


EDITORIAL ESSAY

# Contextualization for Theoretical Contributions: Three Approaches in Management Research

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## Abstract

This editorial essay introduces three approaches for advancing management research through contextualization in Chinese management research. While the Chinese context offers fertile ground for theoretical contributions, scholars often struggle to effectively leverage contextual elements to extend existing theories. I address this gap by presenting three approaches: the counter-intuitive approach, which challenges established assumptions by identifying relationships that contradict conventional wisdom; the contrasting approach, which reveals paradoxical or opposing effects of organizational phenomena across different contextual conditions; and the theory integration approach, which combines different theoretical perspectives to create richer understanding of organizational phenomena. Using published works on *guanxi* and social networks as examples, I demonstrate how these approaches help scholars articulate why the Chinese context matters theoretically. These approaches provide researchers with tools to move beyond simply testing Western theories in China toward making substantive theoretical contributions that extend and enrich existing management theories through contextualization.

## 摘要

本文介绍了通过情境化来推进中国管理研究的三种方法。作者指出，虽然中国情境为理论贡献提供了肥沃的土壤，但学者们常常难以有效利用情境因素来拓展现有理论。作者提出了三种解决方法：(1) 反直觉法，即通过识别与传统智慧相矛盾的关系来挑战既定假设；(2) 对比法，即通过揭示组织现象在不同情境条件下的矛盾或对立效应来充实理论；(3) 理论整合法，即通过结合不同的理论视角，来创造对组织现象更丰富的理解。作者以关系和社会网络研究中已发表的研究，来展示上述三种方法如何帮助学者阐明中国情境在理论发展上的重要性。作者希望上述方法为研究者提供了有用的工具，使他们能够超越简单地在中国检验西方理论，而转向通过情境化对现有管理理论做出实质性的理论贡献，从而扩展和丰富现有理论。

**Keywords:** China; contextualization; *guanxi* and social network; theoretical contribution; theory integration

**关键词:** 理论贡献; 情境化研究; 中国管理; 反直觉方法; 对比方法; 理论整合

## Introduction

Contextualization serves as a crucial approach for making theoretical contributions by enabling scholars to understand how organizational phenomena operate within specific conditions (Bamberger, 2008; Zahra, 2007). Context shapes the meaning and theoretical significance of research findings, helping identify boundary conditions and enhance the application of theories. This approach bridges the gap between abstract concepts and practices, leading to contextualized explanation – a deeper understanding of how and why phenomena occur within particular settings

(Bamberger, 2008; Johns, 2006). Through this process, strong theoretical contributions emerge as researchers uncover how contextual factors challenge or modify existing theoretical relationships, thereby extending theories to account for previously unexplored conditions (Rousseau & Fried, 2001; Whetten, 1989).

It is crucial to recognize that merely testing existing theories in a new setting is insufficient for theoretical advancement. Bamberger (2008) emphasizes the importance of moving beyond *post hoc* contextualization toward developing context theories that specify how surrounding phenomena influence lower-level relationships and he further underlines the methodological and epistemological obstacles. Thomas, Cuervo-Cazurra, and Brannen (2011) caution that simply applying theories to unexplored contexts does not guarantee new insights. Similarly, in Chinese management research, authors must explain why the unique Chinese context matters theoretically to motivate their studies, and how theories could be extended and enriched through contextualization. Many manuscripts I reviewed for MOR fail to demonstrate how this context can shed new light on existing theoretical relationships or reveal new mechanisms, instead merely testing Western theories' applicability in China.

The Chinese context offers fertile ground for theoretical contributions due to its unique institutional, cultural, and economic features that extend and challenge Western-derived management theories. As evidenced by a review of Chinese management studies (Jia, You, & Du, 2012), China's distinct research context, characterized by its socialist market economy, strong state influence, and rapid transformation, provides an ideal setting for theory development. The complexity of China's institutional environment, characterized by the coexistence of formal and informal institutions and the interplay between traditional values and modern business practices, presents unique opportunities for theoretical advancement (Child & Marinova, 2014; Zhang, Tan, & Tan, 2016). As scholars have argued, research on Chinese organizations and management practices can significantly advance theoretical understanding by demonstrating how Western-derived theories require both modification and novel theoretical extensions, thereby enriching our understanding of context-specific boundary conditions and theoretical mechanisms (Child, 2009; Tsui, 2012).

Despite the promising opportunities for theoretical advancement, scholars face significant challenges in contextualizing their research within the Chinese setting. One fundamental challenge lies in balancing unique contextual elements while ensuring theoretical relevance extends beyond the Chinese context (Tsui, 2012). These challenges arise from China's distinctive institutional environment, which often requires researchers to reconsider the applicability of established Western theories. To address these challenges, scholars have proposed several strategies. For example, Meyer (2006) suggested examining how contextual elements moderate the relationships between variables, rather than simply applying existing theories without considering their contextual fit. Tsui (2007) emphasized developing indigenous theories grounded in Chinese phenomena to capture unique aspects that Western theories might overlook. Furthermore, theoretical bridging connects Chinese contextual elements with existing frameworks to demonstrate how they modify or extend these theories (Li, Leung, Chen, & Luo, 2012). Building on these insights, Meyer's (2014) concept of 'deep contextualization' emphasizes the importance of thoroughly understanding organizational and sociopolitical environments to develop more nuanced and contextually relevant theoretical insights.

However, despite these valuable insights, existing literature provides insufficient guidance on contextualization and theorization processes. Specifically, researchers need more guidelines to effectively bridge theoretical development with contextual understanding. In this editorial essay, I address this gap by introducing three approaches for contextualized theorization: the counter-intuitive approach, the contrasting approach, and the theory integration approach. These approaches operationalize and extend previous contextualization strategies, particularly Tsui's (2007) call for indigenous theory development, by providing specific methods to identify and theorize unique Chinese phenomena.

I differentiate these three approaches by examining three key aspects for each: (1) the contextual conditions that enable theoretical insights, (2) the theoretical mechanisms that explain relationships within these contexts, and (3) the theoretical contributions that advance our understanding. Each approach offers unique pathways to theoretical contribution through contextualization. I illustrate these approaches with previously published work and provide specific suggestions for their application in research. This toolkit helps scholars articulate why the Chinese context matters theoretically and how it can enrich existing theories, moving beyond simply checking whether Western theories apply in China. To demonstrate the practical application of these approaches in Chinese management research, I focus our discussion on published works of *guanxi* and social networks. These phenomena represent crucial aspects of Chinese management (Chen, Chen, & Huang, 2013; Zhang et al., 2016; Zhang, Wang, & Ahlstrom, 2024) that have generated significant theoretical contributions. I illustrate these three approaches in Table 1.

### Three Approaches of Contextualized Theorization

#### *Counter-Intuitive Approach*

A counter-intuitive approach challenges established assumptions by presenting and explaining relationships that contradict conventional wisdom or existing theoretical predictions. This approach is especially valuable for contextualizing research because unexpected findings are more likely to emerge in unique contexts like China, where distinct institutional and market conditions create environments that challenge theories developed in Western settings. Such findings are valuable for theory development because they force scholars to question taken-for-granted assumptions and develop more nuanced theoretical explanations (Bartunek, Rynes, & Ireland, 2006; Davis, 1971). The effectiveness of this approach depends on both identifying surprising relationships and providing compelling theoretical mechanisms to explain them, while using empirical evidence to challenge and extend theory.

Xiao and Tsui (2007) exemplifies the counter-intuitive approach by challenging Burt's structural holes theory (2009), revealing that in Chinese high-tech firms, employees with networks rich in structural holes received lower compensation than those with closed networks. This contradiction emerges from specific contextual conditions – China's collectivistic culture and high-commitment organizational environments – where the theoretical mechanisms operate differently. The authors explain that structural holes' control benefits are viewed as self-serving behavior that violates cultural norms of collective welfare. Their theoretical contribution extends social capital theory by introducing the concepts of 'integrators' versus 'brokers' to explain how similar network positions yield opposite outcomes across cultural contexts. This work reveals implicit assumptions in existing theory about individualism and develops new constructs that account for contextual differences, advancing our understanding of how social capital functions differently in collectivistic settings.

Li, Poppo, and Zhou (2008) demonstrate the counter-intuitive approach by challenging the assumption that managerial ties are universally beneficial. Their findings reveal contradictory relationships: an inverted U-shaped relationship for foreign firms versus a positive linear relationship for domestic firms. The contextual conditions driving these counter-intuitive findings include China's unique institutional environment (government preferences for domestic firms), cultural differences (varying time orientations), and organizational structures (market-based versus relationship-based routines). These elements create the liability of foreignness in tie utilization. The theoretical mechanisms explain how political factors, cultural differences, and organizational incompatibilities reverse expected outcomes for foreign firms, revealing how market and institutional forces in China's transition economy produce different effects. Their theoretical contribution extends social capital theory by challenging core assumptions and showing how organizational types modify core relationships, developing a more nuanced understanding of how context shapes social capital's value.

**Table 1.** Contextualization for theoretical contributions: Three approaches

	Counter-intuitive approach	Contrasting approach	Theory integration approach
Definition	Challenges established assumptions by presenting relationships that contradict conventional wisdom or existing theoretical predictions in specific contexts.	Unpacks complex interactions that demonstrate varying or opposing effects under different contextual conditions.	Combines different theoretical perspectives or concepts to create a richer understanding of context-specific organizational phenomena.
Contextual conditions	Unique cultural, institutional, or market features that lead to outcomes different from existing theory predictions.	Settings where competing institutional or market forces create tensions that enable the same phenomenon to exhibit opposing effects.	Environments where single theories are insufficient to capture complex, context-specific interactions, requiring multiple theoretical lenses.
Theoretical mechanisms	Identifies mechanisms explaining why established relationships operate differently in specific contexts.	Phenomena generate contrasting effects through moderation (contextual factors alter the main relationships), opposing main effects (different forms of the same variable producing contradictory outcomes).	Synthesizes mechanisms from multiple theories to explain how contextual factors shape organizational phenomena through their interaction effects.
Theoretical contributions	Challenges and extends theory by revealing underlying assumptions and developing new understanding and constructs that account for contextual differences.	Advances theory by revealing inherent dualities/multiplicity, enriches understanding by capturing paradoxical relationships and the interplay between competing contextual forces.	Develops richer explanations by bridging theories and creating new concepts that better account for contextual complexity and reveal insights beyond what each theory could provide individually.
Application guidance	Identify established theoretical beliefs, document contradictory findings in the Chinese context, and develop contextualized explanations that account for these contradictions.	Identify tensions challenging simplified assumptions, develop mechanisms explaining how these tensions operate through moderation or opposing main effects, and demonstrate significance by revealing inherent complexity and advancing theory beyond linear relationships.	Identify complementary theories with different strengths, develop a coherent framework that meaningfully connects their key concepts, and craft hypotheses that explicitly demonstrate how their interaction reveals novel insights within the specific research context.

To effectively apply the counter-intuitive approach, scholars may focus on three key aspects: (1) identify established theoretical beliefs from existing literature, (2) document findings that contradict these beliefs in the Chinese context, and (3) develop contextualized theoretical explanations that account for these contradictions. Rather than simply testing for boundary conditions, researchers should examine how China’s institutional, cultural, and market characteristics transform core theoretical relationships. This involves carefully theorizing how specific contextual elements (e.g., government influence, collectivistic values, or relationship-based business practices) reverse or modify established theoretical predictions. Researchers need to develop robust theoretical mechanisms to explain these contradictions in ways that advance broader theory. The goal is to use contradictions found in the Chinese context to challenge, extend, and enrich existing theories rather than simply showing their limitations. As exemplified by Tsui’s (2007) research, the development of new

constructs like ‘integrators’ versus ‘brokers’ helps explain how seemingly similar network positions lead to opposite outcomes in different cultural contexts.

### Contrasting Approach

The contrasting approach reveals paradoxical or opposing effects of organizational phenomena across different contextual conditions. This approach is powerful for contextualizing research because China’s transitional economy and cultural practice often creates inherent tensions and paradoxes that cannot be captured by theoretical frameworks developed in other contexts (Zhang, Waldman, Han, & Li, 2015). This approach captures multiple theoretical mechanisms that demonstrate contrasting effects (LePine & Van Dyne, 2001), including moderation effects (where high and low conditions of given moderating variables produce contrasting outcomes) and opposing main effects (where different antecedents have contradictory influences). As Johns (2006) emphasizes, contextualization helps identify these complex relationships by revealing how contextual factors can alter or even reverse established relationships. This approach is particularly valuable when studying phenomena that demonstrate seemingly contradictory patterns across different settings, allowing researchers to move beyond simplified linear relationships to capture the inherent complexity of organizational phenomenon. By exploring these paradoxical relationships, scholars can bridge the gap between abstract concepts and their context-dependent manifestations (Smith & Hitt, 2005; Suddaby, Hardy, & Huy, 2011), developing more nuanced theoretical explanations that account for the complex realities of organizational phenomena.

Gu, Hung, and Tse’s (2008) study exemplifies the contrasting approach through its nuanced examination of *guanxi* in Chinese business contexts. This research situates *guanxi* within China’s transition economy where traditional relationship-based practices and market competition coexist, creating tensions between relational governance and market forces. Through these conditions, the authors reveal theoretical mechanisms explaining *guanxi*’s paradoxical effects: while *guanxi* positively impacts market performance both directly (through sales growth and market share) and indirectly (through enhanced channel and responsive capabilities), these benefits are challenged by moderating variables where high level of competitive intensity transforms network obligations into liabilities and high level of technological turbulence constrains *guanxi*’s effectiveness by limiting firms’ ability to adopt innovations. These insights yield theoretical contributions by advancing our understanding of *guanxi*’s inherent duality as both resource and constraint, moving beyond simplified characterizations to identify specific conditions under which effects shift from positive to negative. This study captures how institutional and market contexts modify *guanxi*’s function, providing a more nuanced understanding of relationship governance in transitional economies that acknowledges the competing forces shaping the effectiveness of *guanxi*.

Yan and Chang’s (2018) study exemplifies the contrasting approach by revealing the paradoxical nature of political connections through opposing main effects in China’s institutional environment. The research identifies unique conditions within China’s political system, where power dynamics between central and provincial governments create settings characterized by multi-level governance and regional rivalries. The study demonstrates how different antecedents have contradictory influences: connections to a focal provincial government enhance firm acquisition success, while connections to rival provincial governments simultaneously harm outcomes – effects further moderated by inter-government rivalry intensity. This nuanced approach yields theoretical contributions by moving beyond viewing political connections as uniformly beneficial, instead revealing how different types of connections function as either assets or liabilities depending on specific government relationship configurations. The study advances our understanding of political strategy in transitional economies, demonstrating how the contrasting approach enables scholars to develop theoretical models that account for the complex, contradictory nature of institutional influences in the Chinese context.

To effectively apply the contrasting approach, researchers may focus on three key aspects. First, identify meaningful tensions by examining relationships that challenge simplified assumptions, revealing how competing forces within specific contexts create paradoxical and different outcomes (Johns, 2006; Meyer, 2014). Second, develop theoretical mechanisms that explain how these tensions operate, clearly articulating whether the contrasting effects emerge through moderation or opposing main effects (Bamberger, 2008; Whetten, 1989). Third, demonstrate the theoretical significance of these contrasting effects by showing how they reveal inherent dualities or multiplicity within organizational phenomena and how understanding this complexity advances theory beyond linear, uniform relationships.

### *Theory Integration Approach*

The theory integration approach is the one that combines different theoretical perspectives or concepts to create a richer understanding of organizational phenomena (Cornelissen, 2023; Shaw, Tangirala, Vissa, & Rodell, 2018). This approach is relevant for contextualizing as the unique Chinese context often requires different theoretical lenses to adequately explain phenomena that emerge from the intersection of cultural practices, institutional change, and global market forces. Research applying this approach can enhance explanatory power by accounting for phenomena that single theories may inadequately explain, build on and develop bridging concepts to reconcile disparate theoretical viewpoints and concepts, and demonstrate enhanced contextual sensitivity (Cornelissen, Höllerer, & Seidl, 2021; Oswick, Fleming, & Hanlon, 2011). Furthermore, it facilitates the generation of hypotheses that emerge from the intersection of different theories and concepts, potentially leading to theoretical advancements and new research directions (Zahra & Newey, 2009).

Li, Zhou, and Shao's (2009) study exemplifies the theory integration approach by bridging competitive strategy and social network perspectives to develop a rich understanding of foreign firms in China. The competitive strategy perspective focuses on how firms can achieve superior performance through differentiation or cost leadership strategies but does not account for the role of managerial ties. Social network theory emphasizes the importance of managerial ties in facilitating economic exchange and enhancing firm performance, particularly in environments with weak formal institutions. Through integration, the study reveals the mechanisms of how competitive positions and managerial ties interact in ways shaped by the Chinese context. Both differentiation and low-cost positions influence profitability, yet their effectiveness depends on managerial ties specific to China's business environment. Political ties negatively moderate the differentiation-profitability relationship, as government connections may reduce differentiation efforts in China's government-influenced markets. Conversely, business ties enhance differentiation by providing local market knowledge crucial in contexts where foreign firms face information asymmetries. This integration makes theoretical contributions beyond what either theory alone provides, revealing how competitive strategies and network relationships interact within China's institutional context, offering insights that are contextually embedded yet generalizable to similar emerging economies.

Chen and Ren (2023) demonstrate the theory integration approach by integrating concepts from social exchange theory with insights from *guanxi* and cronyism research. The Chinese organizational context – characterized by complex interpersonal networks, hierarchical structures, and *guanxi*-based relationships – creates an environment where Western theories of favoritism are insufficient. Within this setting, the authors develop 'indirect cronyism' as a bridging concept connecting indirect reciprocity logic with the un-transference rule of *guanxi*. Through this integration, they reveal how indirect cronyism operates through two mechanisms: fulfilling obligations to help indirect *guanxi*-*ihu* and strengthening relationships with third parties. These mechanisms are shaped by managers' particularism orientation, hierarchical power dynamics, and other organizational members' justice perceptions. The integration contributes by establishing indirect cronyism as a distinct phenomenon with its own logic and consequences, not merely an extension of direct cronyism or traditional



*guanxi*. By showing how these integrated concepts operate specifically within Chinese organizational contexts, the study advances understanding of favoritism dynamics in ways that neither theory/perspective alone could achieve.

To effectively apply the theory integration approach, researchers may focus on three key aspects. First, identify complementary theories by analyzing each theory's strengths, limitations, assumptions, and boundary conditions (Edwards, 2010; Zahra & Newey, 2009). This examination helps reveal how different perspectives can address phenomena within specific contexts, showing where one theory's strengths compensate for another's weaknesses (Mayer & Sparrowe, 2013). Second, construct an integrated framework by synthesizing key elements from selected theories and relevant mechanisms (Okhuysen & Bonardi, 2011). This requires mapping relationships between concepts from different theoretical underpinnings and identifying how they interact within the research context. Third, develop and test context-sensitive hypotheses that demonstrate insights beyond single-theory explanations. Researchers should specify how contextual factors moderate or mediate relationships between constructs, ensuring hypothesized relationships capture insights emerging specifically from the integration of theories (Colquitt & Zapata-Phelan, 2007; Van de Ven, 2007).

## Discussion

The three approaches – counter-intuitive, contrasting, and theory integration – represent complementary approaches to advancing theoretical contributions through contextualization. These approaches can be used individually or in combination to enhance the depth of contextualization and theoretical insights. For instance, Xiao and Tsui's (2007) work also demonstrates the contrasting element by exploring how high-commitment organizations' communal values conflict with structural holes' individual information benefits. Similarly, Gu et al.'s (2008) study incorporates theory integration by combining social capital and relationship marketing theories to explain *guanxi*'s role as a governance mechanism in Chinese interfirm exchanges. Therefore, these approaches should be viewed as flexible tools that researchers can employ based on their research objectives and empirical contexts. As Cornelissen and Durand (2014) suggest, theoretical contributions often emerge from creatively combining different approaches, I hope these approaches can serve as guides for identifying and developing theoretical insights while maintaining contextual sensitivity.

These three approaches extend Locke and Golden-Biddle's (1997) seminal work on problematization in management research. While they identified strategies for positioning research against existing literature through intertextual coherence and problematization, my introduction of three approaches provides specific tools for leveraging contextual elements to challenge and extend theory. This extension helps scholars move beyond rhetorical construction of research opportunities to concrete strategies for using contextual factors as theoretical tools.

These three approaches also operationalize Tsui's (2007) call for indigenous research by providing specific methods to develop contextually embedded theories. The counter-intuitive approach reveals how uniquely Chinese phenomena challenge Western theoretical assumptions; the contrasting approach captures indigenous paradoxes that Western theories may overlook; and the theory integration approach incorporates indigenous concepts (like *guanxi*) with existing theoretical frameworks. Collectively, these approaches offer pathways for developing indigenous theories that remain relevant within but also beyond the Chinese context. My typology of three approaches also extends Bamberger's conceptual work (2008) by offering specific, practical approaches for implementing contextualized theorization in research practice. It offers actionable research strategies to identify context-specific phenomena, develop theoretical mechanisms, and articulate theoretical contributions that leverage contextual uniqueness.

While my retrospective analysis of exemplar papers reveals that successful theoretical contributions often implicitly incorporate these approaches, the authors of the exemplar papers may not have explicitly used these approaches. This observation aligns with scholars' suggestions that theoretical

development benefits from both systematic and intuitive thinking processes (Shepherd & Suddaby, 2017; Shepherd & Sutcliffe, 2011; Swedberg, 2014). By making these approaches explicit, I aim to enhance researchers' ability to decode authors' approaches in published work and consciously apply these approaches in their own research, particularly when studying organizational phenomena in contextual settings like China.

Although all three approaches are demonstrated through quantitative studies in our exemplars, there may be methodological considerations worth exploring when selecting between approaches. Researchers should consider the suitability of research design to examine the phenomena central to each approach: for the counter-intuitive approach, designs need to be capable of identifying statistically significant relationships that contradict established predictions; for the contrasting approach, analytical techniques that can effectively capture interaction effects, nonlinear relationships, or opposing main effects are essential; for theory integration, careful operationalization of constructs from different theoretical traditions and specification of complex relationships between variables becomes paramount. Additionally, sample selection and contextual variables require thoughtful consideration across all approaches to ensure that the Chinese context's unique characteristics are appropriately captured and measured. These methodological considerations, while not exhaustively explored in this essay, may influence researchers' ability to effectively apply different contextualization approaches.

While I've focused on *guanxi* and social networks as examples, these three contextualization approaches have broader applicability across various domains in Chinese management research. These approaches can be applied to examine different organizational phenomena such as government-firm relations, state ownership effects, family business succession, digital platform governance, and sustainability practices where Chinese contexts present distinctive characteristics that diverge from Western assumptions. As the Chinese context continues to evolve and present intriguing research opportunities, I hope these three approaches offer tools for researchers to navigate this complexity and advance theory development.

An important consideration when applying these contextualization approaches is the generalizability and transferability of the resulting theoretical insights. While deeply contextualized theories capture the richness of Chinese phenomena, researchers need to be aware of their boundary conditions. These boundaries determine where theories retain explanatory power and where they require modification. Their theoretical contributions gain significance when researchers explicitly address how insights might extend beyond China. Scholars can enhance transferability by (1) specifying the institutional and cultural conditions under which their theoretical mechanisms operate, facilitating comparisons with similar contexts; (2) distinguishing between context-specific mechanisms and more universal mechanisms that may apply across settings; and (3) connecting context-specific findings to more abstract theoretical concepts. This perspective on theory transferability aligns with Chen's (2025) editorial essay on 'evolution of theories' perspective, which offers a roadmap for advancing indigenous theoretical contributions to more universal theories through systematic testing across contexts. By articulating these transferable elements, researchers ensure that contextualized theories contribute both to understanding Chinese management and advancing broader management theory.

**Acknowledgements.** This editorial piece originated from my reading on *guanxi* literature and my instruction of the session on Particularistic Ties and Interpersonal Interaction for the first IACMR Phenomenon-based Theorizing in Chinese Management Research PhD Course. I acknowledge helpful comments from Zilin He and Amy Yi Ou and two anonymous reviewers.

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