

## Case studies in the retailer internationalization: a literature review

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### ABSTRACT

Research on retail internationalization (RI) has undergone an intense development phase since the 1990s, dominated by quantitative research and based on the retail experience of large-scale retailers formats such as supermarkets. However, the internationalization of the retail sector has evolved into areas that existing models have not been able to explain, generating a demand for more thorough research. The result has been an increase of articles published since the early 2000s based on research of an exploratory and qualitative nature, such as case studies. In this article, main contributions are identified in RI arising from case studies resulting from the selection and analysis of 48 articles published in academic journals between 2000 and 2015. As a result, relevant findings on the steps of the RI process are presented, such as input modes for franchise, international divestment, and characteristics of the RI process of specific types of firms, such as fashion retailers and small- and medium-size retailers.

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### 1. Introduction

Studies on retail internationalization (RI) began to emerge in the 1990s, marking the beginning of a prolific stage of development of knowledge and consolidation of research that today has its own body of theory (Alexander & Doherty, 2010). While part of the RI knowledge comes from concepts of international business that are strongly grounded in manufacturing activity, another part is from specific research on retail activity, whose specific demand—according to some authors—is the development of a body of theory (Alexander & Myers, 2000; Dawson, 1994, 2000).

Research on RI has gone through an intense phase of development in the past 20 years that is dominated by quantitative research (Swoboda, Zentes, & Elsner, 2009), which is in line with that

observed in the field of international business studies (Welch, Piekkari, Plakoyiannaki, & Paavilainen-Mäntymäki, 2011). However, several authors argue that the application of qualitative methods such as the case study (CS), is fundamental to the knowledge of idiosyncratic characteristics of cultures and countries as well as the exploration of specific issues such as divestment processes, instances of the same phenomenon occurring in many countries, and characteristics of emerging countries (Elg, Ghauri, & Tarnovskaya, 2008; Ghauri, 2004; Jonsson & Foss, 2011). CSs are also considered suitable for studies on retail activities and international services given the high degree of dependence that these activities have on contexts (Palmer & Owens, 2006).

Interestingly, despite the growing number of international brands that are opening mono-brand stores in various industries (fashion and luxury), for

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countries' retail scenario, including emerging countries (Deloitte, 2014), studies on RI are still heavily concentrated on large-scale retailers such as supermarkets and department stores (Gomes, 2016). Little, therefore, is known about IR firms whose main activity is the development of their own brands.

As a result of the peculiarities of RI, there is a demand in academia for research with more thorough methods (Alexander & Doherty, 2010; Moore, Doherty, Alexander, & Carpenter, 2010; Picot-Coupey, 2006). An increase in the number of articles published on RI from the 2000s, based on exploratory and qualitative research, has been seen (Alexander & Doherty, 2010) such as CSs.

This article identifies the main RI contributions of research using the CS method through a systematic review of the academic literature available between 2000 and 2015. From an academic perspective, the results of this paper create a starting point for scholars interested in RI as it identifies gaps in the literature of this field. From a management perspective, this article identifies a careful selection of CSs in RI whose learnings and conclusions constitute a valuable source of knowledge.

The article starts with a brief review of the evolution of RI literature, followed by a methodology used in the search and identification of CSs. Then, the results of the selected sample, organized by RI theme, are presented and discussed. Finally, we conclude this article with relevant contributions and identified gaps.

## 2. Literature review

International business literature has sought to explain the phenomena involved in the internationalization of firm processes, with a clear focus on manufacturing (Dawson, 1994). However, for some authors, the theoretical foundations of international business have not yet provided suitable models to understand RI strategies—such as geographic coverage, entry modes, and patterns of adaption to target countries—and therefore have based their studies, empirical findings, and theoretical framework from studies on retail (Alexander, 1990; Salmon & Tordjman, 1989; Treadgold, 1991).

Dawson (1994) warned that the field of international business has developed based on manufacturing firms and that adaptations of manufacturing concepts for retailers should be done

with some care, as there are several factors that differentiate these activities, such as economies of scale, degrees of geographical dispersion, exit costs, return rate on investment, and the importance of suppliers. Despite this warning, some authors resorted to prevailing international business theories—economic and behavioral approaches (see Carneiro & Dib, 2007)—in an attempt to explain the process of RI, such as the model proposed by Sternquist (1997), based on the eclectic paradigm (Dunning, 1988), and that by Vida and Fairhurst (1998), which considers the assumptions of the Uppsala model (Johanson & Vahlne, 1977).

The debate has involved three important issues in the construction of the RI theme: a) definition of the scope of activity, b) identification of elements that characterize a firm as an international retailer, and c) a specific research agenda.

The scope of RI includes the idea that while a manufacturing firm exports its products/brands to be distributed in foreign markets, a retail firm "exports" its own distribution activity (Burt & Mavrommatis, 2006). According Dawson (1994), RI is given in terms of visible and invisible dimensions. The less visible dimensions would be those related to the internationalization of financial investment and international purchases. In the visible, there is the transfer of management and technical knowledge through the establishment of stores in foreign markets. However, to characterize an international retail firm, some authors cite the presence of value chain elements involving non-domestic markets, as imports from other countries for distribution in the domestic market is not what characterizes an international retail firm (Sternquist, 1997). To be so, a retailer must have stores in foreign markets whose operations are under its management, excluding cases in which entry into overseas markets has been done through capital flows without any operational control (Alexander & Doherty, 2009).

The third theme, which addresses the importance of establishing a research agenda for the development of knowledge and consolidation of research, proposes the division of knowledge among the stages of the RI process, such as reasons for internationalization, target market selection, and operation patterns. Swoboda et al. (2009) catalog 105 articles published in international journals between 1990 and 2008 and grouped them into three themes: i) basic approaches, including

strategies and reasons for internationalization; ii) approaches to the market, which includes selection and market entry, operations, and management, and iii) performance and failure. The authors commented that the RI field is still young compared to international business as a whole and suggest research avenues in all subjects, especially studies on performance and divestment.

More recently, researchers have been facing difficulties in explaining RI from certain categories in which the brand itself is a determining factor in expansion strategies, such as fashion and luxury brands. This stems from the massive presence of research with large retailers such as supermarkets, which distribute several third-party brands (Gomes, 2016; Ilonen, Wren, Gabrielsson, & Salimäki, 2011). Although large retailers still arouse the curiosity of researchers, particularly for their economic importance in the international arena, fashion and luxury retailers have demonstrated large-scale international activity and attracted the attention of research groups looking to expand their expertise in the area (Arrigo, 2015; Doherty, 2009; Moore et al., 2010).

### 3. Methodology

Literature reviews are an important tool for academic activity, gathering information about what is already known and indicating new paths for research. In this study, we sought to identify the contribution of research supported by the CS method in the construction of RI knowledge through a review of academic articles published in English in scientific peer-reviewed journals between 2000 and 2015. Aiming to overcome some of the traditional review failures with respect to replication, a systematic review of literature was decided upon, adapted to the management field (Tranfield, Denyer, & Smart, 2003), in a two-step procedure, followed by classification and analysis. In the first stage, a search in the databases Ebsco, Web of Science, Scopus, and ScienceDirect (search terms: "international\*" and

"retail\*" for articles on RI, and "case stud\*" for articles that used CS method) was carried out, followed by a consultation of the articles' bibliographies. After repeated checks, a list of 193 articles on RI was generated. In the second stage, items were selected that deal with CS, resulting in 48 articles.

The choice to restrict this search to articles based on CS resulted from CS's contribution to the understanding of complex phenomena in the business environment, as they allow the observation of phenomenon in a natural and contemporary context. According to Yin

(2014, p. 14), "CS is a research strategy that best responds to questions like 'how' and 'why' in contemporary events," where the researcher has little or no control, and for which theory is incipient or scarce, which seems to be the case with RI. Among the 48 CS articles, both single and multiple cases were found. Single cases are considered relevant when they are critical, revealing, and allow for in-depth research, while multiple cases facilitate the construction of theory and allow researchers to extrapolate the results to other similar situations (Ghuri, 2004).

Articles were then analyzed and classified according to the main research themes of RI, according to the organization proposed in the RI literature review prepared by Swoboda et al. (2009): (i) motivations, (ii) strategy, (iii) selection and entry in markets, (iv) operating standards in markets (including learning and adaptation), and (v) performance (including divestment). In addition, for each article the following were examined: a) number of cases, b) unit of analysis, c) area of operation of the studied retail firms, and d) countries/regions of origin and destination.

### 4. Discussion and analysis of results

The articles selected are listed, grouped by thematic area, and briefly described in Table 1.

**Tab 1**

List of CSs in retail internationalization

Theme RI	Unit of Analysis	Results	Authors
Motivations	(N = 9), SMEs, England	Management features: Identification of objective factors such as contacts abroad and international experience, and subjective factors such as attitudes to risk by entrepreneurs.	(Hutchinson, Quinn, & Alexander, 2006)

	(N = 9), SMEs, England	global brand appeal, personal experience of the entrepreneur, and network relationships are facilitators of the motivation to internationalize	(Hutchinson, Alexander, Quinn & Doherty, 2007)
	(N = 6), SMEs, England	Internal and external barriers to internationalization related to (i) management—lack of vision, fear of loss of control, and lack of knowledge; (ii) company—transfer of the retail concept for other countries, lack of resources, and lack of consolidation in the domestic market; and (iii) the foreign market—law, currency, cultural differences, and logistics. Negative perception of government support to overcome these barriers.	(Hutchinson, Fleck, & Lloyd-Reason, 2009)
	(N = 8), SMEs, England	Internal and external barriers are inhibitors of international SME expansion. It points out some ways to overcome these barriers, especially for the luxury market and strong brands.	(Hutchinson, Quinn, Alexander, & Doherty, 2009)
	(N = 4), fashion, Turkey	Retailers of emerging countries are late entrants and internationalize because of a lack of opportunities in the domestic market	(Eren-Erdogmus, Cobanoglu, Yalcin, & Ghauri, 2010)
Strategy	(N = 3), supermarkets, England	Internationalization causes changes to corporate brand strategy	(Burt & Sparks, 2002)
	(N = 5), fashion, England	Identification of dynamic capabilities in RI: first level, such as learning and entrepreneurial orientation; and second level, such as brand building, store management, and channel management.	(Frasquet, Dawson, & Mollá, 2013)
	(N = 9), SMEs, England	In addition to a strong brand image, firms choose to expand domestically and internationally at the same time and are vertically integrated.	(Hutchinson & Quinn, 2011)
	(N = 4), mixed, Europe	Model expansion of manufacturing retail strategy based on sales (outsourced distribution) vs. brand (own distribution)	(Ilonen et al., 2011)
Entry	(N = 6), franchises, fashion, England	Factors in the choice of franchise: organizational (international experience, resources, franchised brand, influence of managers) and environmental (opportunistic approach, target market complexity, domestic competition, availability of partners for franchising).	(Doherty, 2007b)
	(N = 6), deductibles, England	Selection of international franchisees: strategic (market selection precedes selection of partners) and opportunistic (partner selection precedes market selection) behavior.	(Doherty, 2009)
	(N = 3), mixed, England	To mitigate risks and accelerate learning, the firm establishes partnership networks in local markets and maintains centralized coordination.	(Girod & Rugman, 2005)
	(N = 4), mixed, England	Cultural distance, lack of information, the importance of local networks, and reputation of the country lead to firm market resistance and the option of joint ventures.	(Palmer, Owens, & De Kervenoael, 2010)
	(N = 6), fashion, France	Indication of various entry modes used by fashion retailers in internationalization, from the opening of stores, sales through multi channels, to the use of shop-in-shop.	(Coupey-Picot, 2006)

	(N = 13), private label retailers in various categories	The implementation of temporary stores allows one to test and adapt operations to the target market of consumers, develop and sustain the brand itself, and develop network relationships with multiple stakeholders.	(Picot-Coupey, 2014)
	Ikea Sweden furniture,	Entry into Russia/China: Recognition that there are different actors in networks and that there are different types of management for each market entry phase.	(Elg et al., 2008)
	(N = 6), luxury retailers	The presence of various luxury brand concept store clustered in urban spaces endows the space with a "sense of luxury." Therefore, locating flagship stores of competing brands is a co-branding activity.	(Arrigo, 2015)
Operation	(N = 20), luxury retailers	Luxury retailers chose to enter into agreements with exclusive distributors and set up stores, chose emblematic places such as hotels and shopping malls, and invested in continued growth in order to increase market presence.	(Bonetti, 2014)
	Day, Spain supermarket,	Comparing the perception of store image among consumers of the country of origin and country of destination (Greece): Although the perception is different between countries, the store is perceived similarly in relation to local competitors.	(Burt & Mavrommatis, 2006)
	(N = 13), fashion retailers	Identifies three types: a) "glocal"—much internationalization and a high share of direct retail, b) hybrid—internationalization is not directly related to direct retail, and c) directing style—little internationalization and a low share of direct retail.	(Caniato, Caridi, Moretto, Sianesi, & Spina, 2014)
	(N = 6), franchises, fashion, England	Association of the relationship between franchisor and franchisee in the process of "marriage," involving recognition of the need, evaluation, and attraction of a partner.	(Doherty & Alexander, 2004)
	(N = 6), franchises, fashion, England	Contracts are not the only way to control RI franchises. The retailer can exercise control through selection and the relationship with franchisees on the basis of trust and establishment of master-franchisees	(Doherty & Alexander, 2006)
	(N = 6), franchises, fashion, England	Support mechanisms in the franchised network. Conceptual model offers two levels of support: strategic management (planning, market analysis, financial monitoring) and operational support (store opening, training, marketing).	(Doherty, 2007a)
	Home Depot, USA bricolage,	Entry into Canada affected competitors and consumers have adopted a new retail style	(Hernandez, 2003)
	Debenhams, dept. store, England	It describes the details of entry and operation in culturally distant markets (the Middle East) and the role of local partners	(Jones, 2003)
	Ikea Sweden furniture,	The importance of learning (in Russia): Knowledge about the market varies with entry phase and operation. Learning process models should be expanded.	(Elg & Jonsson 2006)

	Ikea Sweden	furniture,	"Forward," back, side, and learning between headquarters and subsidiaries accelerate learning processes (operations in China, Japan, and Russia)	(Jonsson, 2008)
	(N=10), Europe/USA	fashion,	Conflict resolution in chains: Coercive tools of control do not apply to retail fashion because store team participation is essential in brand development.	(Moore, Birtwistle, & Burt, 2004)
	Tesco hypermarket, England		Learning is facilitated by uncertainty and shocks in the international market, inhibited by the size of the domestic market, and does not necessarily occur in stages	(Palmer, 2005)
	Wal-Mart hypermarket, USA		Learning from the reaction of competition to the new entrant in an emerging market (Brazil).	(Rock & Dib, 2002)
	Tesco hypermarket, England		Despite cultural differences, market orientation in adapting mixed marketing to emerging countries (Eastern Europe) has a correlation with performance	(Rogers, Ghauri, & George, 2005)
	Tessiform, Italy	fashion,	Reorganization of relationship networks to better support international operations (China)	(Guercini & Runfola, 2010)
Performance	Zara, Spain	fashion,	Success in RI stems from the sharing of knowledge in the international chain, including the store, and the advantages of vertical integration. Initial expansion was followed by psychic distance, but acquired learning was a barrier that was quick to overcome	(Bhardwaj, Eickman, & Runyan, 2011)
	Fallabela, store, Chile	dept.	Resources and expertise of the Chilean retailer in establishing partnerships, innovation, capability for learning, and adaptation are key to an expansion in Latin America.	(Bianchi, 2009)
	Fallabela, store, Chile	dept.	RI of the Chilean retailer was validated by complying with social standards in markets based on entry into social networks, organizational learning, and knowledgeable teams.	(Bianchi, 2011)
	Carrefour hypermarket, France		Reasons for operational success in Brazil: Organizational skills and culture offer advantages related to shop format, location, and consumer relationships.	(Diallo, 2012)
	Zara, Spain	fashion,	Determinants of RI success: internationalization initially in stages, driven by growth restrictions in the domestic market and international opportunities. Vertically integrated and focus on shop image	(Lopez & Fan, 2009)
	(N=2), England/USA	fashion,	Brand strength, exclusive distribution management, and careful control in aligning retail operations with brand image are determinants of RI performance.	(Moore & Wigley, 2007)
	(N=2), England/USA	fashion,	Runs through several stages of the internationalization process and contributes to "proactive opportunistic" and "reactive opportunistic" typologies. It identifies the strength of the brand and the distinctive quality of the products as key success elements in RI	(Wigley, Moore, & Birtwistle, 2005)

	Per Una, fashion, England	Success stems from monitoring the perceptions of consumers in the target market (brand, price and product) while maintaining a consistent global policy. Demands initiative strategies of the headquarters, but tactical adjustments for franchisees in the target market	(Wigley & Chiang, 2009)
Divestment	(N = 2), fashion, England	Identifies stages of the divestment process and views franchises as permanent alternative markets	(Alexander & Quinn, 2002)
	Home Depot, bricolage, USA	international firm divestment in Chile as a result of inadequate institutional target market rules	(Bianchi & Arnold, 2004)
	(N = 4), supermarket/shop depot., Europe/USA	Divestment of international retailers in Chile. Foreign firms must meet institutional standards of the target markets and gain legitimacy in society to succeed.	(Ostale & Bianchi, 2006)
	Marks & Spencer, dept store., England	Reasons for divestment in various markets: lack of an overall strategy for internationalization, firm differentials in the country of origin were not perceived at the destination, the absence of adequate control systems.	(Burt, Mellahi, Jackson, & Sparks, 2002)
	(N = 1), fashion retailer unidentified, England	Divestment is impacted by corporate culture, stability in the domestic market, the general perception of the performance of internationalization, new management and input mode. Changes in management are an important condition for divestment.	(Cairns, Marie Doherty, Alexander & Quinn, 2008)
	(N = 7), mixed, England	Divestment as a result of corporate crisis, internal restructuring, change of focus, or as a result of a positive restructuring of the firm, such as the reorientation of international vs. domestic strategy.	(Cairns, Quinn, Alexander, & Doherty, 2010)
	Ahold, hypermarket, Netherlands	Divestment is a multidimensional construct and involves reactions to changes in target markets and/or is the result of strategic decisions. Moreover, decisions vary in different markets.	(Palmer & Quinn, 2007)
	Marks & Spencer, dept. store, England	Strategic decisions and internal crises, coupled with crisis in the target market, led to failure in Hong Kong. The firm learned that adaptation and knowledge occur in reciprocity between the firm and subsidiary. Divestment occurred with a change of operating mode (franchise).	(Jackson & Sparks, 2005)

**Source:** Prepared by the authors

#### 4.1. Description of the sample

In Table 1, note the prevalence of retail studies from developed markets, accounting for 45 of the 48 analyzed articles—and especially the UK, with 24 articles, followed by other European countries. It is interesting to see a low number of studies from US firms and leadership of studies with European firms, as already pointed out by Alexander and Doherty (2010). Only three articles carried studies on the internationalization of retailers originating from emerging countries. A total of 29 articles did not

specify the destination market, but a greater participation of emerging markets in 12 articles is noted.

The articles selected in the sample were published in 29 different journals. There is, however, clear leadership from the journals *International Journal of Retail and Distribution Management* and *The International Review of Retail, Distribution and Consumer Research*, where 11 articles were published in each journal from a total of 48.

**Tab. 2**  
Countries and regions involved in the articles

Countries / Regions	Markets	
	Source	Destiny
Developed	45	7
England	24	1
Europe-others	15	4
USA	3	0
Several	3	2
Emerging	3	12
Chile	2	2
Turkey	1	2
Latin America	0	2
Middle East	0	1
Eastern Europe	0	1
Asia	0	4
Several (unspecified)	0	29
<b>Total</b>	<b>48</b>	<b>48</b>

Source: Prepared by the authors

In Table 3, there is a certain balance between single case and multiple case studies with 21 and 27 articles respectively (among the 48). Regarding the type of retailer firm studied, 18 articles studied large-scale retailers such as supermarkets and department stores, and 15 articles studied fashion retailers (including luxury retail). Retailers, small franchises, and small- and medium-sized enterprises (SMEs) have been the subject of five studies each.

Regarding the themes studied, the sample was classified according to the model used by Swoboda et al. (2009), where RI articles are classified into six

**Tab. 3**  
Type of retailer studied in articles

Retail type	Case study	
	Multiple	One of a kind
Large	2	16
Fashion	10	5
Franchises	5	0
SMEs	5	0
Several	5	0
<b>Total</b>	<b>27</b>	<b>21</b>

Source: Prepared by the authors

thematic categories—namely, motivations, strategies, entry modes, operations, performance, and divestment—seeking patterns for comparative analysis.

**Tab. 4**  
RI Themes addressed in the articles selected

Themes in RI	Study Sample		Case Studies of RI Sample	
	Swoboda et al. (2009)			
Motivations	14	13%	5	10%
Strategy	13	13%	4	8%
Entry mode	34	33%	7	15%
Operations	17	16%	16	33%
Performance	13	13%	8	17%
Divestment	13	13%	8	17%
<b>Total</b>	<b>104</b>	<b>100%</b>	<b>48</b>	<b>100%</b>

Source: Elaborated from Swoboda et al. (2009)

Table 4 shows, for RI themes, the distribution of the study sample of Swoboda et al. (2009)—which includes quantitative and qualitative research, with a predominance of the first—and the distribution of our sample. In the study of Swoboda et al. (2009), there is a balance between surveyed RI themes, especially only for those involving RI entry modes, with 33% of the sample. In the sample of this research, note the prevalence of IR case studies dealing with target markets—represented by studies on the adopted operation patterns in these markets— with 33% of the sample, and studies performance and divestment, with 17% of the sample for each subject. The greater relevance of the thematic areas identified in our sample reflects the authors’ interest in RI, searching to deepen knowledge of the stages of the process and the construction of new theories (Alexander & Doherty, 2010; Picot-Coupey et al., 2014; Swoboda et al., 2009).

#### 4.2. Analysis of RI themes

##### 4.1.1 Motivations

Research on motives for RI were concentrated in firms that face barriers to internationalization, namely SMEs and firms coming from emerging countries.

Hutchinson and colleagues led a research group on the internationalization of SMEs. Among the findings, it was identified that SMEs’ motivations are influenced by subjective factors—such as the personal experience of entrepreneurs and attitudes toward risk (Hutchinson et al., 2006), and objective factors—such as the role of networks relationship



abroad (Hutchinson et al., 2007) and the international experience of entrepreneurs (Hutchinson et al., 2006). In addition, for SMEs that have their own brands, international brand image is the main motivation for internationalization and can be a way to overcome barriers to internationalization (Hutchinson, Quinn et al., 2009).

In a study on emerging country retailers, Eren-Erdogmus and colleagues (2010) found that the main motivation for the internationalization of Turkish fashion retailers—who are late entrants in international markets—was a lack of domestic growth opportunities.

#### 4.1.2 Strategy

In studies on strategy, the elements that could affect internationalization arising from specific types of retailer firms were highlighted. In fashion RI, findings converged for two important elements in international expansion: brand building and store chain management (Frasquet et al., 2013; Hutchinson et al., 2007.).

For manufacturing retailers, a pattern in the establishment of their international distribution was identified. While distribution through third parties aims to increase sales coverage, distribution through mono-brand stores is focused on spreading the brand and delivering a complete customer experience (Ilonen et al., 2011).

For multi-brand retailers such as supermarkets, brands are not associated with the products but the corporation itself. Burt and Sparks (2002) pointed out that internationalization is able to change corporate brand strategy, considering that perceptions in foreign markets cannot be similar to that in the domestic market. Thus, a retail corporate brand strategy with values that have appeal in many markets is a prerequisite for international operations.

#### 4.1.3 Entry into new markets

On the theme of entry into international markets, issues related to the perception of risk and the cost of commitment decisions and control were addressed in relation to the scale of risk, cost, and entry mode controls in RI. Here, organic expansions are at the top of the scale and, at the other end are franchises, while joint ventures have a level immediately below organic growth.

Franchises were thorough studied by Doherty in his work on UK fashion retailers. According to Doherty (2007a), the choice to franchise as an entry mode requires some preconditions, and not just a decision about risk and cost. This option is due to a combination of organizational factors—such as the international experience management, a brand that can be franchised, and environmental factors—target market complexity, and the availability of partners to franchise in the target market. The author pointed out that a firm adopts strategic behavior when deciding to enter a market after choosing local partners. Otherwise, their behavior is opportunistic and subject to greater risk (Doherty, 2009).

In a study by Picot-Coupey (2006), the author pointed out that fashion retailers have more flexible entry options than traditional retailers and that the entry mode depends on destination country characteristics and the speed desired for expansion. In addition, unlike other traditional retailers, fashion retailers and other sectors with their own brand, such as furniture, can choose previous entry modes when establishing stores chain and wholesales in destination countries, showing similarities to manufacturing firms (Ilonen et al., 2011). They can also, like other firms, establish franchises and chains of stores operated by themselves or by regional partners. This implies a sophisticated channel management, a capability little addressed in the RI literature, and is also characteristic of manufacturing firms.

Networks in target markets influence entry into new markets. In a study by Girod and Rugman (2005), the establishment of partnerships in target markets can mitigate risk and accelerate learning. In a specific study on Ikea, Elg et al. (2008) identified the existence of different actors in social networks in the target market with varying degrees of importance according to the stage of the entry process. According to the authors, identifying these actors and managing them differently promoted a smooth entry for Ikea into Russia and China, which are complex markets that are culturally distant from that of the Swedish firm.

Palmer and Owens (2006) contributed to RI entry mode knowledge by studying the choice of joint ventures. Although it is often justified through the advantage of sharing resources, it can also be adopted to mitigate cultural distance and gain time in learning, contributing to a more focused view than the exploitation of resource sharing.

#### 4.1.4 Operations

Studies on operation standards respond to questions regarding the marketing mix adopted by firms in the target market and learning arising from international experience—those specific to a particular market, installed competition, and those that affect firm internationalization processes (Swoboda et al., 2009). The adaptation of the marketing mix to the target market is considered a key element in retail operations of supermarkets in the selected studies (Burt & Mavrommatis, 2006; Rogers et al., 2005). However, the debate extends when it comes to fashion or luxury retailers, whose standardization is considered as a main competitive advantage in international markets (Ilonen et al., 2011; Moore et al., 2000; Wigley & Chiang, 2009).

Regarding the control of operations in target markets, Doherty and Alexander

(2006) developed a theoretical framework for international franchising based on the relationship between franchisors and franchisees. The authors emphasize that coercive methods (contracts) are ineffective in such scattered and distant markets and that non-coercive methods based on support and monitoring should take precedence. Therefore, firms must have sufficient organizational structure and be qualified to manage an international network, with strict criteria for selection of new franchisees, analogizing a wedding (Doherty & Alexander, 2004).

Learning derived from Ikea's international expansion was the stage for studies on learning where Jonsson and Elg (2006) found that knowledge of the target market varies according to the stage of entry and operation so that the learning process models should be expanded to better explain the performance of firms in RI. In another study on Ikea, Jonsson (2008) pointed out that "forward" (headquarters to subsidiary), reverse (subsidiary to headquarters), and lateral (between subsidiaries) learning were able to accelerate firm learning processes in RI. Social networking also appear as fundamental in the learning process, as in the study of a Italian fashion retailer launching in China (Guercini & Runfola, 2010), where the retailer was forced to reorganize its networks—including those in its country of origin—to operate properly in this market.

Regarding the impact of international retailers operating in target markets, two selected CSs have

opposite results. While Rocha and Dib (2002) reported that Wal-Mart's entry into Brazil contributed to changes in the operating pattern of domestic retailers and the incoming firm was a target of retaliation, Hernandez (2003) depicts Home Depot and its innovative format in Canada as having good consumer acceptance and natural accommodation by competitors.

#### 4.1.5 Performance

The performance of retailers is analyzed in CSs from the perspective of success and divestment, which may occur because of failure or strategic decision.

Analyzing the success of fashion retailers, salient elements relate to brand strength and established value chains, including distribution channel decisions (Wigley et al., 2005; Wigley & Moore, 2007), RI elements that are little studied in the literature because they are normally associated with manufacturing firms. However, the fashion segment is characterized by a high degree of vertical integration and so other value chain elements should be incorporated into models of retail operation internationalization, as demonstrated in the case of Zara (Lopez & Fan, 2009). For CSs on Italian fashion retailers, Wigley and Chiang (2009) concluded that the international success of firms were due to the monitoring of perceptions of consumers in the target market on brand, price, and product, maintaining a consistent global policy. The authors contributed to the standardization vs. adaptation debate in order to indicate that franchises in target markets can take tactical actions, if approved by the headquarters. In contrast, in the case of Carrefour's operations in Brazil, Diallo (2012) indicated that its success was the result of marketing mix adaptations and the international orientation of staff to the local culture.

Success in the international expansion of emerging retailers was described by Bianchi in two longitudinal CSs that revealed the resources and capabilities used by an emerging country firm—Fallabela, from Chile—to compete with retailers from developed countries located in the target market. In the first study (Bianchi, 2009), the reasons for the firm's success are considered in existing theoretical models on the benefits of ownership, organizational learning, and expansion to neighboring countries (Sternquist, 1997). In the subsequent study, Bianchi (2011) added that, to know and respect the social norms of destination countries, the retailer would

have to, successfully, level with their American and European competitors installed there while not enjoying the same advantages of origin. With this, the author sought to demonstrate that the principles of institutional theory should be considered in the RI models, especially in emerging countries. The lack of compliance with institutional standards of target markets seems to have been the predominant reason to explain the failure and consequent divestment of large interactional retailers from developed countries in Chile, as in the case of Home Depot and others (Bianchi & Ostale, 2006).

Bianchi also contributed to knowledge of emerging market firms' RI by highlighting two factors for the success of the Chilean firm Fallabela when expanding in Latin America. The first refers to resources and organizational skills as guidance for innovation and the ability to learn and adapt in accordance with the tradition of resource-based view. The second attributes success to social legitimacy achieved in target markets.

Finally, clashes with international business theories contributed to highlight the specifics of RI. In the study of the British supermarket Tesco, Palmer (2005) found that its international expansion did not occur incrementally, as recommended by the Uppsala model (Johanson & Vahlne, 1977), but—on many occasions—the company opportunistically chose to expand into markets where there was available space and consumers, in line with the locational advantages defended by the eclectic paradigm (Dunning, 1988). The case also shows that the learning resulting from internationalization was not assimilated by the firm to address future actions. In a study on the success of the Spanish fashion brand Zara (Lopez and Fan, 2009), the expansion of the retailer seemed to follow the Uppsala model (Johanson & Vahlne, 1977) since it initially entered into psychically close markets and later expanded into more distant countries. However, its rapid and extensive international expansion, fueled by an effective production chain and brand image, also finds explanation in the advantages of ownership, according to Dunning's (1988) eclectic paradigm.

#### 4.1.6 Divestment

Divestment is still little studied in the RI literature, according to some authors, because of its multifaceted, complex nature and also the difficulty of obtaining primary information (Alexander &

Doherty, 2010). However, it has received important contributions from CSs, which are the predominant method in this thematic RI area. Despite the absence of robust models, some findings gained consistency in CS as antecedents of divestment.

Divestment may happen as a reaction to changes in target markets, changes in the domestic market, or as a result of strategic and organizational changes in firms (Cairns et al., 2008; Palmer & Quinn, 2007). Failure to establish an appropriate organizational structure to operate internationally has been identified as a precursor to the massive divestment of Marks & Spencer in several markets during the 1990s (Burt et al., 2002). However, divestment does not necessarily mean exiting a target market or changes to operation modes as the establishment of franchises to replace the stores represents an alternative permanence in the market (Alexander & Quinn, 2002).

## 5. Conclusions

Despite having limitations, CS application in the investigation of phenomena related to RI has contributed relevant theoretical elements in understanding processes. Especially in international business, the influence of context on the phenomenon, given the diversity of countries, cultures, and historical situations involving internationalization processes, indicates CSs as a key method for understanding the complexity surrounding RI processes (Piekkari, Welch, & Paavilainen, 2009).

Based on this research, it is concluded that CS application in RI has contributed much to knowledge of the specific phenomena of retailers, their idiosyncrasies, as well as in the building of new theory applicable to different retail formats—such as deductibles and SMEs— whose internationalization process takes on a different basis from that observed for traditionally surveyed retailers like supermarkets.

However, there are still many avenues for further research and deepening of the above CS findings in RI with respect to: a) international retailer divestment; b) retail segments that exclusively use their own brand, such as fashion and luxury goods; c) retailers from emerging countries; and d) the role of social networks in RI. Regarding this last item, it was interesting to note that the use of social networks in RI can facilitate entry and expansion in destination markets and accelerate learning about target

markets, especially those with larger cultural distances from developed markets, as observed in several studies on Ikea, which was analyzed here.

This systematic review of literature thus contributes to academic and management knowledge, providing a starting point for scholars interested in RI, showing some gaps in academic knowledge, as well as giving real CSs with their learnings and conclusions forming a summary for firm management staff.

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# Estudos de caso na internacionalização varejista: uma revisão de literatura

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DETALHES DO ARTIGO	RESUMO
<p><b>Histórico do artigo:</b>            Recebido em 02 de outubro de 2015            Aceito em 20 de janeiro 2017            Disponível online em 30 de abril de 2017</p> <p>Sistema de Revisão “Double Blind Review”</p> <p><b>Editor científico:</b>            Ilan Avrichir</p> <hr/> <p><b>Palavras-chaves:</b>            Internacionalização de Varejo            Estudo de Caso            Revisão de Literatura</p>	<p>A pesquisa em internacionalização varejista (IV) passou por intensa fase de desenvolvimento desde a década de 1990, dominada por pesquisas de natureza quantitativa e com base na experiência de varejistas de grandes formatos, como supermercados. Entretanto, a internacionalização do setor varejista evoluiu em bases que os modelos existentes não têm sido capazes de explicar, gerando uma demanda por pesquisas com métodos mais profundos de conhecimento. O resultado foi um aumento de artigos publicados desde o início da década de 2000 baseados pesquisas de natureza exploratória e qualitativa, como estudos de caso. Neste artigo, são identificadas principais contribuições no conhecimento sobre IV oriundas de estudos de caso, resultantes da seleção e análise de 48 artigos publicados em periódicos acadêmicos entre 2000 e 2015. Como resultado, são aqui apresentadas relevantes achados sobre etapas do processo de IV, tais como modo de entrada por franquia e desinvestimento internacional, e características do processo de IV de tipos específicos de firmas, tais como varejistas de moda e pequenas e médias varejistas.</p> <p>© 2017 Internext   ESPM. Todos os direitos reservados.</p>

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