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Context is King! Considering Particularism in Research Design and Reporting

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Abstract

We aim to raise awareness of context by examining its role in empirical research. We apply the dichotomy of universalism and particularism and discuss the interaction of theory and culture in order to consider the scope of validity for research findings and conclusions. We illustrate our arguments by referencing three cases, each of which has contextual inadequacies. We aim to discourage the conduct of research, and acceptance of papers, that falsely imply universalism, rely on convenient samples or ignore indigenous constructs. We offer specific prescriptions for authors, editors and reviewers to help ensure that both the research context and scope of validity are adequately communicated and understood.

1. Introduction

Information Systems (IS) research is commonly constructed around the interplay of people, activities and technology, informed by theory, conducted with methods and reflective of epistemological stances. Research is also situated in a particular context or contexts. A wide variety of contexts exists; they may be classified in terms of their geographical, cultural, organisational and human characteristics.

A key objective of all research, no matter the context, is to make discoveries and reach conclusions that are demonstrably valid. This suggests that the findings and conclusions should be relevant and useful to an identifiable audience (Robey and Markus, 1998). An important question, however, is: How far can validity reasonably be expected to extend, given the limited context in which most research is conducted? It is this question that motivates the current paper.

Extensions of validity are often referred to as generalization. Definitions of the term vary, but Seddon and Scheepers' (2012) recent work corresponds to our own view that generalization is the "act of arguing, by induction, that there is a reasonable expectation that a knowledge claim already believed to be true in one or more settings is also true in other clearly defined settings". Further, we recognise that a researcher may generalise findings in a number of different ways. These include: from one context to a different context; from one context to a new theory that the researchers develop; and from one context to an existing theory that the researchers broaden with their new findings (Lee and Baskerville, 2003, 2012).

For example, imagine that we are interested in how IT may support the decision making processes and propensities of Swedish bankers. If we have studied a representative sample of Swedish bankers in a rigorous fashion, then our findings may reasonably be generalised to a wider population of Swedish bankers. This would be generalisation from one context to a similar context. Alternatively, we may generalise our findings to a new or existing theory that explains IT-supported decision making. However, answers to other questions are less clear: Are our findings generalizable to Norwegian or Danish bankers? Do the findings apply to Swedish dustmen or millinery workers?

This example prompts broader questions related to research context. They include: To what extent can we plausibly generalize from one occupational group or societal culture to another? To what extent are the findings of a study strictly limited to the original context? These questions highlight the importance of boundary conditions.

All research models and theories are implicitly or explicitly bounded with respect to their contextual applicability. Boundaries need not only concern the physical context where the research is undertaken. They can include other factors, such as those identified in the cross-cultural psychology literature (Hofstede, 2001; Trompenaars, 1993; House et al., 2004) and the IS literature (Leidner and Kayworth, 2006; Myers and Tan, 2002). For example, the literature on culture and IT management (Martinsons and Davison, 2003) reveals that each of the uncertainty avoidance, power distance, time orientation and particularism of a society has a significant influence on several important IS phenomena.

A slightly different facet of generalizability is the usefulness of research. Usefulness has been conceptualized in terms of relevance and practicability (Banville and Landry, 1989; Baskerville, 1996; Keen 1991) as well as consumability and relevance (Robey and Markus, 1998). Useful research is relevant to other people who can apply the findings meaningfully. Useful research can also inform practice and thus bring benefits to assorted stakeholders. Research that is relevant for and applicable to a wider range of phenomena is traditionally considered to be more useful (Babbie, 1990). However, cultural and contextual details may be ignored or neglected as they may impede that wider application.

Our review of the IS literature reveals a growing tendency to study specific phenomena and particular cases. Each phenomenon or case is based in a distinctive context even as it has certain general properties. However, it is rare to see explicit consideration of the context and its key characteristics. The growing tendency to conduct studies in a specific context without considering the implications raises an important issue: the extent of validity of our research findings and conclusions.

In this research essay, we explore the role of context in IS research. We aim to raise awareness of why context matters and so hope to engage the IS research community in a debate about our research contexts and designs. Following this introduction, we explore the dichotomy of universalism and particularism in IS research before moving on to a more detailed exploration of the interaction between theory and culture. We illustrate our arguments with reference to three cases, each of which has contextual inadequacies. We then discuss the implications of our research before concluding with more prescriptive thoughts.

2. Theories: Universal and Particular

A multitude of theories and theoretical models have been developed, applied and tested in the behavioural sciences. Given that "researchers … ascribe different meanings to the term 'theory'" (Weber, 2012), we clarify that we adhere to Weber's (2012, p.4) own definition: A theory is "a particular kind of model that is intended to account for some subset of phenomena in the real world. A theory is a social construction (Jaccard & Jacoby, 2010, pp. 7-10). It is an artifact built by humans to achieve some purpose". A number of different types of theory are recognised. These range from high-level social theories, such as structuration theory (Giddens, 1984) through mid-range theories (Merton, 1968), to the multitude of micro-level theoretical models and working hypotheses that we create in abundance in the quotidian course of our research. The mid-range theories which have limited scope (Recker, 2012) and encompass specific causal models are of most interest to us. Many of the more abstract mid-range theories in the IS literature are based on the Technology Adoption Model (Davis, 1989). These theories imply the existence of boundary conditions even if these conditions are not stated explicitly. This limits their applicability to specific contexts and "the phenomena it is intended to cover" (Weber, 2012). These boundary conditions are influenced, even if unconsciously, by the culture and experiences of those who develop the theory.

In Information Systems, we routinely borrow and adapt theories from other disciplines. The most notable reference disciplines are economics, marketing, psychology and sociology. We then test these theories in contexts that may differ greatly from those that inspired their creation. These tests of the theory may be contextually inappropriate if they make assumptions that are not present in the original set of boundary conditions. These tests typically seek to confirm or deny the extent to which the theory is valid in a new context. In addition, they may contribute to our knowledge or understanding about a specific IS-related phenomenon.

Researchers often appear to assume that a given theory which they are adopting is universally applicable. The context and the boundary conditions that governed the original instantiation of the theory are commonly ignored. We found this ignorance in dozens of articles that have appeared in top-tier IS journals over the past decade. Some researchers explicitly assert that the theoretically-informed results from their study will equally apply in other contexts. Universalism is implicitly assumed in many other papers. In the extreme situation, universally valid implications are assumed from a single local or regional study. As Gordon et al. (1987) remark, "Behavioral scientists display a disturbing tendency to discuss prematurely the applicability of their research to other settings and subject populations".

This kind of theory testing also tends to ignore indigenous constructs that may influence behaviour. For example, Ng and Chua (2006) studied the effect of trust in cooperative behaviour in social dilemmas. Drawing on a predominantly Western literature and testing the theoretical model with a Singaporean undergraduate student population, they completely ignored constructs specific to the Singaporean context that might usefully have informed the theorising. Similarly, Zhong et al. (2012) investigated the applicability of transactive memory systems (Wegner, 1987) to knowledge sharing by virtual teams in China, but failed to model any China-specific cultural factors.

These two investigations and many other published studies make useful contributions as etic tests of theory. However, the lack of indigenous characteristics that might also have helped explain the nature of cooperative behaviour and knowledge exchange arrangements in the particular contexts of Singapore and China, respectively, is troubling to us. We feel that it represents a failed opportunity to explore more fully the mid-ground between particular and universal contexts. More specifically, there may be indigenous Chinese or Singaporean constructs that could survive rigorous testing in other contexts and so might enhance our knowledge of the phenomena studied in these, and potentially more remote, contexts.

In contrast, in a recent paper (Young et al., 2012) about how Taiwanese teachers contribute to knowledge portals, the authors drew extensively on the Chinese concept of mianzi (face). The research team found that the teachers were reluctant to contribute due to a fear of the negative gaze that they might receive from other people. ‘Face’ is by no means an exclusively Chinese concept. However, it is an important driver of behaviour in the Chinese context – and likely elsewhere. Further studies on the impact of face (and other indigenous factors) in other contexts would be desirable.

We also found several studies in top-tier journals which were based on multiple literatures and subsequently relied on models with components that reflected utterly different contexts. For example, the design of an instrument to measure the adoption of social media in a workplace setting in Germany drew upon a study of Facebook adoption for hedonic purposes by undergraduate students in Taiwan, and the associated instrumentation. This represents a change of societal culture, a change of population type, and a change of technology purpose. Such a universalistic assumption, whereby any prior study is good for informing any current or future study, is problematic. As Gregor and Klein (2014) suggest, in building theoretical models, researchers must not only justify the cause and effect linkages between constructs, but also seek to ensure that the prior empirical studies they cite are appropriate. This latter task is sometimes ignored completely.

Reliance on one population as a proxy for another is also common in the IS literature. For example, undergraduate students have often served as a proxy for the general population in studies of technology use (e.g. Lowry et al., 2010) or e-commerce behaviour (Ou and Sia, 2010). They have also been surrogates for managers (Speier and Morris, 2003). This is much less plausible in our view. The common tendency to substitute students for managers has been roundly criticised by Gordon et al. (1987) and others. Students tend to be much younger than managers (often representing a different generation in society) and have less or even no work experience. They will approach tasks very differently than seasoned managers. Meanwhile, Lee and Dennis (2012) insist that if students are employed as research subjects, then the research designs and tasks must “live in the students’ worlds”; i.e. “students compose the population of interest” or otherwise closely resemble the “population of interest … on theoretically relevant variables” (Gordon et al., 1987).

The universalist approach to research makes no allowance for cultural, institutional and other environmental differences. Some authors have explicitly recognised this as a limitation of their research. They commonly include a fairly standard boilerplate in their papers. They acknowledge the impoverishment of their data sampling or the limitations of their theoretical models and exhort future researchers to be more inclusive (e.g. Speier and Morris, 2003). However, we aim to discourage the continued acceptance of studies that merely acknowledge a universalistic research design as a limitation. We believe that ignoring indigenous constructs and relying solely on convenient data samples compromises the quality of the research and contributes to the institutionalisation of this limitation in our research.

Notwithstanding the apparently widespread disdain for context, we suggest that contextual differences are significant in the behavioural sciences. This includes Information Systems. The rich tapestry of life “is replete with social content” (Gordon et al., 1987). The myriad of unforeseeable and emergent circumstances make strict control nearly impossible (cf. Descola, 1996), unless it is achieved artificially by resort to experimental conditions in the laboratory. Unlike artefacts in the physical sciences, humans tend to agglomerate into societies with different cultures and institutional arrangements, including the laws of the land, moral imperatives and normative behaviour. Studies have demonstrated that fundamental human beliefs, values, assumptions, attitudes and behaviour vary considerably across societies (e.g. Hofstede, 2001) and even professions (e.g. Ramachandran et al., 2013). The values and espoused behaviours between the generations of a single profession in a fairly homogeneous society have been found to vary significantly (e.g. Martinsons and Ma, 2009). Consequently, demographic characteristics are often significant predictors of information systems acceptance and use (e.g. Venkatesh et al., 2014).

Given the subtlety and complexity of sub-cultural differences within a larger population, it can be difficult to maintain consistent units of research analysis using standard types of controls. Even in an apparently homogeneous population such as undergraduate students attending the same 'local' university, there are likely to be significant differences as a result of migration patterns, family backgrounds, ethnicity and extra-curricular interests. It can be nearly impossible to tease out the impact of all these different factors.

In direct contrast to universalistic research designs and assumptions, particularistic research explicitly acknowledges the specific context wherein it is undertaken. For instance, Martinsons (2008), drawing on the work of Trompenaars (1993) and indirectly Parsons & Shils (1951), distinguishes between societies based primarily on rules and those based primarily on relationships. This enabled him to formulate a theory of relationship-based e-commerce.

The rule-based set of arrangements corresponds with universalism, whereas the relationship-based approach corresponds to particularism (Parsons & Shils, 1951). Do all societies regulate behaviour with rules? Are these rules uniformly applied? Can one trust in the 'rule of law' to protect the rights of all individuals? A universalist would tend to answer these questions in the affirmative. A particularist would suggest that in different societies, different practices apply: there may or may not be rules governing a particular practice, and those rules may or may not be applied uniformly. Martinsons (2008) found that while there are rules (laws) in China to protect consumer interests, they tend to be both less developed and less consistently enforced than in the United States. In the absence of extensive, consistent and trustworthy rules, consumers tend to develop and rely on their personal relationships with vendors. In the Chinese context, these relationships are known as guanxi (Ou et al., 2014).

Although the precise meaning of guanxi is contested, for the immediate purpose we define it as close and pervasive ties between two or more individuals emphasising mutual and obligatory reciprocity, combined with personal trust, face preservation and relationship harmony (cf.: Farh et al., 1998; Leung et al., 2005; Ou et al., 2014). In the Chinese context, a good buyer-seller relationship is perceived to be a better guarantee of a satisfactory transaction than a rule or law. These interpersonal relationships are clearly very particular: their validity extends to the parties connected by the relationship but no one else. Developing and relying upon one-to-one relationships is less efficient than relying on systemic rules but imperative if the rules do not exist or are unreliable (Martinsons, 2008). Based on the theory developed by Martinsons (2008), this reliance on personal relationships is likely to be valid in all societies characterised by weakly-developed and inconsistently-enforced legal systems. Martinsons (2008) suggests that most of the world's people currently live in such societies. The work of Ou et al (2014) provides an initial test of the validity of guanxi as a significant influence on online buyer behaviour in China. However, only repeated tests can validate this conjecture convincingly.

In similar vein, we may consider the research of Snell et al. (1996) into the ethical decision making practices of managers in Hong Kong. Their findings are expected to be valid for other managers in Hong Kong. They may also be valid wherever the cultural and social norms are similar to those encountered in Hong Kong. Scholars such as Hofstede and Bond (1988) have argued that the Confucian-oriented societies spanning East Asia have strong cultural similarities. However, more recent studies have found stark differences between Chinese and Japanese populations on phenomena such as the use of decision support systems (Martinsons and Davison, 2007), IT-enabled organizational change (Martinsons et al., 2009) and IT ethics (Davison et al., 2009).

Findings from Confucian-oriented societies are even less likely to be valid in contexts where significantly different cultural and social norms prevail. Managers in the United States, United Kingdom, Germany and South Africa are likely to behave quite differently from those in Hong Kong and China because of differences in both cultural and institutional factors (Martinsons and Westwood, 1997). The prevailing values and norms in a Chinese organization and the society in which it is embedded differ greatly from those in American organizations and society. Managers in China will align their behaviour to an external business and political environment where guanxi-type relationships dominate (Xin & Pearce, 1996), contrasting starkly with the rule-based environment found in the United States (Martinsons, 2008).

The above examples of particularistic research designs were undertaken in Chinese contexts., We acknowledge that they may have limited applicability in other contexts. However, such limited applicability is not restricted to research undertaken in China. For example, the theory of structural holes (Burt, 2009) has received wide attention in recent years. It aims to explain how entrepreneurial individuals, known as brokers, can act as virtual bridges between two or more people. These brokers exploit the latent need for useful relationships by transforming network structures and creating valuable benefits for themselves (Xiao and Tsui, 2007).

An important corollary of the theory of structural holes is that brokers operate in a market that favours individualistic negotiation for advantages. This reflects the fundamental characteristics of business and society in the United States of America (cf. Burt et al., 2000).

Brokers thus prioritize the fulfilment of individual goals, emphasizing self-interest and task achievement over the upholding of social norms, obligations to others and a harmonious environment (Triandis, 1995; Adler and Kwon, 2002). This individualistic, self-centred mode of operation is uncommon among the Chinese and Japanese. They tend to favour a more collectivistic, even altruistic, set of boundary spanning arrangements for knowledge exchange (Burrows et al., 2005). The desired outcome in most East Asian societies is relationship harmony. In China, this is supported by strong social norms that include reciprocal obligation, face protection and guanxi (Xiao and Tsui, 2007). Consequently, leveraging structural holes is a less valuable activity in a collectivistic society with high levels of interpersonal commitment.

3. Theory and Culture

Most theories in the social sciences are implicitly limited by cultural or contextual circumstances. For instance, theories are often framed by scholars who hark from a Western cultural orientation. They were culturally and professionally socialised under a regime of Western norms. This does not automatically diminish the cross-cultural or cross-contextual validity of the theories, yet these theories require rigorous testing to assert the scope of their cross-cultural validity. Studies have commonly tested the applicability of existing theories (e.g. Chiu et al., 2014) and popular practices (Hempel and Martinsons, 2009) in important new contexts. However, the standards for scholarly publication are continually rising. Academic gatekeepers now increasingly look for contributions that go beyond replication and confirmation of applicability. They prefer contributions that modify or extend the focal theory.

Meanwhile, theories that are developed in non-Western contexts are likely to include concepts somewhat alien to Western minds. An attempt to map the dimensions of culture from a Chinese perspective (Chinese Culture Connection, 1987) revealed many similarities with Hofstede (1980), but also some differences. Most notably, it discovered the dimension related to time that was initially labelled Confucian Work Dynamism. Relabelled as Long-term Orientation, this new dimension of culture helped to explain the remarkable economic growth of East Asian societies from the 1960s to the 1990s (Hofstede and Bond, 1988). This dimension was later demonstrated to exist in societies not characterised by a Confucian heritage, but its origins as a theoretical construct clearly lay in non-Western research.

We have already mentioned guanxi, which is recognised as a critical element in Chinese society (Fu et al., 2006; Chen et al., 2013). Ou et al. (2014) suggest that guanxi plays a primary role in influencing online consumer behaviour on TaoBao, a major e-commerce portal in China. Meanwhile, Davison et al. (2013) document how guanxi restricts and shapes knowledge exchange activities in Chinese professional service firms. Whether guanxi will consistently display cross-cultural validity in non-Chinese social contexts remains unknown. However, Sue-Chan and Dasborough (2006) provide initial evidence that guanxi is not restricted to Chinese contexts, documenting its influence in Australian personnel decisions.

The vast majority of theories in the social sciences have been developed by people based in Western social contexts. This raises questions such as: Do we need non-Western theories? Further, if we do need them, how could we develop them? Barney and Zhang (2009) suggest two options that should be considered for developing theories applicable to a new context such as China.

The first option focuses on the etic testing of theories that have been developed elsewhere in a Chinese context. This testing and the presumed refinement to follow might result in acceptable theories applicable to the Chinese context. However, these theories would be fundamentally rooted in the Western experience, even if tweaked so as to reflect some Chinese characteristics.

The second option focuses on identifying the existence of phenomena or constructs that are uniquely Chinese. These Chinese constructs, perhaps in combination with genuinely universal ones, would then be used to theorise about specific causal relations. This emic approach is favoured by Tsui (2004, 2006). It would lead to the development of a native Chinese theory. Unsurprisingly, emic, theory-building papers are rare, though Malinowski's (1922) anthropological studies enact the principles of emic work (see also Descola, 1996). In the IS field, such emic studies are more likely to be feasible when conducting case studies (Yin, 2003), action research (Davison et al., 2004, 2012) or an ethnography (Myers, 1999).

4. Cases of Contextual Imprecision

The contexts for business research tend to exhibit considerable heterogeneity with respect to cultural values and social norms. Studies going back to at least Hofstede (1980) clearly reveal the differences in values across social contexts. The implication is that data collected in one social context is unlikely to reflect adequately the social norms implicit in other contexts. Unfortunately, the important role of context in designing research is not always appreciated. As reviewers/editors for a variety of different journals, we often read research articles where the context is specified vaguely, if at all. Examples (all real, but disguised so as to protect the identity of the authors and research subjects) of such contextual imprecision include:

1. "We were unable to obtain access to managers, so we asked students at a major mid-Atlantic university to undertake managerial tasks, before surveying them on their preferences"
2. "We interviewed employees at a large industrial concern in the South West about their use of ERP systems"

3. “We studied a large, global logistics firm, which operates in all 50 US states and 81 other countries”

In each of the above examples, while some aspects of context may be revealed, others are plainly absent or concealed. In the first example, quite where a mid-Atlantic university might be located is something of a mystery. Is it really in the middle of the Atlantic Ocean? Perhaps St. Helena or Ascension Island? Or does “mid-Atlantic” mean something else altogether? As Wikipedia[1] notes, the mid-Atlantic States “form a region of the United States generally located between New England and the South Atlantic States. Its exact definition differs upon source, but the region often includes Delaware, Maryland, New Jersey, Pennsylvania, Washington D.C., New York, Virginia, and West Virginia. North Carolina is sometimes also included”. As a precise definition, this leaves quite a lot to be desired. However, it is clear that while “mid-Atlantic” may be a more-or-less meaningful geographical context for (some) people in the US, it may not be clear for people who are not professionally or culturally socialized in this sub-national or regional context. More importantly, obfuscating the context with the geographically-imprecise ‘mid-Atlantic’ toponym seems careless or casual at best, deceptive or mendacious at worst. The findings of the study are likely to be valid in this topospace, but have questionable validity beyond it.

In the second example, no useful geographical context is mentioned at all. The authors simply say that the company is somewhere in the South West. Most countries have a South West; there is no reason to assume that this South West is anywhere in particular. The authors of the paper were asked why they had not explicitly mentioned the context in which they had undertaken their research. Two reasons were offered. First, they indicated that the study was conducted in the South West of India, but then explained that they had not

[1] http://en.wikipedia.org/wiki/Mid-Atlantic_states

identified the country as they assumed that no one would be interested in India. Second, they considered that the context was immaterial because they considered the results to be universally valid.

Both of these reasons are deeply flawed, even as they are connected. Research that is conducted in India is inherently no more or less interesting than research conducted anywhere else. If we (the audience) know that the research is conducted in India, then that knowledge helps us to make sense of the extent to which we can usefully apply the findings. First, it tells us that findings are most likely to be valid in the South West of India. Second, it suggests that the findings may apply in places that are geographically, culturally and institutionally proximate. This could include other parts of India and neighbouring countries. Third, the findings will apply in other contexts to the extent that they resemble the research context. However, as with other geographically-limited contexts, the results are unlikely to be valid universally.

Beyond the two reasons offered by these authors for deliberate withholding of geospecific contextual information, we suggest that other motivations may exist, though we have no strong evidence for or against these explanations. For instance, the authors may have believed that if they identified the research context as India, reviewers might be less inclined to review the paper favourably (cf Davison, 2014). They could not claim that the research was undertaken in a specific other location, such as the United States or a European country, as this would be telling a lie. However, by failing to specify the context, they might give the impression that the research was conducted in a location more attractive to reviewers/editors than India. In this way, they could game the review process in their favour. Their assertion that no one would be interested in India gives some credence to this interpretation of their behaviour. Both of the authors of the current paper have personally experienced discrimination when trying to publish research conducted in non-Western contexts. Several reviewers have questioned why they or anyone else should care about a study conducted in Asia. In response, we often begin by citing population numbers. There are more than 4 billion people living in Asia. These 4 billion people represent more than half the world's population. This majority is expected to care more about a study conducted on their own continent rather than one undertaken half a world away. In contrast, Europe and the whole of the Americas (North plus South) each have a population of less than one billion.

Regardless of comparative population numbers, reporting a research context simply as "South West" is indefensible. Disguising the location where data was collected to deflect attention or deliberately withholding material information may be perceived to be an act of professional dishonesty and guile. Another plausible explanation of this case is more mundane: the researchers were simply unaware of the importance that an editor attached to context. Hence, perhaps in order to conserve space, they decided to omit identifying information. Nevertheless, this does not explain why they included the South West marker in the first place.

The third example does provide a very general sense of context. In our view it is still inadequate. We are merely told that the firm is global, but not in which part(s) of the world the specific study was undertaken. Although a firm may espouse a single organizational culture across its worldwide operations, a global or international study should still expect to encounter some cultural and institutional differences at the societal level. Indeed, this kind of expectation enabled Hofstede (1980) to identify four dimensions of societal culture by studying IBM employees working all over the world. Despite the strong corporate culture of "Big Blue", Hofstede identified significant international variances in work values among the IBM employees. This variation was attributed primarily to the prevailing national culture. Similarly, Siemens espouses a strong German organizational culture throughout its global operations. Nevertheless, Voelpel and Han (2005) found that the knowledge sharing behaviour of its employees in China more closely follows Chinese societal norms than German organizational norms.

5. Convergence or Divergence

In reflecting on the interplay between context, theory and generalization in research, we are struck by the extensive variations in both espoused and enacted beliefs. A cynic might argue that the IS discipline along with the wider research world is irredeemably fractured across multiple fault lines based on epistemology, methodology and assorted cultural factors. However, in a global society that is increasingly interconnected, some scholars argue that there will be a convergence towards a universal set of norms and standards (e.g., Child, 1981; Deuze, 2007). Such a convergence would suggest that theories reflecting global norms, tested with data collected under the auspices of a single methodology and corresponding to a single epistemological *weltanschauung*, would be increasingly valuable.

An alternative view is that particularism will be amplified as members of different societies, including academic factions, show disdain for 'other' values and ways of doing things while seeking to protect their own traditional cultures. For example, the behaviours of American, European and Japanese professionals tend to more strongly reflect their idiosyncratic national values when they are on expatriate assignments (Schneider and Barsoux, 2003). Americans tend to become more individualistic and self-dependent in their new environment. Meanwhile, the Japanese who work overseas tend to rely even more on consensual decision making than they do in their native country. These types of cultural values are deeply embedded and largely immune to pressures exerted by economic, methodological or epistemological ideology (Hofstede, 2001; Tan, 2002).

The intellectual or economic leadership (hegemony) of "The West" will not be universally acceptable in a polycentric world. Thus, we can expect to see an increasing appreciation of locally distinctive values, beliefs and behaviours. Correspondingly, there would be a greater emphasis on “what works locally” rather than globally. Some multinational enterprises have moved in this direction – for many years HSBC aspired to be ‘the world’s local bank’ – even as others (for example, Amazon, Dell and eBay) seem to be rooted to a universal norm, assuming that basically one size fits all.

Remarkably, in early 2011 the incoming chief executive, Stuart Gulliver, announced that HSBC would no longer seek to be 'the world's local bank'. HSBC had concluded that the costs of offering different sets of banking products and services in different contexts were too high. In an effort to benefit from greater economies of scale, the bank has been standardizing many of its products and services while pruning some of its smaller and less profitable operations. HSBC now aims to be ‘a leading international bank’. We believe the strategic transformation of HSBC away from localized differentiation towards a more global cost leadership strategy creates new business opportunities for smaller banks. By aligning their resources and capabilities with a specific cultural and instructional environment, they can be highly responsive to local needs.

The strategic change undertaken by HSBC since 2011 was based on a two-step process. The bank first undertook a thorough analysis of its organization units and their assorted market environments. The level of analysis was on business segments at a national level. Thus, the retail banking, commercial banking and investment banking operations in a given country were each analysed separately. The focus of the analysis was on the competitive strengths and weaknesses of HSBC as well as the external threats and opportunities in that specific market.

A subsequent step involved a decision about every business in every market within the HSBC portfolio. This decision was based on strategic relevance and attractive returns. Two key questions were asked: ‘Where to play?’ and ‘How to win?’ (Lafley and Martin, 2013). If HSBC could not identify 'how to win' with a given business in a given market, it decided 'not to play'. Some of these decisions were more difficult than others but subsequently HSBC decided to discontinue or dispose of about five dozen businesses while aiming to improve or turn around about three dozen others.

6. Research Prescriptions for Considering Context

A very thorough and systematic decision making process preceded the decisive actions that HSBC has made since 2011. Similarly, we believe that it is important for researchers to thoroughly and systematically identify their own strengths and the opportunities with respect to the environment. Then, at the research design stage, they need to make some difficult decisions regarding the aims and context of their study. The question of context, 'where to play', must be considered together with the aims of the research (what to discover? where to publish the discovery?), and thus 'how to win' in the academic publishing game. The aims and context should fit with their personal strengths and the environmental opportunities.

A key indicator of success in many academic disciplines is the publication of an article in a respectable journal. Ideally, the article will have a significant influence on both real-world practices and subsequent academic research. A common goal will be to improve managerial or organizational performance while setting the foundation for and stimulating further study of a theory or a phenomenon. The choice of research context will be a significant factor in determining the degree of influence on both practice and future research.

The context for a study should be chosen based on the specific aims and objectives of the research rather than convenience. A context that is very similar to those of previous studies should be chosen if a primary aim is to *replicate* those studies. Alternatively, if the aim is to *extend* an existing theory, then identifying and selecting a different context is imperative. For example, if an existing theory was derived in a rule-based context, then it may be useful to investigate it in a relationship-based context. Even greater care in the choice of context will be needed if the boundary conditions of a theory are to be tested.

As mentioned in our introduction, a key dimension of research validity involves the practical utility of findings (Keen, 1991; Banville and Landry, 1989). Managers need to ensure that their policies and practices fit their cultural and institutional contexts. Confidence in the effectiveness of these policies and practices will depend largely on the degree to which they have been derived from and tested by rigorous research in relevant contexts. Studies of what works best in the USA are more likely to be relevant in Canada and the United Kingdom than in China or Iraq.

We urge researchers to avoid simplistic designs that test a few variables in a highly controlled context. Cultural and institutional constraints should be considered as part of the research design process. If they are not considered adequately, the subsequent findings and conclusions may still be published, but will ultimately fail to make a significant contribution to the literature. Research whose validity is limited or uncertain is also likely to lack the credibility needed to improve the performance of managers and their organizations.

We also urge research gatekeepers to pay more attention to context. For example, the templates for reviewing manuscripts could include criteria such as the “clarity of context” and “consistency between the aims and context of the research”. Meanwhile, we believe that editors and reviewers have an obligation to understand the context of the research that they are evaluating (ask questions if it is not clear!) and consider its relevance as part of the peer-review process.

Multinational virtual teams, joint ventures and other forms of cross-cultural alliances are among the real-world contexts that experience culturally-oriented barriers to their effectiveness. It is important to determine the specific differences that cause cross-cultural tensions and impair the performance. In a study of US-Norwegian systems development teams (Sarker and Sahay, 2004), language caused more divergence among team members than anything else: Norwegian team members, when under pressure, tended to switch from English (which all team members could understand) to Norwegian, their first and preferred language. This frustrated American team members who did not speak Norwegian.

Language is a core element of communications. Shared language can be a force for convergence in the world. However, national languages are a source of intense pride and identity, fiercely defended. Although English may be widely spoken by professionals in international business centres globally as a lingua franca, this is more a matter of convenience than genuine linguistic convergence. At home or socially these same professionals are likely to speak a divergent multitude of national or regional languages.

Information technology can both support and inhibit communication. The impact of IT will often depend critically on the context. People who must work together but are literate in different languages may benefit from software that can translate their written messages. However, that same translation software can contribute to misinterpretation and misunderstandings because it lacks the personal touch and fails to convey the non-verbal signals that are used to enhance face-to-face communication.

7. Conclusion

We believe that it is unrealistic for social science researchers to ignore the context of studies. Cultural and institutional differences matter! The assumption that we can achieve theoretical convergence and generate genuinely universal findings is naïve and even irresponsible. The social sciences differ from the physical sciences in that the validity of research depends significantly on its context.

Contextual differences are likely to impose boundary conditions on theories that must be accepted and acknowledged. At the same time, it is equally impractical to consider all the nuances of a specific context. Instead, the factors that distinguish a particular context need to be identified and considered when designing a research investigation and analysing findings. We must make plausible interpretations of reality through our research (cf. Weick, 1989).

First and foremost, investigators need to explicitly consider the context of their research. This requires thinking carefully about 'where to play' at the theory development and design stages of a study. The research design is not complete without clear specification of the context in which the research will be conducted and the contexts for which the findings may reasonably be useful.

Ethical research communication also requires that authors not be coy about their context. They should be encouraged and perhaps mandated to provide information that is sufficient for reviewers and readers to get a clear understanding of the context, while also protecting the privacy of their data subjects. Journal and conference gatekeepers in the social sciences can facilitate this by including specific criteria related to the research context in the templates that are used to evaluate submissions. Readers will then be in a position to determine to what extent a published study is relevant to them.

As editors and reviewers, we have observed many authors deflecting attention away from contextual issues altogether. Our follow-up communications with the authors often led to a discovery that the context constituted a weakness in their theory or research design. They had not given adequate thought to their research context. In some cases, an inappropriate choice of context represented a fatal flaw in the study. We suggest that 'playing in the wrong place' precludes 'playing to win'. In other cases, an honest reflection on the context can lead to thoughts on validity and limitations that stimulate ideas and suggestions for further research. However, withholding key information about the research context is counter-productive to the advancement of knowledge. It may also arouse suspicions as to why the context was not identified clearly and explicitly.

We believe that those of us who study IS and management phenomena must accept and accommodate some degree of particularism in our research. This requires a more nuanced appreciation of the limitations of research designs and theories. However, we do not take the extreme position of arguing that all theories should be particularistic. Instead, we advocate a more inclusive, pluralistic approach (cf. Ravitch, 1990), which both integrates different perspectives and avoids isolating cultures where unfamiliar variables and relationships hold sway (cf. Davison, 2014).

Our core thesis is that the context needs to be considered explicitly and thoughtfully as the research is designed and theories are formulated. Research designers should be clear about the expected scope of validity for their study before undertaking it. The collected data should confirm that the actual context corresponds to expectations. Subsequently, the analysis and interpretation should recognise that the findings *may* have currency in other contexts, but that this is subject to validation. A safer way of communicating theoretical findings is by generalizing them to theory rather than directly to other contexts (Yin, 2003; Lee and Baskerville, 2003). Theory can then be tested and validated in different contexts.

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