka-Helmhout, 2009, p. 272). Examples for the quick evolution of distinctive subsidiary capabilities due to large institutional gaps were initiatives to implement global strategies such as CSR- or environmental strategies (Hamprecht and Schwarzkopf, 2014; Acquier *et al.*, 2018), but also to new product development (Saka-Helmhout, 2009).

Though large institutional distance represented a triggering condition for (local) subsidiary initiative, HQ approval and the implementation of subsidiary initiatives at the corporate level required either a framing of the initiative in line with the MNC's organizational values or the incremental alignment of values (Hamprecht and Schwarzkopf, 2014; Acquier *et al.*, 2018). The latter refers to Stage 2 of Schmid *et al.*'s (2014) process model where it is explained in the context of issue framing.

Paradoxically, just as institutional distance influenced opportunity identification, so did acculturation: An omnipresent global vision and control over subsidiaries due to hierarchically structured reporting systems and the delegation of responsibilities were characteristics of so-called headquarter-driven entrepreneurship (Boojihawon *et al.*, 2007). HQ indirectly encouraged subsidiary initiatives by facilitating communication among units due to, for example, the creation of cross-country learning groups (Saka-Helmhout, 2009) and monthly meetings (Boojihawon *et al.*, 2007) or through the provision of documentation on best practices (Nadayama, 2019). Moreover, interpersonal exchanges with parent and sister companies could also help at identifying solution-relevant knowledge across the MNC network (Tippmann *et al.*, 2012).

One way to affect subsidiary initiative-taking behaviour was therefore the configuration of organizational structure (Nadayama, 2019). Especially, flexible organizational structures, which allowed for shifts in accountability were prone to entrepreneurial behaviour in subsidiaries

(Boojihawon *et al.*, 2007). As opposed to this, subsidiary initiatives also arose in unfavourable organizational contexts (Saka-Helmhout, 2009). Knowledge exchange between HQ and sub-units did not automatically lead to subsidiary initiative-taking (Saka-Helmhout, 2009).

Subsidiary managers' individual characteristics

The ability and motivation of subsidiary managers played a significant role in the first stage of the initiative process. Ability comprised the managers' technical expertise which enabled them to discover new lucrative technological solutions tailored towards their assessment of the subsidiary's capabilities (Saka-Helmhout, 2009; Dörrenbächer and Gammelgaard, 2016). Moreover, a thorough understanding of the corporation and its technologies helped in searching for opportunities that addressed multiple requirements and, therefore, could be implemented at a global level (Tippmann *et al.*, 2012).

Motivation was frequently described by some sort of "entrepreneurial spirit", the actors' proactive orientation to search for ideas in the internal MNC network and the external environment, which spurred initiative-taking regardless of size or technological advancement of the subsidiary (Saka-Helmhout, 2009; Dörrenbächer and Gammelgaard, 2016). Some managers consciously envisioned global solutions, proactively assumed responsibility and aimed to add value to the entire corporation (Tippmann *et al.*, 2012). This seemed to be especially true for recently employed managers, who were more prone to ambitious goals that extend far beyond local needs (Dörrenbächer and Gammelgaard, 2016). Such a proactive entrepreneurial behaviour of subsidiary managers was explained by individual interests such as career aspirations and career orientations (Dörrenbächer and Geppert, 2009, 2010).

To sum up, our meta-synthesis approach led to the identification of external and internal pressures, institutional distance and subsidiary managers' characteristics as antecedents to the identification of initiative opportunity as elaborated above.

4.2 Micro-level sub-processes and HQ-subsidiary power relationships in issue selling, evaluation and approval of initiative

In the identified and reviewed literature, issue selling was regarded as a power game (Dörrenbächer and Gammelgaard, 2016), a managerial practice perspective that included the activities that were taken by so-called change agents towards a global strategy implementation (Acquier *et al.*, 2018). Drivers of the subsidiary managers' engagement in negotiating initiative approval were amongst others intrinsic motivation and a personal interest in the evolution of the subsidiary role (Dörrenbächer and Geppert, 2009).

At the micro-level issue-selling is defined as "individuals' behaviours that are directed toward affecting others' attention to and understanding of issues" (Dutton and Ashford, 1993, p. 398). At the subsidiary level, it comprises issue-selling activities such as *attention-attracting*, *lobbying* and *issue framing* that aim at receiving approval for initiatives (Dörrenbächer

and Gammelgaard, 2016; Acquier *et al.*, 2018) and that are elaborated in the following paragraphs based on the qualitative studies included in our meta-synthesis.

Attention-attracting could be both long-term and short-term oriented. Long-term oriented attention-attracting tactics comprised for example image and reputation building activities both at the individual (Dörrenbächer and Geppert, 2009) and organizational level (Dörrenbächer and Gammelgaard, 2016), which were prerequisites to successful lobbying. Several factors had been shown to affect attention-attraction: (1) overall good performance, (2) demonstrating excellence in developing new capabilities, (3) subsidiary's reputation with regard to previous initiatives and image control and (4) avoiding negative attention for example by informing HQ about specific host market characteristics (Dörrenbächer and Gammelgaard, 2016).

Lobbying for initiatives referred to informal mechanisms such as “personal appeals” (Dutton and Ashford, 1993, p. 419) and was successful, when personal relationships among MNC units were available for example through job rotation and internal recruiting and were thereafter cultivated. Moreover, a certain degree of persistence and the integration of powerful internal and/or external parties such as main customers could influence the success of lobbying and led to the approval of the initiative. This political strategy (Dörrenbächer and Geppert, 2010) was captured by the term “resource mobilization” (Dörrenbächer and Geppert, 2009) and not only strongly linked to subsidiary managers' ability in terms of social skills, but also to their motivation due to current career aspirations. Lobbying gained importance, the lower the degree of HQ attention was (Dörrenbächer and Geppert, 2009, 2010; Dörrenbächer and Gammelgaard, 2016).

Issue framing referred to “hybridization work”, which comprised different types of practice and boundary work (Zietsma and Lawrence, 2010; Acquier *et al.*, 2018): Internal and external boundary work helped influencing the headquarters. Intra-organizational boundary work comprised activities such as the appointing of boundary spanners, supporters at top management and the creation of multi-competence teams. Inter-organizational boundary work was targeted to enhancing awareness and internal expertise as well as external support by joining normative initiatives, setting up external partnerships with experts and by extending the initiative's scope from local to global (Acquier *et al.*, 2018). Practice work through reporting and external communication aimed at aligning and at introducing new values and practices (Acquier *et al.*, 2018). Maintenance practice work helped to reduce the institutional distance between different approaches to CSR by connecting the initiative to corporate history and values and include CSR within organizational routines. Renewing practice work included (1) changing normative associations and (2) introducing new issues, routines and competences (Acquier *et al.*, 2018).

Generally, the issue selling process could be described as a time-consuming negotiation process to persuade HQ of the value-adding potential of the initiative. Subsidiaries engaged in issue-framing to formulate an initiative according to HQ's preferences. The issue framing

was crucial to persuade HQ of the initiative's value-adding potential in order to finally get approval to implementation (Tippmann *et al.*, 2012; Hamprecht and Schwarzkopf, 2014; Dörrenbächer and Gammelgaard, 2016).

HQ-subsidiary power relationships influenced the degree of issue-selling. Powerful subsidiaries such as market access providers of strategically important host markets were characterised by less asymmetrical HQ-subsidiary power relationships and therefore, HQ approval required low degrees of issue selling. By contrast, more isolated subsidiaries in highly asymmetrical HQ-subsidiary power relationships must engage in issue selling to receive HQ attention and support (Saka-Helmhout, 2009; Hamprecht and Schwarzkopf, 2014; Dörrenbächer and Gammelgaard, 2016). Especially, HQ attention was regarded as essential for subsidiaries to convince HQ of initiative opportunities (ul Haq *et al.*, 2017).

To sum up, issue-selling strategies might influence HQ decisions to approve the subsidiary initiative. Nevertheless, if subsidiary power was low, even high issue selling efforts were not successful (Dörrenbächer and Gammelgaard, 2016).

4.3 Commitment and implementation of initiative

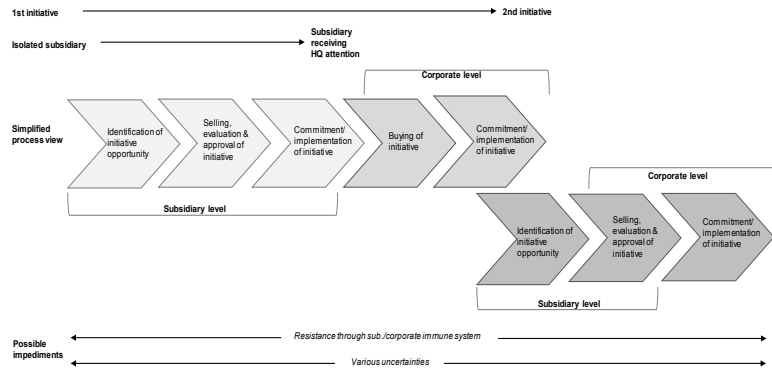
The previous section has shown that issue selling took place gradually, as did the implementation of initiatives (Acquier *et al.*, 2018). In practice, the subsidiary initiative process stages "selling, evaluation and approval" and "commitment and implementation" were interleaved since the initiative process was one of incremental implementation and commitment supported by issue selling tactics. Global subsidiary initiatives therefore were not implemented, but evolved under the influence of extant issue selling tactics (Tippmann *et al.*, 2012; Acquier *et al.*, 2018).

At the corporate level, the previous section has shown that the time to commitment and implementation of initiatives strongly depended on initiative type and its alignment with corporate values. Generally, HQ were more likely to approve, commit and implement initiatives if these fit with the MNC's organizational values. At the subsidiary level, HQ's approval for implementation was not necessarily needed as long as the subsidiary used its own resources. In-house initiative selling activities were crucial in supporting the implementation (Nadayama, 2019).

4.4 Subsidiary initiative in the light of subsidiary evolution

By grouping the identified elements to each of the process stages above, in the following we link these into the adapted model of subsidiary initiative development that builds on Schmid *et al.* (2014). This process is sketched in Figure 3 before it is elaborated in the following paragraph.

Fig. 3: Subsidiary initiative in the light of subsidiary evolution



Source: Own compilation based on Schmid *et al.* (2014, p. 207) and data of the set of qualitative case studies.

In the beginning of the process and until HQ approval, subsidiaries typically lacked HQ support and relied on “own” resources (Saka-Helmhout, 2009; Dörrenbächer and Geppert, 2009, 2010; Hamprecht and Schwarzkopf, 2014; Dörrenbächer and Gammelgaard, 2016). In order to run successfully through the issue selling process, minor and major investments in the development of the initiative were necessary (Saka-Helmhout, 2009; Dörrenbächer and Geppert, 2009; Dörrenbächer and Gammelgaard, 2016). These investments did not only comprise, for example, product trials, but also investments in in-house issue-selling such as cultural trainings of employees to successfully implement the initiative at the subsidiary level (Acquier *et al.*, 2018; Nadayama, 2019).

As the subsidiary evolved over time, this was noticed by HQ due to HQ control and monitoring (Tippmann *et al.*, 2012). From then on, the subsidiary received HQ attention (Dörrenbächer and Gammelgaard, 2016) and HQ attempted “to replicate this “superior” knowledge at other units worldwide” (“buying of initiative”-stage in our model adaptation) (Tippmann *et al.*, 2012, p. 759). As a result, the subsidiary was likely to gain power and as the asymmetry of the HQ-subsidiary power relationship decreased, HQ’s approval of further (second) initiatives required only low degrees of issue selling. At the same time, the subsidiary would lose its “advantage of isolation” (Hamprecht and Schwarzkopf, 2014; Nadayama, 2019).

This process could explain the dual motivation of some subsidiary managers causing an autonomy-control dilemma (Nadayama, 2019): On the one hand, subsidiary power was important to have a voice (Dörrenbächer and Gammelgaard, 2016). On the other hand, having a voice came with a loss of “freedom of non-centrality” (Hamprecht and Schwarzkopf, 2014, p. 773). In fact, subsidiary autonomy with little or no HQ involvement could enhance its entrepreneurial spirit and constituted an advantage in the implementation of initiatives at the subsidiary level (Saka-Helmhout, 2009; Nadayama, 2019).

5. Discussion and conclusion

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Susanne Royer
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of subsidiary isolation:
a meta-synthesis of
subsidiary initiative-taking

The aim of this study was two-fold: First, we investigated the different stages of initiative undertaking and the factors influencing them. We then showed how subsidiaries can make use of this process to attract HQ attention and thereby could break the vicious circle of subsidiary isolation. On the basis of the findings of a set of ten case studies, we provided a more differentiated picture of multi-level subsidiary initiative development processes.

Our first contribution lies in assigning contextual, organizational and micro-level factors to the three stages of the initiative process sketched by Schmid *et al.* (2014). While our understanding of subsidiary initiative from “(..), a troublesome and little-understood concept” (Ambos *et al.*, 2010, p. 1100) has developed over the past years (for a detailed literature review and research agenda see Schmid *et al.*, 2014 and Strutzenberger and Ambos, 2014), we offer a more dynamic view of the interaction of various elements that leads to subsidiary initiative implementation and shows how the impact of subsidiary characteristics varies considerably over time during the process. At least two observations that come with managerial implications should be highlighted:

First, less embedded subsidiaries might generally be more prone to the identification of initiative opportunity. This has been explained by the motivation of subsidiaries to show entrepreneurial behaviour which was intensified when the institutional distance of HQ and subsidiary was large (Saka-Helmhout, 2009; Hamprecht and Schwarzkopf, 2014; Acquier *et al.*, 2018). Therefore, managers of less embedded subsidiaries felt the urgency to show entrepreneurial behaviour and deal with issues that otherwise would not be dealt with in the MNC system (Hamprecht and Schwarzkopf, 2014; Acquier *et al.*, 2018). The previous section has also shown that not only institutional distance (Saka-Helmhout, 2009; Hamprecht and Schwarzkopf, 2014; Acquier *et al.*, 2018), but also the encouragement of communication between MNC units through indirect HQ involvement influenced the identification of new business opportunities (Boojihawon *et al.*, 2007; Saka-Helmhout, 2009; Tippmann *et al.*, 2012; Nadayama, 2019). This implies not only that HQ managers can affect subsidiary initiative due to structural changes (Boojihawon *et al.*, 2007; Nadayama, 2019), but also that a gradual alignment of values and practices may, over time, come with higher degrees of subsidiary embeddedness and, accordingly, lower levels of local adaptation.

Second, the power or weight of subsidiaries is expected to be of importance in stage two of the process, the issue selling, evaluation and approval of initiative (Saka-Helmhout, 2009; Hamprecht and Schwarzkopf, 2014; Dörrenbächer and Gammelgaard, 2016; ul Haq *et al.*, 2017). Put differently, less embedded subsidiaries that lack strategic significance and power suffer from not being heard and therefore hardly manage this stage of the process effectively. The findings indicate that low subsidiary power may lead to HQ refusal of subsidiary initiative even if high issue-selling efforts were undertaken (Dörrenbächer and Gammelgaard, 2016). This is also in line with the argumentation by ul Haq (2017). Since the

previous section has shown that motivated subsidiary managers may try to implement the initiative at their subsidiary, when the negotiation process with HQ has failed (Dörrenbächer and Geppert, 2009), it should be differentiated between the approval, commitment and implementation of subsidiary initiatives at the *corporate* and at the *subsidiary level*.

This leads to our second and main contribution which is especially interesting for subsidiary managers. For the case of isolated subsidiaries, we adapt Schmid *et al.*'s (2014) process model and show how an isolated subsidiary can attract HQ attention due to subsidiary initiative taking at the subsidiary level, which eventually leads it out of isolation. While this observation might be relevant for so-called local innovators (Gupta and Govindarajan, 1991), it is even more relevant for less powerful receptive subsidiaries. This is because local innovators might have weight due to their external embeddedness in the host market and could make use of their voice, while receptive branches cannot.

At the same time, the previous section has also shown that subsidiary managers were found to be ambivalent towards initiative taking, since having a voice (Dörrenbächer and Gammelgaard, 2016) was argued to come with perceived losses of the advantage of isolation (Nadayama, 2019) and the “freedom of non-centrality” (Hamprecht and Schwarzkopf, 2014, p. 773). Subsidiary managers’ fear of losing their freedom to make decisions and take actions on their own might even prevent them from taking advantage of new business opportunities. Indeed, this effect has previously been investigated by Ambos *et al.* (2010), who show that, at least in the short term, subsidiaries jeopardize their free hand by evoking HQ attention.

While the ambivalence of HQ towards initiative taking (Ambos *et al.*, 2010; Birkinshaw and Fry, 1998; Bouquet *et al.*, 2016) and, accordingly, the HQ resistance towards subsidiary initiative taking, i.e. its corporate immune system (Birkinshaw and Fry, 1998; Birkinshaw and Ridderstråle, 1999), have been discussed in previous literature, our study turns the attention to the subsidiary level. More specifically, our findings suggest that, in the case of less powerful and more isolated subsidiaries, motivated subsidiary managers see themselves forced to implement their initiative at the subsidiary level to receive - purposely or not purposely - HQ attention (Acquier *et al.*, 2018; Nadayama, 2019). Not only at the corporate level, but also at the subsidiary level a certain amount of ambivalence towards the initiative was observed, since the implementation of new products or processes might come with in-house investments and changes (Saka-Helmhout, 2009; Dörrenbächer and Geppert, 2009; Dörrenbächer and Gammelgaard, 2016; Acquier *et al.*, 2018; Nadayama, 2019). This means that, in some cases, issue selling tactics are first used to overcome the *subsidiary immune system* in order to then fight the corporate immune system. This could be a fruitful avenue for further research.

In addition, further research should consider the type of subsidiary initiative, since it shapes the initiative taking process. It has been shown that global strategic initiatives were mainly driven by external pressures of the environment of the subsidiary’s host country (Hamprecht and Schwarzkopf, 2014; Acquier *et al.*, 2018) and incrementally *evolved*, when

issue-selling tactics were applied (Acquier *et al.*, 2018). By contrast, process innovations were shown to be also driven by internal pressures due to the urgency to respond to non-routine problems (Tippmann *et al.*, 2012). This implies a certain time pressure that is expected to speed up the process of approval, commitment and implementation.

Generally, managers of less-embedded subsidiaries should be aware of possible HQ resistance and show persistence over time. This has also been concluded by Bouquet and Birkinshaw (2008a), who summarized a set of different strategies for low-power units to increase their power and weight. HQ managers' awareness is of the same importance at least regarding two significant points. First, silent, but motivated subsidiaries can only be detected by some sort of HQ monitoring and reporting, which emphasizes the relevance of formal HQ mechanisms such as expatriation policies and systems to evaluate subsidiary performance (Miao *et al.*, 2011). Second, while knowledge exchange and subsidiary initiative taking can be facilitated by structural changes (Boojihawon *et al.*, 2007; Nadayama, 2019), too much alignment of values, practices and processes might pose a threat to the motivation of subsidiary managers to identify initiative opportunities (Saka-Helmhout, 2009; Hamprecht and Schwarzkopf, 2014; Acquier *et al.*, 2018). HQ managers are therefore challenged to balance their (positive) attention towards subsidiaries.

As a limitation, we have to acknowledge that the included case studies have not been conducted to answer our research questions and, except from Nadayama (2019), do not explicitly address the case of isolated subsidiaries. However, by "translating" and further interpreting the data we could come to an adaptation of Schmid *et al.*'s (2014) process view of subsidiary initiative development. All case study findings have contributed to the adapted model, most of them to more than one stage. An exception was the study by ul Haq *et al.* (2017) that met our inclusion criteria, but exclusively focused on the issue of HQ attention.

We decided for a systematic approach regarding "filtering the literature" for fitting qualitative studies to be included in our meta-synthesis. A limitation resulting from this structured approach may be that we have in a relatively early stage of the research focused on ten studies that met our inclusion criteria leaving possible blind spots where our inclusion criteria may not have worked perfectly. However, this investigation gives starting points for further research that can be more open to including further findings from previous studies where seen as adding value.

This study shows that meta-synthesis-oriented approaches are a valuable complement to quantitative meta-analyses and to investigations of a limited number of qualitative cases. Following this approach, we came to a more holistic and finer-grained understanding of subsidiary initiative processes and drew our attention to aspects that are underrepresented in the current body of subsidiary initiative research.

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sinergie
italian journal of management

ISSN 0393-5108
DOI 10.7433/s113.2020.04
pp. 51-70



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