Emergent Culture In Global IS/IT Outsourcing: A Cultural Systems Perspective

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EMERGENT CULTURE IN GLOBAL
IS/IT OUTSOURCING: A CULTURAL
SYSTEMS PERSPECTIVE

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Abstract

The paper addresses culture as an issue that has been only partly addressed in the existing Information Systems / Information Technology (IS/IT) literature on outsourcing. It examines culture exclusively in relation to IS/IT global outsourcing (GLOS). In doing so, it identifies research issues in the study of culture in IS/IT GLOS that indicate a need to examine the emergent culture in outsourcing relationships. It then proceeds to explain the appropriateness of using a cultural systems perspective to study emergent IS/IT GLOS culture and proposes a model that incorporates concepts from the normative literature on systems. The paper addresses culture in terms of changeability and dynamism, and it contributes to the body of research that emphasizes cross-cultural issues and their importance in IS/IT projects. Addressing culture as emergent, it focuses on understanding that culture in a GLOS relationship emerges and is therefore different from the cultures expressed by the organizations in the pre-relationship period. The cultural perspective discussed in the paper supports in-depth understanding of the IS/IT GLOS culture and facilitates understanding of its role in the effectiveness and efficiency of GLOS relationships.

Keywords: Outsourcing, Culture, Systems

Word count: 5,923
1 Introduction

Outsourcing of Information Systems and Information Technology (IS/IT) describes the practice of transferring assets, leases, staff, and managerial responsibility for delivery of services from internal IS/IT functions to external third party providers (Grover, 1996; Hirscheim & Lacity, 2000; Kern & Willcocks, 2002).

Used as a strategy and as a business practice, outsourcing is defined through the difference in the location of the service recipient (also known as buyer, customer, or client) and the service supplier (also known as provider or vendor). Consequently, with respect to geographical distance, the broad term of outsourcing has been divided into further types, as the following list demonstrates (Murthy, 2004; Palvia, 2004):

- Onshore outsourcing (or traditional outsourcing) involves both the customer and the provider being located in the same country.
- Nearshore outsourcing involves outsourcing to countries close to the client company or to countries that are related by the same category of treaties or alliances.
- Offshore outsourcing involves outsourcing to countries or continents not necessarily connected by national boundaries or trade laws but, nonetheless, they are characterized by compatibility in areas of culture, economic status, and capabilities.
- Farshore outsourcing involves countries separated by a distance larger than the distance encountered in cases of nearshore and offshore relationships.

For the purpose of this research, Global Outsourcing (GLOS) is defined as the relationship and the collaboration between two or more organizations, within the context of nearshore, offshore and farshore IS/IT outsourcing alliances, arrangements, or deals.

Regarding the location factor, apart from the impact of physical distance as described in the above definitions, many researchers also emphasize the additional importance of psychological or cultural distance, according to which the degree of cultural
similarity is more important than spatial affinity between the organizations involved in a GLOS relationship (Evans et al., 2000; Gurung & Prater, 2006). Yet, it seems that cultural issues, as a new form of managerial challenges related to GLOS projects, “are not yet fully understood” (King & Torkzadeh, 2008). Moreover, the role of people and cultural change required to support strategic buyer-supplier relationships has been largely ignored (McIvor & McHugh, 2000; Nicholson & Sahay, 2001), while issues with external policy makers and foreign audiences can be a vital issue still underexamined (Finn, 2003).

The present paper adopts the view that the interaction between IS/IT collaborating organizations within a GLOS context is related to the expression and interaction of their unique sets of cultural characteristics. This results in the development of an emergent GLOS culture, consisting of a new set of cultural characteristics that is different from the one expressed in the period before the GLOS relationship. The aim of this paper is to propose a novel approach to the study of culture in IS/IT GLOS, by applying a cultural systems perspective. Following the introduction of the present section, section 2 discusses global IS/IT outsourcing and ways culture has been addressed in relation to the topic. Section 3 discusses two research issues identified in the current study of culture in an IS/IT context, both of which point to the need to address the emergent nature of IS/IT GLOS culture, as is then discussed in section 4. This is further analyzed in section 5, where the cultural systems perspective is discussed in terms of its appropriateness to address cultural emergence in an IS/IT GLOS specific context. The paper concludes with a discussion of the significance of the proposed approach and outlines further research possibilities.

2 Global IS/IT outsourcing

GLOS involves the relocation of business processes from high-cost to lower-cost locations, outside the client’s national boundaries (Erber & Sayed-Ahmed, 2005; Heeks et al., 2001). It is an important aspect of the IS/IT business strategy (Gurung & Prater, 2006) and has resulted in higher business expectations and new challenges for organizations (Cullen et al., 2005), while, from a managerial perspective, its
management has become a “competency” that future managers “must” learn (Carmel & Tjia, 2005).

Regarding different types of outsourcing, various criteria are frequently discussed in the literature, including the following:

- Geographical distance (Murthy, 2004; Palvia, 2004)
- Process versus project scope (Carmel & Tjia, 2005)
- Retained versus transferred activities (Lacity & Hirschheim, 1995)
- Emerging sourcing arrangements (Willcocks & Lacity, 1998)
- Customer – supplier perspective (Beulen et al., 2006; Rottman & Lacity, 2006)

Considering advantages and disadvantages of IS/IT GLOS, cost advantage can be achieved through access to large pools of IS/IT experts and low-salary workforce, while disadvantages may exist as a result of increased coordination costs due to socioeconomical and geopolitical risks (Beulen et al., 2006). Compared to the traditional buyer-supplier outsourcing relationship, practical considerations in GLOS may include the need for control and monitoring of the provider, constant communication, and rigorous definition of requirements (Ramarapu et al., 1997; Rottman & Lacity, 2008).

Moreover, client organizations need to be aware of certain categories of costs, such as transaction costs, extra offshore costs, or hidden costs (Carmel & Agarwal, 2002; Overby, 2003), before initiating a GLOS relationship and in order to better estimate in advance the overall impact of the potential outsourcing relationship (Modarress & Ansari, 2007). Such costs and risks appear to also exist in traditional outsourcing. However, they pose a greater threat in cases of global outsourcing, mainly due to the geographical distance factor (Carmel & Tjia, 2005; Heeks et al., 2001; Rottman & Lacity, 2006).
2.1 Culture in IS/IT GLOS

The importance of culture in IS/IT GLOS has been cited by many researchers in the IS/IT field (Gurung & Prater, 2006; Khan & Fitzgerald, 2004) and the management of outsourcing relationships (Krishna, 2004; Sahay, 2003). According to current research (Abbott et al., 2010), success of global outsourcing projects often relies on achieving mutual cultural understanding, based on which the collaborating organizations can build trust and share knowledge. Moreover, in a list of the “top 12” offshoring issues, researchers consider the effects of cultural differences to be number two (after strategic organizational implication) in importance (King & Torkzadeh, 2008), while cultural compatibility is addressed as a key issue when considering cultural issues in a GLOS project (Piachaud, 2005).

Culture and culture-related issues are frequently mentioned as factors that affect GLOS collaboration and relationships, being potential indicators of success or failure (Barthelemy, 2003; Fjermestad & Saitta, 2005; Kliem, 2004; Piachaud, 2005; Rottman & Lacity, 2004). More specifically, in relation to IS/IT outsourcing, culture has been studied as:

- A part of success factors models for IT outsourcing (Aubert et al., 2005; Fjermestad & Saitta, 2005)
- Guidelines for effective and strategic sourcing partnerships (Piachaud, 2005)
- A set of criteria for choosing successfully a provider (Barthelemy, 2003)
- A risk category (Davison, 2003; Rottman & Lacity, 2004)
- A hidden cost (Barthelemy, 2003) or “a trap to avoid” (Power et al., 2004)
- A way of managing risks of offshore IT development projects (Kliem, 2004)

Moreover, culture and cultural characteristics have contributed to project failure through escalation of workforce and social risks (Rottman & Lacity, 2004), overlooking of personnel issues (Barthelemy, 2001; Barthelemy, 2003), and ineffective relationships (Oza et al. 2004; Oza & Hall, 2005; Stringfellow et al., 2008). In addition, they are also related to behavioral issues and trust (Parker &
Russell, 2004), and to inefficiency expressed in low productivity, poor commitment, ineffective communication, and lack of expertise and readiness (Niccolai, 2005).

3 Research issues in the study of culture in an IS/IT GLOS context

This section addresses a call for change in the way culture is addressed in relation to the IS/IT field and the need to examine culture beyond the stable nature of cultural dimensions.

3.1 A call for change

Culture is a topic studied frequently in relation to various business/organizational issues and the importance of culture and cultural differences is evident in the increasing amount of research on the topic (Myers & Tan, 2002; Nisbett et al., 2001). However, at the same time, an increase can be observed in the number of studies that call for a change in the way culture is approached. Among the reasons for such a call is the belief that, in the contemporary modern environment, the cultural concepts discussed in the past as part of anthropological and sociological theories are not effective any more in reflecting the aspects of the modern economy. This is mostly because of their focus on stability and their inability to address the responses of the modern organizations to the changing nature of competition in a broader international environment (Hendry, 1999; Myers & Tan, 2002).

Therefore, in order to address this research issue, recent research has focused on discussing the need for a new approach to the study of culture which will emphasize its nature as ongoing, contested, and emergent, based on the influence of the contemporary dynamic environment (Weisinger & Trauth, 2002; Weisinger & Trauth, 2003).
3.2 Domination of a research dichotomy

In terms of applying specific cultural perspectives to the field of IS/IT, the dichotomy between national and organizational culture, as is discussed below, seems to dominate the field (Karahanna et al., 2005).

National culture is analyzed through taxonomies and lists of corresponding dimensions, claiming that a certain set of characteristics appears across countries or nations. Depending on the geographical region or national borders, the magnitude of the characteristics varies (Leidner & Kayworth, 2006) but, within the specific region or borders, it is considered fixed, immutable, and predominantly affected by the country within which the group members were raised, educated, and formed their early value system. The most popular conceptualization of national culture is Hofstede’s taxonomy (Hofstede 1980), while other characteristics that have been used to describe national culture include Confucian dynamism (Hofstede & Bond, 1988), achieved versus ascribed status (Trompenaars & Hampden-Turner, 1994), objective-emotional dimension (Newman, 1977).

Organizational (or corporate) culture is evident in the organizational context, without necessary representing the culture of the country of origin of the individuals. It differentiates between organizations according to the expression of dominant behaviors (Leidner & Kayworth, 2006) and is developed through the shared history and the expectations of organizational actors (Veiga et al., 2000). Compared to the stability of national culture, as addressed in Hofstede’s taxonomy, due to constant communication and interaction, organizational culture is characterized by instability. As a result, it is an evolving product of the organizational environment, according to which organizational actors are considered capable to adjust by setting aside aspects of their primary cultural experience and by embracing cultural aspects normalized within the specific organizational context (Tsotra & Fitzgerald, 2007).

While studying culture within the field of IS/IT, the research dichotomy discussed between national and organizational culture, with an emphasis on Hofstede’s taxonomy, seems to dominate the field (Leidner & Karahanna, 2006).
domination becomes even more noteworthy when viewed in relation to the call for change raised by researchers. To address it, the concept of culture as emergent has been discussed as an alternative cultural approach yet, as discussed in the next section, such theories have not been examined using empirical data.

4 Emergent IS/IT GLOS culture

In this paper, the concept of emergence, in relation to culture, follows the general concept of organizational culture, according to which culture is unstable and mutable, characterized by variation and dynamism (Brannen, 1998; Brannen & Salk, 2000). Emphasis on emergence and dynamism has been emphasized by researchers in the discussion of two theoretical, not mutually exclusive, subtypes of the organizational culture, situating and negotiated, as discussed in the next paragraphs.

The first subtype, situating culture, involves the way multiple cultural contexts interact in order to influence social behavior in the organizational environment. It focuses on behavior that is shared among organizational actors and influences them (Weisinger & Salipante, 2000; Weisinger & Trauth, 2003). More specifically, situating culture addresses culture as locally situated within a specific context, dynamic, grounded in actual behaviors, and contextually embedded in socially negotiated work practices.

Negotiated culture, on the other hand, differs from situating culture in its emphasis on negotiations, instead of context. More specifically, it involves negotiations in the ways that actors use their various cultural identities to participate in new organizational settings, the ways that culture emerges in settings characterized by multicultural variability, and in the ways that the social and work environment influences the creation of a unique working culture within the specific organizational context (Brannen, 1998; Brannen & Salk, 2000).

Expanding on the concept of the emergence of culture as addressed by situated and negotiated culture, after a period of interaction in a GLOS specific organizational context, individuals tend to develop common sets of procedures and experiences,
resulting in a context-specific and localized working culture. The interaction between GLOS collaborating organizations reflects the expression and exchange of the two organizations’ unique sets of cultural characteristics and results in the development of a new, unique set that is specific to the GLOS context. Within this specific GLOS cultural context, a new culture emerges in the GLOS relationship and has the potential to change and adjust through the interaction of certain characteristics and the negotiation of identities, settings, and context.

When considering the nature of culture in GLOS relationships, individuals coming from a certain national culture often work in a country characterized by a different national culture. Employees’ cultural disposition develops through a combination of characteristics of their national culture and the expression of characteristics associated with the organizational culture in which they have to function every day (Tsotra & Fitzgerald, 2007). Consequently, the GLOS relationship may start with groups of one organization exhibiting cultural characteristics similar to characteristics associated with their national culture of origin and later, starting from such characteristics, culture moves towards development of new values, meanings, and norms in bi/multicultural organizations or groups (Brannen & Salk, 2000; Tsotra & Fitzgerald, 2007).

Building on the cultural subtypes that address the emergent nature of culture on IS/IT GLOS and on the call for addressing culture in a way that emphasizes its emergence, IS/IT GLOS culture, in the present paper, is proposed to demonstrate the following basic characteristics:

- It is locally situated in the GLOS context of the relationship, the organization, or the broader business environment in which organizational actors, with different cultural identities and affiliations, interact.
- It is influenced by its stakeholders, both within and outside the organization and, by reacting to internal and external influences, the organization becomes dynamic, learning, and adaptable in terms of actual behavior.
• It is embedded in everyday, socially negotiated work practices through which cultural change is behaviorally and dynamically expressed in the GLOS relationship.

• It emerges as a result of multicultural variability and interactivity and, by adapting to the social, organizational, and environmental influences, it becomes a unique emergent culture within the specific GLOS context.

In order to better understand the emergent culture in the IS/IT GLOS cultural collaboration, this paper adopts a cultural systems perspective, as will be discussed in the following section.

5 Using a cultural systems perspective to study the emergent IS/IT GLOS culture

In order to better understand IS/IT GLOS cultural collaboration, the present paper proposes the adoption of a systems perspective and, more specifically, the perspective of one particular type of systems, that of cultural systems. The reason is that, as an inherent characteristic, systems (and among them cultural systems), express emergence, dynamism, interaction, and evolution, concepts also addressed in the normative literature and prior research in relation to the role of GLOS culture and to the need for culture to be perceived beyond a static and stable concept. Consequently, the perception of GLOS relationship extends to GLOS perceived as a cultural system as presented in figure 1. In the figure, the GLOS cultural system results from the interaction between cultural characteristics associated with the collaborating organizations (organization I and organization II) and expresses an emergent GLOS culture.
5.1 IS/IT GLOS cultural systems

Systems consist of “a set of interrelated elements” (Ackoff, 1971) that can be perceived as a unit within the environment (Vaccari & Delaney, 1999). Their components are connected together to form a “whole” that exhibits properties of the “whole”, rather than properties of its component parts (von Bertalanffy, 1968).

Within the general category of systems, cultural systems are defined as coherent sets of values, concepts, beliefs, rules, learned behaviors, expressed symbols, and ideals (Parsons et al., 2001). They distinguish a particular society by guiding and rationalizing its members’ behavior, as it emerges through decision-making, past accumulation of resources, and action-based decisions (Ember et al., 2002). The content or the components of a cultural system also include the various ways people organize their world experience, their scheme of cause-effect relationships, the hierarchy of their values, and the processes used for achieving desired features (Chesebro & Bertelsen, 1998). Viewed as an entity, a cultural system facilitates attribution of meaning and functions as an active symbolic system of socialization that creates, reinforces, and alters individual, social, and enculturation processes (Chesebro, 1984).

From a cultural emergence perspective, a specific cultural system develops and changes as a result of the inherent interaction and the contribution of its elements to
the organizational context. In this context, the cultural system refers to the cultural elements that are expressed and experienced by organizational actors, e.g. their values, concepts, beliefs, rules, learned behaviors, feelings, conduct, ideals, rewards, expectations. Through interactions, interrelations, and interdependence of such elements, the cultural system has the ability to evolve and change. Thus, the emergent culture of a system, within a specific context (in the present study a GLOS cultural system within a GLOS-specific context) can be examined according to ways that various components of the cultural system contradict, complement, or coexist with each other. In doing so, they rely on various methods, such as socialization, feedback, interaction, collaboration, and transmission of cultural characteristics (Archer, 1996).

Furthermore, a cultural system is characterized by the hierarchical context or multi-level layers of its components (von Bertalanffy, 1968). According to the perspective of this paper, the larger environment in which the GLOS cultural system belongs is the external organizational or business environment, within which the GLOS context operates (within which the GLOS cultural system expresses an emergent GLOS culture). Moreover, communication and interaction can take place between the levels of hierarchy, resulting in a certain level (or lack) of information flow. The more information the GLOS cultural system acquires, the more freedom and flexibility it has in terms of availability of possible choices and potential for emergence and change (Doktor et al., 1991).

Further related to cultural systems’ interactions is the concept of regulation and control. Depending on its relation to the external environment, a system may be isolated from its environment and closed. In a closed system, there is no import or export of information or cultural “material” and, therefore, its final state is determined by its initial conditions, manifested as cultural stability and lack of emergence. In contrast, an open system exchanges information with the environment, resulting in interaction and reorganization of the system’s components (Mora et al., 2007).

The above characteristics of a GLOS cultural system are used in figure 2 to propose a model of emergent IS/IT GLOS culture.
According to the proposed model, as applied to the IS/IT field, GLOS culture emerges from a GLOS cultural system, as it (the GLOS cultural system) results from cultural characteristics of the collaborating organizations (organization I and organization II).

<table>
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<th>Cultural systems characteristics</th>
<th>Description</th>
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| A&B (Attitudes & Behaviors)     | A – Attitudes: abstract, tacit, internalized representations of the world  
B – Behaviors: expressed, empirical, related to attitudes |
| Environment                     | Represents the business setting within which the specific GLOS relationship operates and the existence and role of hierarchical boundaries. |
| Interactivity                   | Includes interrelationships and exchange within the cultural system and between the system and the environment. |
| Control                         | Involves power issues and use of power to achieve goals.  
It is different from the interactivity category because it can play an instructive and directive role towards the system’s functionality and goal orientation. |
| Emergence                       | Describes the evolution in the GLOS relationship, along with the potential for enculturation and adaption. |

Table 1: Cultural systems characteristics of emergent IS/IT GLOS culture
The IS/IT GLOS cultural system is related to attitudes and behaviors (A&B), the environment, interactivity, and control. These concepts emerge from characteristics of the cultural systems theory, as discussed above, and are described in table 1.

5.2 Appropriateness of using a cultural systems perspective

After the GLOS relationship has been initiated (usually through a contract, deal, alliance, or partnership) and the terms of the GLOS relationship have been agreed, organizations enter a new stage. The companies, from two separate entities, merge into a cultural system that evolves as a unit and finds ways to adjust and achieve its goals. The cultural system evolves as a result of the context in which it operates and the regulations it faces, and evolves towards manifestation of its unique emergent culture.

Examining organizations as systems is not a modern perspective (e.g. Ashby, 1962; Katz & Kahn, 1966) and the present study follows and expands on such an intellectual basis. In the present paper, through the use of cultural systems to model a GLOS relationship, the GLOS relationship becomes a dynamic system of adaptation and evolution, containing elements that interact with one another and with(in) the environment.

The basic proposition of the paper is that cultural components interact to create a cultural system, which is related to an emergent GLOS culture. This proposition relies on theoretical aspects and inherent characteristics of the systems theory, according to which systems are identified through the interactions and the interdependencies among their components. Therefore, in systems terms, the GLOS cultural relationship can be viewed as a set of interrelated cultural characteristics forming a “whole”.

Theoretical aspects and characteristics of the systems literature that indicate the appropriateness of viewing a GLOS relationship as a GLOS cultural system include the following:
• GLOS is part of a multilayered environment and functions as an open system that is subject to information exchange and flow.

• GLOS relationships include various interactions and regulatory activities in order for the relationship to attain its goals.

• A GLOS-specific culture eventually emerges through regular interaction and interdependence of the integrated components of a GLOS cultural system.

• The business environment, the GLOS context, and various managerial, supervisory, and group activities provide regulation and feedback in a GLOS relationship.

• Management and supervision serve as control mechanisms to ensure the objectives of the GLOS cultural system are met.

• In order to survive or maintain equilibrium with respect to the environment and its goals, a GLOS cultural system moves towards change, adaptation, and adjustment.

In addition, the general systems perspective is appropriate for the study of IS/IT GLOS because both collaborating organizations enter a new stage, after the outsourcing deal is signed by both collaborating parties and the terms of the relationship have been agreed. The companies, then, merge into a new system. This GLOS system emerges and functions within its specific (GLOS) context, moving through interactions towards an emergent GLOS culture.

Overall, the cultural systems perspective, in order to describe the emergent GLOS culture, is using cultural systems characteristics, as they are discussed by systems researchers and applied in the organizational field (Checkland, 1994; McLeod, 1995). GLOS, on the other hand, addressed through the unique and emergent nature of its culture, exemplifies such systems characteristics making, therefore, the cultural systems perspective a promising perspective way of understanding the theoretical background to the emergent nature of the IS/IT GLOS culture.
6 Discussion

As discussed in section 3, national culture expresses cultural stability. If national culture was to be applied to an organizational level, it could be beneficial only to small and highly exclusive organizations, with low levels of cultural homogeneity. In addition, with globalization including not only exchange of finished goods and services but also the diffusion and infusion of cultural norms, business processes within and across organizations become interconnected and powered by information and technology exchange (Leidner & Kayworth, 2006).

Using the conceptual aspects of cultural systems, the present paper adopts the view that:

- In the emergent GLOS culture, emphasis is on the context (i.e. the business environment, the economic climate, the workplace, the stakeholders, the work practices)
- The GLOS relationship is a dynamic system of adaptation and evolution that contains multiple components that interact with one another and with(in) the GLOS context.

When individuals become members of an organization of any type, they carry with them and transfer their original cultural characteristics while, in addition, they encounter some of the characteristics of the surrounding culture. Different characteristics interact and a context-specific culture emerges, operates, and functions dynamically in the specific organizational context, to then adapt again, according to the changing environment and the system’s goals.

To summarize, the paper addresses the following issues from the literature and previous research:

- In terms of GLOS, researchers call for attention to the fact that there has been little in-depth study of IS/IT GLOS, while challenges of a cultural nature are not adequately understood.
In terms of GLOS and culture, prior researchers consider the effects of cultural differences as crucial and understudied, frequently associated with project failure and additional cost.

In terms of culture in relation to the IS/IT field, there is a call for a different approach to the study of culture, as a reaction to the dominant IS/IT research dichotomy that tends to focus on either national or organizational culture. Consequently, the paper proposes a model of emergent IS/IT GLOS culture that addresses the uniqueness of the GLOS context and the interaction of cultural characteristics that lead to the cultural emergence.

Regarding its research significance, the present paper addresses culture as an important issue only partly addressed in the current state of the IS/IT literature on GLOS, and it examines culture exclusively in relation to IS/IT GLOS. In doing so, it focuses on the emergent GLOS cultural relationship and applies a cultural systems perspective in cultural emergence. Moreover, it contributes to the body of research that emphasizes cross-cultural issues and their importance in IS/IT projects, expanding on existing work that emphasizes the effect of culture on managerial issues and the behavior of organizational actors. Finally, the paper offers further understanding of the role of culture collaboration in the overall efficiency and effectiveness of a GLOS relationship.

Based on the conceptual development discussed in the paper, future research will focus on using the concepts discussed to extend the proposed model, through data from an industrial setting.
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