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From Boundary Spanning to Creolization: Cross-cultural Strategies from the Offshore Provider's Perspective

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ABSTRACT

In achieving success in global sourcing arrangements, the role of a cultural liaison, boundary spanner or transnational intermediary is frequently highlighted as being critical. In this paper, we argue that concepts like "boundary spanning" have been limited in theorizing the complexities of cross-cultural collaborations in offshore outsourcing processes. This paper presents an alternative framework of "creolization" that combines and further extends theoretical understandings of these processes. We investigated 13 companies through 26 in-depth, semi-structured interviews in Xi'an Software Park, an emerging Chinese software and services outsourcing hub. A grounded analysis of the data revealed four conceptual groupings for the practices undertaken at these companies, labeled as boundary spanning, mixed identity, network expansion and cultural hybridity. We posit that the process of creolization supports these practices and furthermore provides a unique basis for strategies positioning cross-cultural work from a supplier's perspective.

Keywords

Offshoring, cross-cultural collaboration, creolization, boundary spanning, cultural hybridity, identity, Diaspora, China

INTRODUCTION

Global sourcing is characterized by the migration of knowledge-intensive and routine IT-enabled tasks from large industrialized countries to lower wage, highly productive, labor-intensive locations (Carmel and Tjia, 2005; Willcocks and Lacity, 2006). This phenomenon raises a variety of issues affecting client-supplier interactions which have attracted interest in the research community, albeit dominantly focusing on the client's perspective and relationships with large, multinational Indian firms. Recently, however, China has been identified as the next major competitor in the offshored services industry and is actively implementing strategies to develop this sector, including the development of technology parks targeting offshore software and services providers (Qu and Brocklehurst, 2003).

The success of offshored projects, however, is often contingent on the achievement of sufficient mutual cultural understanding, which provides the basis of trust, knowledge sharing, and smooth collaboration. In achieving such goals, the role of a cultural liaison, boundary spanner or transnational intermediary has been frequently highlighted as being critical to either creating linkages for new markets to emerge (Heeks and Nicholson, 2004; Jensen, 2009) or for cultural and knowledge exchange to take place (Krishna, Sahay and Walsham, 2004; Levina and Vaast, 2005).

In this paper, we argue that while concepts like "boundary spanning" have been useful in theorizing cross-cultural collaborations in offshore outsourcing processes, they are also limited by their emphasis on boundaries, separation of identity, and imagery associated with geographical dispersion. This paper presents a framework of "creolization", conceptually representing the complexities, i.e. the interconnected concepts and processes of cross-cultural management in offshore outsourcing from a suppliers' perspective. The empirical work is an exploratory study on offshoring practices in Xi'an Software Park, a Chinese offshore services hub. Our research question is: *how do Chinese suppliers negotiate competitive*

positions in offshore software and services provision and how can we usefully conceptualize these processes to better understand underlying issues and challenges?

The next section comprises a critical literature review on concepts of "boundary-spanning", "Diaspora" and "identity" in global work, from which we propose a conceptual framework of "creolization" in the third section. The empirical findings of offshore software service providers in Xi'an, are then presented in section four, followed by discussion and conclusion of key contributions of the paper.

"BOUNDARY SPANNING", DIASPORA AND IDENTITY IN GLOBAL WORK

In the context of offshore outsourcing, the practice of boundary spanning has been recognized as critical in moderating relationships between client and vendor thus impacting on project performance (Gopal and Gosain, 2009; Levina and Vaast, 2008; Marchington, Vincent and Cooke, 2005). A key feature of globally distributed work is the ability to leverage the resources and skills of the cheaper, remote location to complete the service provided. Boundary spanners play a key role in providing a knowledge bridge through which required practices, procedures and other know-how can be acquired by the remote service provider. Moreover, as knowledge intermediaries, (Nicholson and Sahay, 2004; Sahay, Nicholson and Krishna, 2003), boundary spanners also adopt the role of building trust within relationships.

The role of boundary spanners is often played by members of a Diaspora or ethnic expatriate community. Such communities have been linked to the success of software exporting industries in developing or emerging economies (Heeks and Nicholson 2004; Saxenian, 2002), like India, for example, where large Indian expatriate communities in the United States spawned trading relationships in IT-related services with contacts in their home territories (Arora, Gambardella and Torrisi, 2001; Heeks and Nicholson, 2004). Research on the effects of expatriate communities on cross-border trade indicates that a number of common interrelated factors influence the establishment of viable linkages. This influence is most noted where transnational communities are large, well educated, well connected to home-country contacts, possess a willingness to engage with the home-country contact, have access to relatively more advanced technical knowledge in the host country and help to build reputational confidence and trust (Kapur and McHale, 2005; Saxenian, 2002).

Individuals, groups or firms involved in bilateral cultural collaborations are found to experience tension between different identities. For example, D'Mello (2005) reports that Indian knowledge workers in the outsourcing industry who straddle the boundaries of global and local arenas are found to struggle with the tensions between traditional and emerging roles such as family orientation versus individualism and standardization versus customization. Moreover, the identity of IT workers in globally distributed work is also entangled with "mobility" – geographic, social and existential (D'Mello and Sahay, 2007). Boundary spanners who adopt dual identities, i.e. "joint identification", also have an important role in overcoming a divisive "us" versus "them" mentality in business relationships and negotiating status differences in cross-cultural collaborations (Levina and Kane, 2009; Levina and Vaast, 2008).

THEORISING THE CONCEPTS

The review above suggests a complex inter-relationship between these processes influencing key areas that affect offshoring success such as cross-cultural communication, knowledge exchange and relationship management. In this section we attempt to build a conceptual framework drawing upon current literature and concepts from other disciplines.

The notion of boundary spanning or bridging inherently signifies the distinction and separation of two or more territories or spaces that are artificially connected by agents such as Diaspora members or expatriate managers. This paper proposes to move beyond the idea of bridging to that of a process of "creolization" (Sahlin-Andersson and Engwall, 2002). The concept has roots in linguistics and cultural studies:

> "Creole languages or cultures draw on and are formed in the interconnectedness of various languages or cultures. Creole language or culture does not replace the original one. Instead, Creole cultures have been shown to be open, and their relation to the cultures from which they have evolved remain visible and clear…In addition, Creole cultures have been described as vital, diverse, and innovative… (ibid. p. 28)"

The term "creolization" is being used here to counterbalance globalization discourses that view global culture as imposing itself onto local contexts. We would like instead to conceptualize the entanglement of global and local networks, cultures, knowledge and resources as creolization. We conceive it as encompassing the dynamics of Diaspora influences, boundary spanning and identity in the processes of cultural confrontation and interactions in offshoring contexts. The metaphor of creolization also allows us to understand how individuals are able to live in and draw upon diverse cultural contexts which constitute their identity.
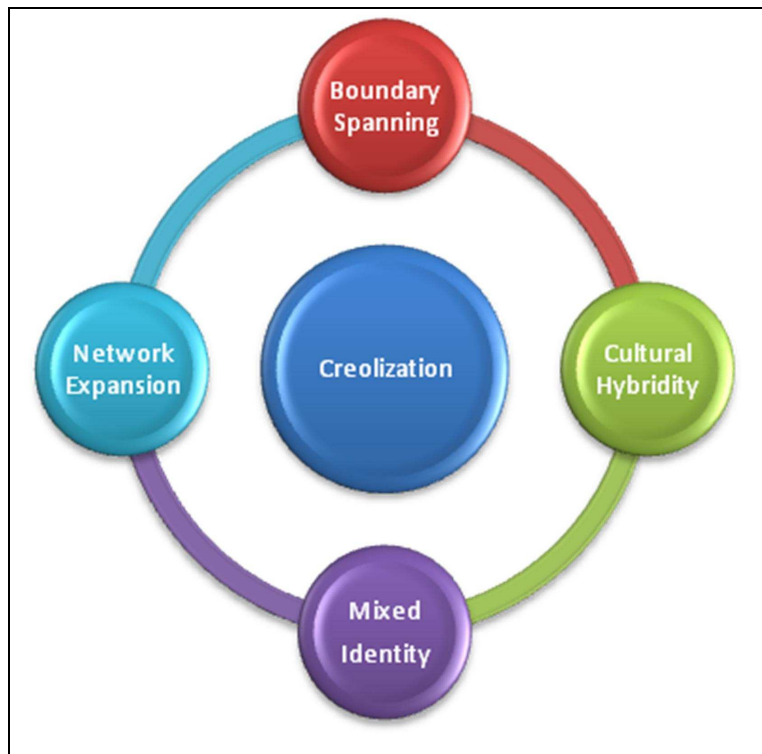
Figure 1. A conceptualization of the process of creolization

Incorporating, therefore, the notion of creolization with the conceptual positions outlined above, our framework for understanding the creolization phenomenon can be depicted as in Figure 1. This integrated framework encompasses four interconnected processes implicated in cross-cultural interactions in global sourcing ventures. The concept of *boundary spanning* has been reviewed earlier but we would also like to emphasize the idea that boundary spanning is an emerging, negotiated position influenced by organizational context and other institutional forces (Levina and Kane, 2009).

The second concept is that of *cultural hybridity*. Relatively little has been researched about organizational culture and identities of firms that are significantly influenced by multiple cultures. Offshore service providers, by nature of their business positioning, have to develop organizational strategies which allow them to tap into cultural and social repertoires of both local and overseas networks. "Hybridity" reflects the reality of a globalized world where there is "a gradual spectrum of mixed-up differences" (Geertz, 1988, p. 148), and where clear boundaries become objects of reification and power hegemony. There has therefore been a move in cultural studies to move beyond Diaspora into hybridity. As Felski (1997) argues,

> "Metaphors of hybridity and the like not only recognize differences within the subject, fracturing and complicating holistic notions of identity, but also address connections between subjects by recognizing affiliations, cross-pollinations, echoes and repetitions, thereby unseating difference from a position of absolute privilege (p.12)."

So the concept of "cultural hybridity" is distinct from those of "Diaspora" and "boundary spanning". While the latter is useful in signifying the expansion and interconnectedness of networks which are clearly observable in global sourcing activities, they are also constrained precisely by the assumed boundedness which stresses "internal coherence and unity, logically set apart from 'others' (ibid. p. 142)." Rather, we suggest that these are co-existing facets of creolization which not only demand the acknowledgement of diversity and difference, but also the recognition of processes of accommodation, contestation and legitimization of a heterogeneous culture, where "the local is constituted globally" (Khondker 2005).

"Creoles" as boundary spanners and knowledge translators are influenced in their roles by the norms and values of the groups with which they identify. Levina and Kane (2009) argue, for example, that individuals who undertake these roles are able to assume dual identities thus effectively spanning potential cultural gaps that could lead to conflict. This ability to operate in the interface of cultural groupings, negotiating a state of "in-betweeness", is key to creating and maintaining cross-cultural relationships. The creoles apply to local contexts the perspectives, abilities and notions of image particular to the Diaspora and immigrant experience. The adoption of *mixed identity* is often a result of processes of acculturation, that is, adopting social traits of another group; and assimilation, incorporating the norms and values of another social group into those of one's

own. Inherent to mixed identities are tensions inevitably arising from the pronounced "differences" in cultural confrontation (D'Mello, 2005) and in the context of offshore outsourcing, the need to reconcile status differences (Levina and Kane, 2009). The tensions experienced by creoles and the consequences are complex and nuanced and call for better understanding.

The final component of our framework of creolization is *network expansion*, which we feel is an important extension of the idea of creolization, particularly in the context of offshore service providers. It refers to the generation and connection of disparate networks. In the processes of network expansion, creoles build trust relationships when exploring and establishing local connections, provide the knowledge and capabilities necessary to establish linkages between actors in adopted and home territories and finally play the role of "reputational intermediaries" (Kapur and McHale, 2005), i.e., proxies of reputational "capital" while a foreign offshore provider establishes that reputation over time. Table 1 summarizes the discussion on the process of creolization and how we have conceptualized it.

Creolization as a theoretical construct encapsulates and connects these underlying processes associated with cross-cultural collaboration	
Boundary Spanning	Bridging and Bridgehead functions, Knowledge Mediation, Engendering Trust
Cultural Hybridity	Generating a hybrid culture
Mixed Identity	Applying to the local context the perspectives, abilities and notions of image particular to the Diaspora & immigrant experience and the tensions resulting from the engagement with local and global contexts
Network Expansion	Mediating reputation, network extension, relationship building, local-global linkages

Table 1. Creolization as a theoretical construct

In summary, this framework represents a theoretical conceptualization of the complex inter-relationship from the perspective of offshore service providers. These four processes are inter-connected and overlapping, and we are not in a position to establish causal relationships among them. Rather, we argue that organizations strategically mobilize these processes in order to enable sustainable and scalable offshore service provision. To successfully extend their networks into overseas markets, these organizations have to mobilize all the above processes, i.e., to draw upon Diaspora connections, actively seek to span boundaries by valuing and assigning key individuals who are able to negotiate and reconcile mixed identities. These processes have to be connected and anchored by an organizational culture which embraces hybridity of cultures, norms, and practices.

METHODOLOGY

The research site, Xi'an Software Park in Xi'an, China, established in 1998, promotes the development of software and services outsourcing industries. Ninety percent of enterprises engaging in software and services outsourcing in Xi'an are located at the park. It has an annual industrial growth rate of up to 45%, and comprises nearly 780 companies, of which foreign-funded enterprises account for 170. The services offered range from software development, through to tasks such as handling client queries and providing back-end support to client-facing processes. At the end of 2008, there were over 71,000 employees in the park whose total revenue reached 22.7 billion RMB, with exports at 110 million US dollars.

We employed an exploratory case study approach (Yin, 2003). Two research site visits were made, each separated by a six-month interval. Thirteen indigenous and multi-national companies, whose organizational structures reflected a mixture of expatriate and local management, were chosen as participants in the research. In-depth face-to-face semi-structured interviews lasting between 1 to 1.5 hours were held with 26 mid to senior level managers within these companies. The interview protocol addressed questions concerning the firms' delivery capability, their knowledge management processes and issues encountered with cross-cultural collaboration and relationship-building. Interviewing two levels of management allowed for gathering multiple perspectives which could then be used to build rich stories of actual practice.

The research team consisted of 2 native Chinese speaking researchers, one based in the UK, and one based in China, both with fluent English and Chinese language skills, and two native English speaking researchers based in the UK, with no Chinese language skills. All interviews were transcribed; Chinese language interviews were transcribed into Chinese then, where needed, translated into English for further analysis.

We employed a qualitative data analysis approach based on aspects of grounded theory (Glaser and Strauss, 1967). Initially, a thorough reading of the two sets of interviews, from the two site visits was undertaken so as to extract main issues arising

from the respondents' answers. These initial themes were then used as high level coding categories for data analysis. Data were then coded, generating further categories and subcategories, which were grouped together under logically occurring conceptual positions. Labels for these positions were later developed from consulting relevant literature and theories until we were satisfied that appropriate concepts had been developed for what was being observed in the field. No *a-priori* theory was assumed except for a passing knowledge of issues related to cross-cultural management and knowledge transfer/exchange issues in intercultural encounters in offshoring arrangements.

THE CASE STUDY

This section presents our key findings which show evidence of the creolization process, organized under the conceptual constructs of boundary spanning, cultural hybridity, mixed identity, and network expansion.

Boundary Spanning

Most companies we visited made conscious efforts to bridge the cultural and knowledge gaps in serving offshore clients through a number of organizational practices such as: maintaining a semi-permanent onsite bridgehead team; systematically organizing language and cultural training; sending between 10% to 80% of their development staff over to clients' sites to acquire language, technical and communicative skills in the particular cultural context. Bridgehead teams could spend from 3 to 6 months abroad and on their return would expect to serve as knowledge mediators and direct points of contact with clients.

Apart from facilitating communication and collaboration with offshore clients, these types of agents can also serve as knowledge mediators for local clients and institutions. For example, one of the managers in an American-headquartered firm comments on how local governments could reach out to overseas clients,

> "I should say many of them are all local Chinese ... when they went to United States or other countries [and] they give presentations, they are using their way to think and to present. I talked to them and I said, I give you an idea, why not you get ... all these big [international] companies, because we all are located in Xi'an, you can ask our executives [to] be your consultants, [we] can provide you a solution and suggestions ... because we have different point of the view of the world. You must use their (international clients') language to explain. Otherwise you are talking this way and nobody understands...so you need to use their way to present." *[Manager 1, Company S]*

Cultural Hybridity

Many of the firms interviewed demonstrated cultural positions of a blended or hybrid nature. The cultural cues with which one of these provider firms identified, for example, tended to accommodate mixed perspectives. At one point it was a foreign company, headquartered in the US, operating in China, viewing itself as different from local Chinese companies but at the same time ironically incorporating within its trading name the indigenous name for China, 'Hua'. The organization also designated one informal lounge area as the "Starbucks" lounge and decorated it with paraphernalia reminiscent of a New York style café, while serving guests (i.e. the research team) cups of Chinese tea to drink. The company actively supports the development of organizational roles such as the basketball playing programmer, the band playing team member and the employee as Westerner:

> "I am not saying our employees are 100% Western culture, but we can really mix that culture,… our kids, our employees are very Western, that's why we have the band, we have a basketball team, we have a ping pong team, we have all that so when you are not working you are able to express yourself, so when you go back to your office, you bring that spirit with you and that also actually helps you to unite the company" *[Manager 1, Company H]*

Several firms encouraged exchange visits where clients visit the provider's site for a period of time (three to six months, for example) and providers pay return visits to the client's site so that some form of cultural exchange can take place. Foreign clients sample the local cuisine, for example, while indigenous Chinese learn more about the client's cultural context. A more elaborate example of this was the institution of an "international exchange" concept where one organization actively encouraged Westerners to visit and work on internships within the organization, while sending almost 80% of their own staff to live and work in the Western client's home country.

Mixed Identity

Respondents who had been exposed to non-Chinese contexts either as immigrants or foreign students were able to express unique perspectives that appeared superficially contradictory but upon closer inspection revealed an ability to adopt multiple views of identity and to relate to how these influenced the business environment and foreign client relationships. For example, two of the interviewees, a Chinese returning student and a first-generation Chinese immigrant who is member of a North American Chinese Diaspora, found that although they were now both living and working in China, they viewed it more as an adopted home, claiming instead an affinity with the North American context and viewing China and the Chinese as foreign. Nevertheless, they were able from their unique perspective to reflect on the tensions inherent in attempting to accommodate dual identities and how these affected communication processes:

> "The biggest problem is that, again I believe, as foreigner, it's not the Chinese peoples' problem, you have to understand that, that barrier was built by the foreign people. Sometimes, especially for me, when I first came to China, if you throw me into an environment that has a lot of Chinese, even though these Chinese have, … a Western culture, they like Western stuff, but when they communicate with us, we refuse to really communicate with them... they're going to be more open, because they already have that in them, you see that's why they are Western, that's why they wear Nike." *[Manager 1, Company H]*

Differences in status and power between offshore providers and clients have been a feature of the work done in offshore outsourcing studies, but the way in which mixed identity plays a role in negotiating those differences has not been much explored. We found evidence of ways in which respondents adjusted their image that reflected some of these power disparities and their ongoing struggles with these constraints. It was evident in the responses given by one technical manager of a Chinese based US subsidiary who could not distinguish himself from headquarters management even though he lived, worked and was permanently based in Xi'an managing Chinese teams. In his responses "us" consistently referred to the North American management team, with whom he identified.

Tensions were also evident between the need for these organizations to reconcile the local and global contexts created by their "bridging" roles both as Chinese service providers for external multinationals and subcontractors or vendors within the local Chinese context. Such tensions led for example to acknowledgements that the foreign/global context was better understood and easier to negotiate than that of the local/lived-in, contrary to intuition or expectations.

Network Expansion

An important characteristic shared by most of the service providers we visited was the prevalence of senior management teams with multi-cultural backgrounds and/or experience who invariably performed a liaison or bridging role with regard to the foreign client. These people tend to play a leading role in the company, or serve in key positions such as project managers, sales managers or team leads. These key individuals are at the forefront of cultural encounters and network extensions, and are able, for example, to set up connections, explore new markets, and promote reputations either in local or overseas markets. They are also able to mobilize and exploit institutional and material resources either locally or across national boundaries to achieve their objectives. For example, one of the most successful BPO companies in China has strategically tapped into their alumni connections from their US education experience and used it as a base to expand their global presence:

> "you see we start with these counties we were familiar with around Detroit area. And also most of the executive level are graduated from University of Michigan, one of the famous university, and alumni is a pool, a labor pool, a knowledge pool. And especially FORD and GM these manufacturing car companies are in Detroit these are our customers as well. We are also dealing with Boston, New York, Texas as well. You see that how we have grown and where we are now."*[Manager 1, Company C]*

The connections that are made between these disparate networks mobilize resources in each network, revealing possibilities and resources that are available in other locations, predicating more complex and potentially higher value business linkages such as consulting/advising or strategic alliances.

DISCUSSION

The topic of cross-cultural management in offshore relationships has been approached from various perspectives (Krishna et al., 2004; Mahnke, Wareham and Bjorn-Andersen, 2008). However, studies that present "how-to" recommendations often see cultural liaisons as a panacea for cross-cultural issues and fail to recognize that it is only one link in a complex set of

strategies for sustaining competitive advantage. In this paper, we show that although the use of boundary spanning mechanisms such as cultural liaisons and bridgeheads are important, they will only be effective and sustainable if such practices are anchored in a vision that does not seek to reify differences but to assimilate them, i.e., a strategy of creolization.

The findings from our empirical work reflect the views that cultural positions are emergent, contested and negotiated and support to some extent the notion of the emergence of a working culture perspective (Walsham, 2002, Krishna et al., 2004). We develop a metaphor that describes that process and how it translates into strategic positions from the vendor's viewpoint. Table 2 summaries the practices we observed in each dimension of creolization and their strategic significance for an offshore supplier. Creolization is firstly a process of generation and interconnection of networks, which we refer to as *network expansion*. Our research shows that successful Chinese offshore service suppliers are able to explore and establish local networks both locally and overseas and join them together through the supply bases located in China, thereby exploiting local institutional, infrastructural, human and cultural resources. For example, the local network in Xi'an draws upon high quality and low-cost human resources from the large number of local universities, favorable governmental policy and incentives, and a long history of cultural interaction with Japan. These resources pooled together by creoles serve as connecting points between local and overseas networks of client-bases which creoles develop and tap into. The cultivation and expansion of successful and sustainable networks tend not to result from ad hoc activities but are based on more sophisticated linkages. The creoles themselves do not identify with any singular culture and network. Rather they are able to adopt perspectives from multiple cultural positions to form a *mixed identity* and operate in the intersection of both.

The constant challenge to mediate perspectives and reconcile differences has to be met with systematic *boundary spanning* activities, such as virtual and face-to-face communications, cross-site training and visits, and trans-situational learning (Vaast and Walsham, 2009). Boundary spanning inevitably brings tensions, but these can to various extents be dissolved or alleviated in a hybrid organizational culture cultivated in the supplier base, where differences are not reified or problematized but accommodated and normalized in day-to-day practices. In other words, the Chinese suppliers adopt a cultural management strategy to promote *cultural hybridity* which does not privilege distinctions but rather adopts interesting and useful practices from different cultural perspectives. We believe that cultural hybridity is key to maintaining successful offshore collaborations, an element ignored in the literature. The success of the Indian outsourcing suppliers takes this element for granted because modern Indian business culture is by default a cultural hybridity resulting from centuries of colonial history. Major Indian outsourcing suppliers do not consider themselves Indian, but international companies. If Chinese suppliers are to achieve a similar degree of success, they will have to start by strategically positioning themselves in the intersection of cultures, networks and knowledge traditions and try to thrive in this space.

A creolization perspective spawns these practices emanate which represent key strategies for negotiating cross-cultural collaborations	
Network Expansion	Generate local and overseas networks which mutually tap into multiple resources. The networks are interconnected, stabilized and consolidated via creoles serving as connecting points.
Mixed Identity	Adopt a composite identity that can understand different cultural perspectives so that viewpoints do not appear foreign but simply the product of interactions.
Boundary Spanning	Achieve mutual understanding by active cross-cultural communication, cross-site training and visits, and trans-situational learning.
Cultural Hybridity	Encourage adopting hybrid organizational culture incorporating aspects from various ethnic backgrounds to promote more cohesive working cultures, not privileging distinctions and differences but rather adopting different but interesting and useful practices.

Table 2. Summary of practices adopted by Xi'an Software Park practitioners

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CONCLUSION

In this paper we have developed a conceptual framework describing the phenomenon of creolization, which, we argue, offers an alternative model to extant notions of boundary spanning, cultural liaisons, bridgeheads and Diaspora influences that are widely posited in the literature as strategies that bridge cross cultural practices in offshoring. We have argued that this phenomenon, which we have derived from a study of practices reported by software and services suppliers operating in an

offshore hub in China, reflects and elucidates the complexities of cross-cultural interaction occurring in offshoring relationships.

Although our study included a limited sample and a compressed time frame for data gathering, we can demonstrate that the insights gained are reflective of aspects hitherto only marginally addressed in the literature and to which we added value. Thus, one of the contributions of this paper has been the application of the concept of creolization as a theoretical lens that combines, but differentiates itself from, other conceptual positions, such as boundary spanning, that have hitherto been presented as standalone perspectives in the literature. We have also elaborated on the processes that take place within a creolized sub-culture, labeled as network expansion, boundary spanning, mixed identity and cultural hybridity, and provided evidence of these processes at the level of organizational practices.

Our contributions also include identifying nascent strategies which we believe emerge from this creolized working culture and which may offer Chinese suppliers unique and useful ways of approaching the challenge of competitive positioning in the offshoring industry. In fact, this is one of the implications of creolization for effective inter-cultural management. Our final contributions lie in providing this unique and insightful study in the under-researched area of offshoring studies from a supplier's perspective and moreover adding to the dearth of such studies from the Chinese suppliers' context. We further posit that more in-depth, longitudinal studies of these creolized practices are needed to gain further more substantial insights.

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