

Editorial: Repurposing management knowledge production in the Global South context

Serving on editorial boards of management journals for almost a decade has taught us valuable lessons about purposeful research. A key lesson includes the significance of maintaining theoretical and methodological rigour and crafting engaging narratives that effectively convey a study's methodology and contributions to the management research field. Another equally crucial lesson is recognising that getting management research wrong in Global South [1] contexts may lead to missing significant opportunities to address pressing problems such as increased inequality and unsustainable growth. Nevertheless, much remains overlooked in the debate about the need for and the challenges of producing purposeful context-oriented research in the Global South. Most studies have not sufficiently tapped into the challenges faced by scholars from these developing economies, including the trade-off between local relevance and international publication rigour. The growing pressure to publish and the management education curricula, prioritise content, shape and quantity of research production that aligns with mainstream Global North management knowledge at the expense of local purpose (Trzesniak, Plata-Caviedes, & Córdoba-Salgado, 2012; Mattos, 2008; Mascarenhas, Zambaldi, & Moraes, 2011). So, how do we repurpose management research for the local good?

This editorial endeavours to discuss some key challenges of developing and publishing management studies about the Global South, proposing potential solutions. Our objective is to invigorate local dialogues on the essence of quality and purpose within the realm of management research in these contexts. To achieve this purpose, we use Brazil as an illustrative case to help us discuss the challenges and the potential benefits of repurposing Global South research. Such a discussion carries profound implications for developing theories addressing global societal challenges that researchers aspire to tackle. At the same time, it also offers the potential to bring about positive changes in developing economies.

Brazil: an illustrative case

We use Brazil as an illustrative case for three main reasons. Firstly, conducting purposeful research in contexts such as Brazil is essential due to its size, influence and need for significant socio-economic improvements (Barnard, Cuervo-Cazurra, & Manning, 2017; Buckley, Doh, & Benischke, 2017). Brazil is grouped within the BRICS economic bloc (comprising Brazil, Russia, India, China and South Africa, with invitations extended to Argentina, Egypt, Ethiopia, Iran, Saudi Arabia and the United Arab Emirates) and is recognised as a potential catalyst for future economic growth. Yet, the country grapples with enduring issues related to social inequality, significant institutional deficiencies and,

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since 2020, the formidable challenge of recovering from a profound recession brought on by the coronavirus crisis (Hall, Matos, Sheehan, & Silvestre, 2012; World Economic Forum, 2021).

Secondly, Brazil has the sixth largest and youngest population globally – around 212 million in 2020, of which 43.83% are 24–54 years old – creating a massive demand for university education and research (Population Pyramid, 2020). According to the local government, there are 13,445 active higher education courses in Management (bachelor's) across the country, and in 2017, more than 682,555 students enrolled in Management courses (e-MEC, 2019, MEC, 2018). Thus, management research in countries like Brazil can potentially add significant and real value to local society.

Finally, local academics have expressed interest in purposeful research. In 2006, the *Academy of Management Journal* editors developed a survey asking their editorial board to define what makes an article captivating; the responses revealed that authors, reviewers and editors from developed economies emphasised theoretical contributions (Bartunek et al., 2006). Conversely, the survey with Brazilian editors revealed that they leaned towards the “so what?” element, focusing on a study’s impact on real-world management practices. Of note here is that the meaning of the word “purposeful”, which in Portuguese translates to “com propósito”, is defined in the dictionary as “having or showing determination or resolve”, and thus can take different forms, depending on one’s interpretation or priority regarding what needs to be resolved. There is not a single, universal definition of purposeful or engaging research. Instead, multiple interpretations exist, tailored to the specific context at hand. Our point is that the Brazilian survey results can be interpreted as an indication of a strong, and yet latent, local appetite for developing purposeful research.

What challenges do researchers from contexts like Brazil encounter when conducting and publishing research?

We address this question by exploring the influence of two interrelated factors. Firstly, the research process that involves perceptions of methodological rigour and the importance of local relevance. Secondly, local research and teaching institutional environments that include pressure to publish in top American and European journals, not to mention business schools’ curricula heavily based on management knowledge developed in these countries.

Research process issues

In Global South contexts such as Brazil, traditional quality standards in research are difficult to demonstrate (De Lima, 2020). Several significant methodological constraints can limit knowledge production and opportunities for publication in emerging economy contexts (Matos & Hall, 2020). These constraints encompass issues like low literacy rates, difficulties in accessing and sometimes unsafe research locations, as well as challenges related to trust and freedom of speech. However, these challenges are often not adequately considered during the research design phase, addressed in the research development process or explained in the methodology section of published articles (Halme, Piekkari, Matos, Wierenga, & Hall, 2022). As a result, research conducted in these contexts may not be widely disseminated because it does not meet the stringent standards of top-tier journals. This can lead to losing valuable insights for global management research (Halme et al., 2022).

Another negative outcome of the challenges associated with conducting research in the Global South is that authors might opt to replicate conventional methodology templates developed in the Global North instead of submitting a more transparent methodology and likely-to-be rejected contribution. Note, however, that transparency may not necessarily

mean appropriateness and relevance. A researcher may outline lots of steps in the data collection and analysis process, but not necessarily the proper ones. According to Gioia, Corley, and Hamilton (2013), “transparent evidence” matters when it helps to present a data-driven convincing argument that “prefigures the developing theory” (p. 25). However, local methodological design considerations such as sample design, research instruments and construct measures have been identified by Rajan and Makani (2016) as key for ensuring cross-cultural research methodological validity. Such arguments are consistent with a growing body of evidence in human behaviour and psychology research that shows considerable variation in things such as perception, analytic reasoning, fairness and cooperation amongst human populations. According to Henrich, Heine, and Norenzayan (2010: p. 29), “[...] people from Western, educated, industrialised, rich and democratic (WEIRD) societies [...] are some of the most psychologically unusual people on Earth.”

Additional difficulties in developing purposeful research are expected when the researcher is situated in a context characterised by the co-existence of two contrasting lived realities. In Brazil, one large population lives in poverty, with a low literacy rate. While they have solid traditional knowledge, their businesses are often technologically unsophisticated and mostly operate under informal, ineffective or rapidly changing institutions (Rousseau & Fried, 2001). Then, another utterly different reality involves a smaller but influential, middle- and high-income, educated and well-trained population, whose businesses are often technologically sophisticated, understand global markets and opportunities and operate in the formal sector. Differences in realities within the same country are sometimes more significant than across borders. Instead, these are typically ignored, misrepresented or even hidden as authors fear they may be deemed as methodologically weak by mainstream management journals, which may prefer papers “that do not deviate from an ‘acceptable outcome’” (Ado & Wanjiru, 2018, p. 203). While such a dichotomy is known by many (Narayan & Petesch, 2002), in practice, it has yet to be integrated into local business schools’ curricula. Instead, methods and theories are taught based on management knowledge created in and for developed country contexts without considering its limitations when applied in other environments.

Transferring meaning between developing economies and developed economies’ readers/reviewers might also be more problematic than in developed countries. For example, foreign research ethics, values and standards for transparency are not universal but vary, morally and legally, among cultures and nations (Wines & Napier, 1992). However, editors and reviewers of top management journals follow a set of publishing quality and ethical standards grounded in developed economies’ values, morals and beliefs, regardless of the context in which the research was conducted. We suggest that research quality issues are created by discrepancies between values, norms and beliefs in the context in which data is collected and the context in which the study is published. Thus, a gap may exist between what one group considers methodologically unethical and what another finds acceptable and analysis and sense-making of the phenomenon studied may be context-dependent. For example, consider the difference in perception of what constitutes illegal business activities (in economically stable societies) but legitimate (i.e. acceptable according to norms, values and beliefs) in disadvantaged communities. According to Webb, Tihanyi, Ireland, and Sirmon (2009), different groups may consider unethical as legitimate because that group has a broader definition of social acceptability. Examples of illegal business for some and legitimate for others include knock-off luxury products, music piracy and activities involving undocumented workers (Webb et al., 2009).

The “rules of the game”: publish or perish, and the institutional environment

In academic publishing, Hall and Martin (2019) found that research misconduct can be driven by the researcher’s perception that questionable and inappropriate behaviour towards research reporting is acceptable if it does not lead to any tangible damage – “no harm, no foul.” Growing publishing pressure from home institutions may have created negative incentives for authors in at least two ways. Firstly, authors may engage in dubious behaviour, gaming the system or suppressing information that can be seen unfit within Global North templates (Hall & Martin, 2019). This is reflected in, for example, authors presenting a “sanitised” report of the study limitations followed by superficial directions for future research. According to Brutus, Aguinis, and Wassmer (2013), poor quality limitations represent a missed opportunity to identify critical theoretical and methodological gaps in management research. While ethical issues related to selective reporting of critical information have long been acknowledged in management research (Brutus et al., 2013), additional problems due to research context have been largely ignored.

Researchers in developing economies are exposed to unintended consequences caught amongst pandering to the status quo (e.g. replicating mainstream studies), engaging in dubious methodical practices (e.g. omitting key data collection challenges that may otherwise result in rejection) or failing to publish useful context-sensitive insights in leading journals. While academics in developed countries also face these issues, we argue that they present an even more pressing concern in Global South contexts. The gravity of missed opportunities to address complex societal and economic issues amplifies the significance of these challenges in such regions. We pose that institutional rules need to be rectified. Hence, researchers have the licence to develop work connected to local business leaders and policymakers they intend to inform.

How do we repurpose management research for the local good?

In what follows, we offer some insights on how to develop research in and for Global South contexts that not only might have the potential to bring societal benefit but also contribute to global management knowledge.

Value your context

Context-dependent research findings have the potential to significantly contribute to global knowledge and should not be underestimated (Tsui, 2007). Yet, we often come across papers that include context specificity as the study’s main limitation. Instead, we recommend that authors emphasise the contributions to theory and practice that emerged specifically because of their focus on that particular context and leave the limitations to describe what was impossible to do and how future studies should address these shortcomings.

Researchers studying developing economies’ settings sometimes prioritise demonstrating rigour at the expense of considering local realities. While using methodological templates can confer legitimacy in the eyes of gatekeepers such as editors and reviewers, it may also create an impression of “false rigour” (Eisenhardt et al., 2016, p. 1121). Furthermore, the risks associated with disregarding contextual factors can lead to a substantial misrepresentation of the underlying complexities, resulting in weak theories (e.g. Jackson et al., 2019; Rousseau & Fried, 2001). One related common issue faced by authors developing contextualised qualitative research is the difficulty in addressing the generalisability of their study. Nevertheless, researchers need to keep in mind that in qualitative non-positivist research approaches, generalizability comes from the theoretical contributions rather than the results.

Value local high-quality papers

Another issue frequently neglected by researchers in developing economies is the significance of incorporating local literature. It is not unusual to come across papers that delve into theories and implications that might be more relevant to developed contexts, overlooking the potential applicability of local research. This links directly to the review quality and process of local journals and the adoption of a more diverse portfolio of institutional incentives without so much focus on Global North-based journals.

Authors may be incentivised to engage in dubious behaviour, such as suppressing methodological realities that may be seen as unfit within leading management journals.

Editors and reviewers need to be on board

The methodological issues and recommendations discussed above cannot be fully addressed without the appreciation and support of editors and reviewers. Closing the loop, the same challenges that hinder theoretical insights of studies conducted in Global South countries also play a role in achieving them when properly addressed and reported. Editors and reviewers can thus direct research production to this end by signalling to authors that such an approach is welcome. On a more pragmatic level, journals should provide evidence of such support by, for example, showcasing special issues on new methods and new approaches, forums, paper development workshops, editorials, etc. In addition, editors should be mindful of matching the study approach to the right reviewer so that the papers land in the “right room of conversation.” A reviewer’s inappropriate methodology opinion may just mean that his/her mindset is settled on conventional standards. A context-sensitive methodology could be the perfect approach to investigate a particular phenomenon in a challenging context. If the reviewer is unfamiliar with the journal’s position on such an approach, the inappropriate criticism may hamper the publication of an insightful study.

Like most management publications, management journals expect papers to include implications for practice. In line with our recommendations for authors to better elaborate on limitations, readers need to be cautious about the scope and applicability of the study’s implications for practice. Here, we stress the importance of being cautious by, for example, avoiding the danger of misinterpreting the results, which can be done by carefully reading the study limitations. This goes beyond being “aware”, a popular term used by authors when describing the study’s contributions to practice; they would rather make a sincere attempt to inform readers of the challenges they encountered, how they attempted to overcome them and how those that could not be addressed require careful consideration before managerial decisions are made.

Note that we are not recommending a “lowering of the rigour bar” for research conducted in the Global South. Instead, we recommend that editors and reviewers recognise the practicalities of relevant management research under such conditions and carefully assess the transparency of how the methods and limitations were explained, which may very well involve more work than for high-income markets. Otherwise, opportunities for relevant theoretical contributions and valuable insights for societal improvements will be missed.

Conclusions

Developing purposeful research by gaining accurate knowledge from Global South contexts such as Brazil is essential for management research due to the sheer size and potential for growth, the potential to provide novel and useful theoretical insights, and ultimately to improve business practice in markets that need social improvement the most.

We argued that knowledge production derived from empirical research within such settings can be compromised due to *in situ* challenges and idiosyncrasies that may not be

adequately captured by methodological templates developed and expected by Global North's leading management journals. This homogenising tendency (Tsui, 2007) may lead to potentially helpful theoretical contributions, and opportunities for valuable insights for societal improvements fail to be diffused. As noted by Bell, Kothiyal, and Willmott (2017), standards of methodological practices may increasingly produce lame and isomorphic management research. More disconcerting is that ignoring contextual differences may result in data manipulation, falsification and/or cheating or isomorphic research that may result in flawed findings.

We recognise that standardising research methods within management studies has advanced knowledge production in many ways. Our intention in this editorial was not to refute such accomplishments but rather provide complementary insights to allow for relevant management research that draws on Brazil and other countries in the Global South, for that matter, to live up to its potential. Otherwise, an unanticipated outcome of “rigour over relevance” is that global management scholarship will miss out on contributing towards addressing pressing societal needs.

In this editorial, we take a bold step forward by offering preliminary guidelines for authors, editors and reviewers to champion the richness of transparent and honest research about the Global South. We aim to ignite a dynamic discourse that dives into the many challenges local researchers face. We invite diverse voices to join the conversation, not just from the academic realm but also from the broader spectrum of stakeholders, including government bodies, grant agencies, senior managers from business schools and more. We seek constructive engagement from all corners to collectively address these crucial issues and pave the way for transformative solutions.

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Note

1. We use the term “Global South” interchangeably with “developing economies”, which according to the United Nations Conference on Trade and Development Statistics (UNCTADstat), include Africa, Latin America, the Caribbean, Asia excluding Israel, Japan and the Republic of Korea and Oceania excluding Australia and New Zealand (<https://unctadstat.unctad.org/EN/Classifications.html>). While these nations possess distinct cultural identities, they display significant commonalities in socio-economic challenges, including high poverty rates, inequality and a substantial prevalence of informal business activities.

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Data availability statement

Data sharing is not applicable to this article as no new data were created or analyzed in this study.