

# Strategic global human resource management research in the twenty-first century: an endorsement of the mixed-method research methodology

*Timothy Kiessling and Michael Harvey*

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**Abstract** Global competition is rapidly becoming the norm in which nearly all business organizations must compete in one fashion or another. The complexity and value of strategic global human resource management (SGHRM) will continue to compound in significance as globalization becomes the predominate form of business. Both practitioners and researchers maintain the grapple with understanding the global phenomena and the resulting impact on the entire human resource management system.

Previously, researchers' maintained research programmes utilizing Western-style theories and methods, which were predominantly quantitative, to explore phenomena that may now be inappropriate. These methods and theories frequently do not capture the 'fabric' of global phenomena that include complex interactions of culture, institutions, societal norms and government regulations, among a few concerns.

The mixed methods approach is proposed to add the 'fabric' required, illustrating the depth and flexibility needed to explore the SGHRM issues. Mixed methods are a combination of qualitative and quantitative approaches that maintain methodological rigour as well as measures for reliability and validity. This paper explores the current methods, the reasons for their lack of success in portraying the depth of the phenomena and why the mixed methods approach appears to be a superior method for research for the SGHRM field.

**Keywords** Strategic global human resource management; globalization; mix-method research; global research issues.

Cross-cultural research can be tenure threatening choice.

(Steers *et al.*, 1992)

Cross-cultural research is not for the faint hearted.

(Teagarden *et al.*, 1995: 1261)

## Introduction

Both human resource practitioners and researchers alike are concerned with the shift towards globalization of business and the resulting impact on strategic global human resource management (SGHRM) (Martin and Beaumont, 1998; Lepak and Snell, 1999;

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Michael Harvey (address for correspondence), Hearin Chair of Global Business University of Mississippi (tel: +662 915 5830; fax: +662 9155821; e-mail: mharvey@bus.olemiss.edu). Timothy Kiessling, Assistant Professor of Management California State University-Stanislaus.

Dowling *et al.*, 1999; Harvey and Novicevic, 2002). Global competition is becoming the norm and, at current growth rates, trade between nations will exceed total commerce within nations by 2015 (Daft, 1997). In industries such as semiconductors, automobiles, commercial aircraft, telecommunications, computers and consumer electronics, it is impossible to survive and not scan the world for competitors, customers, human resources, suppliers and technology (Gregersen *et al.*, 1998). In this environment, the global human resource management becomes more important to the success of the firm, while at the same time becoming more complicated and difficult to administer (Grant, 1996; Kamoche, 1997; Boxall and Purcell, 2000; Harvey and Novicevic, 2003).

Past research confirms that the human resources are a valuable component for an organization attempting to develop a strategic competitive advantage (Wright *et al.*, 1994; Lepak and Snell, 1999). When human resources are employed strategically, firms compete more effectively in this new dynamic marketplace, especially when 'the productivity of superior resources depends upon the nature of their employment and the skill with which a strategy based on resource superiority is implemented' (Peteraf, 1993: 186). Yet, research into global human resource management is increasingly difficult to pursue, and complicated, as culture and its alignment with strategy may be very difficult to research through strictly quantitative methods.

It would appear that organizations must develop a cadre of managers who have a global mindset as a way of thinking within the global marketplace (Kedia and Mukherji, 1999; Paul, 2000; Begley and Boyd, 2003). These managers must develop a pluralistic management perspective that encourages and maintains multiple perspectives in order to solve complex global problems (Aguirre, 1997; Harvey *et al.*, 1999; Reynolds, 1997). Two-thirds of the world's CEOs view the priorities within the intense change of the new global market place as: foreign competition as a key factor in their firm's future business success, employment and revenues to be generated increasingly outside their firm's home country, and the effective management of human resources as critical to global success (Hambrick *et al.*, 1989).

This paper's focus is to develop a process for conceptualizing SGHRM utilizing a mixed-method research approach. First, the new global hypercompetitive market conditions and the problems for SGHRM will be explored. Second, previous types of research methods and their failure to provide adequate insight in SGHRM are examined. Then an examination/justification of a mixed-method approach is considered as being a superior means for researching SGHRM issues in the twenty-first century. Next, an SGHRM and a mixed-method programme to assist in the development of a global human resource system are suggested. Finally, barriers to the development of a SGHRM programme are examined to illustrate the types of research that will be needed utilizing the mixed-method approach. The underlying foundation of the paper is that, given the evolution of human resource management into a global network (e.g. SGHRM), new problems will confront human resource managers and, therefore, new research methods will be necessary.

### **The evolution of a human resource management perspective**

Domestic HRM is typically defined as a broad typology that covers three areas: 1) work relations (i.e. the way work is organized, the division of labour and the deployment of workers around technologies and production processes); 2) employment relations (i.e. the arrangements governing such aspects of employment as recruitment, training, promotion, job tenure and the reward of employees); and 3) industrial relations (i.e. the representational aspirations of employees and the 'voice systems' that may exist,

such as work consultation, employee involvement practices, work councils and collective bargaining) (Gospel, 1992). Domestic HRM has not developed in isolation, but rather in the context of industrial change and economic development. As such, HRM represents a set of responses to the dramatic and continued effect that industrialization has had on society and the world of work (Dulebohn *et al.*, 1995).

The next step in the evolution of human resource management was international (IHRM), which becomes increasingly complex as new types of employees and their unique attributes are considered as part of the IHRM activities: host-country nationals (HCNs), home-/parent-country nationals (PCNs) and third-country nationals (TCNs) (Morgan, 1986). Numerous new issues rise given the diversity of employee in an international context: 1) expatriates; 2) host-country nationals; 3) third-country nationals; and, most recently, 4) inpatriates. The complexity of operating in different countries and employing different national categories of workers is a key variable that differentiates domestic and international human resource management, rather than any major differences between the HRM activities performed (Dowling *et al.*, 1999). The literature on IHRM is extensive and has traditionally focused on several levels of analysis: 1) issues facing employees (i.e. in terms of transferring expatriates overseas); 2) the IHRM function and its attendant activities; and 3) the types of factors (firm level and otherwise) that may influence IHRM (Napier *et al.*, 1995).

The present level in the evolutionary process of human resource management, which complicates the human resource functions and systems that much more, is strategic global human resource management (SGHRM). Viewing the human resource functions in an SGHRM context exacerbates the international human resource issues due to the co-ordination efforts required to implement the strategy of the corporation. In today's global business environment, global organizations must utilize all possible sources of competitive advantage, and human assets are one of these sources (Barney, 1991; Schuler and Rogovsky, 1998). The success or failure of an organization in a global context will be determined by its managerial capabilities, and the development of globally sophisticated managers is a major challenge in order to obtain global competitiveness (Hax, 1989).

Virtually any type of international problem, in the final analysis, is either created by people or must be solved by people. Hence, having the right people in the right place at the right time emerges as the key to a company's international growth. If we are successful in solving that problem, I am confident we can cope with all others.

(Duerr, 1986: 43)

An example of just one of the issues in SGHRM in regard to the mixed-method technique is where to focus the location of the workforce. The location of the workforce is an important strategic consideration, but one that is all too often given only limited attention. Frequently, decisions are based purely on quantitative attributes of the decisions, such as trade-off transportation costs, scale economies and other explicit cost-based variables. This quantitative practice, however, can lead to suboptimal results, as decision-makers tend to focus only on factors that are easily quantifiable. Important qualitative issues are frequently neglected and are often central to supporting or creating a global competitive advantage. For example, location dictates the level of knowledge embedded in the workforce; as such, it can affect the ability of firms to implement skill-based process technologies or it can limit the effectiveness of quality programmes. Quantitative analysis in understanding and explaining global commerce is not sufficient and a mixed-method approach (combining both quantitative and qualitative) may provide the insight into successful implementation of SGHRM practices.

Unlike the phenomena that exist in the many physical sciences, human resources deals with essentially complex human phenomena. The use of quantitative data to research and understand human resource management is necessarily limited by the availability of 'hard' data on which to base decisions. To overcome this flaw, global research in particular has advocated a cross-fertilization of both quantitative and qualitative research (Boyacigiller and Adler, 1991; Brewer, 1992; Daniels, 1991; Parkhe, 1993). Quantitative methods sometimes do not work well in the study of global management due to the complexity and unstructuredness of the problems, with multiple important interactive relationships that cannot be studied in a quick or easy fashion (Wright, 1996). However, researchers must not overlook or abandon quantitative analysis, but use it in concert with qualitative research to grasp the whole concept in explaining this new, dynamic, complex global market.

### **The impact of globalization on IHRM**

The evolving global marketplace can be characterized as one of uncertainty, diverse global competitors, rapid technological change, widespread competitive wars and seemingly endless reorganizations (Ilinitch *et al.*, 1998). There is little doubt that to be viable during the twenty-first century in the global environment, organizations, whether global or domestic, will need to be more global in their outlook, if not in their operations (Rhinesmith, 1993). The complexity involved in operating in different countries and employing different nationalities of employees is a key variable that differentiates domestic and global HRM. Four additional variables (besides complexity) either diminish or accentuate differences between domestic and global HRM: the cultural environment; the differences in industry structures between countries; the extent of reliance on the home-country domestic market; and the attitudes of senior management (Dowling, 1999).

A twenty-year review by Clark *et al.*, (2000) of journal papers, published between 1977 and 1997 in twenty-nine major journals worldwide, that focused on comparative or global HRM found that the methods of data collection were: questionnaires (42 per cent), case studies (30 per cent), literature reviews (11 per cent) and a very small number of studies used questionnaires in combination with in-depth interviews and case studies (2 per cent). What is most interesting is that over 41 per cent of all the studies (total studies reviewed: 20,287) failed to offer any explanation for their results and those that were explained simply stated cultural (22 per cent), institutional (19 per cent) or a combination of both. These variables were explained *ex post* and typically were residual variables rather than independent or explanatory variables (Clark *et al.*, 2000). It would appear that global research has not progressed in 30 years as the cultural/societal setting 'is still a reality to be explained and as such cannot yet explain other realities' (Roberts, 1970: 330).

Researchers are not alone in their slow-to-develop global mindset, as practitioners from North America also appear unprepared for this new market environment. Eighty-two per cent of *non*-North American executives consider a global outlook as very important for the future versus 62 per cent for US CEOs, and 70 per cent *non*-North American CEOs versus 35 per cent of US CEOs consider experience outside their home country as very important (Hambrick *et al.*, 1989). It would appear that US CEOs are underestimating the importance of a global mindset as the global organization must have managers who are prepared to manage a diverse, cross-cultural workforce (Scullion, 1991). This new breed of global managers will need to be very professional, of high quality, deployable, multi-skilled, multidisciplinary and cross-cultural (Vanderbroeck, 1992).

The traditional SIHRM models have been developed to capture the influence of HR programmes (e.g. policies, practices and issues) on a multinational organization's outcomes and vice versa. The most cited models take either a contingency perspective, emphasizing consistency between HRM and the organization's strategy (Schuler *et al.*, 1993), or a universalistic perspective, emphasizing complementarity between HRM and strategy (Taylor *et al.*, 1996). The SIHRM models seem to be appropriate under the conditions of strategic stability supported by the hierarchical structure and strong organizational culture. In these models, it is assumed that multinational organizations compete primarily under low ambiguity and within clearly defined geographic and industry boundaries. In other words, it is assumed that slow-cycle pressures for organizational renewal and corporate restructuring are salient. In such an environment, organizations are assumed to compete for economic surplus to achieve a structural competitive advantage by aligning their competencies with these activities. In most SIHRM models international variables, like national culture (contingency) or employment systems (complementarity) (Boxall and Purcell, 2000), are dominant. However, De Cieri and Dowling (1999) argue against further development of specific international models. Moreover, Dowling *et al.*, (1999) argue that the SIHRM models fail to capture HR effectiveness within global networks. Rather, models encompassing the evolution process from SIHRM to an SGHRM system need to be developed as organizations globalize their operations.

The shift from an SIHRM to an SGHRM system is crucial for the evolution of the processes and mechanisms found in HRM systems in order to match the personnel needs of global organizations. This shift is not a semantic one but rather a very definite difference in the manner of managing the human resource function (see Table 1). The SGHRM system shapes organizational culture in terms of co-operative traits and practices (i.e. content) rather than in values and attitudes (Denison and Mishra, 1995). Also, this influence is reflected in terms of the extent to which organizational culture is shaped across the organizational units (i.e. strength). The extent to which the content and strength of organizational culture are shaped by the shift to the SGHRM system is influenced by the managerial global leadership mindset. If this influence is significant, the organization's global performance is likely to be improved.

The SGHRM perspective on human resource management goes beyond the SIHRM view by emphasizing that HR effectiveness arises not only from the aggregate talent of

**Table 1** *Transformation of intangible dimensions of human resource perspective*

<i>Traditional hierarchical SIHRM</i>	<i>Evolving network heterarchy SGHRM</i>
Agency	Stewardship
Control/monitoring	Trust/commitment build
Information asymmetry	Knowledge sharing
Unidirectionality	Reciprocity
Structure-oriented	Process-oriented
Behavioural consistency	Cognitive reference
Fit	Flexibility
Hierarchy	Heterarchy
Oriented towards cost	Oriented towards value
Formal rules	Informal norms
HQ initiatives	Subsidiary initiatives
Functionalism	Cross-functionalism
Administrative spirit	Entrepreneurial spirit

the organization's employees, but also from the co-ordinated deployment of this talent across the global organization's network of relationships. The efficiency of this type of relational co-ordination is in turn a function of the global organization's cultural context (Beer *et al.*, 1995). For the global HR manager to develop the leadership role, modes/options and influence the major transformation of the organization's cultural context, the role of human resource management is to be refocused from the 'traditional HR focus on attracting, selecting, and developing individuals to a new focus on developing an organizational context which will attract and develop leaders as well as facilitate teamwork'. This new global leadership focus of HR encompasses new approaches to decision-making, as well as innovative approaches to organizing and managing people within global networks (i.e. global team-based management, high involvement of diverse employees and effective and meaningful communication across cultures). In other words, the innovative global HR leadership can succeed in changing the organization's culture only by focusing more on the new strategic task within global networks and less on modifying traditional HRM programmes.

The focus on the new global strategic task requires both an effective leadership by the global HR manager and an efficient design of the SGHRM system. Specifically, the HR manager's role transformation towards leadership within a global network is contingent upon an efficient SGHRM system design. To yield an efficient SGHRM system, the HRM processes necessitate seamless interfaces across a variety of dynamic relationships within a global network. The purpose of the seamless interfaces is to mitigate different risks and uncertainties arising due to the interaction among members within the global network. These human resource processes must also contribute to the optimization of knowledge integration within the global network (Salbu, 1991). Therefore, it is proposed in this paper that the architecture of the SGHRM system depends upon the scope of the MNC strategic orientation relative to network members and the extent of the dynamics in the global network environment. By using the theoretical perspectives of relational contracting (MacNeil, 1974, 1978, 1980, 1985) and the knowledge-based view of the firm (Grant, 1996), a theoretical framework for an efficient SGHRM system design supporting global HR manager's leadership can be developed for global organizations.

Due to the importance of human capital as one form of competitive advantage in the new global marketplace, the SGHRM manager's role will become elevated (Gregersen *et al.*, 1998). The key to success in the global marketplace is the ability to attract, train and retain a diverse workforce (Harvey and Novicevic, 2002, 2003). A dedicated and talented workforce may serve as a valuable, scarce, non-imitable resource that can help firms execute an appropriate positioning strategy (Lado and Wilson, 1994) and the human dimension has received a good deal of conceptual attention from strategy scholars (Fiol, 1991; Lado *et al.*, 1992; Rumelt *et al.*, 1991).

The global organization must be flexible enough to develop products/services that attract consumers, yet maintain a fit of organization systems and controls that maintain corporate culture and quality. Global organizations are more efficient and effective when they achieve fit relative to when there is not fit (Baird and Meshoulam, 1988; Lengnick-Hall and Lengnick-Hall, 1988; Milliman *et al.*, 1991) and yet a focus on maximizing fit can be counterproductive if the firm has adopted conflicting competitive goals to correspond to a complex competitive environment (Lengnick-Hall and Lengnick-Hall, 1988). SGHRM will be an integral part of the firm's strategy to find organizational fit yet maintain employee/customer flexibility, or, as coined, to 'think globally/act locally'.

The marketplace and employees are ever changing and new culturally specific SGHRM procedures will require flexible innovative solutions. Flexibility can be broken

into two components: resource and co-ordination. Resource flexibility is when a resource can be applied to a larger range of alternative uses. This is measured by the difficulty of switching the use of one resource to another and the amount of time to do so. For example, the extent to which the firm can re-synthesize strategy, reconfigure change of resources and redeploy resources refers to co-ordination flexibility (Sanchez, 1995). SGHRM managers will be required to establish systems that are flexible enough, but also encourage strategic or organizational goal fit. In the current dynamic global market, this task is enormous, if not impossible.

Both the SGHRM researcher and practitioner have nearly insurmountable obstacles to obtain the relevant information necessary to develop or study SGHRM systems. Global studies are invariably more expensive, time consuming and difficult to 'sell' to management than domestic studies, and can be a liability for global researchers in a competitive research funding environment. In addition, global research takes more time, involves more travel and frequently requires the co-operation of host-country organizations, government officials and researchers. Development of a stream of global human resource management research is consequently much more difficult (Dowling and Schuler, 1992).

### **The evolution to strategic global human resource management systems**

SGHRM uses as its focus the belief that people are a valuable resource and should be managed strategically. Thus SGHRM needs to be aligned to and support the organization's strategic objectives in order to obtain legitimacy (Kamoche and Mueller, 1998). Institutional theory posits that HRM practices develop and attain legitimacy through the construction of reality (Oliver, 1997). HRM becomes institutionalized, whereby its social processes, obligations or actualities come to take on a rule-like status in social thought and actions (Meyer and Rowan, 1977). When individuals within the firm come to accept shared definitions of what comprises legitimate HRM practices, or HRM becomes institutionalized, the likelihood of significant changes in those practices recedes (Scott, 1987; Wright and Snell, 1998). Therefore, research into SGHRM must take into account complex interactions in how non-choice behaviours can occur and persist, through the exercise of habit, convention, conveniences or social obligation (Oliver, 1991), rejecting the idea that organizational phenomena are the products of rational choice based upon technical considerations (Westney, 1993).

More than just a complicated unique valuable resource, people are also a source of capabilities that are firm specific and more valuable than resources that are available and transferable. These human capabilities are seen as developing, carrying and exchanging information (Amit and Shoemaker, 1993). The integration and co-ordination of personnel throughout the global system in SGHRM has proved to be difficult to manage due to barriers of distance, language, time, culture, turf battles and accountability, and the proliferation of communication channels, to name a few (Bartlett and Ghoshal, 1990).

The strategic effectiveness of the human organization in the global market is of considerable importance and both practitioners and researchers have begun to explore the theoretical and empirical linkages between SGHRM and strategy (Adler and Ghadar, 1990; Kobrin, 1992; Milliman *et al.*, 1991). SGHRM is seen as positioning its resources through vertical and horizontal fit. The alignment of SGHRM practices and strategic management is referred to as vertical fit and is seen as directing human resources towards the primary initiatives of the organization (Schuler and Jackson, 1987). Congruence of SGHRM practices is referred to as horizontal fit and is viewed as instrumental for efficiently allocating human resources (Baird and Meshoulam, 1988).

SGHRM is a relatively young profession and, because SGHRM is of an applied nature, there is tension between SGHRM researchers and practitioners (Swanson, 1997, 1998; Ruona, 1999; Toracco, 1997; Jacobs, 1997). Due to this apparent tension, the output by researchers is judged primarily by its usefulness to practice (Lynham, 2000). The research-practice-development-theory-cycle is both epistemological (nature of knowledge) and ontological (nature of reality) and assists in a multi-paradigm view in SGHRM. This view is more conducive to the multifaceted nature of human and organizational realities, and to constantly transforming contexts of human and organizational reality (Gioia and Pitre, 1990; Lynham, 2000).

SGHRM research has become ever more difficult as the focus repeatedly turns to emerging markets because they constitute the major growth opportunity in the evolving world economic order. Their potential has already affected a shift in global organizations, which now highlight emerging market investments when communicating with shareholders, as illustrated by Coca-Cola. Coca-Cola invested \$2 billion in China, India and Indonesia (which together account for more than 40 per cent of the world's population) and predicts that it can produce sales in those countries that double every three years for the indefinite future, compared with Coke's 4–5 per cent average annual growth in the US market in the past decade (*Business Week*, 1996).

For SGHRM research in particular, issues such as the cultural environment, the industry with which the multinational is primarily involved, the extent of reliance of the multinational on its home-country domestic market and the fact that attitudes of senior management will affect the global and local human resource planning, staffing, performance management, training and development, compensation and benefits, and labour relations, must all be included to understand and develop an understanding of the field (Dowling *et al.*, 1999). Quantitative analysis may not be equipped to consider all the underlying issues in SGHRM.

The mixed-methods approach in researching the differing global institutional effects (i.e. social processes, obligations and complex interactions of non-choice behaviours), linkages between SGHRM and strategy, the importance of the emerging market and the field's practitioner-oriented view appears a superior method of research. Identifying and defining the problem of reflecting external reality with explanations that best produce desired outcomes with nebulous relationships is difficult, but a task that researchers must endeavor. The results of academic study should also be practitioner oriented but in researching in emerging markets often there has been little or no research which has proven successful.

Data collection and analysis procedures that are flexible but maintain integrity as to validity and reliability are necessary in exploring complex interactions especially in attempting to integrate SGHRM and the field of strategy. A generalizable 'story' that is developed to explain the phenomenon under investigation will be effective as a bridge between an academic researcher and the practitioner, as well as in understanding and describing complex global interactions.

### **Appropriate methodologies for research related to SGHRM issues**

Although there have been recent attempts to augment quantitative research techniques, quantitative techniques still are the norm for global research (Teagarden *et al.*, 1995). Quantitative techniques focus on the measuring of things that can be counted 'using predetermined categories that can be treated as interval or ordinal data and subjected to statistical analysis' (Patton, 1997: 273). Predetermined categories are developed, unavoidably so, through a researcher bias. This type of research assumes that

the predetermined categories also encompass the construct that the statistical analysis is attempting to evaluate. 'To date, the academic community, by itself, has remained primarily dedicated to single culture and comparative research which, while still necessary, is no longer sufficient and therefore no longer relevant for the competitive environment of today's transnational' (Adler and Bartholomew, 1992: 566).

Quantitative research suggests of the universalist paradigm or that the universalist typically will research through carefully designed questions leading to proof or disproof through measurement and rigorous evaluation utilizing existing theory and literature (Brewster, 1999). The universalist paradigm (dominant in the USA) uses evidence to test generalizations of an abstract and law-like character and tends towards acceptance of convergence. The disadvantages of this viewpoint are that it ignores other potential focuses, the research objectives are too narrow (i.e. ethnocentric) and it ignores other levels (i.e. culture) and other stakeholders (i.e. institutional, governmental and legal) (Guest, 1990; Pieper, 1990).

Both quantitative and qualitative research, performed in concert, will provide researchers with the evidence needed to evoke an understanding within the global marketplace. The use of qualitative research is especially significant in relation to different cultures whose values, goals and morals vary significantly. Qualitative research focuses on people's experiences and the meanings they place on events, processes and the environment of their normal social setting. Qualitative data 'focuses on *naturally occurring, ordinary events in natural settings*, so that we have a starting handle on what "real life" is like' (Miles and Huberman, 1994: 10, emphasis in original).

Also, management research trends suggest that researchers may be moving even further away from rigour and limiting applicability due to their failure to triangulate. Lower internal validity, external validity and construct validity have been found in the 1980s and 1990s due to methodological approaches that do not use rigorous triangulation (Scandura and Williams, 2000). Triangulation through the use of mixed methods in global research will strengthen researchers' findings.

Table 2 identifies five accepted steps applicable to research in the social sciences. Each of these steps will be compared and contrasted for quantitative, qualitative and mixed methods for use with SGHRM problems/issues.

#### *Define problem and develop hypothesis*

Research of global social behaviour theories, problem definition and the development of hypothesis have fundamental confounding problems: 1) culture definition; 2) identifying whether a phenomenon is culturally specific or universal; 3) determining how a researcher can mask their own cultural bias in designing and conducting a study; 4) determining which aspects of the study should be identical and which equivalent across cultures; and 5) identifying threats to interpretation caused by interactions between cultural and research variables (Adler, 1984). Further obstacles for researchers include: selection of topic, how and who to sample, translation, measurement, instrumentation, administration of the research, data analysis and interpretation.

The way in which one asks the research question is important because it determines, to a large extent, the research methods that are used to answer it. The goals and objectives of the project must be identified to formulate the questions. Quantitative methods develop highly specific hypotheses that employ operational definitions and are clearly testable. Global research conveys hidden nuances, the phenomena are often idiosyncratic and not comparable to apparently similar domestic phenomena, and so rigid quantitative techniques may be inappropriate.

**Table 2** *Research method comparison*

	<i>Quantitative</i>	<i>Qualitative</i>	<i>Mixed methods</i>
Define problem and develop hypotheses	Highly specific hypotheses are developed that employ operational definitions and are testable.	The problem is clearly stated in paragraph format in two or three sentences that describe the background and purpose.	Problem reflects external reality with explanations that best produce desired outcomes with nebulous casual relationships.
Construct research design to max. internal and external validity: Selection of sample Control or manipulate subjects	Control of extraneous variables and major attention is given to maintaining comparable conditions and reducing error and bias. A random, unbiased sample is obtained.	Portions of this step are predetermined because qualitative studies are often undertaken using known locations and participants.	A combination of controls of both extraneous variables and reduction of error variance through triangulation or seeking convergence of results.
Instrumentation Specify data collection procedures	Close-ended questionnaires, tests, numerical data (time, length, weight, etc.).	Interviews, open-ended questionnaires, observer participant, focus groups.	Planned use, with some limitations on the qualitative data collection procedures.
Select data analysis methodology	Parametric statistical tests, measurement with numbers.	Interpretative measurement with words, modes and medians may be obtained.	Option of converting quantitative data into qualitative or vice versa for comparison.
Evaluate results and draw conclusions	Results are generalizable, but many findings are not applied.	Data reduction into a manageable form is required through category creation.	A 'story' is developed to explain the phenomena studied and is generalizable.

Mixed methods attempt to define the problem, reflecting external reality that is situational and culturally specific, with explanations that may best produce desired outcomes. The first question attempting to define the problem and to understand nebulous causal relationships starts out broadly and becomes progressively narrowed and more focused during the research process as concepts and their relationships are uncovered. In the development of the evaluation questions, the researcher must be objective and have an openness or willingness to listen and to give voice to respondents, whether they are individuals or organizations. This means having an understanding, while recognizing that researchers' understandings are often based on the values, culture, training and experiences they bring to the research situations and that they might be very different from those of the respondents.

Global research therefore becomes more complicated and is often difficult to coordinate or to maintain formal practices. Global research theories and techniques are difficult to impose upon foreign management, and, if applicable, they must be culturally close to the countries where those theories exist. In addition, it is argued, the application of management models and theories developed in one country is inappropriate within another (Azumi, 1974; Hofstede, 1980, 1983, 1993; Laurent, 1983, 1986). Further, national cultures differ in the degree to which they enable managers to adopt non-home-grown practices (Kirkbride and Tang, 1992; Tayeb, 1988, 1995), although recent research suggests that some contingency-type theories may be applicable (Ralston *et al.*, 1999).

Research problems and theory development in SGHRM are often driven by the needs of the practitioner, not based upon domestic developed theory and often tackle vague issues. However, an impasse between the practitioner and the researcher arises from a difference in focus and goals, or relevance versus rigour, or usefulness versus validity, especially in regard to those researchers who are characterized by quantitative techniques (Dubin, 1976; Marsick, 1990; Van de Ven, 1989). 'The demand that theory be useful therefore, characterizes an applied field' and requires that there 'be a market orientation (i.e., a practical real-world need) for the theory' (Dubin, 1976: 19).

Problem definition and hypothesis development in SGHRM research generally fall into three types of models: classificatory (i.e. categorizing activities, entities or data for the purpose of clarifying complex relationships), descriptive (i.e. explaining a process and much more complex than classification) and causal (i.e. representations that attempt to develop casual relationships according to some pre-specified theoretical structure) (Punnett and Shenkar, 1996). Before data collection, the researcher utilizing a flexible mixed-method approach may be able to establish a line of reasoning and identification of anticipated results. The mixed-method technique will provide a means to address the multifaceted problems more effectively due to flexibility and unconstrained view.

*Construct research design to help ensure internal and external validity: selection of sample, control or manipulation of subjects and instrumentation*

The most frequently used research approaches to global issues consist of: 1) comparative (i.e. comparisons of two or more countries and some specific aspect of HRM), 2) international (e.g. HRM within global organizations), 3) foreign national (e.g. single-country studies by non-indigenous researchers attempting to draw conclusions with home-country implications), and 4) a combination of the above (Adler, 1983; Adler and Bartholomew, 1992, 1997; Peng *et al.*, 1990).

A Western ethnocentric bias permeates much of global research literature, underpinning the universalistic approach that the instruments and measures developed

in one culture are believed to be equally appropriate and applicable in other nations. This view fails adequately to specify the nature of societal/cultural differences and how they affect the phenomenon under investigation due to the use of instruments and measures that remove societal or cultural dimensions from organizations (Child, 1981; Clark, 1996; Cray and Mallory, 1998). Yet, the basic purpose of examining global perspectives is to contribute an understanding of the extent to which there are differences and similarities among nations as well as between organizations and their members in different relational settings (Clark *et al.*, 2000).

It is suggested that, when performing global research, the firm should not copy successful solutions that resulted from other cultural traditions, but that the underlying goals adapted to that culture should be examined (Albert, 1989). Another criticism of recent research is the need to move away from the parochialism inherent within Anglo-American research towards a more pluralistic perspective based on openness to other perspectives (Boyacigiller and Adler, 1991; Redding, 1994; Clark *et al.*, 2000). As the predominant current paradigm from a Western researcher's perspective utilizes both Western theories and quantitative research, it is apparent that in the very least a mixed-methods approach that attempts to understand new global phenomena should be utilized.

As McGrath (1982) noted, it is not possible to do an unflawed study; the global unflawed study is nearly impossible. So the primary manner in which to address the issue of research trade-offs is to obtain corroborating evidence from using a variety of methods, known as triangulation. Simplistically, a triangulation method taken from navigation and military history, which 'use[s] multiple reference points to locate an object's exact position' (Jick, 1979: 602), may provide legitimate guidance to social science researchers. Triangulation within mixed methods has developed into four perspectives that combine both qualitative and quantitative research, and are used according to the situation: 1) sequential studies (i.e. the researcher conducts two separate phases or qualitative and quantitative research); 2) parallel/simultaneous studies (e.g. both types of research are conducted simultaneously); 3) equivalent status designs (e.g. both approaches are used equally to understand the phenomena under study); and 4) dominant-less dominant studies (e.g. one or the other method is used as the single dominant paradigm) (Creswell, 1995).

A mixed-method approach to designing a study that explores the underlying relationships through qualitative data in co-ordination with quantitative data will assist the researcher in the explanation of complex and seemingly ambiguous global constructs. For example, seven cultural factors have been identified that must be addressed in global training design: 1) social systems and institutions, 2) interpersonal relationships, 3) politics, 4) polities, 5) religion, 6) economic systems and 7) educational and technological bases (Bin Yahya, 1989).

#### *Specify data collection procedures*

Rich interaction is the *sine qua non* of global research for which quantitative methods are mostly inadequate (Teagarden *et al.*, 1995). Yet, typical global research is performed through questionnaires with a Western-style theory supporting the research findings. This disposition should be avoided, as investigators should attempt to avoid prior commitment to any theoretical model (Van Maanen *et al.*, 1982). An evolving coherent theoretical framework rather than one imposed *a priori* has been suggested, so the researcher will 'be open to what the research site has to tell us' (Glaser and Strauss, 1967: 118). The mixed-method approach will assist researchers due to its evolving and exploratory nature.

The Western-style/quantitative/universalist research approach to global research may not be successful in these transitional and emerging markets and must be augmented through contextual research. For example, 'few if any, Western institutions actually know how to achieve...translation of successful Western methods into African contexts' (Machlachlan, 1993: 170; Harvey, 2002). Global research is difficult outside North America and Europe because archival sources are rare and often incomplete, mass mailings are rarely successful and academia often plays a different role in other countries. Also, in these countries less emphasis is placed on contractual business relationships and more upon trust and interpersonal relationships. In these settings, data collection will require a non-traditional approach (Teagarden *et al.*, 1995).

In the development of data collection procedures the evaluator should make use of non-technical literature such as reports, videotapes, newspapers, periodicals and other materials to assist in the development of the evaluation questions. This process will assist in providing a source for comparison and sensitivity to nuances in the data, it can be used as a secondary source of data, stimulate further elaboration during the research process and can be used to supplement interviews and observations (Strauss and Corbin, 1996).

Simply identifying target respondents as a potential sample becomes complicated, as the issues and questions to be discussed/asked must be understandable to the respondent. In global research, this becomes all the more difficult due to differing symbols, cultural understandings and language. The questions must be translated forward and backward with the meaning intact. Use of culturally specific symbols must be avoided and conceptual equivalence be established.

The design and format of the questionnaires should be flexible in comparison with the traditional experimental or longitudinal survey designs. The qualitative and mixed methods design allows a researcher to adjust the ongoing data-collection methods and modes of analysis much more quickly to respond to context-specific constraints (Lee, 1999). In global research, this flexibility allows the researcher to delve more deeply into the underlying latent constructs not observable through direct quantitative techniques.

Data-collection strategies for the mixed-method technique typically fall within four general categories: 1) asking individuals for information and/or experiences; 2) seeking what people do, recording what they do or making inferences; 3) asking individuals about their relationships with others; and 4) using data collected and/or documented by others.

Self-report techniques or asking for information and/or experiences are the most frequent sources of data in traditional quantitative and qualitative research, yet are the weakest form of data-collection strategy (Tashakkori and Teddlie, 1998). Even more so in global research, there are cultural biases (including within subgroups) that make this type of data-collection strategy even less credible, such as the acquiescence bias (yes-saying), extremity bias (tendency to pick the end points of a scale), central tendency bias (middle of scale selections) and positivity bias (selection of positive bias) (Punnett and Shenkar, 1996; Usunier, 1998).

The interview is a powerful method of data collection, which may have open- and closed-ended interview formats, that typically results in copious amounts of information, but is very expensive and time consuming (Lavrakas, 1993; Fowler and Mangione, 1990). It is also especially appropriate when a researcher requires in-depth knowledge of issues and relationships as found in SGHRM. 'Cross-cultural and multicultural research is a prime example of such applications' (Tashakkori and Teddlie, 1998: 103) and 'personal interviews constitute the most prevalent instrument' of obtaining data in global survey research (Punnett and Shenkar, 1996).

The observational method eliminates the need to use either the interview or self-report techniques, thus avoiding the biases involved. Unfortunately, this method also has drawbacks, such as 'objective self-awareness' (unintentional changes of the subject) and 'actor-observer difference' (subjects' action responses are not the same as to what observer considers as stimulus).

Although the benefits of multiple methods are illustrated through the faults of each of the techniques described (there are both more techniques and more faults of each), time and cost is a relevant part of any researcher's agenda. Several sources that will assist in data collection and verification are: experts, personal knowledge and archival data that could support data collection in a well-designed study.

### *Select data analysis methodology*

The challenge faced by researchers in the global marketplace is how to solve a multidimensional puzzle located at the crossroads of national and organizational cultures (Laurent, 1986). Unfortunately, Western researchers utilizing their ethnocentric tools have performed much of the global research. 'We cannot, and should not, expect wholesale transfer of American . . . concepts and tools' (Kerrigan and Luke, 1987: 14) for management training theory and practices.

In the mixed-method technique, the distinction between data collection and data analysis may not be clear-cut. In practice, for example, the researcher will often be creating, testing and modifying analytic categories as an iterative process, such that data analysis may be considered 'an organic whole that begins in the data-gathering stage and does not end until the writing is complete' (Potter, 1996: 120). The questions are developing empirical data that involve and derive from the participants' experiences within a natural setting. The phenomena of interest rely on the interpretations, sense-making and 'lived' experiences of the organizational participants.

Mixed-method research is often not standardized, thus presenting problems for the researcher who is accustomed to reliable and well-validated measures. This type of research should be seen as a process of data reduction that simultaneously enhances the data's meaning; however, issues of reliability and validity will still be applicable (Marshall and Rossman, 1995).

Researchers wish to justify their interpretations of the data in some way in order to assess rigour and authenticity. The criteria used are: 1) applicability (the extent to which readers can apply the findings to their own contexts); 2) empowerment (the extent to which the findings enable readers to take action); 3) rhetoric (the strength of the argument presented); and 4) resonance (the extent to which the research process reflects the goals of the research) (Guba and Lincoln, 1989).

Regardless of the nature, type or scale of measurement in regard to research data, both validity and measurement reliability must be ascertained. Because attributes of global research, its constructs or latent variables, may not be observable, it is not possible to observe the degree of correspondence between a variable and the measure obtained. Although a correlation coefficient cannot be calculated for qualitative observations, triangulation of multiple data sources will suffice (Tashakkori and Teddlie, 1998).

The resultant data must have a 'trustworthiness' quality in regard to design and measurement quality and the four criteria that could be collectively combined to establish this trustworthiness are: credibility, transferability, dependability and confirmability (Lincoln and Guba, 1985). Different methods for determining the four criteria include: prolonged engagement, persistent observation, triangulation techniques, peer debriefing, negative case analysis, referential adequacy, member checks, dependability audit,

confirmability audit and reflexive journal (Tashakkori and Teddlie, 1998). Global research is very difficult and time-consuming, and causes the researcher many additional steps along the entire spectrum of the process of research design.

Finally, researchers (Caracelli and Greene, 1993) have established four mixed data analysis strategies.

- 1 *Data transformation* concerns the conversion of one data type into another so that both can be analysed together, such as converting qualitative data into numerical codes and quantitative data into narratives for analysis.
- 2 *Typology development* is when a set of substantive categories are developed, then used as a framework.
- 3 *Extreme case analysis* includes the collection of additional data to explain extreme cases in the hopes that issues previously not recorded are exposed.
- 4 *Data consolidation/merging* is the process of creating a new data set by consolidating data sets in either qualitative or quantitative form for further analysis.

#### *Evaluation of results and drawing conclusions*

In regard to the evaluation of results and the researcher's drawing of conclusions, the researcher's stakeholders and constituents vary significantly in their understanding of research methods, terminology and application. Two issues are important in reaching closure: when to stop adding new information and when to stop iterating between theory and data (Eisenhardt, 1989). When only incremental improvement occurs with each new amount of data, closure should occur. As the scientific mission of organizational researchers requires that they share their findings, the primary mechanism would be to prepare the manuscript for a scholarly journal. Although there are no hard and fast rules, and these would vary across journals, some suggested guidelines are common to global research and are not so very different from purely quantitative-type research, except for the content.

A non-traditional approach such as the contextual/qualitative research view would complement quantitative research, for it searches for an overall understanding of what is contextually unique and why. The research is inductive (versus deductive for the universalist) and theory is drawn from an accumulation of data collected or gathered. The major role of the contextualist in global research and literature is to identify the way labour markets work and what the more typical organization is doing (as opposed to the universalist and their research of 'leading edge' companies and 'best practices') (Brewster, 1999).

The contextual approach also focuses on the individuals within the organization, the long-term health of the organization and or the community and country within which the organization operates, rather than the declared corporate strategy and approach laid down by senior management. Neither the universalist nor the contextual paradigm is wrong or an inadequate way to study global issues, but research in this area will be 'enhanced if we utilize the best of both' (Brewster, 1999).

As SGHRM has a strong applied tradition, a strong theoretical or conceptual basis must be put forth to justify whether the researcher did intend to solve a distinct managerial problem or concern. A literature review that provides a foundation for evaluation and subsequent referral should be developed. Assuming that either theory, problem-solving or hypothesis-testing is the researcher's goal, the researcher must follow the tradition of falsifiability, level of analysis, unit of focus and operationalization. The sample and context of the sample would then include the type of selection,

information given to the subjects, subjects' emotional and social states, and the researcher's rapport with the subjects (if direct contact was made). Data collection, analysis and verification discussing reliability, validity, generalizability, replication, types and kinds of data with steps in its collection should all be supplied. Finally, a discussion in regard to the results, implications, limitations, contribution and alternative explanations should be considered.

In evaluating the results of global research and drawing conclusions, the development of procedures and guidelines often may differ widely. Transnational firms no longer have just one culture that inherently defines their organizational culture, as senior executives are generally from numerous nationalities (Adler and Bartholomew, 1992). The transition from multi-domestic to global creates the greatest challenge in global research in regard to the internationalization process and thus must be taken into account in the process of drawing conclusions.

### **Summary and conclusion**

The historic arrangement between researchers and the static domestic environment is succumbing to a global marketplace fraught with uncertainty and new variables that were previously unaccounted for. The tried and true quantitative methods, frameworks and paradigms of Western researchers no longer seem adequate in regard to global HRM research. Global researchers are now confronted with complex new issues that interact such as: social systems and institutions, interpersonal relationships, politics, politics, religion, economic systems and educational and technological bases.

The demands for shared norms and values within a global network pose a myriad of simultaneous challenges and/or problems in the development of SGHRM systems: 1) frequent ambiguity about human resource management authority; 2) multiple interdependencies among subsidiaries; 3) increased uncertainty about the sustainability of network flexibility and efficiency; 4) possible discontinuities in securing top-level support for changes in human resource management systems; and 5) difficulties in acquiring the multiplicity of skills and competencies required for effective SGHRM in knowledge sharing (Nonaka, 1990; Ring and Van de Ven, 1992). Which combination of these challenges will be most salient at a particular time period or for a specific network configuration will depend upon which aspect dominates the relational content in the global network, these aspects being: 1) the communications aspect, 2) the exchange aspect or 3) the normative aspect. The communications aspect of relational content in a global network refers to the human resource management-related information apprehension among network members. The exchange aspect is related to operating human resource management aspects supporting the flow of goods and/or services, whereas the normative aspect reflects shared expectations that network members have of one another based on some social feature (i.e. culture). The interplay of these aspects may profile the emergence of the following potential barriers creating significant problems for SGHRM researchers.

#### *Multiplicity of network units*

The multitude of current and potential global network units requires continuous managerial mental accounting and prioritization in selecting actual collaborating units. This requires shifting the human resource management selection criteria for personnel as well as practices as the firm strategic orientation changes. In other words, a global human resource manager needs to develop an informed sense of which unit's human resource management systems are most compatible with the objectives of the network.

Moreover, when operating simultaneously in multiple vertical and horizontal networks, a global human resource manager faces multiple actors with varying human resource management-related tasks, policies and resources instrumental for the firm strategic goal achievement. These multi-actor structures require managerial multi-tasking competence in the development of the firm dynamic relational capabilities and routines.

#### *Global network instability*

Though a global network offers the potential for the firm's rapid adaptation to changing conditions, flexibility of adjustment and capacity for innovation, an SGHRM system must bridge the gaps of incomplete knowledge or goal conflicts in the network about human resource management flexibility. Timely managerial action is required to facilitate rapid human resource management responses, in the global network, to emerging profitable opportunities and successful human resource management adaptation to the current and future sets of its technologies, products and production capacities and to rapidly changing markets. The SGHRM system must direct collaborative effort and operating needs towards effective outcomes while maintaining network responsiveness, changing network memberships and avoiding hierarchy.

#### *Discontinuities in internal organizational support*

The success of global networking of human resource management systems requires prior attainment of internal organizational resource co-ordination and top-level management support. In other words, external networking success depends upon a previous success in the internal management coalition-building environment for human resource management flexibility. The most critical internal support mechanism for continuity of a global human resource management success is the top management team headed by the CEO.

#### *Multi-dimensionality of strategic human resource leadership task*

A manager developing an SGHRM system faces a complex task of multiple interdisciplinary dimensions: 1) technical dimensions (technological options) of the global network; 2) legal dimensions (regulative restraints) affecting networking; 3) political dimensions (centrality bargaining) of network power distribution; and 4) economic dimensions (value capturing) of value chain streamlining. This multidimensionality of the strategic human resource management task imposes extraordinary time and competency demands upon global human resource managers and their ability to combine multiple dimensions into effective firm actions.

#### *Multi-skill leadership demands for global network human resource management*

Global networks require flexible capacities, skills and knowledge that go beyond those of hierarchical human resource management. These multi-skill demands for managing within a SGHRM system include: 1) agile and decisive leadership behaviour expressed in continuing engagement and assertive acting on a changing information base (i.e. thinking and acting in options); 2) ability to identify, access and tap into the skills, knowledge and resources of internal and external network stakeholders (i.e. global human resource managers need to know who possesses or controls the critical resources: capital, technology, information, expertise, time and the absorptive capacity indispensable for flexible human resource management designs); 3) capability to formulate mutual benefits and engender purposeful interactions among the identified stakeholders with the objective of pursuing human resource management-related aspects of a co-operative

idea/project/programme/relationship/membership; 4) building trust with the stakeholders who possess needed resources (i.e. expertise); 5) multi-level co-ordination across many global human resource cultures, procedures and divisions of labour incorporated into the global network; and 6) trans-disciplinary competence quickly to acquire, utilize and apply knowledge from multiple disciplinary practices.

Domestic HRM has had to evolve along with the global marketplace, as new employees such as expatriates, third-country nationals, host-country nationals and inpatriates have provided a plethora of new and often contradictory demands. SGHRM demands new research tools effectively to understand and evaluate this global phenomena. Exacerbating this trend is the predilection of Western researchers to continue using out-dated theories and methods to evaluate methodologically the global issues whose applicability is in doubt.

A mixed-method research stream is considered the most appropriate method to examine these new global issues in SGHRM. Unfortunately, both the time and the cost of this type of research are either prohibitive or frighten researchers who are on the 'tenure clock'. A combination of qualitative and quantitative through a mixed-method technique provides the researcher with the flexibility to adapt to uncertain global issues and the ability to delve deeply to discern the cultural, societal and institutional nuances present.

In essence, the uncertain global marketplace will only continue to grow and, along with it, the many issues for SGHRM. The human element in global organizations becomes increasingly important in this setting and both global co-ordination and control of their workforce will affect corporations' strategies. These global employees may also provide the necessary core competency with which to maintain global competitiveness. As SGHRM takes the forefront in corporate strategy and practitioners recognize the complexity of a global workforce, the mixed-method technique will be needed to develop both theoretical and practical global SGHRM applications.

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