



Advanced Topics on Global Information Systems:

Introduction (1)

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Where I am from...



Global Information Systems, University of Jyväskylä (JYU)

Focus area

- Global Information Systems (GLIS)
- Knowledge Management & E-Learning**
- Internationalization / Globalization; support of globally distributed groups
- Cultural aspects for learning and knowledge management
- Support through Information and Communication Technologies
- Standardization, Quality Management and Assurance for E-Learning
- Adaptive Systems

Projects

- OpenScout: Management education in Europe and North Africa as application field for open content
- COSMOS / Open Science Resources: Exchange of Scientific Content
- ASPECT: Open Content and standards for schools
- iCOPER: New standards for educational technologies
- Nordlet: Nordic - Baltic community of Open Educational Resources Exchange
- LaProf: Language Learning Open Educational Resources for Agriculture

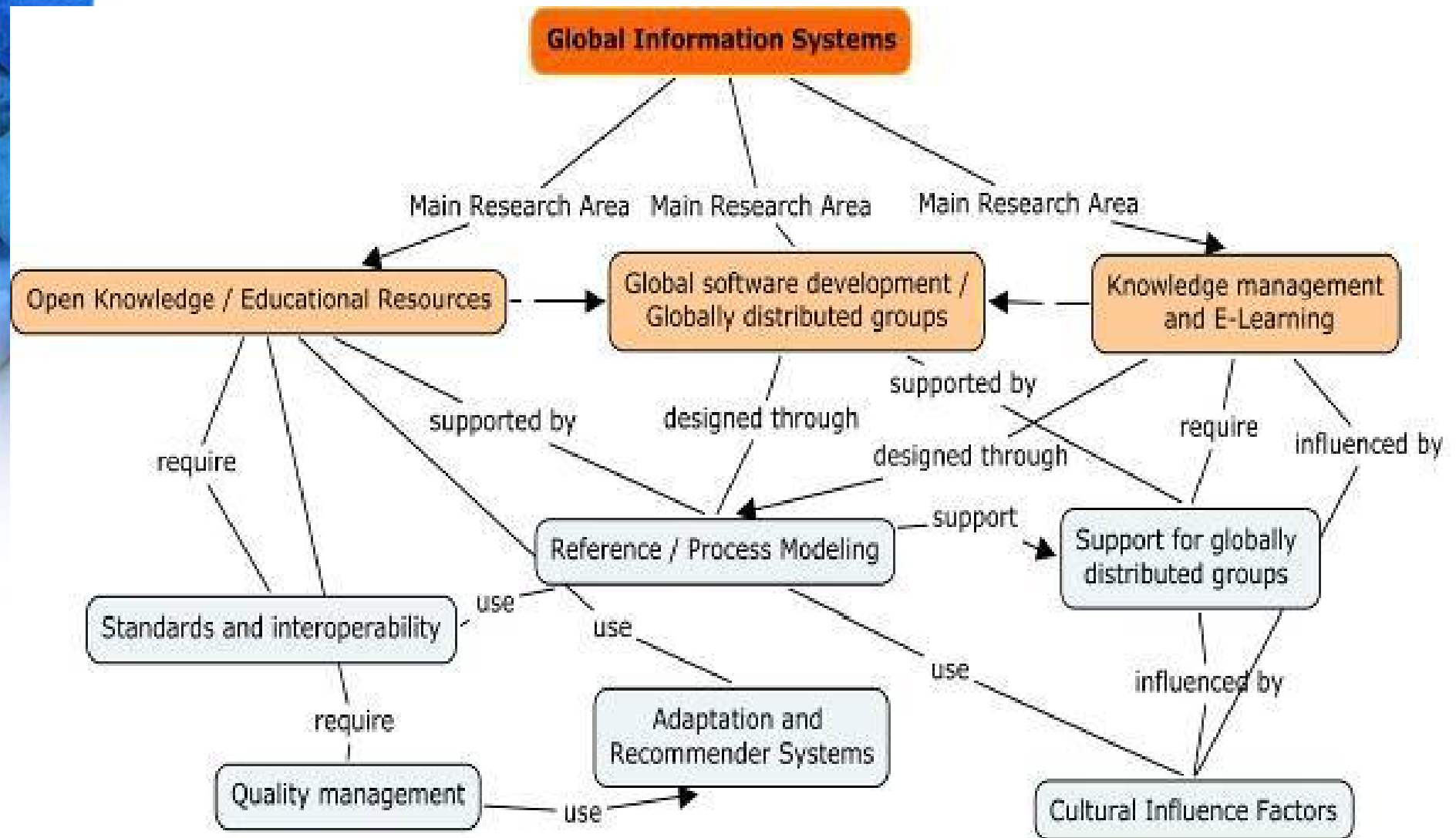


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Global Information Systems



Contents

- Motivation
 - Expectations
- Global Information Systems
 - A quick summary
- Advanced Topics in Global Information Systems
 - Definition and Scope
 - Examples
 - Questions, problems, opportunities
- Group formation

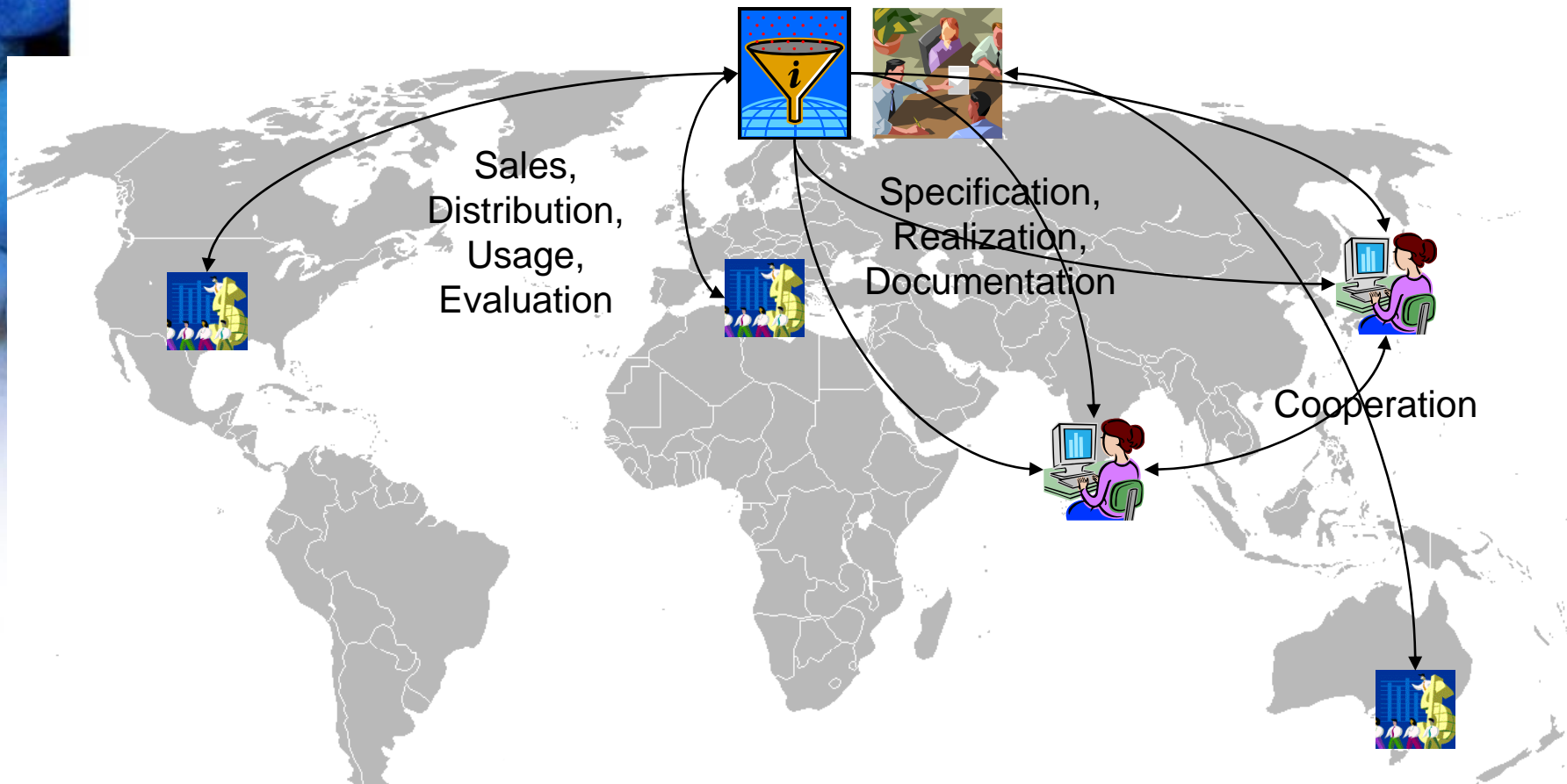


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A First Scenario

Project Idea &
Management



Source: [<http://commons.wikimedia.org/>]

What can you expect?

- Analyze and evaluate management and development problems in globally distributed organizations
- Develop solutions based on existing research
- To apply and extend research concepts to the field of global information systems
- To evaluate approaches and concepts
- To design and develop research-led systems to be used in a international context



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Your expectations?

- Why did you choose this course?
- Which experiences do you have in the field?
- Which issues would you like to discuss?



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Approach

Course outline

- Short Introduction on the topic
- Determining the topic
- Continuous discussion / support
- Presentation
- Elaboration of the topic
- Final presentation

Interaction & Discussion

- Preparation: Slides, readings & recent papers
- Questions: E-Mail, Forum, Skype (jan_m_pawlowski)

Objectives

- Analyzing and evaluating recent research and development: State of the art in Global Information Systems
- Researching recent developments (“extended literature research”)
- Determining gaps and weaknesses of existing approaches
- Developing an own research plan / research concept
- Presenting results internally (and maybe externally)



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Course Organization*

- 25.01./01.02: Short introduction
- Literature Research
Determining the topic
- 15.02.: Individual Discussion
- 01.03.: Presentation: State of the Art
- Concept Elaboration
Research Paper
- 08.03., 22.03, 05.04, 19.04.:
Individual Discussion
- 26.04.: Research
Presentation

Special lectures:

- 08.03./05.04. Global
Knowledge Management
- 22.03.: Competences for the
Global IS Workforce
- 19.04. Supporting Global
Virtual Teams with Social
Software / Evaluation
framework for global team
support
- ...to be announced...

**subject to changes and special
lectures / presentations,
please check the course
homepage*

Global Information Systems: A quick summary

- Characteristics
- Problem, challenges, opportunities
- Selected Topics
 - Knowledge Management in GLIS
 - GLIS for Educational Settings
 - Awareness in GLIS
- Summary

Characteristics

- Economical, organizational, technological factors
 - Strategy and management of globally distributed processes
 - Communication in distributed teams
 - Coordination of geographically distributed processes
 - Technical infrastructure
 - Usability
 - Cultural issues
 - Domain specific issues
 - ...
-
- Decisions: Outsourcing (Organization), Offshoring (Location), ...
 - Competencies: Management, cooperation, cultural issues



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Definitions

- Global Software Development (GSD):
Developing software in geographically distributed teams
- Global Information Systems (GLIS) are
systems produced and/or used in a global
context
- $GSD \subset GLIS$

Motivators (Sangwan, 2006)

- Limited trained workforce
- Differences in development costs
- Shorter production life-cycle through shift models
- Technological advancements
- Closeness to target markets



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Influence Factors

CARMEL (1999)

- Geographical dispersion
- Loss of communication richness
- Coordination breakdown
- Loss of team awareness
- Cultural differences



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Influence Factors

EVARISTO (2003)

- Trust
- Level of dispersion
- Type of stakeholders
- Type of projects
- Synchronicity
- Complexity
- Systems methodology
- Perceived distance
- Policy and standards
- Culture



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Success Factors

- SANGWAN et al. (2006)
 - Reduce Ambiguity: e.g., processes, management, design
 - Maximize Stability: e.g., design specifications, informal communication
 - Understand dependencies : e.g., temporal, functional, technical
 - Facilitate coordination: e.g., guidelines, standards, meetings
 - Balance flexibility and rigidity: e.g., working culture, decision making

Summary

- Wide field with a variety of approaches
- Different scenarios leading to different solutions
- Some influence factors are common to all approaches, e.g.,
 - **Communication / coordination**
 - Stakeholder
 - Infrastructure / systems architecture
 - **Culture**



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Distributed Virtual Teams: Issues

- Staffing: Finding, selecting and initiating virtual teams
- Coordination of tasks and dependent work items
- Communication between teams
- Cultural aspects, barriers, and solutions



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The virtual manager

- Skills required
 - General management
 - People management
 - Communication
 - Technical knowledge
 - Decision making
 - Problem solving
 - Administration
 - Cultural knowledge and skills



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Cost issues

- Management time for coordination
- Training cost for cross-cultural communication
- Cost of misunderstanding (re-work, delays, drop-out)
- Increased cost for offshore experts
- Communication, travel cost



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Creating teams

Process

- Choose team members
- Interview team members
- Consider team dynamics
- Consider personalities of team members
- Evaluate abilities, skills / competencies

Staffing plan

- General information
- Staffing process
- Goals, objectives, timelines
- Staffing profiles
- Skill sets and requirements
- Organizational chart



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Creating teams (2)

- Defining roles and responsibilities
 - Job description
 - Annual performance objectives
 - Growth and development plan

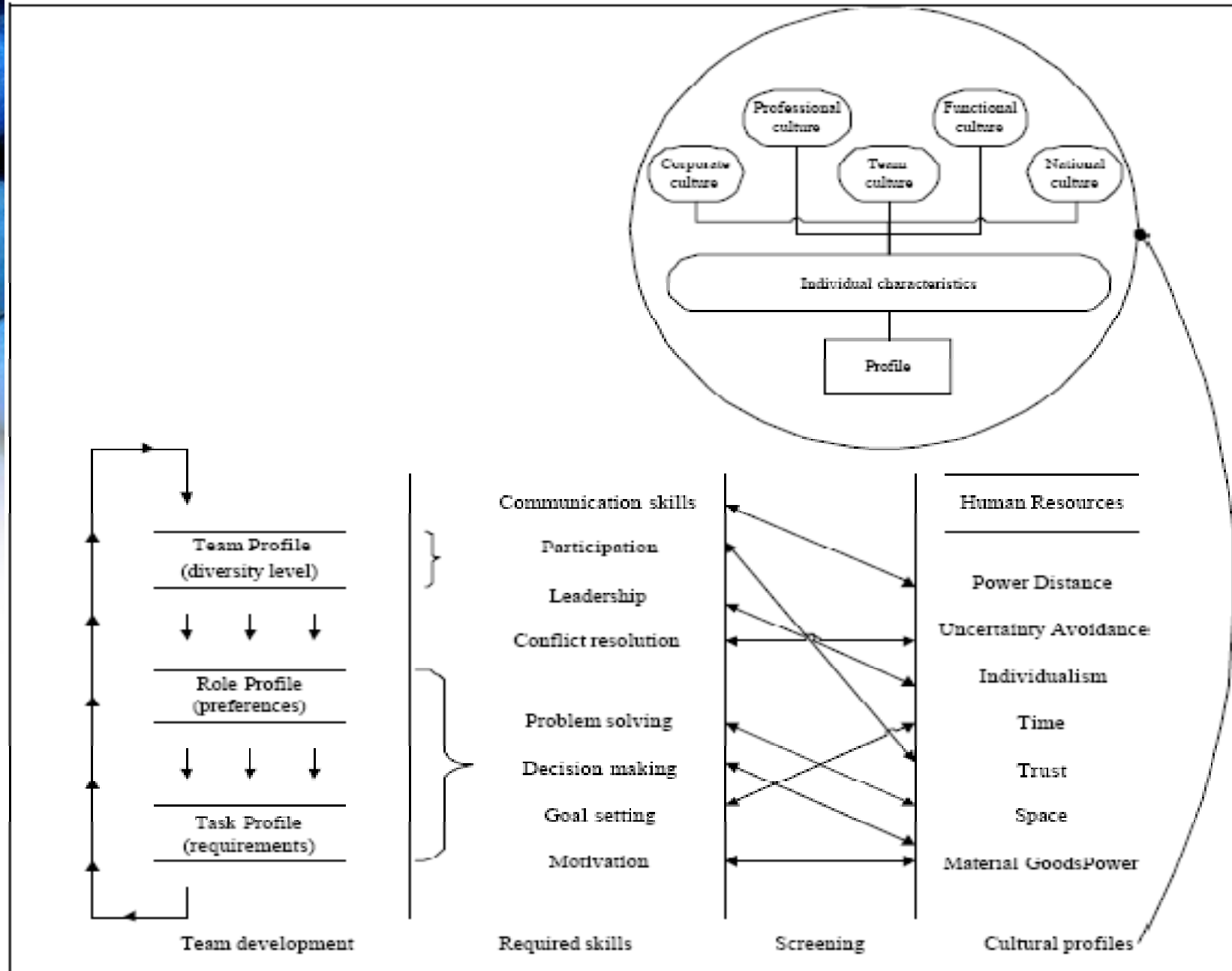


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Cultural profiles (Dafoulas, Macaulay, 2001)



Management issues

- Team meetings across time zones
 - Split regional teams
 - Rotating conference calls
 - Management meetings
- Managing language difficulties
 - Translation
 - Communication rules (clarity of speech, rotating right to speak,...)
 - Avoiding / knowing gestures
 - Questions in different cultures

Building teams

- Managing cultural differences (see L3)
- Considering adjustment to calculate productivity and potential difficulties
- Phases of cultural adjustment
 - Enthusiasm
 - Conflict Stage
 - Integration Stage
 - Adaptation Stage



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Virtual Teamwork

- “The perfect team”
 - Work atmosphere
 - Innovation
 - Creativity
 - Collaboration
 - Honesty
 - Effectiveness
 - Productivity
 - Support
 - Success



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Virtual Teamwork (2)

- Discovering commonalities
 - Workshops, informal meetings
- Creating trust
- Understanding dynamics of the team
- Creating a virtual community
- Team member interaction
 - Virtual communication
 - Virtual team days
 - Sharing best practices
 - Rewards



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Virtual Teamwork Processes

- Communication process: A formal plan defines...
 - Stakeholder groups
 - Formal Communication plan
 - Meetings
 - Conference call
 - Communication tools
 - Documents
 - Website / intranet updates
 - Informal communication / escalation
 - Communication rules



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Virtual Teamwork Processes (2)

- General process management
 - Design, development, ...
- Change control process
 - E.g., resources, schedule, maintenance, catastrophes, ...
- Defect-tracking process (technical)
- Organizational processes
- Client and vendor processes
- Status report process
- Risk Management
- Escalation procedures



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Definitions of Culture

- “Culture is the collective programming of the mind which distinguishes the members of one category of people from another.” (Hofstede, 1984)
- “Most social scientists today view culture as consisting primarily of the symbolic, ideational, and intangible aspects of human societies. The essence of a culture is not its artifacts, tools, or other tangible cultural elements but how the members of the group interpret, use, and perceive them. It is the values, symbols, interpretations, and perspectives that distinguish one people from another in modernized societies; it is not material objects and other tangible aspects of human societies. People within a culture usually interpret the meaning of symbols, artifacts, and behaviors in the same or in similar ways” (Banks et al. 1989)

Definitions of Culture

- Culture is defined as the “[...] definitive, dynamic purposes and tools (values, ethics, rules, knowledge systems) that are developed to attain group goals” (Mabawonku, 2003)
- Culture includes “[..]every aspect of life: know-how, technical knowledge, customs of food and dress, religion, mentality, values, language, symbols, socio-political and economic behavior, indigenous methods of taking decisions and exercising power, methods of production and economic relations, and so on.” (Verhelst, 1990)
- The system of shared beliefs, values, customs, behaviours, and artifacts that the members of society use to cope with their world and with one another, and that are transmitted from generation to generation through learning (Bates, Plog, 1990)



How does culture influence GSD / GLIS?

■ Impact on

- Working style
- Group behavior
- Communication
- Design
- ...

■ How to represent culture / which aspects should be analyzed?

■ How do these aspects influence design and development processes?

More perspectives on “culture”

- Organizational or corporate culture: Management style, rewards, working atmosphere
- Professional culture: Formal education within a group of professionals
- Functional culture: functional roles within the organization
- Team culture: common work experiences



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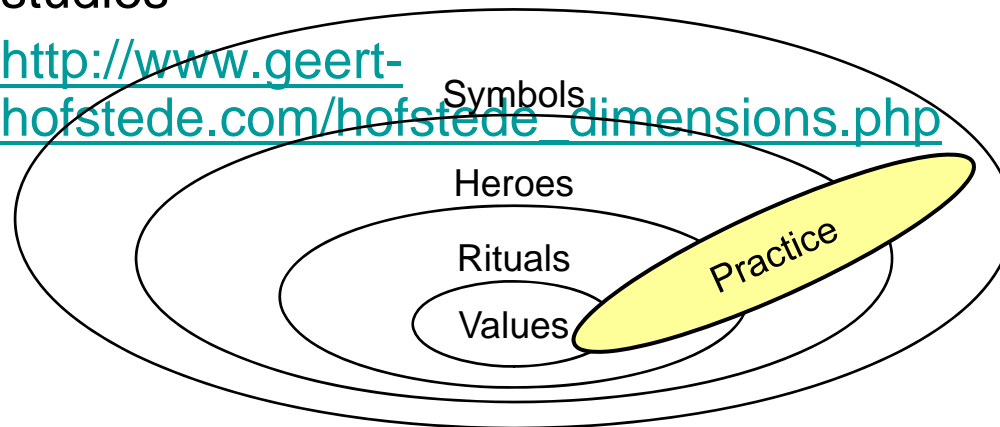
Eastern vs. Western Management (Haghirian, 2007)

| Western Management | Eastern Management |
|---|--|
| Hierarchical, egalitarian command, segmented concern | Free-form command, roles loosely defined, holistic concern |
| Professional managers, position related to function | Social leaders often with high sounding titles for low ranking jobs |
| Particularism, specialized career path possibly with rapid evaluation and promotion, individually oriented | Non-specialized career paths, slow evaluation, regimented promotion, socially oriented |
| Decentralization of power | Centralization of power |
| Mobility Stability | Diversity Unity |
| Direct approach | Indirect approach |
| Systematic analysis, standardization, categorization, classification, conceptualization, precision | Ambiguity, reaction, adaptation |
| Long-term set planning | Often lack of formal set planning, high flexibility in adjustment |
| Explicit control mechanisms | Implicit control mechanisms |
| Organizations and systems adapt for change | Leaders/managers adapt to change |
| Adapted from: Haghirian, P.: Management in Japan – The kaisha in the 21st Century, Keio University, Japan, 2007 | |



Hofstede's "Dimensions of Culture" (1)

- Model to compare cultures
- Culture as a set of typical attributes / behaviours (manifestations of culture)
 - Values
 - Rituals
 - Heroes
 - Symbols
- Based on a study for IBM in 64 countries / follow-up studies
- http://www.geert-hofstede.com/hofstede_dimensions.php



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Hofstede's "Dimensions of Culture" (2)

Analysis dimensions

- Power distance index (PDI): Common position to diversities within a country and the people's position towards authorities.
- individualism-index (IVD): Degree, to which individuals in a country wish to be free from dependencies to other persons and the authorities
- masculinity index (MAS): Degree to represent gender-roles as part of common norm, school, family and workplace as well as politics
- Uncertainty avoidance index (UAI): How do individuals feel threatened by uncommon or insecure situations
- Long term orientation (LTO): Time-orientation of a society (e.g., planning horizon)



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Hofstede's "Dimensions of Culture" (3)

| Country/Region | Score | Rank | Country/Region | Score | Rank | Country/Region | Score | Rank |
|----------------|-------|-------|----------------|-------|-------|----------------|-------|-------|
| Germany | 26 | 70 | Germany | 67 | 18 | Germany | 66 | 11-13 |
| Austria | 11 | 74 | Austria | 55 | 27 | Austria | 79 | 4 |
| France | 68 | 27-29 | France | 71 | 13-14 | France | 43 | 47-50 |
| Spain | 57 | 45-46 | Spain | 51 | 30 | Spain | 42 | 51-53 |
| Portugal | 63 | 37-38 | Portugal | 27 | 49-51 | Portugal | 31 | 65 |
| South Korea | 60 | 41-42 | South Korea | 18 | 63 | South Korea | 39 | 59 |
| Brazil | 69 | 26 | Brazil | 38 | 39-40 | Brazil | 49 | 37 |
| Guatemala | 95 | 3-4 | Guatemala | 6 | 74 | Guatemala | 37 | 61-62 |

Values for Power Distance Index (PDI)

Values for Individualism Index (IDV)

Values for Masculinity Index (MAS)

| Country/Region | Score | Rank |
|----------------|-------|-------|
| Germany | 65 | 43 |
| Austria | 70 | 35-38 |
| France | 86 | 17-22 |
| Spain | 86 | 17-22 |
| Portugal | 104 | 2 |
| South Korea | 85 | 23-25 |
| Brazil | 76 | 31-32 |
| Guatemala | 101 | 3 |

Values for Uncertainty Avoidance Index (UAI)

| Country/Region | Score | Rank |
|----------------|-------|-------|
| Germany | 31 | 25-27 |
| Austria | 31 | 25-27 |
| France | 39 | 19 |
| Spain | 19 | 35-36 |
| Portugal | 30 | 28-30 |
| South Korea | 75 | 6 |
| Brazil | 65 | 7 |
| Guatemala | n.a. | n.a. |

Values for Long-Term Orientation Index (LTO)



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Critical Analysis

- Empirical study in a corporate culture
- Results were evaluated in hundreds of settings
- Relative values seem to be stable (while absolute values are changing)
- Not applicable to all contexts
- Interpretations for GSD and specific components (e.g., communication) are questionable



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7 Dimensions of Trompenaars and Hampden-Turner

- universalism versus particularism
 - Rules vs. relationships
 - Ideas can be applied anywhere – or regarding certain circumstances
- individualism versus collectivism
 - IDV
- neutral versus affective
 - Emotional involvement
- specific versus diffuse
 - proximity between people, involvement in activities
- achievement versus ascription
 - relationship to other people
 - Is reputation based on people's „objective“ achievement or their position
- past, present, or future and sequential or synchronous
 - relationship to time and sequencing
- internal- or external-oriented
 - dealing with the environment



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14 Dimensions of Henderson (in the field of education / learning)

- Epistemology: Objectivism – Constructivism
- Pedagogical Philosophy: Instructivist – Constructivist
- Underlying Psychology: Behavioral – Cognitive
- Goal Orientation: Sharply-focused – Unfocused
- Experiential Value: Abstract – Concrete
- Teacher Role: Didactic – Facilitative
- Program Flexibility: Teacher-Proof – Easily Modifiable
- Value of Errors: Errorless Learning – Learning
- Motivation: Extrinsic – Intrinsic
- Accommodation of Individual Differences: Non-Existent – Multi-Faceted
- Learner Control: Non-Existent – Unrestricted
- User Activity: Mathemagenic – Generative
 - Initiated by a certain instructional activity – or created by the learners
- Cooperative Learning: Unsupported – Integral
- Cultural Sensitivity: Non-Existent – Integral

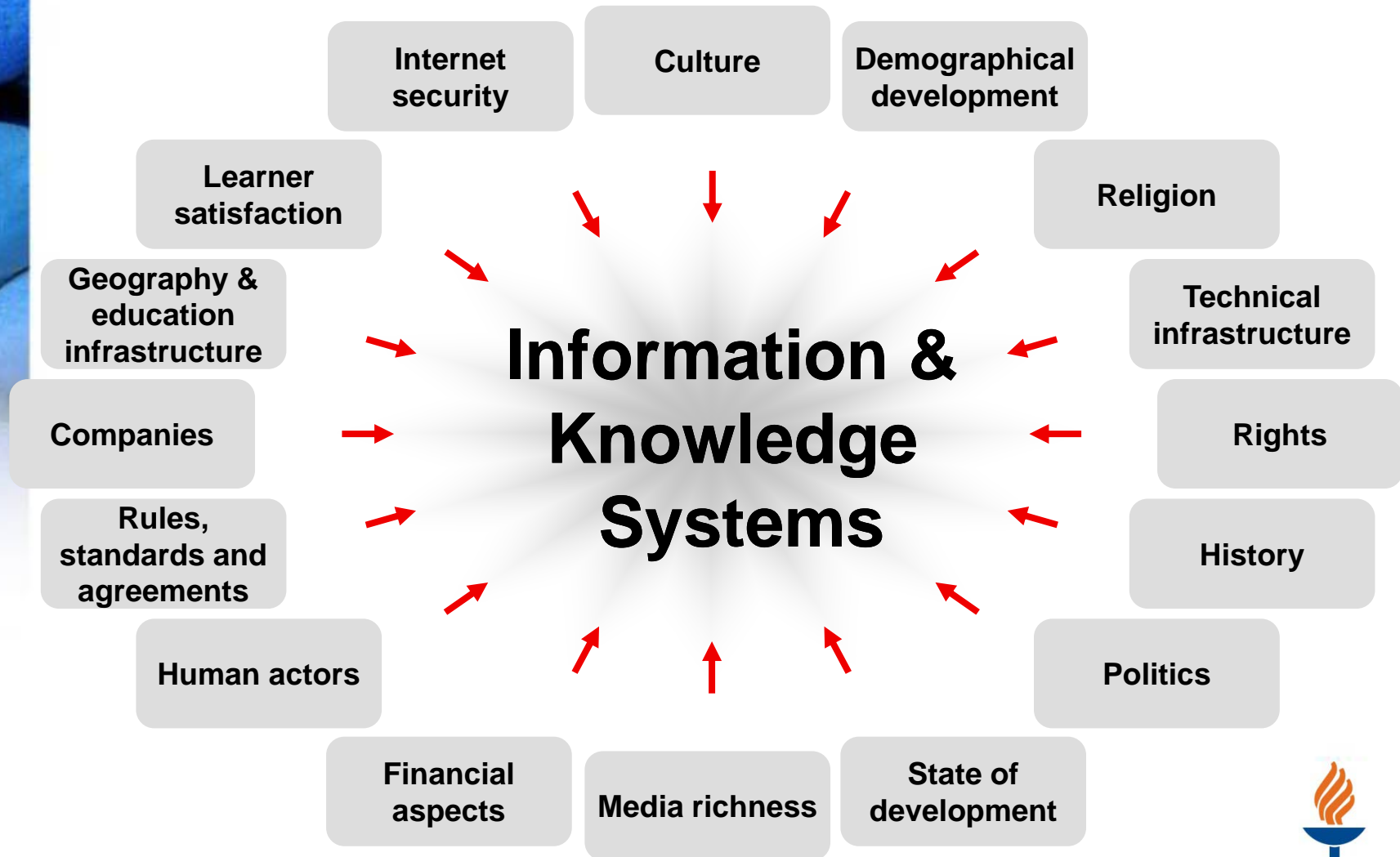


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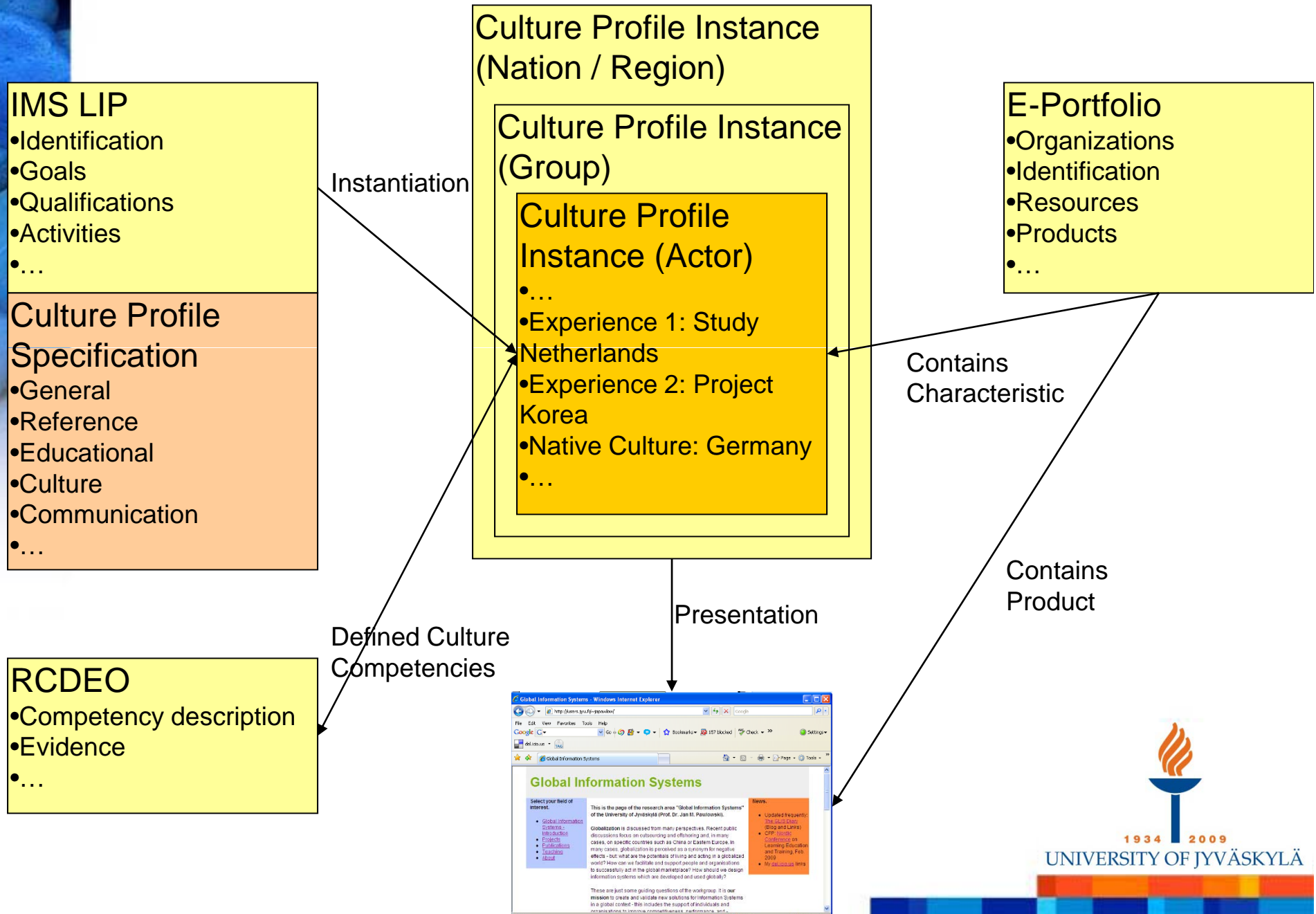
Context Metadata (Pawlowski, Richter, 2007)



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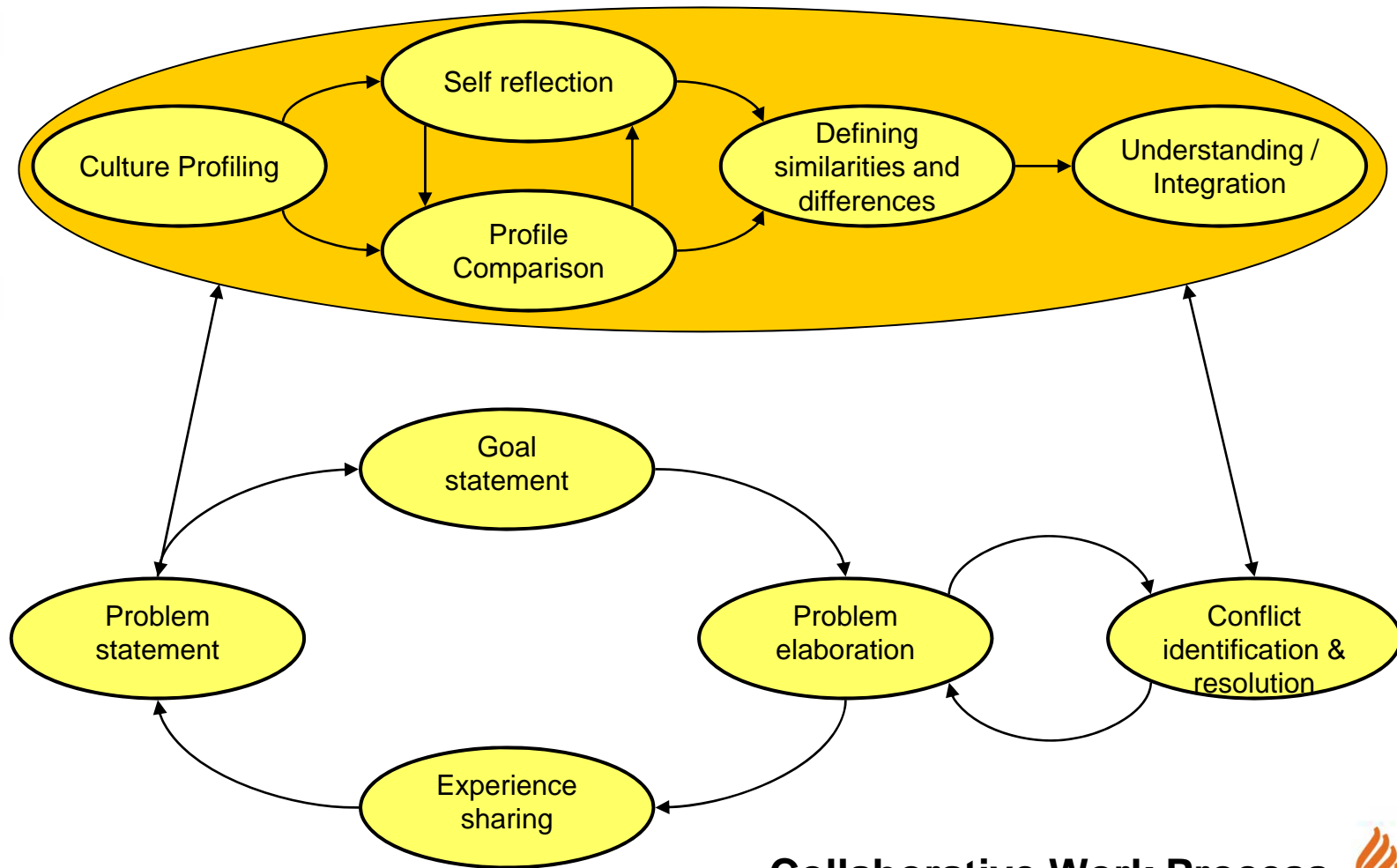
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Culture Profiles



Culture Awareness Process

Culture Awareness Process



Collaborative Work Process



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Tools

- ▣ Process Design
- ▣ Coordination Tools
- ▣ Awareness Tools
- ▣ Specific Tools (Translation)
- ▣ Simple support mechanisms!
 - Culture Clouds

korea culture professional japan china relation to my
boss teaching style germany finland giving
feedback



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Summary

- Models to represent culture...
 - Have been developed for different purposes and context
 - Vary in their level of abstraction
 - Can be used as a guideline to identify influence factors
- No model is validated to cover all influence factors for a design and development process
- Besides: Other requirements have to be taken into account!



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- Karolak, D.W. (1998): Global Software Development: Managing Virtual Teams and Environments (Practitioners)- ISBN-10: 0818687010
- Avgerou, C. (2002): Information Systems and Global Diversity, Oxford University Press, Oxford, 2002. ISBN-10: 0199240779
- [GSD 2004] Proceedings of the 3rd International Workshop on Global Software Development, Co-located with ICSE 2004, Edinburgh, Scotland, May 24, 2004 (available for download)
- **Kruchten, P.: Analyzing Intercultural Factors Affecting Global Software Development – A Position Paper, In: [GSD2004], pp. 59-62**



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- ❏ Carmel, E. (1999): Global Software Teams: Collaborating Across Borders and Time Zones (High Performance Cluster Computing) - ISBN-10: 013924218X
- ❏ Garton, C., Wegryn, K. (2006): Managing Without Walls: Maximize Success with Virtual, Global, and Cross - Cultural Teams, MC Press, US, 2006.
- ❏ Äijö, T., Kuivalainen, O., Saarenketo, S., Lindqvist, J., Hanninen, H. (2005): Internationalization Handbook for the Software Business; The Model of Internationalization Paths & Internationalization Workbook, Centre of Expertise for Software Product Business, 2005.
- ❏ More references will be listed in each lecture



Potential topics

- Cultural barriers in Higher Education
- Metadata models for cultural representation
- **Awareness tools to support global knowledge management**
- **Social software to improve communication in global information systems**
- Theories of global information systems
- Local approaches
- Research-based development and evaluation
- ...



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Cultural barriers in Higher Education

- Objective: To identify cultural barriers in Higher Education settings
- Proposed method: Survey and recommendations
- Knight, J.: Higher Education Crossing Borders, UNESCO, 2006.
http://www.col.org/colweb/webdav/site/myjahiasite/shared/docs/GATS_web_nocover.pdf
- Rego, M., Moledo, M.: The intercultural dimension of higher education: Opening new educational pathways, Studies in Learning, Evaluation Innovation and Development, 4(3), pp. 1–14.
<http://www.sleid.cgu.edu.au/include/getdoc.php?id=597&article=185&mode=pdf>



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Metadata models for cultural representation

- Objective: To analyse the use of metadata models to represent cultures
- Proposed method: Expert interviews, construction
- Pawlowski, J.M., Richter, T.: The Need for Standardization of Context Metadata for e-Learning Environments, Proc. of the e-ASEM conference, Seoul, 2007.



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Awareness tools to support global knowledge management

- Objective: To evaluate the use of awareness tools for the improvement of knowledge management processes in global settings
- Proposed method: Expert interviews / construction
- J.D.Herbsleb, A.Mockus, T.A.Finholt, and R.E.Grinter. Distance, dependencies and delay in a global collaboration. ACM Conference on Computer Supported Collaborative Work, pages 319–328, 2000.
http://conway.isri.cmu.edu/~jdh/collaboratory/research_papers/cscw_delay.pdf
- D. Redmiles, A. van der Hoek, B. Al-Ani, T. Hildenbrand, S. Quirk, **A. Sarma**, R. Silveira Silva Filho, C. de Souza, E. Trainer, Continuous Coordination: A New Paradigm to Support Globally Distributed Software Development Projects, In Wirtschaftsinformatik, Special Issue on the Industrialization of Software Development, 2007, 49(Special Issue), pages S28-S38.
http://www.ics.uci.edu/~asarma/papers/cc_gsd.pdf



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Social software to improve communication in global information systems

- Objective: To evaluate the use of social software tools for the improvement of communication and collaboration processes in global settings
- Proposed method: Expert interviews / construction
- Keegan, H. (2007): Social Software for Virtual Mobility: An Online Community for practice-based learning,
http://www.esmos.eu/documents/publications/papers/EDEN_2007_HK.pdf
- Davis, N., Cho, M. O., Hagenson, L. (2005). Intercultural competence and the role of technology in teacher education. Contemporary Issues in Technology and Teacher Education [Online serial], 4(4). Available:
<http://www.citejournal.org/vol4/iss4/editorial/article1.cfm>



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Theories of global information systems

- Objective: To compare theories of global information systems
- Method: Literature review, evaluation
- Initial material: Avgerou, C. (2002): Information Systems and Global Diversity, Oxford University Press, Oxford, 2002. ISBN-10: 0199240779



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Additional topics

■ Use your creativity ;-)



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Literature Review

- Searching relevant literature
- Summarizing the state of the art
- Presentation of recent research in the field
- Discussion and support!



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