**Paper type: General review**

**(RE)DISCOVERING SOCIAL IDENTITY THEORY: AN AGENDA FOR MULTINATIONAL ENTERPRISE INTERNALIZATION THEORY**

**ABSTRACT**

**Purpose:** Firminternalization is a central concept within the business strategy literature, as part of the broader social sciences. The purpose of this paper is to show *how* and *where* MNE internalization theory can benefit from a SIT perspective to better understand 21st century multinational enterprises (MNEs).

**Design/methodology/approach:** This paper provides a review and future research agenda for the use of SIT related to MNE internalization theory. We complement an evolutionary review of SIT literature with a systematic bibliometric analysis identifying specific thematic gaps. Extending Buckley and Casson’s review of and future research agenda for MNE internalization theory, we propose three specific future research directions along with 20 guiding research questions.

**Findings:** International business (IB) scholars are familiar with limited aspects of SIT and apply it only in certain research areas, mainly connected to human resource management and leadership, organizational identity and work-related outcomes or international marketing. Strategic management and strategy-related IB scholars are less familiar with SIT, despite growing interest in MNE micro-foundations and decision-making under uncertainty.

**Originality:** We position SIT as a natural meta-theoretical fit to MNE internalization theory. By providing a future research agenda along with 20 supporting research questions, we help to advance MNE internalization theory by linking individual, group and intergroup perspectives against a more socially nuanced, interactionist and dynamic view of MNEs and their decision making.

**KEYWORDS:** MNE internalization theory, social identity theory (SIT), review, research agenda, uncertainty

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**1. INTRODUCTION**

“Internalisation theory is, by its nature, comparative (internal versus external, location A versus location B)”(Buckley, 2014, p. 240).

Multinational enterprises (MNEs) are embedded firms that engage in internalization/externalization decisions and control value-adding activities in different locations (Buckley, 2016a). Born from economic theory (Casson, 2014), MNE internalization theory was developed by Buckley and Casson (1976) to explore endogenous MNE behavior against an exogenous environment (Buckley and Casson, 2020). However, the existence of MNEs remains a kind of tautological net result “when the benefits of internalization exceed the costs” (Buckley and Casson, 2020, p. 240). For example, this has obvious implications for how firm boundaries are understood, as economic and social boundaries may differ significantly and impact MNEs’ decision making.

We argue that the internal/external MNE balancing act is the precise reason why Tajfel and Turner’s (1979) social identity theory (SIT), with its focus on distinguishing in-groups from out-groups, can be applied to MNE internalization theory. We will show *how* and *where* MNE internalization theory can benefit from a SIT perspective and how SIT can help the decision-making process for internalization to “become a central concept in a true social science of business strategy” (Buckley and Casson, 2020, p. 250).

Yet, probing the inner workings of MNEs remains challenging (Buckley and Casson, 2019), regardless of the evolution of internalization theory (Buckley and Casson, 2020), recent advances in MNE micro-foundations (Foss and Pedersen, 2019) and research on politics of identity within and by MNEs (Vaara *et al*., 2019). Buckley and Casson (2019) have stressed the need to incorporate more sociological and psychological perspectives for the continued evolution of MNE internalization theory, for which greater attention needs to be paid to individuals and social interactionism (Buckley and Casson, 2020).

The distinction between the “internal” and the “external” perspectives on MNEs across various levels calls for a versatile and applicable meta-theory (Buckley and Casson, 2020),[[1]](#footnote-1) like internalization theory within the IB discipline (Buckley and Casson, 2020). As a social psychology meta-theory (Reese *et al*., 2019), SIT can guide IB research toward exploring social interactionism (Buckley, 2012; Buckley and Boddewyn, 2015; Buckley and Casson, 2020) and agency in MNEs (Buckley, 2014) as well as advance the exploration of society–economy interfaces (Buckley *et al*., 2017) at various organizational levels.

Our paper makes three contributions. First, we synthesize past and recent SIT literature relevant to IB scholarship, with a particular emphasis on how SIT is becoming increasingly relevant in the current global landscape, and provide a more socially and psychologically nuanced view of globalization within the IB discipline. Second, we look at areas where SIT has been predominantly applied within the IB sphere. With the help of bibliometric analysis, we identify thematic gaps, so-called “motors” and emerging themes when it comes to the use of SIT applied to IB phenomena. Third, we propose a SIT-informed research agenda focusing on MNEs and internalization theory. Here, we complement the recent overview and future research agenda laid out for MNE internalization theory by Buckley and Casson (2020).

**2. THE BIRTH AND EVOLUTION OF SOCIAL IDENTITY THEORY**

In this section, we provide an overview of Tajfel and Turner’s (1979) social identity theory (SIT), which is aimed at contextualizing SIT’s origins; summarize its evolution; and highlight contemporary developments indicating potential future applications. This section follows the historical-contextual approach taken up by Buckley and Casson (2020), which showed the versatility and robustness of MNE internalization theory as a general IB theory of MNEs. We argue that the evolution of SIT – from examining out-group degradation to in-group distinction to addressing issues of collective behavior and social change in the face of uncertainty – can provide the basis for informing new areas of research, including on MNEs and their internalization processes.

**2.1 Understanding the origins of social identity theory**

As “a social psychological theory of intergroup relations, group processes, and the social self” (Hogg *et al*., 1995, p. 259), SIT is associated with the European school of social psychology. It emerged from a distinct theoretical interest in the broader contextualization of social behavior after WWII (Hogg *et al*., 2004). Its origins can be traced to the early works of Henri Tajfel on the accentuation of perceptions behind social categorization processes in the 1950s, followed by his work on the cognitive background of prejudice in the 1960s, minimal (social) categorization in the early 1970s and social comparison within groups in the mid-1970s.

At first, Tajfel focused on explaining prejudice, conflict between groups and discrimination based on out-group degradation (Turner, 1996). This work was consistent with the socio-political movements of the 1950s and 1960s. Socio-political turmoil has continued to motivate SIT’s evolution, especially in terms of deepening our understanding of collective action, social change and extreme behaviors (Hogg *et al*., 2017; Hogg, 2019; Choi and Hogg, 2020a). In the early 1970s, Tajfel’s interest in complex social-categorization processes supplanted his focus on out-group degradation. This led to the articulation of SIT we know today, in collaboration with John Turner (1979), which was later continued by Michael Hogg and Dominic Abrams after Tajfel’s death in 1982.

 Tajfel’s (1972) definition of social identity was clearly shaped by social interactionism. Later, Tajfel (1974) sought to explain how the pursuit of one’s individual and social identities is a function of their beliefs about the nature of the underlying inter-group relations related to status, legitimacy and temporality. At roughly the same time, Turner’s (1975) work on social categorization and comparative in-group/out-group classification started to connect with Tajfel’s work. By the end of the 1970s, SIT emerged as a fully articulated theory (Tajfel and Turner, 1979). At the about the same time, Buckley and Casson’s (1976) MNE internalization theory started taking shape, and like SIT, it has continued to evolve with the changes in the socio-economic and political landscape (Buckley and Casson, 2020).

In the 1980s, the legacy of Tajfel’s work developed into the establishment of self-categorization theory (Turner *et al*., 1987), which explains a group’s social identity formation. It extensively drew on Turner’s work on social categorization (1975) as well as his subsequent work on social influence processes (1982) and self-categorization (1985). By the end of the 1980s, Hogg and Abrams (1988) integrated the various theoretical spin-offs into an expanded version of SIT. Despite these developments, when IB scholars refer to SIT today, they mostly refer to Tajfel and Turner’s (1979) seminal work and most often reduce it to in-group/out-group behavior processes. IB scholars less often draw on the expanded meta-theoretical framework subsequently articulated by Tajfel and Turner’s students, particularly by Michael Hogg, which has increasingly focused on uncertainty.

**2.2 Evolution of social identity theory**

After Tajfel’s death, SIT continued to evolve, and its interest shifted from out-group degradation towards in-group distinctiveness. This can be seen in the body of work published throughout the 1990s and early 2000s, echoing a shift in the socio-cultural and economic issues within global society, in which globalization started to profoundly reshape modern social identities (Giddens, 1991). According to Hogg *et al*. (1995), SIT draws on two crucial socio-cognitive processes: *categorization* (by extenuating intergroup boundaries) and *self-enhancement* (linked to favorable self-evaluation through positive in-group stereotyping and norms relative to the out-group). Self-enhancement should be theoretically distinguished from identity *validation*, which is related to the external recognition and acceptance of an in-group, in rare cases also by an out-group (Choi and Hogg, 2020b). By the mid-1980s, Turner (1985) expanded his prior view of social categorization by introducing the concept of self-categorization. Abrams and Hogg (1988) further formalized their *self-esteem hypothesis* based on Turners (1982) earlier work, which has remained a central tenet of SIT since the 1980s.

The self-esteem hypothesis is part of SIT in two ways. First, it can be seen as a dependent variable – a product of enhanced social identity based on positive distinctiveness and intergroup discrimination. Second, it can motivate intergroup discrimination in threatened social identity and eroded self-esteem, thus also acting as an independent variable (Abrams and Hogg, 1990). In addition, the “mechanics” of self-esteem related to intergroup processes depend on five factors (Oakes *et al*., 1994): (1) the degree of identification with the in-group, (2) the salience of the underlying social categorization, (3) the importance of the comparative dimension to overall identity, (4) the degree of comparability between the groups on selected social characteristics, and (5) the relative status of the in-group (vis-à-vis overall status differences between the groups). This stream of research shaped the evolution of SIT in the 1990s, leading to a typology of various self-esteem types, which has seldom been explored by IB scholars (Rubin and Hewstone, 1998):

* *Global* vs. *specific* self-esteem: relating to an overarching concept of self-esteem (e.g., being “good”) or a particular view of oneself (e.g., being a victim of history).
* *Trait* vs. *state* self-esteem: relating to more enduring (e.g., a leader of the free world) or more transient views based on recent present (e.g., an emerging market with the right to catch up).
* *Personal* vs. *social* self-esteem: relating to one’s inner view of oneself (also connected to the roles one plays), as compared to one’s outer understanding of oneself (as recognized by society).

Michael Hogg’s (2006) work remains particularly relevant for this period, laying the groundwork for a typology of three key motivational mechanisms associated with SIT: (1) self-enhancement, (2) optimal distinctiveness and (3) uncertainty reduction. The first two are closely interrelated and are considered by some as a common motivation mechanism (Rubin and Hewstone, 1998). The latter builds on the motivational role of group identification and validation in reducing uncertainty (Choi and Hogg, 2020a).

Brewer (1991) linked optimal distinctiveness with the process of striking a balance between the need to be included and “part of something” (achieved through group membership and linked to social self-esteem) versus maintaining one’s autonomy and uniqueness (achieved through individuality and linked to personal self-esteem). This was used as an alternative motivational explanation, which replaced SIT’s earlier emphasis on intergroup competition for status being linked to *positive* distinctiveness (Hogg *et al*., 2017). It is important to highlight the difference between “positive” and “optimal” distinctiveness, as the two terms are often mistaken and used interchangeably. The former uses out-group discrimination to elevate the in-group, while the latter focuses more on the in-group and on striking a balance between the individual and the outside world.

By the 2000s, Hogg’s incorporation of uncertainty reduction extended SIT into uncertainty-identity (U-I) theory (Hogg, 2000; Hogg, 2007). Seen as an “epistemic motive” linked to social categorization (Hogg, 2006, p. 120), the general premise of U-I theory is that so-called subjective uncertainty (related to one’s self, relational self or even collective self) can be reduced through group identification and validation (Choi and Hogg, 2020b). However, the reduction of uncertainty through group identification also depends on one’s group status, with highly self-certain individuals being selective and identifying only with high-status groups (Hogg, 2006). This research stream, led by Michael Hogg, has applied the theory to explore extreme and populist behavior (e.g., Hogg, 2019; Hogg, 2014; Hogg, 2019) as well as social change (Hogg *et al*., 2017).

In many ways, the transformation of SIT since the 1990s has mirrored the changing nature of globalization, with its various transformations and identity crises (Giddens, 1991; Reese *et al*., 2019). For example, as the external environment became more volatile, uncertain, complex and ambiguous (i.e. the VUCA-type world) (van Tulder *et al*., 2020), the explored motivational mechanisms captured by SIT also started to expand. This co-evolution of the two fields prompts us to understand globalization in more social psychology terms today within IB (Witt, 2019), where *identity* features prominently (Fukuyama, 2018).

All this explains why we can more easily incorporate SIT today into our understanding of MNEs than we could 40 years ago, when the lines between endogenous firm behavior and exogenous environmental forces were clearer and artificially drawn based on the legacy of the economics discipline (Buckley and Casson, 2020).

For example, a recent critical-discourse paper by Vaara *et al*. (2019) examined the concept of identity politics within management studies. This work positioned national identity as a concept independent from culture within the expanding literature on diversity management. However, the authors limited themselves only to national identity and focused on MNEs as *sites* for identity politics, *actors* in identity building and reinforcement, *stakeholders* within international relations and as *agents* in broader social issues driving social change. While ground-breaking in many ways, their focus on MNEs as political organizational spaces and social actors draws on SIT but from the perspective of politics of power. Within this approach, MNEs are seen as highly political organizational landscapes and complex social spaces with intersecting identities (Vaara *et al*., 2019).

**2.3 Recent development and applications of social identity theory**

The scope of SIT has continuously expanded over time. It has started to address social motivations and inter-group relations (especially conflict) as well as inter-group emotions (e.g., in terms of investing in one’s social identities). SIT has also become increasingly relevant for exploring social harmony and development, collective behavior (i.e., populism and extremism), social protest and social change and the resolution of social dilemmas (Hogg *et al.*, 2017).

For example, in *Scientific American*, Hogg (2019) attributed rapid and overwhelming change, the proliferation of “fake” information and post-truth-type arguments, the ubiquity of social media and the proliferation of various online ecosystems in which extremist groups can thrive to a growing sense of self-uncertainty. Such uncertainty feeds a motivation for identification and the pursuit of validation through seeking affiliation with entitative groups (distinct groups with clear boundaries and norms), which are often extremist in nature and have strong prototypical leaders. Membership in such entitative groups helps to reduce self-uncertainty through depersonalization (e.g. following clear norms) and in-group validation (Choi and Hogg, 2020a).

Since its origin two decades ago (Hogg, 2000), U-I theory has evolved “to explain radicalization, populism, social disintegration, and extremist group behavior” (Choi and Hogg, 2020a, p. 483). It has also shed light on the promotive and preemptive types of identification with entitative groups. U-I theory can also lend itself to a more nuanced understanding of globalization and MNEs. For example, it can help to explain how globalization-induced transformations of identity (Reese *et al*., 2019) create a greater sense of self-uncertainty, which leads individuals to seek validation through entitative groups. This challenges our view of uncertainty as an exogenous environmental variable and shows how it can also become an endogenous aspect of our understandings of globalization (Witt, 2019) and decision making (Buckley and Casson, 2019).

Building on Brewer and Gardner’s (1996) typology of the individual, relational and collective self, collective self-uncertainty is the strongest driver of group identification and uncertainty reduction through validation (Choi and Hogg, 2020a). According to Choi and Hogg (2020a), different social contexts (i.e. caused by rapid social mobility within a society through growing inequality), rapid technological and social changes and economic and political crises further exacerbate one’s sense of uncertainty, which is not necessarily linked just to the individual, their relationships or the collective but can also become part of the broader social climate and environment (Choi and Hogg, 2020a). As Buckley and Casson (2020) call for more “emphasis on the individual” and a need to become critical of “too much emphasis on the single representative actor, operating in isolation, whether they are an individual or a firm” (p. 242), these issues further open the door for leveraging SIT to gain a more theoretically nuanced understanding of MNEs.

**3. SOCIAL IDENTITY THEORY IN THE INTERNATIONAL BUSINESS LITERATURE**

Certain aspects of SIT have been well known within the broader management literature since the 1980s, particularly among scholars influenced by organizational psychology. These aspects include organizational identification, employee loyalty and turnover, leadership, trust and commitment, mergers and acquisitions, and management of diversity (Hogg *et al*., 2004). However, other aspects of SIT, such as self-categorization (Hogg and Terry, 2000) and a more recent focus on “uncertainty” with Hogg’s (2007, 2012) extension of SIT into U-I theory, appear to be less known to IB scholars.

The application of SIT to understanding intergroup dynamics, collective action and social change in the face of an increasingly VUCA-type world (van Tulder *et al*., 2020) can be particularly informative for IB research, particularly because of its direct relevance to managerial decision-making (Buckley and Casson, 2019). Just as the examination of MNEs has contributed to the wider management and organizational theory, so too can a more nuanced understanding of MNEs help to advance the social psychology and economic sociology literature.

**3.1 Application of social identity theory within the international business literature and a focus on multinational enterprises: a bibliometric science map**

Bibliometric analysis is used to examine the structure of a particular body of literature (Zupic and Čater, 2015) and to aid future research based on identified gaps (Rodríguez-Ruiz *et al*., 2019). We extracted papers written in English from the Web of Science (WoS) Core Collection database on July 15, 2020. We focused on the application of SIT within the areas of *business* and *management* (specific WoS literature categories) related to topical terms such as “multinational\*,” “international\*,” “global\*” and “regional\*.” The stars (\*) refer to any variations in the search terms, like “internationalisation” or “internationalization” to account for British and American spelling.[[2]](#footnote-2) In total, 273 papers were identified and provided the basis for our bibliometric analysis, which was performed in R Studio using the Bibliometrix library (Aria and Cuccurullo, 2017).

 The 273 papers were spread across 129 journals related to the business and management journal categories in WoS. They cover a period between 1996 and July 15, 2020. Publication output started increasing in 2011, when it reached double digits, and it peaked at 40 papers in 2019. This indicates that SIT has started to be extensively applied to IB contexts, particularly within the last decade. This is also consistent with a more nuanced understanding of globalization and its implications for social identity (Reese *et al*., 2019; Fukuyama, 2018).

The *International Journal of Human Resource Management* (IJHRM)and *Journal of International Business Studies* (JIBS) were the two most important publication outlets, with 13 papers using SIT each. This was followed by the *Journal of Business Ethics* (11) and *Journal of Business Research* (11), *International Business Review* (8), *International Marketing Review* (7)and *Organization Studies* (6). *Human Relations*, the *Journal of Global Mobility*, the *Journal of International Management* and the *Journal of World Business* have five papers incorporating SIT. The published body of literature is quite fragmented and scattered across a mixture of human resource management (HRM), IB and marketing journals.

 First, a co-occurrence network of the 100 most frequently using *keywords plus* (keywords with additional information) yielded five clear clusters. Of them, only one cluster is distinctly IB in nature, linking SIT with MNE strategies and performance. Another cluster is related to international marketing and explores SIT in the context of consumer behavior, in particular globalization-related attitudes and behavior (i.e. consumer cosmopolitanism and ethnocentrism). Among the other three clusters, which mostly addresses general management and organization phenomena related to organizational identity, work-related outcomes, leadership and entrepreneurial behavior, one also touches upon international assignments and expatriation, while another explores cross-cultural differences in organizational settings.

SIT tends to be employed more for examining mainstream management and organizational issues, with contextual differences across country environments mostly explored in a comparative manner or as moderating conditions. SIT seems to be largely employed for studying individuals (as employees or consumers, and sometimes also as leaders) and is less frequently employed to study organizations or groups of people. This provides an excellent opportunity for scholars studying MNEs to apply SIT to their topical areas. For example, Buckley and Cassons (2020) recently called for more individual-centric research within MNE internalization theory (see also Vora and Kostova, 2020).

To review the use of SIT in the context of MNEs, we applied multidimensional scaling to the 100 most frequent keywords plus, which resulted in three large and particularly distinctive sub-groups, as shown in Figure 1.

Figure 1: Conceptual structure of 100 keywords plus related to SIT and MNEs based on multidimensional scaling



Note: Analysis performed in R Studio using the Bibliometrix library of algorithms (100 keywords plus; n = 273 extracted papers in WoS Core Collection on 15 July 2020)

The largest cluster in the center has a strong HRM and leadership perspective and is quite strategically oriented in nature. It also draws on corporate social responsibility, entrepreneurship and strategy. The second one (bottom-right corner) is more organizational in nature and focuses on organizational identification, commitment, psychological attachment, satisfaction and trust. It focuses on both expatriate employees and top management, while taking into consideration cultural distance and absorptive capacity related to individual-level knowledge transfers.

The third cluster (left of the biggest central cluster) focuses more on consumers and their attitudes associated with foreign products, as well as their attitudes toward specific countries and specific brands. As a comprehensive bibliometric analysis is beyond the scope of this paper, we focus more on identifying specific gaps within the IB literature, where SIT can emerge as a so-called “motor theme” (Cobo *et al*., 2011).

**3.2 Gaps in social identity theory use relevant to international business phenomena**

Figure 2 presents a thematic map of 500 keywords plus (the maximum number available for analysis by *biblioshiny*). The analysis is based on co-word network analysis, which intuitively clusters keywords plus in a strategic two-dimensional layout according to *density* (i.e., level of internal ties among words within an identified theme)and *centrality* (i.e., external ties to words related to other themes) (Cobo *et al*., 2011). Each theme is depicted by up to five keywords plus “labels” that capture the content of a specific theme.

 According to Cobo *et al.* (2011), who developed this thematic approach, the top-right quadrant captures so-called “motor themes.” These have high density (i.e., strong internal ties among keywords plus within the theme) and high centrality (i.e., strong external ties to other themes). In our case, we can see that none of the identified themes fall distinctly within this quadrant. Perhaps MNEs, performance and diversity theme is the closest to a potential motor theme, but it too remains somewhat on the outskirts of this quadrant. This is consistent with growing interest in MNEs as social spaces, where identity politics play out in various ways and identity has finally begun to be explored in its own right, away from culture (Vaara *et al*., 2019). The bottom right quadrant denotes “basic, transversal themes,” which have low density (i.e., loosely connected keywords plus within the theme) but high centrality (i.e., strong external ties to other themes). This quadrant captures themes that refer to work-related contexts, focus on a sense of “self,” and relate to corporate social responsibility, to some extent, which relates not only to a “big question” within the IB literature (Buckley *et al*., 2017), but also holds implications in terms of MNE internalization decisions related to market failures and non-economic institutions (Buckley and Boddewyn, 2015).

Figure 2: Thematic map of 500 keywords plus based on their density and centrality



Note: Analysis performed in R Studio using the Bibliometrix library of algorithms (500 keywords plus; minimum cluster frequency 5 words; n = 273 extracted papers in WoS Core Collection on July 15, 2020)

The top-left quadrant captures highly developed (high density) but isolated themes (low centrality). The strategic management theme in the top-left corner is not only the smallest of all theme bubbles, but also the lowest in terms of its centrality. It is thus no surprise that Buckley and Casson (2020) have explicitly called for a greater focus on individuals and their social interactionism within MNE contexts, as social identity has remained absent from the strategic management-oriented MNE research. Similarly, the general “international business” theme to the right seems to be another well-developed niche theme, acting as an isolated developed pocket rather than a well-connected topical area within IB.

The bottom-left quadrant corresponds to a low density, low centrality context, which is typical of either declining or emerging themes, according to Cobo *et al*. (2011). Similarly, to the motor-theme quadrant, no distinct themes occupy this quadrant, with the theme cluster most directly related to SIT and its consequences being perhaps the closet to an emerging theme. This is particularly true if we take into consideration the trajectory of growth in SIT-related publication within the last decade and the changing nature of IB scholars’ understanding of globalization (see Witt, 2019).

Continuing to explore the “big issues” which need to be addressed within the IB discipline, as outlined by Buckley *et al*. (2017); we believe the isolated, dispersed and to a large degree, conceptual application of SIT limits IB’s “[u]nderstanding how MNEs respond to greater pressures for social responsibility and sustainability in their international operations” (*ibid*., p. 1047), let alone any kind of expansion to address social change and collective action by individuals, MNEs, or governments at various levels (Buckley *et al*., 2017).

**4. A SOCIAL IDENTITY THEORY–BASED AGENDA FOR MULTINATIONAL ENTERPRISE INTERNALIZATION THEORY**

SIT and MNE internalization theory both emerged against the specific backdrop of the 1970s. As meta-theories within their disciplines, they continue to evolve with the demands of society and economy. Buckley and Casson’s (1976) original idea of *internalization* evolved from “a concept in search of a theory” (Buckley, 1983, p. 42) into a versatile Russian-doll stack of theoretical applications. These generally include: (1) internalization decisions (i.e., strategy and growth of MNEs); (2) externalization decisions (i.e., global value chains, MNE networks, and global factories); and (3) the global economy (i.e., MNE impact, boundaries, and locations) (Buckley, 2016a). MNE internationalization theory has also proven itself versatile enough to be applied to societal failures and non-economic institutions (Buckley and Boddewyn, 2015).

We present an agenda for future research focusing on MNEs, operationalized into three interconnected research directions. As much as possible, we also connect them to Buckley and Casson’s (2020) MNE internalization theory review and future research agenda.

**4.1 Exploring the dual outcomes of hyper-globalization and the role of multinational enterprises**

Nobel Prize winner Paul Krugman has admitted a failure to foresee the “runaway train” nature of globalization and the extent of its disastrous consequences (Hirsh, 2018). Hyper-globalization has led to major economic and social upheaval around the world, calling on IB scholars to start more systematically studying how MNEs deal with market failures (Buckley and Boddewyn, 2015). Structural shifts in the global landscape also work hand in glove with the proliferation of the various identity crises that are an inherent part of the globalization-induced processes of identity transformation. Always present, these processes have become particularly strong in post-modern societies (Reese *et al*., 2019; Giddens, 1991). MNEs, as central actors within the economic engine behind globalization, also serve as stages upon which social and psychological processes unfold (Vaara *et al*., 2019).

Whereas the combination of dual outcomes, whereby some groups in some societies/nations experience the majority of benefits and other groups in other regions experience the majority of disadvantages, has been predicted and observed for decades, the *extreme* nature of socioeconomic inequality is a relatively new phenomenon (hence the emergence of the term hyper-globalization). As central actors in (slow-semi-hyper) globalization processes, MNEs have played a major role in this aggregate outcome, feeding various socio-cognitive processes at the level of individuals and groups, as well as fueling politics of identity at the level of organizations and nation states. Bridging the myriad levels of analysis has proven to be quite challenging for IB theory, especially from the perspective of MNEs, as its central actors. In addressing these issues, future research may explore the following research questions:

* *Research question #1*: What specific role(s) did MNEs play in creating the extreme nature of socio-economic inequality we observe around the world today and through which specific internalization-externalization mechanisms was this achieved?
* *Research question #2*: What heuristics, ideologies and directives did MNEs follow to reach their goals? How were such goals and corresponding behaviors shaped by politics of identity? (Sub-question: Refer to it in explanation section)
* *Research question #3*: What do MNE operations, corporate governance, including pay practices, CSR initiatives and non-market, political activities tell us about MNEs’ role in shaping and co-creating today’s post-modern world? (Sub-question: Refer to it in explanation section)

At the individual level, SIT can help us explore the socio-cognitive processes connected to globalization (Giddens, 1991). We believe that SIT provides an appropriately nuanced theoretical lens and a rich enough meta-toolkit for the exploration of globalization process at the level of individuals (Reese *et al*., 2019). It does this by addressing the socio-cognitive processes of *social categorization* and *self-esteem*. The various types of self-esteem (i.e., global vs. specific, trait vs. state and personal vs.social) can add nuance and allow a more social agentic perspective on globalization. We also believe that SIT is very useful in its ability to “convert” exogenous variables into endogenous variables in the exploration of deglobalization (Witt, 2019). In addressing these issues, IB research may consider exploring the following research questions:

* *Research question #4*: How do growing inequalities extenuate the salience of specific social categories (i.e., being middle class, conservative or liberal or even more fundamental social categories of race and gender), which have recently become much more intersectional, contested and rapidly changing over much shorter periods of time?
* *Research question #5*: How do growing inequalities influence the social status of specific social groups in the global environment, which act as MNE stakeholders? (Within the MNE)
* *Research question #6*: How does the social construction of differences between various social groups influence politics of power and privilege? What role do MNEs play in these processes, as either spaces where such processes play out or actors perpetuating such processes in society?

This second set of research questions can help IB scholars explore *how* and *why* people start feeling more uncertain in the face of globalization and its contested outcomes (whether in terms of self, in relation to others, or collectively), and how these processes relate to MNEs. In this regard, uncertainty becomes an endogenous feature of globalization and not an exogenous variable in decision-making (which can increasingly mutate into radical uncertainty, as discussed by Buckley and Casson, 2019). SIT can open new avenues in which to explore MNE decision making (Buckley and Casson, 2019). Not being constrained by the perennial debate between rational choice vs.boundedrationality, SIT can help IB scholars formulate a much more *versatile* and context-specific understanding of rationality with obvious implication for MNE decision-making (Buckley and Casson, 2019). Approaching rationality not as the ability to optimally act based on perfect information, but rather as the “ability to rank alternative outcomes in a logical and consistent way” (Buckley and Casson, 2019, p. 1430), the self-esteem hypothesis articulated by Abrams and Hogg (1990), for example, can help us understand the socially constructed and much more dynamic nature of “rationality” against the backdrop of globalization.

**4.2 From a nexus of contracts to interacting social agents**

The IB discipline’s approaches to globalization have been shaped mostly by neoclassical or institutional theory. Economic theory sees the global economy as a closed-type, self-contained and *de facto* efficient system, in which flows of goods, services, capital, people, ideas, and/or technology are governed by economic laws of internal consistency (Buckley and Casson, 2020) and based on the perfect rationality of its actors (Buckley and Casson, 2019). Institutional theory has, on the other hand, helped the IB discipline (with its natural sensitivity to contextual richness and differences) to explore market failures via concepts of *institutions* (Aguilera and Grøgaard, 2019) and *institutional voids* (see Buckley and Boddewyn, 2015).

 Within an economic view of the firm, the MNE (as the prototypical firm archetype) has been seen as a “nexus of contracts” (Jensen and Meckling, 1979) between parties, such as shareholders, managers, employees, directors and customers. These contracts are generally defined in purely economic terms. In the 21st century, however, MNEs are subject to other types of “contracts” that exist along increasingly non-economic dimensions (i.e., various types of social and psychological types of contracts). Buckley and Casson (2020) also pointed out how MNE internalization theory will continuously need to change, as the 21st-century MNE is not the same as the 20th-century MNE. As we move away from the orthodoxy of shareholder primacy toward being more sensitive to the broader needs of myriad stakeholders, the following research questions arise for MNEs:

* *Research question #7:* Do MNEs need to rethink their boundaries along spatial, temporal and social lines to better accommodate realities of the 21st century?  (Kati: outsourcing/externalization as a mechanism for boundary setting – purely economic logic – MNEs cannot afford make just economic decisions – lose customers; social interactionism, values and identities – association against MNEs – stigma associated with MNEs)
* *Research question #8*: How do home-country institutional setups shape MNE assumptions of institutional functionality in host markets and what role do specific socio-cognitive and identity processes play on the side of MNE decision-makers? (Cognitive biases and home-country institutional set-ups)

Buckley and Boddewyn (2015) laid the groundwork for the last question in the context of exploring “how different *motivations* – for instance, a feeling of moral duty on the parts of the firms versus their concrete need for local infrastructural goods and services – do influence the types of societal roles they [the MNEs] are willing to assume” (2015, pp. 182-183).

 Most MNEs have some form of sustainability or corporate social responsibility (CSR) initiatives that speak to the needs of their stakeholders, aside from their shareholders. Since the publication of Milton Friedman’s seminal work in the 1970s, shareholder primacy has dominated the business mindset and organizational decision-making. As shareholder primacy gives way to acknowledging broader needs of various stakeholders, social interactionism will become particularly relevant. In addressing these issues, future research should explore the following research questions:

* *Research question #9:* How do the contradictory mindsets, value and belief systems and heuristics relating to shareholder primacy vs. stakeholder needs compete with one another?
* *Research question #10:* Has the pendulum swung from one extreme (i.e., shareholder primacy) to the other (i.e., stakeholder needs)? What implications does this hold for MNE internalization/externalization decisions and firm boundaries? (Link 9 and 10 together)
* *Research question #11:* Where are we now with respect to balancing financial needs of shareholders and social and environmental needs of non-shareholding stakeholders?
* *Research question #12:* What implications does this hold for understanding collective actions and social change, and how do MNEs fit in such social agentic processes? (Beginning of a discussion point)

However, addressing broader stakeholder needs is easier said than done. Buckley and Casson outlined two specific issues in IB theory that are particularly relevant in the context of SIT, namely: (1) “too little emphasis on the individual and too much emphasis on the firm” and (2) “too much emphasis on the single representative actor, operating in isolation, whether they are an individual or a firm” (2020, p. 242).

An emerging body of work on MNE micro-foundations has started to address both issues across various IB topical areas – from knowledge management to human resource management *and* entrepreneurship (see Foss and Pedersen, 2019). All three areas are closely related to internalization theory. Among them, *entrepreneurship* has been, in particular, highlighted in Buckley and Casson’s (2020) future agenda for MNE internalization theory. Yet, while a micro-foundational lens bridges the various levels of MNEs, linking individuals with other individuals through interactions, routines and institutional logics, or individuals to the organization, which is especially relevant for internalization theory when it comes to knowledge transfers (Foss and Pedersen, 2019; Vora and Kostova, 2020), it too has some limitations. Foss and Pedersen admitted that “Microfoundations is not a theory, but a set of high-level heuristics concerning theory building and, per implication, theory-based empiricism” (2019, pp. 1594-1595).

SIT can lend a helping toolkit, by exploring the specific motivational mechanisms (self-esteem, optimal distinctiveness, and uncertainty reduction) of individuals and intergroup behavior. The issue of motivation and objectives features prominently within Buckley and Casson’s (2020) agenda. SIT can provide a theoretical link between individuals’ objectives, the MNE and the environment via behavior within MNE internalization theory. According to Buckley and Casson (2020, p. 242), “This vital link in theorizing is often weak.” An entrepreneurship lens can perhaps in turn help IB theory advance SIT. In addressing these issues, IB research may consider exploring the following research questions:

* *Research question #13*: How can entrepreneurship be explored, not just as an identity-based process (i.e., what one *does*) but also as a social identity process (i.e., who one *is*) both internally within MNEs and externally in the social environment?
* *Research question #14*: What role does entrepreneurial thinking and motivation (within an MNE context) play in understanding the dynamics of collective action and particularly social change? (Blend these two together into a single question – corporate entrepreneurship)

Vaara *et al*. (2019) have shown us neatly that MNEs are sites where identity becomes increasingly important, especially as a political process. In their discussion of decision-making aspects of MNE internalization theory, however, Buckley and Casson (2019, p. 1428) have themselves commented that “[e]xtending the [internalization] theory by drilling down to the ‘fine detail’ of organisation and control within the firm is more problematic.”

SIT can again help transcend the unnecessary dichotomy between an external competitive environment and an internal cooperative environment. With its intergroup logic, it helps address multilateral interactions, peer comparisons, and peer decision-making, as well as intergroup conflict and employee personal involvement through identity-based validation and affiliation. These issues have been explicitly acknowledged by Buckley and Casson (2019). Extending social interactionism beyond the boundaries of MNEs, SIT may even help us explore MNEs as stakeholders within international relations (i.e., the recent controversy related to Huawei), agents in global social issues (i.e., MNEs and modern slavery), and/or instigators of social change (i.e., the role of MNEs in a circular economy) (Vaara *et al*., 2019).

**4.3 From external environment complexity to a dynamic understanding of the global environment as a social system with wicked problems**

Buckley and Casson have also pointed to a wider challenge of IB theory in better understanding and more systematically exploring “[t]he global environment of IB activity,” particularly with regard to “specific factors that impact on actors’ behaviour” (2020, p. 242).

Globalization-induced uncertainty has given rise to a tidal wave of populist movements around the world, as a direct backlash against hyper-globalization (Witt, 2019). Regardless of the role that MNEs have played in creating the hyper-globalized world, slowbalization and populist movements are a manifestation of social and collective action that seem to be, in many cases, against what MNEs are perceived to stand for.

At the individual level, SIT can also help us examine *why* individuals, as well as social groups or even organizations, seek out validation and affiliation with entitative groups and prototypical leaders in an increasingly VUCA-type global landscape (i.e. volatile, uncertain, complex and ambiguous) (van Tulder *et al*., 2019). MNEs remain central actors in this landscape. Such prototypical leaders have become well versed in playing on the different self-enhancement triggers (Hogg *et al.*, 1995), often using MNEs as lynchpins.

MNEs will likely suffer the consequences, or legacy effects of the anti-globalization movement, with specific bearing on their decision-making. Buckley and Casson (2019) have pointed to a need to better understand both the direct and indirect aspects of MNE legacy effects. With existing MNE internalization theory less equipped to address indirect legacy effects, SIT can rise to the occasion. In addressing these issues, future research should explore the following research questions:

* *Research question #15*: How do MNEs navigate the competing ideologies that create paradoxical mandates for them to follow? How do MNEs in this process reconcile their dual embeddedness with the socioeconomic changes in the global environment over time?
* *Research question #16*: What are the ways in which MNEs will be affected by these direct and indirect legacy effects, both as employers and as providers of goods and services to a global audience?

Despite the versatility of MNE internalization theory, in how it can “handle” the complexity of various types of market failures (not just natural and systemic ones but also social, cultural, and political aspects of market failures), this is still no guarantee for a shift from a static to a dynamic understanding of MNE decision making. This is an area where MNE internalization theory still has the potential to grow and evolve (Buckley and Casson, 2019). Buckley and Casson have clearly pointed out that:

“[c]hanges in global business strategies are not, therefore, autonomous events prompted by changes in business thinking, but intelligent responses to technological progress, falling transport costs, faster communication, greater international labour mobility, political integration through treaty organisations, and other factors identified by theory” (2019, p. 1427).

As the referenced factors expand to include a broader understanding of globalization, IB scholars will need to explore additional research questions, such as:

* *Research question #17:* How do social structures, institutions, and roles help structure various types of (indirect) legacy effects, which are an essential part of a dynamic theory of decision-making?
* *Research question #18*: What role do direct and indirect legacy effects play in MNE path dependencies and how do such trajectories structure future options for MNEs or by MNEs for other social actors?

Seeing the global environment as an infinitely complex social system brings with it the understanding that many problems that MNEs face or may be part of are not necessarily the result of market failures or institutional voids (Buckley and Boddewyn, 2015), or even of pursuing shareholder primacy at the expense of broader stakeholder needs. Some of them may, in fact, be manifestations of “wicked problems” emerging most often at the nexus of society, economy and policy. Such problems, by their very nature, cannot be solved through any degree of rational decision-making and/or optimization. There are no clear criteria to judge potential solutions to such problems and there is, in fact, no optimal solution to them. Instead, they can only be tamed (Head, 2019). This holds important implications for how managers and firms address problems and decision-making, which also has a bearing on MNE internalization theory. In addressing these issues, future research should explore the following research questions:

* *Research question #19:* Which types of market failures faced by MNEs are the result of institutional voids or market imperfection and which may be manifestations of the “wicked” nature of issues at the nexus of the economy, society and policy-making?
* *Research question #20:* What roles can MNEs play in taming wicked problems and what implications does this hold for their internalization-externalization decisions?

**5. CONCLUSION**

Our aim with this general review paper was to show *how* and *where* Buckley and Casson’s (1976) MNE internalization theory can benefit from a SIT perspective (Tajfel and Turner, 1979), as a natural fit. Both theories are considered to be general and versatile meta-theories in their respective disciplines. Yet, this has not been the main reason for making the link between them. At the level of the global environment, a more nuanced understanding of the social psychology of globalization has shown that socio-cognitive processes, identity transformation and various intergroup dynamics are an inherent part of understanding globalization, as changing interdependence in the nature, level, and intensity of social relationships among all actors of society (Fukuyama, 2018). At an organizational level, the application of SIT can help complement growing research on MNE micro-foundations (Foss and Pedersen, 2019) and politics of identity (Vaara *et al*., 2019), with a more dynamic and socially interactionist understanding of decision-making by and within MNEs against growing uncertainty.

To that end, we presented an evolutionary review of SIT, a bibliometric study of published research in IB drawing on SIT, and have outlined a SIT-based agenda for future research focusing on MNE internalization. Extending Buckley and Casson’s (2020) agenda for future research on MNE internalization theory, we linked individual, group, and intergroup perspectives against a more socially nuanced, interactionist, and more dynamic view of MNEs and their decision making.

We hope that the future research agenda we have laid out for MNE internalization theory and operationalized through 20 guiding research questions can help the decision-making process of internalization to become a pillar for a “true social science of business strategy” (Buckley and Casson, 2020, p. 250). According to Buckley (2016a), the “integration and consistency between the different levels of internalisation theory” remain vital for the theory to stay at the frontier of societal changes and the global economy in the 21st century (p. 77).

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1. We draw on Abrams and Hogg’s (2004) poetic view of a meta-theory, as an overarching “travel guide” that explores the nature of specific phenomena (i.e. firms’ structure and behavior in the case of internalization theory as well as group processes, intergroup relations and the construction of a social self in the case of social identity theory). It further “encourages the integration of theorizing for a range of potentially disparate phenomena” (*ibid.*, p. 98). We do not employ the term as a theory of theories or as theorizing in a philosophy of science sense. [↑](#footnote-ref-1)
2. The following topical search query was performed in WoS: TS=(Social Identity Theory AND (international\* OR global\* OR multinational\* OR regional\*)) AND WC=(business OR management). [↑](#footnote-ref-2)