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## CROSS-CULTURAL DIVERSITY

The globalization of business has greatly increased the frequency and importance of cross-cultural interaction for business managers. The dynamics of value clashes, ethnocentrism, sexism, racism, and miscommunication create challenges that managers must surmount to carry out business effectively. Each of these issues is discussed in the next sections.

### CULTURALLY DETERMINED BELIEFS AND VALUES

Studying the survey responses of tens of thousands of employees in a large multinational company, Hofstede (1980) identified four major dimensions of national culture. These dimensions are *individualism/collectivism*, *uncertainty avoidance*, *power distance*, and *masculinity/femininity*, each of which is discussed below.

Hofstede (1980) defined *individualism/collectivism* as the extent to which people view themselves as individuals or members of a group. Other authors have confirmed that individualism/collectivism is a fundamental dimension of culture that distinguishes societies from one another (Kluckhohn & Strodtbeck, 1961; Triandis, 1994). Individualists believe they are responsible for caring for themselves and their nuclear family and that others are similarly responsible for themselves. Collectivists owe considerably more loyalty to the extended family or the group, and group members have an ultimate obligation to help and care for each other.

*Uncertainty avoidance* is associated with the tendency of individuals to avoid taking risks. Ambiguity is uncomfortable, and deviating from norms is less tolerated in societies where uncertainty avoidance is high.

*Power distance* is the extent to which hierarchy and inequality are accepted in a society. In societies where power distance is high, those lower in the hierarchy are expected to comply with orders from those in authority. At the same time, they have the right to expect those in authority to look after, protect, and provide for them.

Finally, *masculinity/femininity* refers to core values around dominance and nurturance. In masculine societies, people value assertiveness, achievement, and acquisition of material

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wealth. In feminine societies, people place more value on interpersonal harmony, high-quality relationships, and caring for others.

Management researchers have identified links between cultural values and workplace behavior. For example, in India, where power distance is high relative to North America, employees frustrated American managers by their reluctance to embrace empowerment. From the perspective of the Indian employees, the American managers appeared extremely inefficient, and the Indian employees wondered why they were taking so much time to discuss simple decisions with everyone, when just telling everyone what to do and letting them get on with it would be so much more efficient (Lane, DiStefano, & Maznevski, 2000, p. 38). A survey research study comparing Canadians and Indians confirmed that Indian employees reported less autonomy on the job (Aycan, Kanungo, & Sinha, 1999).

Other important dimensions of culture concern beliefs about the nature of human beings and the nature of time (Kluckhohn & Strodtbeck, 1961). Christians tend to have a negative view of human nature, stemming from the story of original sin in the Bible, while the Muslim and Shinto faiths view humans as essentially good (Lane et al., 2000). A view that humans are more evil than good affects managerial control systems based on an underlying suspicion of people. This negative view may explain why electronic productivity and theft monitoring systems are so popular in North American organizations (Lane et al., 2000).

Time tends to be viewed as a commodity in North America, something valuable that must be well used and not “wasted.” As a result, North Americans structure their lives around a rigid schedule designed to maximize productivity and value fulfillment. This view is not shared as stringently around the world, where people may be more relaxed about schedules (Lane et al., 2000). In addition, North Americans tend to be extremely present oriented. In other societies, it is important to take the time to build relationships to generate the trust needed to conduct business. North Americans can make the mistake of trying to rush business deals to have something to show in the short term, which can alienate members of other less present-oriented cultures (Lane et al., 2000).

## CULTURAL MISUNDERSTANDINGS AND ETHNOCENTRISM

Culturally determined differences in values, beliefs, and assumptions cause at least two types of problems for conducting business across cultures. First, people can easily misunderstand each other. Using the same words or gestures, members of different cultures can mean very different things. For example, in one culture, nodding in agreement or saying “yes” may mean willingness to comply with the other person’s views, while in another culture, nodding in agreement or saying “yes” may mean understanding but not necessarily compliance. The two parties to such a conversation can easily walk away with very different views of what has been decided and what will happen next. As a result, people’s expectations for each other’s behavior are not fulfilled, and disappointment with the other party can lead to conflict, attempts at control, or dissolution of the relationship.

Treacherous as miscommunications can be, the problem of ethnocentrism can be even worse for the effective conduct of business. Ethnocentrism is the natural human tendency to view one’s own culture and values as the best or most appropriate (Triandis, 1994). Inability to see the value in different goals and methods can cause inflexibility in dealings

with members of other cultures. Diversity research shows that deep-level value differences exacerbate negative experiences in work groups over time (Harrison, Price, & Bell, 1998; Harrison, Price, Gavin, & Florey, 2002).

## INEQUALITY, SEXISM, AND RACISM ACROSS CULTURES

Members of all human societies appear to have their prejudices about some other group or groups. Sidanius and Pratto (1999) argue that all non-hunter-gatherer societies are organized as group-based social hierarchies, where certain demographic groups are accorded greater status and power than others. Furthermore, they argue that age and gender are two factors showing universal status differences, with older people and men being accorded higher status in human societies. In addition, they observe that all societies have an additional set of status distinctions beyond age and gender. These status distinctions vary between cultures and include such factors as nationality, ethnicity, religion, race, and class. The differences between societies mean that certain religious and ethnic groups are accorded low status in some societies while being accorded high status in others.

Sidanius and Pratto (1999) conducted research in a variety of settings and found that members of high-status social groups in any given society have more favorable attitudes toward inequality than members of low-status groups. In other words, high-status groups tend to believe that their status and power in society is natural and proper, which Sidanius and Pratto call “social dominance orientation.” Low-status groups, on the other hand, are more likely to believe that their low status is due to injustice. Importantly, individuals differ in their level of social dominance orientation, such that some members of low-status groups are unconscious of disadvantage, and some members of high-status groups consider group-based societal inequality to be unjust.

## THE LEGACY OF COLONIALISM

In addition, the history of colonialism has influenced how demographic groups view each other and themselves. At the height of the colonial age, Europe’s colonies covered almost 85% of the globe (Prasad, 1997). As such, it is difficult to overstate the influence of European colonialism on human consciousness as well as intergroup relations.

The idea that one society should be able to “colonize” another is based on an inherent belief in the superiority of the colonizer. The view that the White race and European culture were superior was essential for the conquerors to be able to feel that the coercion of other human societies for the purpose of extracting their wealth was just (Prasad, 1997).

The relationship created between colonizer and colonized was more complex than simply superior to inferior, however. The colonized group was also viewed as “a highly desirable object for Western possession” (Prasad, 1997, p. 290). Stories of the “haunting beauty of the East” or the “vast unspoiled expanses of Africa” reflected the attraction of the colonies for the colonizers.

The decolonization of the 20th century gave autonomy to the formerly colonized societies but left them to deal with the results of decades of plundering and oppression. Under colonization, it was not in the interests of the European colonizers to build the

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infrastructures in their colonies beyond the minimum needed for the extraction of natural resources. Nor was it in their interests to educate the population beyond the level needed to provide the colonizers with a source of cheap labor. Furthermore, attitudes of inferiority and superiority became ingrained in literature, media portrayals, and human psyches (Prasad, 1997).

In part, negative views of formerly colonized peoples remain due to the dynamics of status characteristics. Ridgeway's (1997) *status characteristics theory* suggests that historical inequalities between demographic groups linger in people's consciousnesses due to the material consequences of differential access to education and other resources for achievement. Specifically, Ridgeway argues that because certain groups have not had the education and resources needed to excel on various tasks, people's experiences tell them that members of those groups are less capable. As a result of these experiences, when a new member of a historically disadvantaged group enters a task arena, members of the advantaged group begin the interaction with the assumption that the low-status group member will be incompetent.

This assumption of incompetence affects how the low-status group member is treated. Given that the person is expected to be incompetent, others are less likely to assign complex or difficult tasks to that person, with the result that the person has little opportunity to demonstrate higher level capabilities. In addition, the low-status person is given less speaking time in the group (why waste the group's time with incompetent ideas?) and is more likely to be interrupted by other group members. As such, the person has less opportunity to demonstrate the value of his or her ideas.

As the result of being provided few opportunities to demonstrate competence, the low-status person in the group usually does perform less well than the others, thereby reinforcing their original expectations (Ridgeway, 1997; Ridgeway, Johnson, & Diekema, 1994). Such cycles of negative self-fulfilling prophecies are difficult to break unless one is cognizant of the dynamics of status characteristics and takes steps to intervene.

### MANAGERIAL IMPLICATIONS

Lane et al. (2000) argue that effective cross-cultural management requires adaptability, cross-cultural expertise, and interpersonal skills. Adaptability is needed to break out of the assumptions of one's home culture to see the value of other cultural perspectives. Cross-cultural expertise is valuable for understanding the specific cultural context in which one is working. Such expertise helps to promote effective communication and avoid cultural blunders. Interpersonal skills are needed because building relationships across cultures requires establishing rapport with dissimilar others who may not share one's views and values. Ability to listen to others and make them feel acknowledged, understood, and valued is critical to bridging the cross-cultural divide.

In addition, understanding the dynamics of prejudice and discrimination can also be important to effectiveness in a cross-cultural situation. Given the critical importance of expectations for performance, ensuring that all parties are provided ample speaking time and opportunities to undertake important and challenging tasks is valuable for eliminating the effects of stereotypes.

Finally, managers in a cross-cultural situation should be prepared to face inequalities in the society they are visiting. It is very important to avoid judging others on the basis

of ethnocentrism, which makes it difficult to know what to do when members of other cultures make statements that seem intolerant or bigoted. Cultural relativism, or a stance that “it is their culture, so it is OK for them,” is an inappropriate stance, however, when low-status members of that society are calling for change themselves. Handling inequalities in culturally appropriate ways requires consulting local experts. The most effective global diversity initiatives involve substantial participation by local representatives in goal setting, strategizing, and implementation.

## CASES

### **Ellen Moore (A): Living and Working in Bahrain**

A female expatriate manager working for a large multinational financial institution must contend with gender discrimination. She had been offered a promotion to one or two positions of which she could choose. When she makes her decision and informs her boss, he tells her she cannot have the one she chose because it would mean periodic travel into an Arab culture that, he believes, would not be possible for a woman.

#### *Assignment Questions:*

1. What would you advise Ellen to do and why? What should be her objectives? Are these objectives and actions consistent with what you would do if you were in her situation?
2. Why is Ellen successful as a manager?
3. Did the general manager make the right decision?
4. What are the responsibilities of male colleagues (seniors, subordinates, and peers) toward female managers?
5. What, if anything, in the case differed from your expectations?

### **Ellen Moore (A): Living and Working in Korea**

Ellen Moore, a systems consultant, was sent to Korea to manage a project involving a team of North American and Korean consultants representing a joint venture between a major Korean conglomerate and a significant North American information technology company. The Americans were to be involved for the first 7 months in order to transfer expertise and knowledge to the South Koreans who had little experience in this area. Ellen’s superior had played an integral part in securing the contract in Korea due to his depth of knowledge on the subject. He chose Ellen to be the key North American project manager because she had significant project management skills and impressive international experience. Upon Ellen’s arrival, she discovered that the Korean consultants were far less skilled than she had expected. In addition, Ellen had understood that she and the Korean manager were to be comanagers, but immediately tensions arose regarding who was giving direction to the team and the scope of the project. Tensions escalated until it was clear that the project was behind schedule and the Koreans were not taking direction from Ellen. The Koreans insisted that Ellen was the problem. Ellen’s superior disagreed; he and Ellen must decide how to proceed. The challenge is to balance strategic goals with individual action.

**144 • CASES IN GENDER AND DIVERSITY IN ORGANIZATIONS***Assignment Questions:*

1. What are the problems and why do they exist?
2. What alternatives exist at this point?
3. In Andrew's position, what would you do?
4. What changes would you recommend making for future projects?

**Julie Dempster (A)**

A Black Canadian woman is hired as vice president of marketing and brand positioning for an Amsterdam-based computer software company. Shortly after joining the firm, she encounters a number of cross-cultural and equality issues. She must decide whether to renew her contract with the company.

*Assignment Questions:*

1. Put yourself in Dempster's shoes. How should she proceed at the meeting tomorrow? What should she focus on?
2. How is Nederberg likely to react to the issues Dempster raises?
3. Prepare for the meeting as if you were Dempster.

**The European Experience (A)**

A group of international business majors from a large Boston-area university traveled to Spain, France, and Germany for a yearlong period of study and work. Some of the students described their initial impressions and reactions to living and studying in another country and functioning in another language. Topics discussed include adapting to life in Europe (including language, pace of life, personal space, smoking, local food, sexual norms, personal appearance, and government and bureaucracy), being away from family and friends during the holiday seasons, academics (including differences in learning and teaching styles), and language. The objective of the case is to help undergraduate students who will be living, studying, and working in another country to prepare for their experience.

*Assignment Questions:*

1. What are the issues that create problems for the students, and what is your reaction to their experiences?
2. How would you have handled these situations? What advice would you give to the students?

**Being Different: Exchange Student Experiences**

This case is about African American, Latin American, and Asian undergraduate, international business majors from a Boston-area university who traveled to Spain, France, and Germany for a yearlong period of study and work. Presented are their experiences being minority students in Europe. The experiences range from annoying stares to aggressive propositions from men.

*Assignment Questions:*

1. What are the episodes of prejudice happening to the students?
2. What would you have done if you had been in Felicia's situation?
3. What advice would you give the students about personal security in metropolitan areas?
4. What should Professor Rhodes do? What should the universities do?

## READING

### The Changing Face of Europe: A Note on Immigration and Societal Attitudes

This note discusses the impact of immigration on attitudes and government policy in Western Europe's three largest countries—Spain, France, and Germany. It also examines how the histories and political structures of these countries have influenced immigration policy and the integration of immigrant populations. Finally, it predicts the impact that immigration policy will have on employment and productivity in what some observers have dubbed “Fortress Europe.”

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## ELLEN MOORE (A): LIVING AND WORKING IN BAHRAIN

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The general manager had offered me a choice of two positions in the Operations area. I had considered the matter carefully, and was about to meet with him to tell him I would accept the accounts control position. The job was much more challenging than the customer services post, but I knew I could learn the systems and procedures quickly and I would have a great opportunity to contribute to the success of the operations area.

It was November 1989, and Ellen Moore was just completing her second year as an expatriate manager at the offices of a large American financial institution in Manama, Bahrain. After graduating with an MBA from a leading business school, Ellen had joined her husband, who was working as an expatriate manager at an offshore bank in Bahrain. Being highly qualified and capable, she had easily found a demanding position and had worked on increasingly complex projects since she had begun at the company. She was looking forward to the challenges of the Accounts Control position.

### ELLEN MOORE

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Ellen graduated as the top female from her high school when she was 16, and immediately began working full time for the main branch of one of the largest banks in the country. By the end of four years, she had become a corporate accounts officer and managed over 20 large accounts.

I remember I was always making everything into a game, a challenge. One of my first jobs was filing checks. I started having a competition with the woman at the adjacent desk who had been filing for

years, except she didn't know I was competing with her. When she realized it, we both started competing in earnest. Before long, people used to come over just to watch us fly through these stacks of checks. When I moved to the next job, I used to see how fast I could add up columns of numbers while handling phone conversations. I always had to do something to keep myself challenged.

While working full time at the bank, Ellen achieved a Fellowship in the Institute of Bankers after completing demanding courses and exams. She went on to work in banking and insurance with one of her former corporate clients from the bank. When she was subsequently promoted to manage their financial reporting department, she was both the first female and the youngest person the company had ever had in that position.

Since she had begun working full time, Ellen had been taking courses towards a bachelor's degree at night in one of the city's universities. In 1983 she decided to stop working for two years to complete her bachelor's degree. After she graduated with a major in accounting and minors in marketing and management, she entered the MBA program.

I decided to go straight into the MBA program for several reasons. First, I wanted to update myself. I had taken my undergraduate courses over 10 years and wanted to obtain knowledge on contemporary views. Second, I wanted to tie some pieces together—my night school degree left my ideas somewhat fragmented. Third, I wasn't impressed with the interviews I had after I finished the Bachelor's degree, and fourth I was out of work anyway. Finally, my father had already told everyone that I had my MBA, and I decided I really couldn't disappoint him.



Just after Ellen had begun the two-year MBA program, her husband was offered a position with an affiliate of his bank, posted in Bahrain beginning the next spring. They sat down and examined potential opportunities that would be available for Ellen once she completed her MBA. They discovered that women could work and assume positions of responsibility in Bahrain, and decided they could both benefit from the move. Her husband moved to Bahrain in March, while Ellen remained to complete her masters. Ellen followed, with MBA in hand, 18 months later.

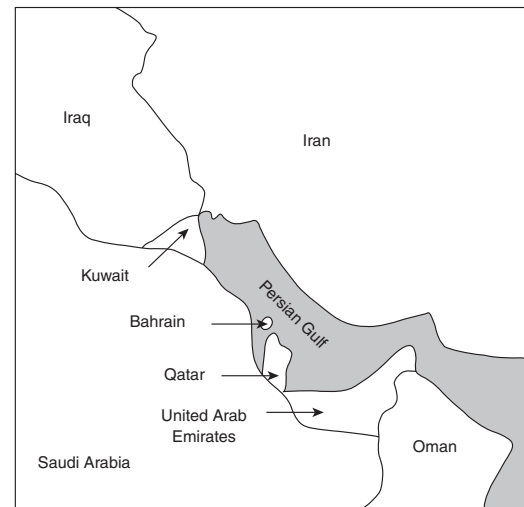
## BAHRAIN

Bahrain is an archipelago of 33 islands located in the Persian Gulf (see Exhibit 1). The main island, Bahrain, comprises 85 per cent of the almost 700 square kilometres of the country and is the location of the capital city, Manama. Several of the islands are joined by causeways, and in 1987 the 25-kilometre King Fahad Causeway linked the principal island to the mainland of Saudi Arabia, marking the end of island isolation for the country. In 1971, Bahrain gained full independence from Britain, ending a relationship that had lasted for almost a century. Of the population of over 400,000 people, about one-third were foreigners.

Bahrain has had a prosperous history. Historically, it has been sought after by many countries for its lush vegetation, fresh water, and pearls. Many traditional crafts and industries were still practiced, including pottery, basket-making, fabric-weaving, pearl-diving, dhow (fishing boat) building, and fishing. Bahrain was the pearl capital of the world for many centuries.

Fortunately, just as the pearl industry collapsed with the advent of cultured pearls from Japan, Bahrain struck its first oil.

Since the 1930s, the oil industry had been the largest contributor to Bahrain's Gross National Product. The country was the first in the Persian Gulf to have an oil industry, established with a discovery in 1932. Production at that time was 9,600 barrels a day. Eventually, crude output had



**Exhibit 1** Maps of the Middle East

reached over 40,000 barrels a day. Bahrain's oil products included crude oil, natural gas, methanol, ammonia, and refined products like gasoline, jet fuels, kerosene, and asphalts.

The Bahraini government had been aware for several years that the oil reserves were being seriously depleted. It was determined to diversify

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the country's economy away from a dependence on one resource. Industries established since 1971 included aluminum processing, shipbuilding, iron and steel processing, and furniture and door manufacturing. Offshore banking began in 1975. Since Bahraini nationals did not have the expertise to develop these industries alone, expatriates from around the world, particularly from Western Europe and North America, were invited to conduct business in Bahrain. By the late 1980s, the country was a major business and financial centre, housing many Middle East branch offices of international firms.

### Expatriates in Bahrain

Since Bahrain was an attractive base from which to conduct business, it was a temporary home to many expatriates. Housing compounds, schools, services, shopping and leisure activities all catered to many international cultures. Expatriates lived under residence permits, gained only on the basis of recruitment for a specialist position which could not be filled by a qualified and available Bahraini citizen.

To Ellen, one of the most interesting roles of expatriate managers was that of teacher. The Arab nations had been industrialized for little more than two decades, and had suddenly found themselves needing to compete in a global market. Ellen believed that one of her main reasons for working in Bahrain was to train its nationals eventually to take over her job.

Usually the teaching part was very interesting. When I first arrived in the office, I was amazed to see many staff members with microcomputers on their desks, yet they did not know the first thing about operating the equipment. When I inquired about the availability of computer courses, I was informed by a British expatriate manager that "as these were personal computers, any person should be able to use them, and as such, courses aren't necessary." It was clear to me that courses were very necessary when the computer knowledge of most employees consisted of little more than knowing where the on/off switch was located on a microcomputer.

Although it was outside of office policy, I held "Ellen's Introduction to Computers" after office hours, just to get people comfortable with the machines and to teach them a few basics.

Sometimes the amount of energy you had to put into the teaching was frustrating in that results were not immediately evident. I often worked jointly with one of the Bahraini managers who really didn't know how to develop projects and prepare reports. Although I wasn't responsible for him, I spent a great deal of time with him, helping him improve his work. Initially there was resistance on his part, because he was not prepared to subordinate himself to an expatriate, let alone a woman. But eventually he came around and we achieved some great results working together.

The range of cultures represented in Bahrain was vast. Expatriate managers interacted not only with Arabic nationals, but also with managers from other parts of the world, and with workers from developing countries who provided a large part of the unskilled labor force.

The inequality among nationalities was one issue I found very difficult to deal with during my stay in Bahrain. The third world immigrants were considered to be the lowest level possible in the pecking order, just slightly lower than nationals from countries outside the Gulf. Gulf Arabs, being of Bedouin origin, maintained a suspicious attitude towards "citified" Arabs. Europeans and North Americans were regarded much more highly. These inequalities had a major impact on daily life, including the availability of jobs and what relations would develop or not develop between supervisors and subordinates. Although I was well acquainted with the racial problems in North America, I haven't seen anything compared to the situation in Bahrain. It wasn't unusual for someone to be exploited and discarded, as any expendable and easily replaceable resource would be, because of their nationality.

Although many expatriates and their families spent their time in Bahrain immersed in their own cultural compounds, social groups, and activities, Ellen believed that her interaction with the various cultures was one of the most valuable elements of her international experience.

## MANAGING IN BAHRAIN

Several aspects of the Middle Eastern culture had tremendous impact on the way business was managed, even in Western firms located in Bahrain. It seemed to Ellen, for example, that “truth” to a Bahraini employee was subject to an Arab interpretation, which was formed over hundreds of years of cultural evolution. What Western managers considered to be “proof” of an argument or “factual” evidence could be flatly denied by a Bahraini: if something was not believed, it did not exist. As well, it seemed that the concept of “time” differed between Middle Eastern and Western cultures. Schedules and deadlines, while sacred to Western managers, commanded little respect from Bahraini employees. The two areas that had the most impact on Ellen’s managing in a company in Bahrain were the Islamic religion and the traditional attitude towards women.

### Islam<sup>1</sup>

Most Bahrainis are practicing Muslims. According to the Muslim faith, the universe was created by Allah who prescribed a code of life called Islam and the Qur’an is the literal, unchanged Word of Allah preserved exactly as transcribed by Muhammad. Muhammad’s own acts as a prophet form the basis for Islamic law, and are second in authority only to the Qur’an. The five Pillars of Islam are belief, prayer, fasting, almsgiving and pilgrimage. Muslims pray five times a day. During Ramadan, the ninth month of the Islamic calendar, Muslims must fast from food, drink, smoking and sexual activity from dawn until dusk, in order to master the urges which sustain and procreate life. All Muslims are obliged to give a certain proportion of their wealth in alms for charitable purposes; the Qur’an stresses that the poor have a just claim on the wealth of the prosperous. Finally, if possible, all Muslims should make a pilgrimage to Mecca during their lives, in a spirit of total sacrifice of personal comforts, acquisition of wealth and other matters of worldly significance.

Certainly the Muslim religion had a tremendous impact on my daily working life. The first time I walked into the women’s washroom at work I noticed a tap about three inches off the floor over a drain. I found this rather puzzling; I wondered if it was for the cleaning crew. When a woman came in, I asked her about the tap, and she explained that before going to the prayer room, everyone had to wash all uncovered parts of their bodies. The tap was for washing their feet and legs.

One time I was looking for one of my employees, Mohammed, who had a report due to me that afternoon. I searched for him at his desk and other likely spots throughout the office, but to no avail, he just wasn’t around. I had had difficulties with Mohammed’s work before, when he would submit documents long after deadlines, and I was certain he was attempting to slack off once again. I bumped into one of Mohammed’s friends, and asked if he knew Mohammed’s whereabouts. When he informed me that Mohammed was in the prayer room, I wasn’t sure how to respond. I didn’t know if this prayer room activity was very personal and if I could ask questions, such as the length of time one generally spends in prayer. But I needed to know how long Mohammed would be away from his desk. Throwing caution to the wind, I asked the employee how long Mohammed was likely to be in prayers and he told me it usually takes about 10 minutes. It wasn’t that I felt I didn’t have the right to know where my employee was or how long he would be away, I just wasn’t certain my authority as a manager allowed me the right to ask questions about such a personal activity as praying.

During Ramadan, the hours of business are shortened by law. It is absolutely illegal for any Muslim to work past 2:00 in the afternoon, unless special permits are obtained from the Ministry of Labor. Unfortunately, business coming in to an American firm does not stop at two, and a majority of the non-Muslim workers are required to take up the slack.

Unlike religion in Western civilization, Islam permeates every function of human endeavour. There does not exist a separation of church, state and judiciary. Indeed, in purist circles, the question does not arise. The hybrid systems existing in certain Arab countries are considered

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aberrations created by Western colonial influences. Accordingly, to function successfully, the expatriate must understand and learn to accept a very different structuring of a society.

### Women in Bahrain

Bahrain tended to be more progressive than many Middle Eastern countries in its attitude towards women. Although traditions were strong, Bahraini women had some freedom. For example, all women could work outside the home, although the hours they could work were restricted both by convention and by the labor laws. They could only work if their husbands, fathers, or brothers permitted them, and could not take potential employment away from men. Work outside the home was to be conducted in addition to, not instead of, duties performed inside the home, such as child-rearing and cooking. Most women who worked held secretarial or clerical positions; very few worked in management.

Bahraini women were permitted to wear a variety of outfits, from the conservative full length black robe with head scarf which covers the head and hair, to below-the-knee skirts and dresses without head covering.

Arabic women who sincerely want change and more decision-making power over their own lives face an almost impossible task, as the male influence is perpetuated not only by men, but also by women who are afraid to alter views they understand and with which they have been brought up all their lives. I once asked a female co-worker the reason why one of the women in the office, who had previously been “uncovered,” was now sporting a scarf over her head. The response was that this woman had just been married, and although her husband did not request that she become “covered,” she personally did not feel as though she was a married woman without the head scarf. So she simply asked her husband to demand that she wear a scarf on her head. It was a really interesting situation; some of the more liberal Bahraini women were very upset that she had asked her husband to make this demand. They saw it as negating many of the progressive steps the women’s movement had made in recent years.

Although Bahrainis had been exposed to Western cultures for the two decades of industrial expansion, they were still uncomfortable with Western notions of gender equality and less traditional roles for women.

One day a taxi driver leaned back against his seat and, while keeping one eye on the road ahead, turned to ask me, “How many sons do you have?” I replied that I didn’t have any children. His heartfelt response of “I’m so sorry” and the way he shook his head in sympathy were something my North American upbringing didn’t prepare me for. My taxi driver’s response typifies the attitude projected towards women, whether they are expatriates from Europe or North America, or are Bahrainis. Women are meant to have children, preferably sons. Although Bahrain is progressive in many ways, attitudes on the role of women in society run long and deep, and it is quite unlikely these sentiments will alter in the near, or even distant, future.

Another time I was greeted with gales of laughter when I revealed to the women in the office that my husband performed most of the culinary chores in our household. They assumed I was telling a joke, and when I insisted that he really did most of the cooking, they sat in silent disbelief. Finally, one woman spoke up and informed the group that she didn’t think her husband even knew where the kitchen was in their house, let alone would ever be caught touching a cooking utensil. The group nodded in agreement. Although these women have successful business careers—as clerks, but in the workforce nonetheless—they believe women should perform all household tasks without the assistance of their husbands. The discovery that this belief holds true in Bahrain is not remarkable, as I know many North American and European businesswomen who believe the same to be true. What is pertinent is these women allow themselves to be completely dominated by the men in their lives.

The one concept I faced daily but never accepted was that my husband was regarded as the sole decision maker in our household. He and I view our marriage as a partnership in which we participate equally in all decisions. But when the maintenance manager for our housing compound came by,

repairs were completed efficiently only if I preceded my request with “my husband wants the following to be completed.” It’s a phrase I hated to use as it went against every rational thought I possess, but I frequently had to resort to it.

These attitudes also affected how Ellen was treated as a manager by Bahraini managers:

One manager, I’ll call him Fahad, believed that women were only capable of fulfilling secretarial and coffee serving functions. One day I was sitting at my desk, concentrating on some documents. I didn’t notice Fahad having a discussion with another male manager nearby. When I looked up from my papers, Fahad noticed me and immediately began talking in French to the other manager. Although my French was a bit rusty, my comprehension was still quite serviceable. I waited for a few moments and then broke into their discussion in French. Fahad was completely dismayed. Over the next few years, Fahad and I worked together on several projects. At first, he was pompous and wouldn’t listen to anything I presented. It was a difficult situation, but I was determined to remain above his negative comments. I ignored his obvious prejudice towards me, remained outwardly calm when he disregarded my ideas, and proceeded to prove myself with my work. It took a lot of effort and patience but, in time, Fahad and I not only worked out our differences, but worked as a successful team on a number of major projects. Although this situation had a happy ending, I really would have preferred to have directed all that energy and effort towards more productive issues.

Bahraini nationals were not the only ones who perpetuated the traditional roles of women in society. Many of the expatriates, particularly those from Commonwealth countries, tended to view their role as “the colonial charged with the responsibility to look after the developing country.” This was reflected in an official publication for new expatriates that stated: “Wives of overseas employees are normally sponsored by their husbands’ employers, and their Residence Permits are processed at the same time . . .”<sup>2</sup> However, wives were not permitted to work unless they could obtain a work permit for themselves.

The first question I was often asked at business receptions was “What company is your husband with?” When I replied that I worked as well, I received the glazed over look as they assumed I occupied myself with coffee mornings, beach, tennis and other leisure activities as did the majority of expatriate wives.

Social gatherings were always risky. At typical business and social receptions the men served themselves first, after which the women selected their food. Then women and men positioned themselves on opposite sides of the room. The women discussed “feminine” topics, such as babies and recipes, while the men discussed the fall (or rise) of the dollar and the big deal of the day. At one Bahraini business gathering, I hesitated in choosing sides: should I conform and remain with the women? But most of these women did not work outside their homes, and, consequently, they spoke and understood very little English. I joined the men. Contrary to what I expected, I was given a gracious welcome.

However, on another occasion I was bored with the female conversation, so I ventured over to the forbidden male side to join a group of bankers discussing correspondent banking courses. When I entered the discussion, a British bank general manager turned his nose up at me. He motioned towards the other side of the room, and told me I should join the women. He implied that their discussion was obviously over my head. I quickly informed him that although I personally had found the banking courses difficult to complete while holding a full time banking position, I not only managed to complete the program and obtain my Fellowship, but at the time was the youngest employee of my bank ever to be awarded the diploma. The man did a quick turnabout, was thoroughly embarrassed, and apologized profusely. Although it was nice to turn the tables on the man, I was more than a little frustrated with the feeling that I almost had to wear my resume on my sleeve to get any form of respect from the men, whether European, North American, or Arab.

A small percentage of Bahraini women had completed university degrees in North America and Europe. While residing in these Western cultures, they were permitted to function as did their



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Western counterparts. For example, they could visit or phone friends when they wished without first obtaining permission. After completing their education, many of these women were qualified for management positions; however, upon returning to Bahrain they were required to resume their traditional female roles.

The notion of pink MBA diplomas for women and blue for men is very real. Although any MBA graduate in North America, male or female, is generally considered to have attained a certain level of business sense, I had to constantly “prove” myself to some individuals who appeared to believe that women attended a special segregated section of the university with appropriately tailored courses.

Ellen discovered that, despite being a woman, she was accepted by Bahrainis as a manager as a result of her Western nationality, her education, and her management position in the company.

Many of my male Arabic peers accepted me as they would any expatriate manager. For example, when a male employee returned from a holiday, he would typically visit each department, calling upon the other male employees with a greeting and a handshake. Although he might greet a female coworker, he would never shake her hand. However, because of my management position in the company and my status as a Western expatriate, male staff members gave me the same enthusiastic greeting and handshake normally reserved for their male counterparts.

Ellen also found herself facilitating Bahraini women’s positions in the workplace.

As I was the only female in a senior management position in our office, I was often asked by the female employees to speak to their male superiors about problems and issues they experienced in their departments. I also had to provide a role model for the women because there were no female Bahraini managers. Some of them came to me not just to discuss career issues but to discuss life issues. There was just no one else in a similar position for them to talk to. On the other hand, male managers would ask me to discuss sensitive issues, such as hygiene, with their female staff members.

The government of Bahrain introduced legislation that restricted the amount of overtime hours women could work. Although the move was being praised by the (female) director of social development as recognition of the contribution women were making to Bahraini industry, Ellen saw it as further discriminatory treatment restricting the choices of women in Bahrain. Her published letter to the editor of the Gulf Daily News read:

... How the discriminatory treatment of women in this regulation can be seen as recognition of the immense contribution women make to the Bahrain workforce is beyond comprehension. Discrimination of any portion of the population in the labor legislation does not recognize anything but the obvious prejudice. If the working women in Bahrain want to receive acknowledgement of their indispensable impact on the Bahrain economy, it should be through an increase in the number of management positions available to qualified women, not through regulations limiting the hours they work. All this regulation means is that women are still regarded as second class citizens who need the strong arm tactics of the government to help them settle disputes over working hours. Government officials could really show appreciation to the working women in Bahrain by making sure that companies hire and promote based on skill rather than gender. But there is little likelihood of that occurring.

The letter was signed with a pseudonym, but the day it was published one of Ellen’s female employees showed her the letter and claimed “if I didn’t know better, Ellen, I’d think you wrote this letter.”

## CAREER DECISIONS

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When Ellen first arrived in Bahrain, she had great expectations that she would work somewhere where she could make a difference. She received several offers for positions and turned down, among others, a university and a high profile brokerage house. She decided to take a position as a special projects coordinator at a large American financial institution.

In fact, the records will show I was actually hired as a “financial analyst,” but this title was given solely because at that time, the government had decided that expatriate women shouldn’t be allowed to take potential positions away from Bahraini nationals. The expertise required as a Financial Analyst enabled the company to obtain a work permit for me as I had the required experience and academic credentials, although I performed few duties as an analyst.

In her special projects role, Ellen learned a great deal about international finance. She conducted efficiency studies on various operating departments. She used her systems expertise to investigate and improve the company’s microcomputer usage, and developed a payroll program which was subsequently integrated into the company’s international systems. She was a member of the strategic review committee, and produced a report outlining the long-term goals for the Middle East market, which she then presented to the senior vice-president of Europe, Middle East and Africa.

After one year, Ellen was rewarded for her achievements by a promotion to manager of business planning and development, a position which reported directly to the vice-president and general manager. She designed the role herself, and was able to be creative and quite influential in the company. During her year in this role, she was involved in a diverse range of activities. She managed the quality assurance department, coordinated a product launch, developed and managed a senior management information system, was an active participant in all senior management meetings, and launched an employee newsletter.

At the end of her second year in Bahrain, Ellen was informed that two positions in operations would soon be available, and the general manager, a European expatriate, asked if she would be interested in joining the area. She had previously only worked in staff positions, and quickly decided to accept the challenge and learning experience of a line post. Both positions were in senior management, and both had responsibility for approximately 30 employees.

The first position was for manager of accounts control, which covered the credit,

collection and authorization departments. The manager’s role was to ensure that appropriate information was used to authorize spending by clients, to compile results of client payment, and to inform management of non-payment issues. The manager also supervised in-house staff and representatives in other Gulf countries for the collection of withheld payments.

The second post was manager of customer services, new accounts, and establishment services. The manager’s role was to ensure that new clients were worthy and that international quality standards were met in all customer service activity. The manager also worked with two other departments: with marketing to ensure that budgets were met, and with sales to manage relationships with the many affiliate outlets of the service.

After speaking with the two current managers and considering the options carefully, Ellen decided that she would prefer working in the accounts control area. The job was more oriented to financial information, the manager had more influence on operations at the company, and she would have the opportunity to travel to other countries to supervise staff. Although she was not familiar with the systems and procedures, she knew she could learn them quickly. Ellen went into her meeting with the general manager excited about the new challenges.

### **Ellen Meets With the General Manager**

Ellen told the general manager she had decided to take the accounts control position, and outlined her reasons. Then she waited for his affirmation and for the details of when she would begin.

“I’m afraid I’ve reconsidered the offer,” the general manager announced.

Although I know you would probably do a terrific job in the accounts control position, I can’t offer it to you. It involves periodic travel into Saudi Arabia, and women are not allowed to travel there alone.

He went on to tell Ellen how she would be subject to discriminatory practices, would not be able to gain the respect of the company’s Saudi



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Arabian clients, and would experience difficulty travelling there.

Ellen was astonished. She quickly pointed out to him that many businesswomen were representatives of American firms in Saudi Arabia. She described one woman she knew of who was the sole representative of a large American bank in the Eastern Province of Saudi Arabia who frequently travelled there alone. She explained that other women's experiences in Saudi Arabia showed professional men there treated professional women as neither male nor female, but as businesspeople. Besides, she continued, there were no other candidates in the company for either position. She reminded the general manager of the pride the company took in its quality standards and how senior management salaries were in part determined by assuring quality in their departments. Although the company was an equal opportunity employer in its home country, the United States, she believed the spirit of the policy should extend to all international offices.

The general manager informed her that his decision reflected his desire to address the interests of both herself and the company. He was worried, he said, that Ellen would have trouble obtaining entry visas to allow her to conduct business in Saudi Arabia, and that the customers would not accept her. Also, if there were ever any hostile outbreaks, he believed she would be in danger, and he could not have lived with that possibility.

Ellen stated that as a woman, she believed she was at lower risk of danger than her Western male counterparts since in the event of hostility, the Saudi Arabians would most likely secure her safety. There was much greater probability that a male representative of the firm would be held as a hostage.

The general manager was adamant. Regardless of her wishes, the company needed Ellen in the customer service position. New Accounts had only recently been added to the department, and the bottom line responsibility was thus doubled from what it had been in the past. The general manager said he wanted someone he could trust and depend upon to handle the pressure of new accounts, which had a high international profile.

Ellen was offered the customer service position, then dismissed from the meeting. In frustration, she began to consider her options.

#### *Take the Customer Services Position*

The general manager obviously expected her to take the position. It would mean increased responsibility and challenge. Except for a position in high school where she managed a force of 60 student police, Ellen had not yet supervised more than four employees at any time in her professional career. On the other hand, it went against her values to accept the post since it had been offered as a result of gender roles when all consideration should have been placed on competence.

She knew she had the abilities and qualifications for the position. She viewed the entire situation as yet another example of how the business community in Bahrain had difficulty accepting and acknowledging the contributions of women to international management, and didn't want to abandon her values by accepting the position.

#### *Fight Back*

There were two approaches which would permit Ellen to take the matter further. She could go to the general manager's superior, the senior vice-president of Europe, Middle East and Africa. She had had several dealings with him, and had once presented a report to him with which he was very impressed. But she wasn't sure she could count on his sympathy regarding her travelling to Saudi Arabia as his knowledge of the region was limited, and he generally relied on local management's decisions on such issues. She could consider filing a grievance against the company. There were provisions in Bahraini Labor Law that would have permitted this option in her case. However, she understood that the Labor Tribunals, unlike those held in Western countries, did not try cases based on precedents or rules of evidence. In other words, the judge would apply a hodgepodge of his own subjective criteria to reach a decision.

*Stay in the Business  
Planning and Development Job*

Although the general manager had not mentioned it as an option, Ellen could request that she remain in her current position. It would mean not giving in to the general manager's prejudices. Since she had been considering the two operations positions, though, she had been looking forward to moving on to something new.

*Leave the Company*

Ellen knew she was qualified for many positions in the financial centre of Bahrain and could likely obtain work with another company. She was not sure, though, whether leaving her present company under these circumstances would jeopardize her chances of finding work elsewhere. Furthermore, to obtain a post at a new company would require a letter of permission from her current employer, who, as her sponsor in Bahrain, had to sanction her move to a new employer who would become her new sponsor. She was not sure that she would be able to make those arrangements considering the situation.

I always tell my employees: "If you wake up one morning and discover you don't like your job, come to see me immediately. If the problem is with

the tasks of the job, I'll see if I can modify your tasks. If the problem is with the department or you want a change, I'll assist you in getting another position in the company. If the problem is with the company, then I'll help you write your resume." I have stated this credo to all my employees in every post I've held. Generally, they don't believe that their manager would actually assist with resume writing, but when the opportunity arises, and it has, and I do come through as promised, the impact on the remaining employees is priceless. Employees will provide much more effort towards a cause that is supported by someone looking out for their personal welfare.

Ellen's superior did not have the same attitude towards his employees. As she considered her options, Ellen realized that no move could be made without a compromise either in her career or her values. Which choice was she most willing to make?

NOTES

1. *Resident in Bahrain*, Volume 1, 1987, Gulf Daily News, pp. 61-63.
2. *Resident in Bahrain*, Volume 1, 1987, Gulf Daily News, p. 57.

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## ELLEN MOORE (A): LIVING AND WORKING IN KOREA

*Prepared by Chantell Nicholls and Gail Ellement  
under the supervision of Professor Harry Lane*

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Ellen Moore, a Systems Consulting Group (SCG) consultant, was increasingly concerned as she heard Andrew's voice grow louder through the paper-thin walls of the office next to her. Andrew Kilpatrick, the senior consultant on a joint North American and Korean consulting

project for a government agency in Seoul, South Korea, was meeting with Mr. Song, the senior Korean project director, to discuss several issues including the abilities of the Korean consultants. After four months on this Korean project, Ellen's evaluation of the assigned consultants suggested

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that they did not have the experience, background, or knowledge to complete the project within the allocated time. Additional resources would be required:

I remember thinking, "I can't believe they are shouting at each other." I was trying to understand how their meeting had reached such a state. Andrew raised his voice and I could hear him saying, "I don't think you understand at all." Then, he shouted, "Ellen is not the problem!"

### WSI IN KOREA

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In 1990, Joint Venture Inc. (JVI) was formed as a joint venture between a Korean company, Korean Conglomerate Inc. (KCI), and a North American company, Western Systems Inc. (WSI) (Exhibit 1). WSI, a significant information technology company with offices world wide employing over 50,000 employees, included the Systems Consulting Group (SCG). KCI, one of the largest Korean "chaebols" (industrial groups), consisted of over 40 companies, with sales in excess of US\$3.5 billion. The joint venture, in its eighth year, was managed by two Regional Directors—Mr. Cho, a Korean from KCI, and Robert Brown, an American from WSI.

The team working on Ellen's project was led by Mr. Park and consisted of approximately 40 Korean consultants further divided into teams working on different areas of the project. The Systems Implementation (SI) team consisted of five Korean consultants, one translator, and three North American SCG consultants: Andrew Kilpatrick, Ellen Moore, and Scott Adams, (see Exhibit 2).

This consulting project was estimated to be one of the largest undertaken in South Korea to date. Implementation of the recommended systems into over 100 local offices was expected to take seven to ten years. The SCG consultants would be involved for the first seven months, to assist the Korean consultants with the system design and in creating recommendations for system implementation, an area in which the

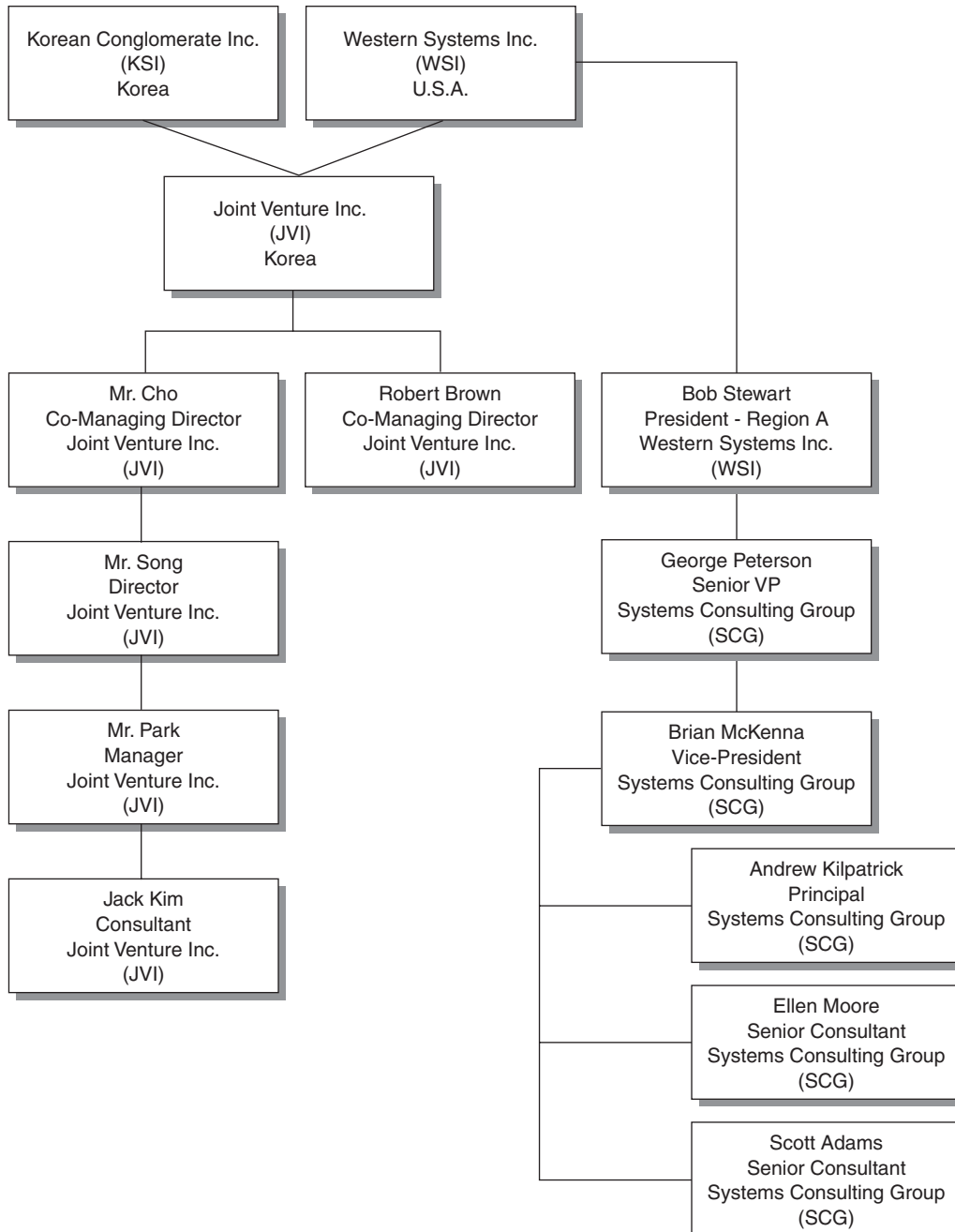
Korean consultants admitted they had limited expertise.

Andrew Kilpatrick became involved because of his experience with a similar systems implementation project in North America. Andrew had been a management consultant for nearly 13 years. He had a broad and successful background in organizational development, information technology, and productivity improvement, and he was an early and successful practitioner of business process reengineering. Although Andrew had little international consulting experience, he was adept at change management and was viewed by both peers and clients as a flexible and effective consultant.

The degree of SCG's involvement had not been anticipated. Initially, Andrew had been asked by SCG's parent company, WSI, to assist JVI with the proposal development. Andrew and his SCG managers viewed his assistance as a favor to WSI since SCG did not have plans to develop business in Korea. Andrew's work on the proposal in North America led to a request for his involvement in Korea to gather additional information for the proposal:

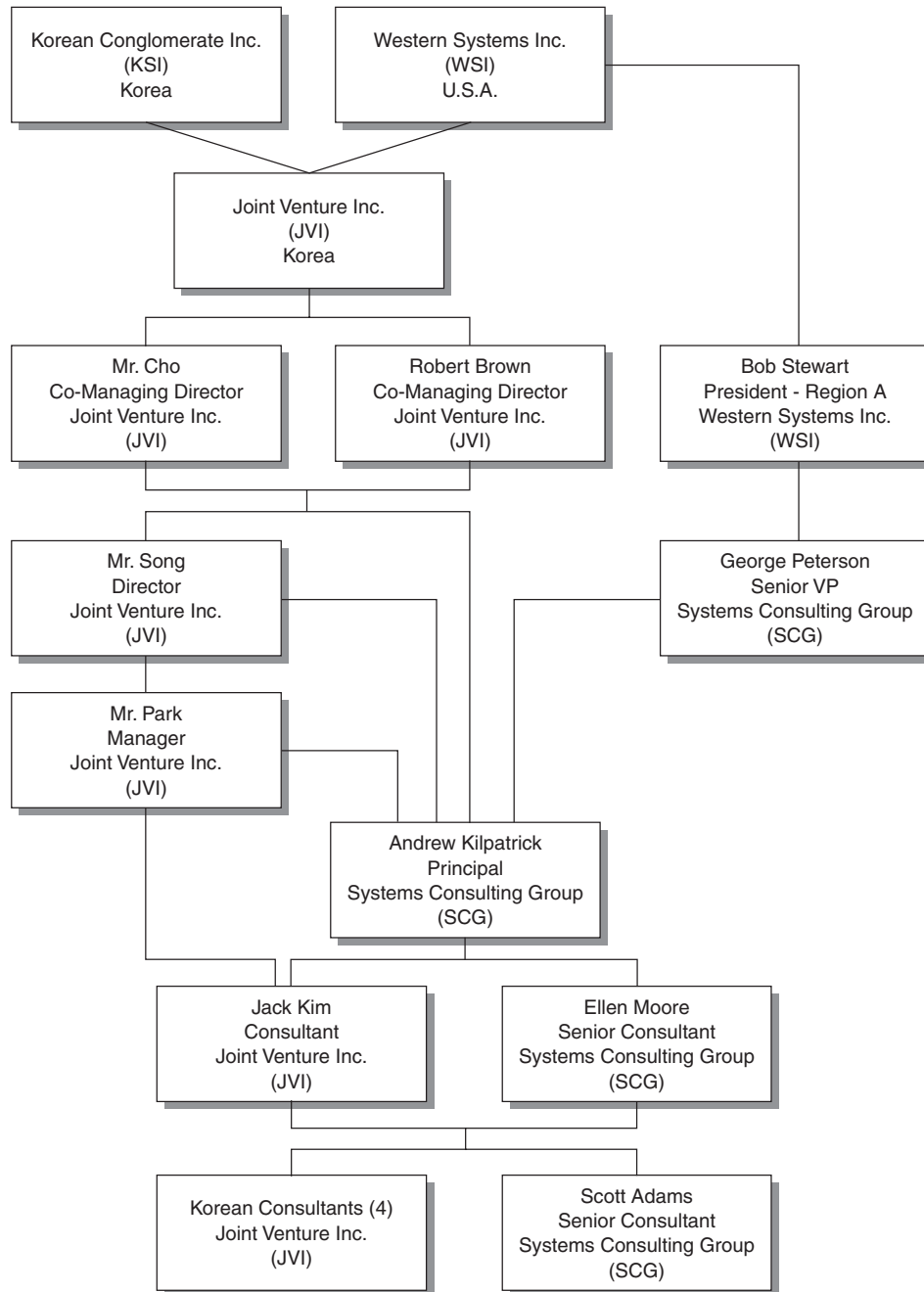
When I arrived in Korea, I requested interviews with members of the prospective client's management team to obtain more information about their business environment. The Korean team at JVI was very reluctant to set up these meetings. However, I generally meet with client management prior to preparing a proposal. I also knew it would be difficult to obtain a good understanding of their business environment from a translated document. The material provided to me had been translated into English and was difficult to understand. The Korean and English languages are so different that conveying abstract concepts is very difficult.

I convinced the Koreans at JVI that these meetings would help demonstrate our expertise. The meetings did not turn out exactly as planned. We met with the same management team at three different locations where we asked the same set of questions three times and got the same answers three times. We did not obtain the information normally



**Exhibit 1** Organizational Structure—Functional View

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**Exhibit 2** Organizational Structure—SI Project Team

provided at these fact-gathering meetings. However, they were tremendously impressed by our line of questioning because it reflected a deep interest and understanding of their business. They also were very impressed with my background. As a result, we were successful in convincing the government agency that we had a deep understanding of the nature and complexity of the agency's work and strong capabilities in systems development and implementation—key cornerstones of their project. The client wanted us to handle the project and wanted me to lead it.

JVI had not expected to get the contract, because its competitor for this work was a long-time supplier to the client. As a result, winning the government contract had important competitive and strategic implications for JVI. Essentially, JVI had dislodged an incumbent supplier to the client, one who had lobbied very heavily for this prominent contract. By winning the bid, JVI became the largest system implementer in Korea and received tremendous coverage in the public press.

The project was to begin in June 1995. However, the Korean project team convened in early May in order to prepare the team members. Although JVI requested Andrew to join the project on a full-time basis, he already had significant commitments to projects in North America. There was a great deal of discussion back and forth between WSI in North America, and JVI and the client in Korea. Eventually it was agreed that Andrew would manage the SI work on a part-time basis from North America, and he would send a qualified project management representative on a full-time basis. That person was Ellen Moore.

At that time, Andrew received immediate feedback from the American consultants with WSI in Korea that it would be impossible to send a woman to work in Korea. Andrew insisted that the Korean consultants be asked if they would accept a woman in the position. They responded that a woman would be acceptable if she were qualified. Andrew also requested that the client be consulted on this issue. He was again told that a woman would be acceptable if she were qualified. Andrew knew that Ellen had the skills required to manage the project:

I chose Ellen because I was very impressed with her capability, creativity, and project management skills, and I knew she had worked successfully in Bahrain, a culture where one would have to be attuned to very different cultural rules from those prevalent in North America. Ellen lacked experience with government agencies, but I felt that I could provide the required expertise in this area.

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#### ELLEN MOORE

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After graduating as the top female student from her high school, Ellen worked in the banking industry, achieving the position of corporate accounts officer responsible for over 20 major accounts and earning a Fellowship in the Institute of Bankers. Ellen went on to work for a former corporate client in banking and insurance, where she became the first female and youngest person to manage their financial reporting department. During this time, Ellen took university courses towards a Bachelor Degree at night. In 1983, she decided to stop working for two years, and completed her degree on a full-time basis. She graduated with a major in accounting and minors in marketing and management and decided to continue her studies for an MBA.

Two years later, armed with an MBA from a leading business school, Ellen Moore joined her husband in Manama, Bahrain, where she accepted a position as an expatriate manager for a large American financial institution.<sup>1</sup> Starting as a Special Projects Coordinator, within one year Ellen was promoted to Manager of Business Planning and Development, a challenging position that she was able to design herself. In this role, she managed the Quality Assurance department, coordinated a product launch, developed a senior management information system, and participated actively in all senior management decisions. Ellen's position required her to interact daily with managers and staff from a wide range of cultures, including Arab nationals.

In March 1995, Ellen joined WSI working for SCG. After the highly successful completion of

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two projects with SCG in North America, Ellen was approached for the Korea project:

I had never worked in Korea or East Asia before. My only experience in Asia had been a one-week trip to Hong Kong for job interviews. I had limited knowledge of Korea and received no formal training from my company. I was provided a 20-page document on Korea. However, the information was quite basic and not entirely accurate.

After arriving in Korea, Ellen immediately began to familiarize herself with the language and proper business etiquette. She found that English was rarely spoken other than in some hotels and restaurants which catered to Western clientele. As a result, Ellen took advantage of every opportunity to teach herself the language basics:

When Andrew and I were in the car on the way back to our hotel in the evening, we would be stuck in traffic for hours. I would use the time to learn how to read the Korean store signs. I had copied the Hangeul symbols which form the Korean language onto a small piece of paper, and I kept this with me at all times. So, while sitting back in the car, exhausted at the end of each day, I would go over the symbols and read the signs.

The third SCG consultant on the project, Scott Adams, arrived as planned three months after Ellen's start date. Upon graduation, Scott had begun his consulting career working on several international engagements (including Mexico, Puerto Rico, and Venezuela), and he enjoyed the challenges of working with different cultures. He felt that with international consulting projects the technical aspects of consulting came easy. What he really enjoyed was the challenge of communicating in a different language and determining how to modify Western management techniques to fit into the local business culture. Scott first met Ellen at a systems consulting seminar, unaware at the time that their paths would cross again. A few months later, he was asked to consider the Korea assignment. Scott had never travelled or worked in Asia, but he believed that the

assignment would present a challenging opportunity which would advance his career.

Scott was scheduled to start work on the project in August 1995. Prior to arriving in Seoul, Scott prepared himself by frequently discussing the work being conducted with Ellen. Ellen also provided him with information on the culture and business etiquette aspects of the work:

It was very fortunate for me that Ellen had arrived first in Korea. Ellen tried to learn as much as she could about the Korean language, the culture, mannerisms, and the business etiquette. She was able to interpret many of the subtleties and to prepare me for both business and social situations, right down to how to exchange a business card appropriately with a Korean, how to read behavior, and what to wear.

## ABOUT KOREA<sup>2</sup>

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Korea is a 600-mile-long peninsula stretching southward into the waters of the western Pacific, away from Manchuria and Siberia to the north on the Asian mainland. Facing eastward across the Sea of Japan, known to Koreans as the East Sea, Korea lies 120 miles from Japan. The Republic of Korea, or South Korea, consists of approximately 38,000 square miles, comparable in size to Virginia or Portugal. According to the 1990 census, the South Korean population is about 43 million, with almost 10 million residing in the capital city, Seoul.

Korea has an ancient heritage spanning 5,000 years. The most recent great historical era, the Yi Dynasty or Choson Dynasty, enlisted tremendous changes in which progress in science, technology, and the arts were achieved. Although Confucianism had been influential for centuries in Korea, it was during this time that Confucian principles permeated the culture as a code of morals and as a guide for ethical behavior. Confucian thought was designated as the state religion in 1392 and came to underpin education, civil administration, and daily conduct. During this time, Korean rulers began to avoid foreign



contact and the monarchy was referred to as the “Hermit Kingdom” by outsiders. Lasting over 500 years and including 27 rulers, the Yi Dynasty came to a close at the end of the 19th century. Today, in Korea’s modern era, the nation is quickly modernizing and traditional Confucian values mix with Western lifestyle habits and business methods.

Although many Korean people, particularly in Seoul, have become quite Westernized, they often follow traditional customs. Confucianism dictates strict rules of social behavior and etiquette. The basic values of the Confucian culture are: (1) complete loyalty to a hierarchical structure of authority, whether based in the family, the company, or the nation; (2) duty to parents, expressed through loyalty, love, and gratitude; and (3) strict rules of conduct, involving complete obedience and respectful behavior within superiors-subordinate relationships, such as parents-children, old-young, male-female, and teacher-student. These values affect both social and work environments substantially.

## MANAGING IN KOREA

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Business etiquette in Korea was extremely important. Ellen found that everyday activities, such as exchanging business cards or replenishing a colleague’s drink at dinner, involved formal rituals. For example, Ellen learned it was important to provide and to receive business cards in an appropriate manner, which included carefully examining a business card when received and commenting on it. If one just accepted the card without reading it, this behavior would be considered very rude. In addition, Ellen also found it important to know how to address a Korean by name. If a Korean’s name was Y.H. Kim, non-Koreans would generally address him as either Y.H. or as Mr. Kim. Koreans would likely call him by his full name or by his title and name, such as Manager Kim. A limited number of Koreans, generally those who had lived overseas, took on Western names, such as Jack Kim.

## WORK TEAMS

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Teams were an integral part of the work environment in Korea. Ellen noted that the Korean consultants organized some special team building activities to bring together the Korean and North American team members:

On one occasion, the Korean consulting team invited the Western consultants to a baseball game on a Saturday afternoon followed by a trip to the Olympic Park for a tour after the game, and dinner at a Korean restaurant that evening. An event of this nature is unusual and was very special. On another occasion, the Korean consultants gave up a day off with their families and spent it with the Western consultants. We toured a Korean palace and the palace grounds, and we were then invited to Park’s home for dinner. It was very unusual that we, as Western folks, were invited to his home, and it was a very gracious event.

Ellen also found team-building activities took place on a regular basis, and that these events were normally conducted outside of the work environment. For example, lunch with the team was an important daily team event which everyone was expected to attend:

You just couldn’t work at your desk every day for lunch. It was important for everyone to attend lunch together in order to share in this social activity, as one of the means for team bonding.

Additionally, the male team members would go out together for food, drink, and song after work. Scott found these drinking activities to be an important part of his interaction with both the team and the client:

Unless you had a medical reason, you would be expected to drink with the team members, sometimes to excess. A popular drink, soju, which is similar to vodka, would be poured into a small glass. Our glasses were never empty, as someone would always ensure that an empty glass was quickly filled. For example, if my glass was empty, I learned that I should pass it to the person on my

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right and fill it for him as a gesture of friendship. He would quickly drink the contents of the glass, pass the glass back to me, and fill it for me to quickly drink. You simply had to do it. I recall one night when I really did not want to drink as I had a headache. We were sitting at dinner, and Mr. Song handed me his glass and filled it. I said to him "I really can't drink tonight. I have a terrible headache." He looked at me and said "Mr. Scott, I have Aspirin in my briefcase." I had about three or four small drinks that night.

Ellen found she was included in many of the team-building dinners, and soon after she arrived in Seoul, she was invited to a team dinner, which included client team members. Ellen was informed that although women were not normally invited to these social events, an exception was made since she was a senior team member.

During the dinner, there were many toasts and drinking challenges. During one such challenge, the senior client representative prepared a drink that consisted of one highball glass filled with beer and one shot glass filled to the top with whiskey. He dropped the whiskey glass into the beer glass and passed the drink to the man on his left. This team member quickly drank the cocktail in one swoop, and held the glass over his head, clicking the glasses to show both were empty. Everyone cheered and applauded. This man then mixed the same drink, and passed the glass to the man on his left, who also drank the cocktail in one swallow. It was clear this challenge was going around the table and would eventually get to me.

I don't generally drink beer and never drink whiskey. But it was clear, even without my translator present to assist my understanding, that this activity was an integral part of the team building for the project. As the man on my right mixed the drink for me, he whispered that he would help me. He poured the beer to the halfway point in the highball glass, filled the shot glass to the top with whiskey, and dropped the shotglass in the beer. Unfortunately, I could see that the beer didn't cover the top of the shot glass, which would likely move too quickly if not covered. I announced "One moment, please, we are having technical difficulties." And to the amazement of all in attendance,

I asked the man on my right to pour more beer in the glass. When I drank the concoction in one swallow, everyone cheered, and the senior client representative stood up and shouted, "You are now Korean. You are now Korean."

The norms for team management were also considerably different from the North American style of management. Ellen was quite surprised to find that the concept of saving face did not mean avoiding negative feedback or sharing failures:

It is important in Korea to ensure that team members do not lose face. However, when leading a team, it appeared just as important for a manager to demonstrate leadership. If a team member provided work that did not meet the stated requirements, a leader was expected to express disappointment in the individual's efforts in front of all team members. A strong leader was considered to be someone who engaged in this type of public demonstration when required.

In North America, a team leader often compliments and rewards team members for work done well. In Korea, leaders expressed disappointment in substandard work, or said nothing for work completed in a satisfactory manner. A leader was considered weak if he or she continuously provided compliments for work completed as required.

## Hierarchy

The Koreans' respect for position and status was another element of the Korean culture that both Ellen and Scott found to have a significant influence over how the project was structured and how people behaved. The emphasis placed on hierarchy had an important impact upon the relationship between consultant and client that was quite different from their experience in North America. As a result, the North Americans' understanding of the role of a consultant differed vastly from their Korean counterparts.

Specifically, the North American consultants were familiar with "managing client expectations." This activity involved informing the client of the best means to achieve their goals and

included frequent communication with the client. Generally, the client's customer was also interviewed in order to understand how the client's system could better integrate with their customer's requirements. Ellen recalled, however, that the procedures were necessarily different in Korea:

The client team members did not permit our team members to go to their offices unannounced. We had to book appointments ahead of time to obtain permission to see them. In part, this situation was a result of the formalities we needed to observe due to their rank in society, but I believe it was also because they wanted to be prepared for the topics we wanted to discuss.

The Korean consultants refused to interview the customers, because they did not want to disturb them. Furthermore, the client team members frequently came into the project office and asked the Korean consultants to work on activities not scheduled for that week or which were beyond the project scope. The Korean consultants accepted the work without question. Ellen and Scott found themselves powerless to stop this activity.

Shortly after arriving, Scott had a very confrontational meeting with one of the Korean consultants concerning this issue:

I had been in Korea for about a week, and I was still suffering from jet lag. I was alone with one of the Korean consultants, and we were talking about how organizational processes should be flow-charted. He was saying the client understands the process in a particular manner, so we should show it in that way. I responded that, from a technical standpoint, it was not correct. I explained that as a consultant, we couldn't simply do what the client requests if it is incorrect. We must provide value by showing why a different method may be taken by educating the client of the options and the reasons for selecting a specific method. There are times when you have to tell the client something different than he believes. That's what we're paid for. He said, "No, no, you don't understand. They're paying our fee." At that point I raised my voice: "You don't know what you are talking about. I have much more experience than you." Afterwards,

I realized that it was wrong to shout at him. I pulled him aside and apologized. He said, "Well, I know you were tired." I replied that it was no excuse, and I should not have shouted. After that, we managed to get along just fine.

The behavior of subordinates and superiors also reflected the Korean's respect for status and position. Scott observed that it was very unusual for a subordinate to leave the office for the day unless his superior had already left:

I remember one day, a Saturday, when one of the young Korean consultants who had been ill for some time, was still at his desk. I made a comment: "Why don't you go home, Mr. Choi?" Although he was not working for me, I knew his work on the other team was done. He said, "I can't go home because several other team members have taken the day off. I have to stay." I repeated my observation that his work was done. He replied: "If I do not stay, I will be fired. My boss is still here, I have to stay." He would stay and work until his boss left, until late in the evening if necessary.

Furthermore, Scott found that the Korean consultants tended not to ask questions. Even when Scott asked the Korean consultants if they understood his instructions or explanation, they generally responded affirmatively which made it difficult to confirm their understanding. He was advised that responding in a positive manner demonstrated respect for teachers or superiors. Asking a question would be viewed as inferring that the teacher or superior had not done a good job of explaining the material. As a result, achieving a coaching role was difficult for the North American consultants even though passing on their knowledge of SI to the Korean consultants was considered an important part of their function on this project.

## WOMEN IN KOREA

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Historically, Confucian values have dictated a strict code of behavior between men and women and husband and wife in Korea. Traditionally,

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there has been a clear delineation in the respective responsibilities of men and women. The male preserve can be defined as that which is public, whereas women are expected to cater to the private, personal world of the home. These values have lingered into the 1990s, with Korean public life very much dominated by men.

Nevertheless, compared to the Yi dynasty era, the position of women in society has changed considerably. There is now virtual equality in access to education for men and women, and a few women have embarked on political careers. As in many other areas of the world, the business world has until recently been accessible only to men. However, this is changing as Korean women are beginning to seek equality in the workplace. Young Korean men and women now often participate together in social activities such as evenings out and hikes, something that was extremely rare even 10 years ago.

Dual income families are becoming more common in South Korea, particularly in Seoul, although women generally hold lower-paid, more menial positions. Furthermore, working women often retain their traditional household responsibilities, while men are expected to join their male colleagues for late night drinking and eating events which exclude women. When guests visit a Korean home, the men traditionally sit and eat together separately from the women, who are expected to eat together while preparing the food.

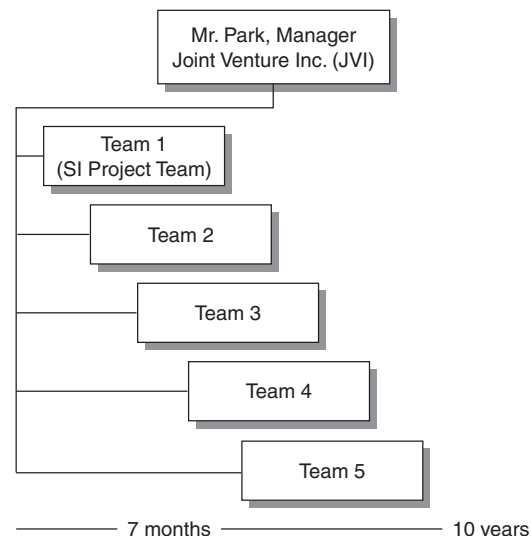
Although the younger generation are breaking from such traditions, Scott felt that the gender differences were quite apparent in the work place. He commented:

The business population was primarily male. Generally, the only women we saw were young women who were clerks, wearing uniforms. I suspected that these women were in the workforce for only a few years, until they were married and left to have a family. We did have a few professional Korean women working with us. However, because we are a professional services firm, I believe it may have been more progressive than the typical Korean company.

### THE SYSTEMS IMPLEMENTATION TEAM

Upon her arrival in Korea, Ellen dove into her work confident that the Korean consultants she would be working with had the skills necessary to complete the job in the time frame allocated. The project work was divided up among several work groups, each having distinct deliverables and due dates. The deliverables for the SI team were required as a major input to the other work groups on the project (see Exhibit 3). As a result, delays with deliverables would impact the effectiveness of the entire project:

JVI told us they had assigned experienced management consultants to work on the project. Given their stated skill level, Andrew's resource plan had him making periodic visits to Korea; I would be on the project on a full time basis starting in May, and Scott would join the team about three to four months after the project start. We were informed that five Korean consultants were assigned. We believed that we had the resources needed to complete the project by December.



**Exhibit 3** Project Time Frame

## JACK KIM

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J.T. Kim, whose Western name was Jack, was the lead Korean consultant reporting to Mr. Park. Jack had recently achieved a Ph.D. in computer systems from a reputable American university and he spoke English fluently. When Andrew initially discussed the organizational structure of the SI team with Mr. Park and Jack, it was agreed that Jack and Ellen would be co-managers of the SI project.

Three weeks after her arrival, Jack informed Ellen, much to her surprise, that he had never worked on a systems implementation project. Additionally, Ellen soon learned that Jack had never worked on a consulting project:

Apparently, Jack had been made the lead consultant of SI upon completing his Ph.D. in the United States. I believe Jack was told he was going to be the sole project manager for SI on a daily basis. However, I was informed I was going to be the co-project manager with Jack. It was confusing, particularly for Jack, when I took on coaching and leading the team. We had a lot of controversy—not in the form of fights or heated discussions, but we had definite issues during the first few weeks because we were clearly stepping upon each other's territory.

Given Jack's position as the lead Korean consultant, it was quite difficult for Ellen to redirect team members' activities. The Korean team members always followed Jack's instructions. Scott recalled:

There were frequent meetings with the team to discuss the work to be completed. Often, following these meetings the Korean consultants would meet alone with Jack, and it appeared that he would instruct them to carry out different work. On one occasion, when both Andrew and Ellen were travelling away from the office, Andrew prepared specific instructions for the team to follow outlined in a memo.

Andrew sent the memo to me so I could hand the memo to Jack directly, thereby ensuring he did

receive these instructions. Upon his return, Andrew found the team had not followed his instructions. We were provided with the following line of reasoning: you told us to do A, B and C, but you did not mention D. And, we did D. They had followed Jack's instructions. We had a very difficult time convincing them to carry out work as we requested, even though we had been brought onto the project to provide our expertise.

In July, a trip was planned for the Korean client team and some of the Korean consulting team to visit other project sites in North America. The trip would permit the Koreans to find out more about the capabilities of WSI and to discuss issues with other clients involved with similar projects. Jack was sent on the trip, leaving Ellen in charge of the SI project team in Korea. While Jack was away on the North American trip, Ellen had her first opportunity to work with and to lead the Korean consultants on a daily basis. She was very pleased that she was able to coach them directly, without interference, and advise them on how to best carry out the required work. Ellen felt that everyone worked together in a very positive manner, in complete alignment. When Jack returned, he saw that Ellen was leading the team and that they were accepting Ellen's directions. Ellen recalled the tensions that arose as a result:

On the first day he returned, Jack instructed someone to do some work for him, and the person responded, "I cannot because I am doing something for Ellen." Jack did not say anything, but he looked very angry. He could not understand why anyone on the team would refuse his orders.

## THE MARKETING RESEARCH PROJECT

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A few days after Jack returned from the North American trip, the project team realized they did not have sufficient information about their client's customer. Jack decided a market research study should be conducted to determine the market requirements. However, this type of study, which is generally a large undertaking on a



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project, was not within the scope of the contracted work. Ellen found out about the proposed market research project at a meeting held on a Saturday, which involved everyone from the entire project—about 40 people. The only person not at the meeting was Mr. Park. Jack was presenting the current work plans for SI, and he continued to describe a market research study:

I thought to myself, “What market research study is he talking about?” I asked him to put aside his presentation of the proposed study until he and I had an opportunity to discuss the plans. I did not want to interrupt his presentation or disagree with him publicly, but I felt I had no choice.

#### DINNER WITH JACK

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Two hours following the presentation, Ellen’s translator, Susan Lim, informed her that there was a dinner planned for that evening and Jack wanted everyone on the SI team to attend. Ellen was surprised that Jack would want her present at the dinner. However, Susan insisted that Jack specifically said Ellen must be there. They went to a small Korean restaurant, where everyone talked about a variety of subjects in English and Korean, with Susan translating for Ellen as needed. After about one hour, Jack began a speech to the team, speaking solely in Korean. Ellen thought it was unusual for him to speak Korean when she was present, as everyone at the dinner also spoke English:

Through the limited translations I received, I understood he was humbling himself to the team, saying, “I am very disappointed in my performance. I have clearly not been the project leader needed for this team.” The team members were responding “No, no, don’t say that.” While Jack was talking to the team, he was consuming large quantities of beer. The pitchers were coming and coming. He was quite clearly becoming intoxicated. All at once, Susan stopped translating. I asked her what was wrong. She whispered that she would tell me later. Five minutes went by and I turned to her and spoke emphatically, “Susan, what

is going on? I want to know now.” She realized I was getting angry. She told me, “Jack asked me to stop translating. Please don’t say anything, I will lose my job.”

I waited a couple of minutes before speaking, then I interrupted Jack’s speech. I said, “Susan is having difficulty hearing you and isn’t able to translate for me. I guess it is too noisy in this restaurant. Would it be possible for you to speak in English?” Jack did not say anything for about 30 seconds and then he started speaking in English. His first words were, “Ellen, I would like to apologize. I didn’t realize you couldn’t understand what I was saying.”

Another thirty minutes of his speech and drinking continued. The Korean team members appeared to be consoling Jack, by saying: “Jack, we do respect you and the work you have done for our team. You have done your best.” While they were talking, Jack leaned back, and appeared to pass out. Ellen turned to Susan and asked if they should help him to a taxi. Susan insisted it would not be appropriate. During the next hour, Jack appeared to be passed out or sleeping. Finally, one of the team members left to go home. Ellen asked Susan, “Is it important for me to stay, or is it important for me to go?” She said Ellen should go.

When Ellen returned to her hotel, it was approximately 11 p.m. on Saturday night. She felt the situation had reached a point where it was necessary to request assistance from senior management in North America. Andrew was on a wilderness camping vacation in the United States with his family, and could not be reached. Ellen decided to call the North American project sponsor, the Senior Vice President, George Peterson:

I called George that Saturday night at his house and said: “We have a problem. They’re trying to change the scope of the project. We don’t have the available time, and we don’t have the resources. It is impossible to do a market research study in conjunction with all the contracted work to be completed with the same limited resources. The proposed plan is to use our project team to handle

this additional work. Our team is already falling behind the schedule, but due to their inexperience they don't realize it yet." George said he would find Andrew and send him to Korea to further assess the situation.

## THE MEETING WITH THE DIRECTOR

When Andrew arrived in August, he conducted a very quick assessment of the situation. The project was a month behind schedule. It appeared to Andrew that the SI team had made limited progress since his previous visit:

It was clear to me that the Korean team members weren't taking direction from Ellen. Ellen was a seasoned consultant and knew what to do. However, Jack was giving direction to the team which was leading them down different paths. Jack was requesting that the team work on tasks which were not required for the project deliverables, and he was not appropriately managing the client's expectations.

Andrew held several discussions with Mr. Park concerning these issues. Mr. Park insisted the problem was Ellen. He argued that Ellen was not effective, she did not assign work properly, and she did not give credible instructions to the team. However, Andrew believed the Korean consultants' lack of experience was the main problem.

Initially, we were told the Korean team consisted of experienced consultants, although they had not completed any SI projects. I felt we could work around it. I had previously taught consultants to do SI. We were also told that one of the Korean consultants had taught SI. This consultant was actually the most junior person on the team. She had researched SI by reading some texts and had given a presentation on her understanding of SI to a group of consultants.

Meanwhile, Andrew solicited advice from the WSI Co-Managing Director, Robert Brown, who had over ten years experience working in Korea. Robert suggested that Andrew approach

Mr. Park's superior, Mr. Song, directly. He further directed Andrew to present his case to the Joint Venture committee if an agreement was not reached with Mr. Song. Andrew had discussed the issues with George Peterson and Robert Brown, and they agreed that there was no reason for Ellen to leave the project:

However, Robert's message to me was that I had been too compliant with the Koreans. It was very important for the project to be completed on time, and that I would be the one held accountable for any delays. Addressing issues before the Joint Venture committee was the accepted dispute resolution process at JVI when an internal conflict could not be resolved. However, in most cases, the last thing a manager wants is to be defending his position before the Joint Venture committee. Mr. Song was in line to move into senior executive management. Taking the problem to the Joint Venture committee would be a way to force the issue with him.

Andrew attempted to come to a resolution with Mr. Park once again, but he refused to compromise. Andrew then tried to contact Mr. Song and was told he was out of the office. Coincidentally, Mr. Song visited the project site to see Mr. Park just as Ellen and Andrew were completing a meeting. Ellen recalls Mr. Song's arrival:

Mr. Song walked into the project office expecting to find Mr. Park. However, Mr. Park was out visiting another project that morning. Mr. Song looked around the project office for a senior manager, and he saw Andrew. Mr. Song approached Andrew and asked if Mr. Park was in the office. Andrew responded that he was not. Mr. Song proceeded to comment that he understood there were some concerns about the project work, and suggested that perhaps, sometime, they could talk about it. Andrew replied that they needed to talk about it immediately.

Andrew met with Mr. Song in Mr. Park's office, a makeshift set of thin walls that enclosed a small office area in one corner of the large open project office. Ellen was working in an area just outside the office when she heard Andrew's voice rise. She heard him shout, "Well, I don't



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think you're listening to what I am saying." Ellen was surprised to hear Andrew shouting. She knew Andrew was very sensitive to what should and should not be done in the Korean environment:

Andrew's behavior seemed so confrontational. I believed this behavior was unacceptable in Korea. For a while, I heard a lot of murmuring, after which I heard Andrew speak adamantly, "No, I'm very serious. It doesn't matter what has been agreed and what has not been agreed because most of our agreements were based on inaccurate information. We can start from scratch." Mr. Song insisted that I was the problem.

## NOTES

1. For an account of Ellen's experience in Bahrain, see Ellen Moore (A): *Living and Working in Bahrain*, 9A90C019, and Ellen Moore (B), 9A90C020; Ivey Publishing, Ivey Management Services, c/o Richard Ivey School of Business, University of Western Ontario, London, Ontario, Canada, N6A 3K7.

2. Some of the information in the "About Korea" and "Women in Korea" sections was obtained from "Fodor's Korea," 1993, Fodor's Travel Publications, Inc.: NY; and Chris Taylor, "Seoul-city guide," 1993, Lonely Planet Publications: Colorcraft Ltd., Hong Kong.

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## JULIE DEMPSTER (A)

*Prepared by Rachel Knight under the supervision of Professor Christine Pearson*

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In August 2002, Julie Dempster reflected on her experiences as vice-president of marketing and brand positioning at Overflow, an Amsterdam-based provider of content management solutions. Since she signed her contract a year ago, she had been trying to negotiate an equity stake in the company. Dempster had arranged a meeting for the following day with Overflow's chief executive officer (CEO) to revisit this issue. Although Dempster was responsible for many positive changes at Overflow, she often disagreed with the decisions made by the company's directors and frequently butted heads with the CEO. Her contract was up for renewal in a week's time and she wondered whether staying at Overflow was the best decision for her, regardless of how the next day's meeting played out.

### JULIE DEMPSTER

A 34-year-old native of Ontario, Dempster aspired to run an international company, preferably in

the media and entertainment sector. Working towards this goal, she earned both a bachelor's degree (1992) and a master's degree (1996) in journalism from Carleton University, and completed two media-related management fellowships in the United States. In the past, Dempster had worked as a correspondent in Africa for various media firms, as a consultant for the Canadian government and the Canadian Advisory Council on the Status of Women as a journalist for WETV (an Ottawa-based global TV network), as a Web developer for the Tribune Company (one of the largest media companies in the United States) and as a marketing specialist for the *New York Times*.

Dempster left the *New York Times* because she had grown tired of being constrained by the rigid and hierarchical structure there. She decided to move to Europe in December of 1999 to focus on broadband and interactive television developments. She chose Amsterdam for a number of reasons. It was an information technology (IT) hub with a multicultural and

cosmopolitan environment that appealed to her. Also, she felt she would be able to function there as an English-speaking professional, despite the fact that Dutch was the official language.

Once there, she was hired by Von Trapp & Partners (Von Trapp), a company that focused on conducting pan-European digital media research and strategy development for media and entertainment companies. She wanted to use this position as a means to learn about both industry trends and the European landscape. After 18 months with Von Trapp and despite promises, Dempster still had not received an equity stake, and she decided to move on.

## OVERFLOW

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In July 2001, Dempster agreed to a two-month consulting contract with Overflow. She accepted it because the position paid a very high salary (by Dutch standards) and she saw it as an opportunity to learn about the role that technology plays in furthering business objectives. Additionally, Overflow's management had agreed to her request for a three-day workweek, giving her time to complete renovations on her apartment.

Overflow was officially founded in January of 2000 and had rapidly become a leader in the field of content management in Benelux (Belgium, the Netherlands and Luxembourg). The company's success was attributable to its innovative technology that enabled information to be distributed in various formats to devices such as personal digital assistants (PDAs), personal computers (PCs), Web browsers, mobile browsers and digital TVs. The technology served to reduce "content chaos," thereby helping companies to lower costs and improve efficiencies.

Overflow was divided into three divisions: software development, sales and eServices. Each was managed by one of the company's three founding members and self-appointed directors: the CEO, chief technical officer (CTO) and chief communications officer (CCO). At the time, the company had 30 Dutch employees, only three of whom were women. As a black Canadian woman, Dempster stood out.

As she began her consultancy, Dempster quickly learned that the formal hierarchy was virtually meaningless. Employees of all levels seemed comfortable sharing their thoughts and complaints at will. At Overflow, from Dempster's perspective, company culture dictated that everyone's opinion was heard regardless of whether the employee was qualified to speak on the subject, or whether management was remotely interested in what the person had to say.

The environment at Overflow was much less professional and much less interactive than what Dempster had been accustomed to, so when her short contract expired, she expressed her plans to move on. The company's CEO, Johannes Nederberg, was extremely disappointed by the news and convinced Dempster that she could play a key role in managing the company if she stayed. It would be her job to put the company on the map, and position it among global competitors in the content management industry. Excited by the prospects, Dempster signed the full-time contract with Overflow as vice-president of marketing and brand positioning in September 2001. She was told that equity was not available to new hires at this time but if she proved herself, she would be offered it in the future.

When Dempster signed on, Nederberg was 28 years old. She found him extremely bright and ambitious, with exemplary sales abilities, despite his lack of formal education beyond high school. Nederberg was clearly the leader among the three directors. The CTO, Klaas Driehuizen, was also young and very bright, and was credited for developing Overflow's software. Driehuizen was not known for his communication skills, but was extremely hard-working. The CCO, Jens Dekker, was very easygoing and friendly, but did not have any management skills. Dempster's position fell under the jurisdiction of the CCO, but she reported informally to the CEO. It was clear to Dempster that he was the best resource the company had, and he was insistent on being involved in her activities.

Overflow did not have a formal value statement but performance was considered "key." It was clear that non-performers had no future at the company. In fact, employees who were

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not seen as living up to a particular standard were fired.

### SETTLING IN

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In order to accommodate Dempster's needs, Nederberg announced that Overflow would adopt English as its official language. (Prior to this, the company's official language had been Dutch, due to its focus on the Dutch market and its Dutch employees.) To ensure her comfort at Overflow, Dempster was provided with a nice, roomy workspace in the location of her choice. From these accommodations, she began developing relationships with Overflow's most important clients. These relationships were vital to Dempster's success and Overflow's future because the clients played a key role in marketing Overflow's technological solutions.

Dempster's mandate was to develop Overflow's image through a mixture of marketing, public relations (PR), corporate communications and client relations. This entailed developing and implementing Overflow's core strategy, managing all marketing activities, managing the distribution of news releases, cultivating relationships with journalists, making sure the senior executives received coverage in the mainstream media, drafting all key marketing collateral, keeping staff up-to-date on business and communicating frequently with clients.

Overflow's employees were respectful and friendly towards Dempster, but she found them generally less professional than her North Americans colleagues. For example, Dempster overheard the Nederberg's secretary telling a client that the CEO couldn't come to the phone because he was "on the toilet." As a result, Dempster drafted a set of standard phone responses for secretaries to use.

On another occasion, a co-worker confronted her aggressively, stating that he "refused to change from Dutch operations just because she was an English-speaker." Dempster reported the incident to Nederberg but refused to identify the co-worker in question. The CEO became very

angry. A few days later, Nederberg explained to all employees that "the company's official language was now English in order to compete in the international game." Shortly after this announcement, Dempster requested and received permission to take a Dutch language course, which was paid for by Overflow.

### THE FINANCE PARTY

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In early November 2001, Overflow obtained a new round of financing from two private investors. The financing was secured despite the dot-com burst and was viewed as a great success. In order to celebrate, the CEO planned a large party that would include current and prospective clients, suppliers, supporters and the media.

When Dempster arrived at the party, she was shocked to find that the wait staff (all young, attractive women) were sporting tiny, revealing T-shirts emblazoned with the Overflow logo across the chest. Dempster was furious that she hadn't been consulted about a decision that would affect that brand image of the company. She wondered if she'd been deliberately left out of the loop. Dempster confronted Nederberg immediately and a heated exchange ensued just as the party was beginning. Nederberg stormed away. Dempster left the party as soon as the scantily clad waitresses began drinking and dancing provocatively with some of the male guests.

When Dempster returned to work on Monday, she was surprised to find the CEO acting as if nothing had occurred. She approached Nederberg and apologized for losing her temper but expressed her disappointment at not being involved in the planning for the party. She explained that she felt the T-shirts and the waitresses' behavior were inappropriate and unprofessional, and she conveyed her desire to be involved in future decisions about how the company would market itself. In response, Nederberg became angry and accused Dempster of embarrassing him in front of his family and friends. In his view, Dempster had over-reacted, and she needed to become more sensitive to European

practices. Nederberg claimed that most of the people at the party were men and that men enjoyed parties with young women as entertainers. Because neither Dempster nor Nederberg could understand the other's point of view, they agreed to disagree on the issue and move on.

About a month after the incident, Dempster received her first performance review. Nederberg indicated that management was very happy with her work and felt lucky to have her on board. The company, as a whole, was impressed that one person could make such a difference to an organization: Overflow had become more organized and more professional as a result of Dempster's presence. Nederberg told Dempster that one area she needed to improve was her cultural sensitivity, citing the finance party. Dempster took this as an opportunity to defend her actions surrounding the finance party again. The conversation escalated into another unresolved argument. For months after, Nederberg continued to make snide comments about Dempster's response to the women at the finance party.

### THE DUTCH MEETING

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In March 2002, Dempster arranged a meeting between Overflow and one of their key technical partners. The meeting was intended for the two sales forces to discuss strategic moves in sales and marketing, for which Dempster would ultimately be responsible. The CEO, CTO, CCO, director of business development and three sales reps were there to represent Overflow. A dozen visitors represented the partner company. Counter to plan, the one-and-a-half hour meeting took place entirely in Dutch, leaving Dempster unable to understand what was being discussed. Even the written materials provided by the other company were entirely in Dutch, despite the fact that they knew that Dempster did not speak the language. She felt out of place. Most of all, she was disappointed and hurt that none of her co-workers stood up for her by speaking English.

That evening, Dempster contemplated leaving Overflow. First, she considered what she was

gaining from working there. She had developed insights into the future direction of technologies for digital media and entertainment, learned a lot about venture capitalism and due diligence, and strengthened her skills in strategic communications. Furthermore, she felt proud of the significant organizational change she had inspired within the company. She was certain that staying at Overflow would provide her with many more challenges and character-building experiences. But she felt isolated and different from everybody there, and that made her wish for more. Dempster contacted a professional recruiter that evening. She would stay at Overflow until something else materialized.

### SOME NEW DEVELOPMENTS

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Five months later, Dempster had yet to find another job that she wanted because the digital media industry was in the midst of significant restructuring and downsizing. However, some positive opportunities had improved her situation at Overflow. Initially, Dempster was invited to attend meetings involving the company directors. Ironically, this change had been precipitated by a sarcastic comment by Nederberg about the "T-shirt" party. Fed up by one more comment, Dempster had given notice, but Nederberg refused to take it. Rather, he vowed that things would change. She agreed to stay and was granted more management involvement.

Also, Dempster was excited that Overflow's rapid growth was outpacing the company's human resources. They would have the opportunity to create new positions and hire new employees. Dempster knew she could play a key role in hiring the right kind of people to shape Overflow's future.

Finally, Overflow had been nominated to receive a prestigious award recognizing the company as "the most promising startup in the Netherlands." Dempster had conducted a presentation for a panel of judges, explaining why Overflow deserved the award, but the recipient had not yet been named. The award was highly

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coveted. It would attract large-scale venture capitalists, and it would bring recognition to the winner's management team.

### SOME LINGERING ISSUES

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Despite these positive developments, Dempster felt unsettled about certain issues. She was concerned with the way management treated some employees. If employees weren't producing, they were let go, often without any chance to improve.

Dempster was concerned also about the way management treated small-sized customers. Little was done to appease them. Nederberg's justification was that the small customers were unimportant and the focus should be placed on "the big fish." Dempster was concerned that this attitude would affect other employees and, ultimately, spill over to the larger customers, as well.

Perhaps the most unsettling issue was Dempster's accidental discovery that other employees did have equity stakes in Overflow. Christian Hoogendam, who had been hired at the same time as Dempster, had a 0.5 per cent stake in the company as a part of his contract. Dempster estimated that this could be worth nearly \$1 million. Although he had an excellent reputation as an IT specialist, Hoogendam had yet to prove himself at Overflow. Other equity allocations seemed somewhat random but all recipients were Dutch.

So, with the contract renewal meeting tomorrow, Dempster sat down to evaluate the pros and cons of staying with Overflow. Certainly, her concerns about financial equity should be voiced. She had bargaining power, after all. But, she was concerned about how Nederberg might react. As she reflected on her experiences at Overflow, with or without an offer of equity, Dempster wondered whether it was time for her to move on.

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## THE EUROPEAN EXPERIENCE (A)

*Prepared by David Wesley under the supervision of Professor Henry W. Lane*

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In September 1999, a group of international business majors from a large Boston-area university travelled to Spain, France and Germany for a yearlong period of study and work. A few weeks after arriving in Europe, they began discussing their experience in an asynchronous online meeting over the Internet. This case reflects parts of the discussion in which some of the students described their initial impressions.

### GETTING SETTLED

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"Coming to France was one of the scariest moments of my whole life," recalled Andrea.

Being told is one thing, but doing it yourself, is another. Tiny details like sheets, laundry, the bus, and even different keyboards. Things you never think about in Boston are big challenges here. Plus, I had never before been out of the United States, so customs and the long flight were all new to me.

The minute I stepped foot in the airport, I never felt more alone in my life! The first day was terrible. I was tired and had to get to the school, sign a lease, go grocery shopping and do it all in French! After 15 hours of sleep, things were much brighter, but the first weekend by myself was awful. I didn't know anyone, and there's only so much time you can spend by yourself. I was missing home, and began having thoughts of "What have I done?"



When Mario left the airport, the narrow streets and small cars made an immediate impression, as he compared them with the relatively wide boulevards and expressways of the United States. When he arrived at the building where he was to stay, he couldn't help but notice how small the elevator was. He observed,

I doubt any of the elevators I have been on in Spain would pass U.S. laws. A recent experience in my building comes to mind. An elderly woman was being returned to her apartment. Her sons had to place the wheelchair sideways and lift up the foot rests, so they could squeeze her feet in. Then she had to ride up to her floor by herself! Among the many differences here, it is clear to me that the Spanish are different in the amount of space they need.

Jim arrived in Madrid after missing his connection in New York. Fortunately he met another classmate who had also just arrived and the two began their first undertaking—looking for a place to live.

After dropping my bags off at the hostel and taking a quick shower, we sped off in search of an apartment. We picked up the *Segundamano* and began dialing, but no luck. We decided to ask a woman walking past us if she knew of any *pisos* available for rent. She then took us to a restaurant to meet her husband. They decided that we looked clean enough to show the apartment directly above the restaurant, and what an apartment! It had three rooms, art and a big kitchen and living area. Then we returned downstairs and wrote up a contract on a napkin and had beers for about two hours with our new *dueños*. Needless to say these wonderful people have treated us like their own sons.

Don echoed Jim's sentiment.

The owners really take care of us. They make sure that we have everything we could possibly need. That was my first realization that business was done a little differently around here. Money doesn't seem to be the first priority. I think they were actually surprised when we gave them the rent on the first of the month!

When John landed at the airport, he and Mike got into a "junk" cab and had to push it out of the airport. On John's first day, he looked at one

apartment, but was not interested in spending more time than necessary on his search.

I don't get all worried about little things like where to live. I came here on a Monday, looked at one apartment that I didn't like, then went to Ibiza to party for six days. When I came back I ran into this English girl from school who had a room free and I took it on the spot.

Katie, however, was less fortunate, and found her first days in Madrid to be somewhat bewildering.

I arrived. I was alone without the comfort of friends or family. I already began feeling homesick. I thought to myself, "Time to call home, tell them I arrived in one piece." Ok! How do you use these phones? I don't understand the operator. Frustration! I'm hungry—what does the menu say? Do you guys know what kind of food this is? How much money? How many pesetas to a dollar? Questions, questions, questions!

She soon met three other American women and they began looking for an apartment to share.

It wasn't an easy task, at least for us. Some of the other girls started the research before I arrived, so they were a few steps ahead of me. We made a million phone calls. Finally we saw a few places together and eventually decided on one.

For Angela, finding an apartment was the most difficult thing she encountered during her first few weeks.

The first day that I arrived, I bought a mobile phone (because it is a basic necessity here), went to the school and got a list of apartments for rent. I began calling people on my mobile phone, but I was not used to communicating with native speakers. I got by, but it took three long and hard days of calling people to find a decent apartment. But I am glad that I was forced to start speaking and I got over my fear of making mistakes really quickly!

## ADJUSTING TO LIFE IN EUROPE

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### Language

Mary, who was studying in Germany, also found speaking on the phone to be a challenge.

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She related the difficulties she encountered when she tried to arrange an internship interview.

I had to call a man at BMW. It was not the best conversation, but I tried my best to converse with him. I tend to get really flustered when I am speaking on the phone in German. As soon as I cannot understand a few words, I begin to panic. So that is what I did—panic. I was trying to ask him how he spelled the street name where I should go, and I used the informal form and conjugated the verb incorrectly. When he stopped what he was saying, I became so flustered that I actually asked again in the same way as the first time. Well, it may have been my imagination, but he sounded very brisk and then just spelled it out in English.

Claudia, who was a native of an Eastern European country, enjoyed returning to a country that had a culture similar to her own. Nevertheless, language was a barrier and she became frustrated when some Germans would speak to her in English because she could not respond fluently in German.

It seems to me that they try to show that their English is better than my German and that they are better at learning foreign languages. I never bother to explain to them that English is also my second language, and that I have learned it as well as, if not better, than they have. Still, only a few people do this to me, so I don't pay that much attention to it. There are just as many who are supportive and help me correct my mistakes.

On her first day in France, Andrea was exhausted by her efforts to speak French for the whole day. She was relieved when she encountered a tour guide who had been on a student exchange in the United States and was glad to speak with her in English.

Dana's first day was also her most difficult. "No one understood me," she recalled. "I couldn't even make a simple phone call to my parents." She continued,

I found some Mexican friends who helped me to settle in on that awkward first day. To get by, I would just stick with the people who had been at the school for one month. They made things much easier. Then, as I got to know the students and

faculty, I began to feel more comfortable with the French. However, language is still the most difficult thing because it takes a lot of mental energy to be able to communicate.

Although all of the exchange students in Spain had a reasonable level of Spanish proficiency before arriving, many had to adjust to living in a non-English environment. Eric was surprised at "how fast the people speak."

I realize that we speak fast in English, but I soon realized that they speak Spanish just as fast, if not faster.

When I am talking to someone from the United States and I see a Spanish student who I know, the person will say "hi" and start up a conversation. I have to jump into Spanish, because if I cannot, I get strange looks. I have to learn to be able to jump from Spanish to English and back again without any problems.

Mike found that living with a family helped ease his adjustment.

I think the tough part about going abroad is learning to speak the language. I've been here over a month and I feel myself getting more comfortable with the language each day. One thing that has helped facilitate this is living with a family. In the house, I speak Spanish only, unless I speak English with other Americans.

Mario agreed, adding,

I recommend that everyone stay with a family, at least to start. It makes your transition much easier, especially if you have never lived abroad and you are not quite familiar with the culture.

Although Jim found Spanish to be a "stumbling block," his transition was made easier by spending time with his English-speaking friends.

It is easy to escape and just hang out with our friends from the United States. I think it is natural to do so, since English is the language we speak best. But I also believe that most of us are doing a great job of meeting new people and practising our Spanish. Most of the students go to the parties



every Thursday, and most of us go out to other parties on weekends. It is not just a Spanish university where people who do not speak Spanish are singled out. There are people from many different countries whose level of Spanish is about the same as ours. I really had anticipated more difficulty in adjusting to being here. It all just takes an open mind and a little patience. In reality, things are pretty similar to home.

Although language was perhaps the most obvious adjustment for most of the exchange students, it was only one of the many challenges that had to be overcome. Rebecca, for example, believed that “culture is just as important as language” as she found herself trying new foods and making new friends. She soon found out that going on exchange was very different than traveling. Reflecting on her situation, she noted, “The biggest challenge for me is to accept the fact that this place had to be called home for a while.”

### **Pace of Life**

In Spain, one of the more obvious differences was the slower pace of life, something that Angela found to be particularly annoying. “People move very slowly here, especially on the sidewalks, and I am always in a rush to get nowhere, so I get aggravated.”

Katie agreed.

They do things that we’re not used to, like walking slowly. They seem oblivious to the people around them. I’ll be honest and say that my patience grows very thin at times. I keep telling myself that it is an adjustment.

“Every night before dinner it seems like all of Madrid goes out for a walk,” recalled Eric. “If you’re in a rush, too bad, because you’re not going anywhere fast!”

### **Personal Space**

Not only did it seem as though everyone went out for walks, but they also seemed to have a very different level of comfort with regard to personal space. Eric noted how Spaniards “bump

into each other all the time without excusing themselves. If they did that in the States,” he observed, “there would be a lot of fights.” In France, Andrea found that the students spoke “really close to your face,” which required some getting used to.

In France and Spain it was also common to greet people with kisses. At the beginning, this created some confusion. Andrea had become used to it, but wondered “Who do you kiss, how many times, and when you leave also, or only upon greeting?”

### **Smoking**

In addition to the slow pace, many of the American students were annoyed by the amount of smoking. This was the first thing that Jim noticed as he stepped off the plane. “I could tell I wasn’t in my own country as soon as I arrived at the terminal and into a cloud of smoke,” he recalled.

Katie, who did not enjoy smelling “like an ashtray” all the time, found it difficult to get used to. Of all the differences he encountered, Mario found that smoking had the strongest impression on him.

I am slowly getting over it, but it has been hard to walk into the school cafeteria and see a cloud of smoke. It is nothing like what people describe in the United States. In the United States, most restaurants, bars, and other establishments where smoking is permitted, ventilation systems are common.

### **Local Cuisine**

Tara found it difficult to adjust to the food, both in restaurants and markets. “I really don’t like Spanish food,” she conceded.

What’s on the menu is what you get, and that’s that! If you try and change or substitute anything, they usually get upset or confused. I was a vegetarian for a few years, but it is quite difficult to live on the minimal vegetarian options they have here, so I have decided to experiment. When I go to the market, I usually get this sensation like I am going to

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pass out. It's not because of the whole animal body parts blatantly displayed (although that is quite disgusting), but the aroma makes me ill. What I wouldn't give for just one day at a Super Stop and Shop.

Katie, on the other hand, preferred Spanish markets to U.S. supermarkets.

We go to the markets in the neighborhood to buy our groceries, as opposed to the supermarket back home. And you tend to become friendly with the man behind the meat counter or the woman picking out your fruit. It's a very comfortable atmosphere.

### Sexual Norms

Germany had very different levels of public acceptance concerning the open display of sexual themes. Meena, who was originally from India, noticed this as soon as she arrived.

I was coming down the escalator in the Frankfurt airport, and the first thing that I saw was a sex and lingerie shop. That is far from the norms of more conservative countries like India. I see a lot more public displays of affection, and people don't stop or even look twice. I definitely have to say that for the first few weeks, my head was always whipping around in amazement.

Another thing that comes to mind was a conversation that I had with two students from Ireland. They said they did not understand why we are always shocked to see nudity in commercials, shows and posters, yet we Americans subject our kids to the most horrific massacre scenes in our American movies. I guess it's just a matter of where you were brought up and what you are used to. The important thing is to try your best to have an open mind about other cultures. I learned that when I came to the United States from India. To me, those are very different cultures too.

When Mary went on an "integration weekend" in Germany, she was surprised to discover that the games they were asked to play were almost all sexual in some way. In one game, participants were asked to exchange clothes with someone of the opposite sex.

Many of the Europeans were so open about it and did not mind standing naked in a farmer's field. But it caused some apprehension for me and for another American. Needless to say, we stuck to our American ways and did not exchange all of our clothing.

Andrea, who had a similar experience in France, felt that the games for her integration weekend were "a little lame." She reflected on her experience.

These ridiculous games involved, in some fashion or other, a sexual undertone. I personally thought it was a little lame, but I tried to remember that it was planned for first year students. I'm now in my fourth year, have lived on my own, paid my own bills and held two jobs. But these were kids in their first year. I probably acted just as stupid three years ago.

### Personal Appearance

Mary was also puzzled by the attitude of a female professor at the college.

She told us that we must do our best to keep up our appearance for an interview, even down to the finest detail of your nails, because it is very difficult for women to hold important positions in the business world and we must work extra hard. But I would be very surprised if that were really true. I guess I am just used to America, where women have the same chances as men and can move up the ladder at the same speed.

France and Spain were much more formal in dress and appearance. In addition, Europeans were, on average, more health conscious and slim. When Andrea decided to go out in her usual American style clothing, namely running pants, a T-shirt and sneakers, she noticed the strange looks she received from many of the French pedestrians. "These clothes are completely normal in the States, but the looks I was getting! Most everyone here goes out in trousers and blouses, or suits."

### Government and Bureaucracy

For some, dealing with government bureaucracy represented a significant challenge. To

Rebecca this became apparent after she tried to renew her visa. The government office responsible for issuing renewals opened at 9:30 a.m. Rebecca planned to arrive at 7:30 in order to get in line and allow for sufficient time to process her application—she thought!

When I arrived, there were already over 200 people in line waiting to renew their visas. I waited in line for four hours. The joke was that it's easier to get into heaven than it is to get a number for your visa. When I went on Friday morning, there were people who had been sleeping in the street since 9:00 the day before.

## THE HOLIDAY SEASON

For most of the exchange students, spending the holidays in Europe was exciting, even though, for some, it would be the first time away from family. Although they would “miss Mom’s cooking,” the students were looking forward to sharing American traditions with their new European friends.

In Spain, the students special-ordered two large turkeys to share among them, although logistics was going to be a major hurdle. Jim explained,

We will need to think about having 30 people coming over to our house for a big meal. We don’t even have an oven or a microwave! Last time I counted, we had only 11 plates, seven forks and five chairs—hmmm. And besides, everyone has class the next day. What time is the football game on? Oh, 2:00 a.m. I *might* be awake.

Still, we should have a great time. The turkey might be overcooked, the stuffing a bit dry, and maybe someone will have to sit on the floor, but all in all, the feeling will be the same. I think we have a pretty nice family here in Spain.

In France, where there were only two exchange students from Boston, it was more difficult to recreate an American Thanksgiving. Still, Andrea viewed it as an opportunity to share her culture with her new European friends and as an

opportunity to correct some misconceptions. In anticipation of the event, Andrea commented,

Everyone who is coming will be a first-timer. But after learning so much about everyone else’s culture, it’s exciting to be able to share some of my own. It was funny when I told a French student about Thanksgiving, he said, “Oh, is that the day when you watch football and drink beer?” “No, that is the Super Bowl,” I replied. He insisted that, while he understood what the Super Bowl was, Thanksgiving was another day for these activities. Then he added that he thought America was a great country! It seems that he missed the true spirit of the holiday.

When Thanksgiving finally arrived, the event exceeded everyone’s expectations. Some of the students brought homemade pies and other traditional American foods. Jim invited his landlords, who appeared to enjoy the event. Rebecca went so far as to claim that, for her, it had been “the best Thanksgiving holiday.”

Despite their efforts to reproduce an American holiday experience, being away from family was difficult for some. As the Christmas decorations began to go up around Madrid, Angela anticipated her homesickness.

Seeing all of the Christmas decorations is very hard, but I don’t think that the idea of spending Christmas without my family will actually set in until around that time. I will miss my family, but I am excited to experience a European Christmas. After all, I may never get the chance to do this again!

Tara was glad to have her American friends near her. They would sit together and talk about their families and tell stories about previous holiday seasons. She commented,

Lots of times it brings back memories that we had forgotten, and it really helps to know we are all in the same boat. I know I have the rest of my life to be at home, so I am going to enjoy this chance to spend the holidays in Europe.

Andrea, who was Protestant, found it difficult to spend Christmas in a Catholic country, where

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the traditions were so different. She reflected on the differences,

In America, we have become too intent on being politically correct and inclusive. I hardly noticed the Happy Holidays signs in Boston, as opposed to Merry Christmas. Here in France, where the country is 85 per cent Catholic (although only a fraction actually practise), I think it would be really tough to be a Jewish student. I've found it hard enough as a Lutheran.

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### ACADEMIA

When the students arrived in Spain on the first of October, they were placed into student "families." These were groups of students organized as social units. A local student was given responsibility for arranging social events for the "family" as a way to help facilitate the integration of the exchange students. Nevertheless, Katie's first few days were "scary."

Spanish was everywhere. Students from Germany, France, England, Sweden and Denmark were all speaking Spanish, except me! I found it to be an intimidating atmosphere.

Some were surprised to discover that the campus was much smaller than their home university. Many of the first impressions of the Spanish university were positive however, particularly with regard to the faculty and staff. Angela noted,

The faculty values our input and comments and look way beyond mistakes that we might make while speaking.

Rebecca was ecstatic when one of the staff members arranged "*Intercambios*" with Spanish students.<sup>1</sup>

One of my *Intercambios* is from the South of Spain. When we met at a wine and cheese luncheon, I was spit on about three times in a half hour, and the hardest thing was not to wipe my face in front of him. But he turned out to be the sweetest guy in the world and even treated me to a

*bocadillo* (snack) and a movie. We spent an entire day in *Retiro* park and the night in *Sol* (a funky area of Madrid where people go out on the weekends), and we spoke eight straight hours of Spanish. We almost forgot to speak English! That's how I am learning the language here—*Intercambios*.

Before leaving the United States, the exchange students were advised that all instruction would be in Spanish. Therefore, some were surprised to find out that most of the Spanish students spoke English and that class assignments were frequently in English. Some courses, however, were exclusively in Spanish, and the exchange students found it necessary to spend long hours reading and translating class assignments.

John was concerned about the attitude some students seemed to have toward Americans.

It is a very cliquy school, and it seems as though there are many students here that feel that it is their school and that we are just visitors, or to be more precise—intruders!

It seems to me that the idea here is to integrate and make contacts all over the world, but many students are content to live with their preconceived notions of Americans as world police and so they stick to themselves. Granted, there are many Americans who act like idiots and perpetuate these perceptions, but it still gets frustrating sometimes. The funny thing is this, these same people seem to be obsessed with our products and pop culture.

Some of the exchange students felt like they had returned to high school again, with class bells and all. Tara noted,

I have noticed a certain aura of immaturity in the students. I don't quite understand it, but they just seem extremely young. Maybe it has something to do with the fact that we've been out in the working world for a couple of years now and the great majority of us are living completely on our own, while the students here are still supported by their parents.

### Respect for Faculty

Jim expected the Spanish students to have the "highest respect" for faculty. Instead, he was

dismayed that professors had to repeatedly tell the students to “shut up” during class. Mike commented,

It has the feeling of a high school. The reason I say this is that the classes are small, with the same students all day and the students talk during class.

For Katie, many of the students seemed to be disinterested in class.

They will talk right over the teacher while they’re in the middle of a lecture. You just don’t do that! We personally find it very rude, but it seems normal and doesn’t appear to bother the professors. It’s very easy to be slack here because there isn’t any consistent work.

In France, Dana had the opposite experience. To her, classes appeared very formal and the faculty demanded the attention of each student. She recalled an awkward situation she had encountered.

Everybody in my class was taking notes as the professor was talking. But I was used to our standard, that as long as you are not talking while the professor is talking there is no problem. So I am listening with my notebook closed, when suddenly the professor stops to ask me if I was planning to take notes. I thought to myself, “*What!*” I just told the professor, “Non, j’écoute,” which means “No, I am listening.” It was so embarrassing. In all the years that I have been at university, never has a professor stopped a class to ask me to take notes, especially if I seemed to be paying attention.

Dana found the French school, with its formalities, to be more like a boarding school than a college, especially since most of the students appeared to be younger than at home. She also found the French professors to be far more formal than she had been accustomed to in Boston. “One day I was walking down the hall with a French student,” she recalled,

One of the faculty members said “Bonjour,” and I replied “Salut.” The faculty member looked at me reproachfully and the French student started

laughing. I asked what it was that I had said, and he proceeded to explain that you should not say “Salut” to an older person, because it is too informal and considered impolite. Believe me that ever since that incident, I always try to say “Bonjour.” However, when “Salut” slips out every now and then, I wish I could turn into an ostrich!

Whenever I do something like that, which appears to be silly, I just laugh at myself, learn from it and move on. Everything just takes time, and some days are easier than others. If it is one of those days when I am not in a good mood and everything seems to be going wrong, I just lock myself in my room and meditate a bit so I don’t get discouraged.

### Teaching Style and Quality

While Dana found that the lecture style of teaching required some adjustment, she believed that the quality of teaching in France was good. Still, she expressed some misgivings.

At this college, if you don’t pass the exams the first time, you get a second chance! The only bad thing is that, most of the time, the finals are 100 per cent of the grade. Therefore it is hard to measure your progress along the way. It is all or nothing.

Andrea found the class projects in France to be “pointless.” “They mostly fall into one of three categories,” she explained,

Either we have already had it, or it is not applicable to our major at all, or it’s applicable only to the French system, and will be useful only if I work in France. It gets frustrating at times, but the value of the out-of-the-classroom learning definitely more than cancels it out. It’s a good experience overall.

Germany was much like France. While Mary lauded the ability of her professors, she was concerned that they often expected the students to understand the material without providing in-depth explanations. She continued,

Another thing I have noticed is that the teachers are always correct here, at least in the students’ eyes. Many students don’t even question the teachers if they disagree, which is very different. I often



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find myself becoming frustrated because I don't understand what they are talking about or what they mean.

Meena was critical of the lecture style. She complained that "there is no room for disagreement and there is very little interaction in class."

There are some classes here that are cancelled frequently, and although they may not be good classes, it doesn't help if we never had them. I'd have to say that I would be retaining more knowledge if the teaching were in the style we are used to in Boston. I don't feel as though I am gaining significant value. Although this may be one of the more harsh comments about this project, it's definitely one of the largest differences in my international experience so far.

Despite the drawbacks, Claudia added that the "professors have been very nice to us and have been kind to organize different outside-of-school activities. They have invited us to their houses for dinner or gone on trips with us."

In Spain, Jim found that the teaching was not so different. "While classes are definitely different," he observed, "they are not quite as different as I expected them to be."

I anticipated exclusively lecture, with our grade based solely on the final exam, and to some extent this is true. But it seems as though things are changing around here. Teachers are bringing real world news into the classroom, and students can participate, ask questions and state their opinions. There are presentations, company analyses and other ways to earn points.

Mario, on the other hand, was more critical.

The professors *expect* students to go out on Thursday nights and skip class on Friday morning, and will often repeat the same material the following class if the attendance is very low. At home, a professor would refuse to repeat class information during office hours, let alone during class.

Karen agreed,

Every class is with the same group of students and the work is much easier. In some aspects this is

frustrating; however, it is also a welcome break from the high-paced teaching styles. I think one of the biggest downfalls of the teaching style here is the fact that most of us have to return to normal classes in Boston.

In Don's view, the classes were "close to worthless."

The professors teach directly out of the book. They use transparencies that are copied from pages directly out of the book. They fail to share any of their own personal experience. The students fail to question the methods being taught. Basically, they believe that what the book says is the only way of looking at things. In presentations, the students analyse companies but have no insight or recommendations of their own.

While Mike agreed with Don, he still found value in the experience. He noted,

The experience of being here, seeing the differences, seeing different cultures and learning a different language completely made up for the fact that we are learning less in the classroom.

Rebecca found her classes to be more interesting, particularly international marketing, for which she had to prepare a presentation on TelePizza, Spain's leading Pizza chain. She extolled the opportunity to study in an international atmosphere with other exchange students from across Europe and North America. "I absolutely think that that is one of the best things about being here."

Katie also had to prepare a presentation. She reflected on the experience: "Getting up in front of people to do a presentation is hard enough, let alone doing it in another language. It was an obstacle to overcome."

After the first two months, some students started to become anxious about final exams. Angela was particularly worried that, since many of the classes were in Spanish and there were no graded assignments by which she could gauge her progress, she felt that she was missing "everything." Still, "each day it gets a



little easier,” she said. Tara seconded that view, adding,

It’s tough because we don’t have much homework, no tests or quizzes, very little expectation to show up to class and virtually no grades before the final exam. It’s very easy to slack off. Needless to say, finals week is going to be lethal!

## NOTE

1. Intercambios were Spanish students who wanted to converse in English with foreign students, while at the same time allowing the foreign students an opportunity to practise Spanish and immerse themselves in the local culture.

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## BEING DIFFERENT: EXCHANGE STUDENT EXPERIENCES

*Prepared by David Wesley under  
the supervision of Professor Henry W. Lane*

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Returning to his office after teaching his Monday morning class, Professor Rhodes logged on to an Internet discussion group that he was facilitating for students who were on exchange in Europe. By this time, the students had been living in Europe for only about a month where they attended classes at well-known universities. Once they completed a semester of studies, the students were expected to work for locally based companies for an additional four to six months. Classes were taught in the language of the host country, and students were expected to have sufficient foreign language skills to study and work in the local setting.

Professor Rhodes always enjoyed reading their postings about the joys and heartaches of adapting to a new country, language and culture. Most students were somewhat naïve when they left the United States, but a year later they returned with language fluency and a more cosmopolitan attitude.

The new topic that Rhodes found on the discussion board that morning, “Race and Discrimination,” surprised him. This was the first time the issue had been raised in the two years since he began facilitating these online discussions. He wondered if possibly it was because, this year,

more minority students were on exchange or perhaps because students just did not discuss it in previous years.

### INITIAL EXPERIENCES: CURIOSITY AND SUSPICION

**Paul (Asian, Spain)**—Well . . . after one month of being in Spain, I feel pretty good. I have learned so much already about cultural differences and language differences between regions and have improved my speaking and listening skills.

People are really nice here, but from what I have seen so far, they do tend to stick to their own “kind.” Maybe it’s wrong of me to say this because I have been here for only one month, but I feel as though I don’t belong here sometimes. There are some places that I go and people just stare at me and they don’t stop. Some have a look of disgust and some look with curiosity. It gets to me, but I’m learning to shake it off. People here say I’m being paranoid, but I know it’s not that because I have had to deal with this my whole life. I know when people are joking and when

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people are being rude about things like race. This bothers me, but not enough to make me want to go home. I love it here and I can't wait to see more. Regardless of some feelings of racism, which don't arise very often, this place is amazing.

**Mei (Asian, Germany)**—I feel the same way about the stares. It's a little awkward. Sharon and I are both Asian, and we live in a very small town in Germany where almost everyone knows each other. Going into the town centre, we definitely get the hardest stares that we've ever gotten in our lives. It's a bit different, but not harmful in any way. I wonder what they're thinking sometimes. We usually just laugh it off though. But when I'm in a bad mood, it gets annoying really fast!

**Robin (African-American, Spain)**—I don't like the stares Felicia and I get when walking down the street or even at school. I guess the Spaniards are not used to seeing black Americans. To me, it seems the only people of color you see on the streets are selling bootleg CDs, or they are the prostitutes you see on every corner of Gran Via.

While we were struggling to get into our own building (the front door is hard to open and we had a lot of groceries), this lady came and started asking who we were and what we wanted. We told her we were going to our *piso* (apartment) and she acted like she didn't believe us. Then she proceeded to start talking about us to her neighbors. I'm sure not all Spaniards are like this, but so far I have run into a lot of this kind.

But not to complain about everything, Madrid is a beautiful city and despite all the complaining, I am glad that I have this opportunity to experience it. Our motto is, "What doesn't kill you makes you stronger."

### BEYOND CURIOSITY

Latin American students in Spain also had posted comments expressing concerns about racism. Their Spanish was different and set them apart. They also thought there was a negative stereotype

of Latin Americans, which came from people linking an increase in gang and drug-related murders to an increase of Latin American immigrants. The students hoped that this discussion would help their American colleagues realize they were not being paranoid.

Professor Rhodes responded with some supportive comments, but he was not worried since no one sounded like they were in any danger. However, his surprise turned to concern when the topic surfaced again a few weeks later.

**Felicia (African-American, Spain)**—Yesterday afternoon after class, I was walking up the stairs in my apartment building. We live on the fifth floor. On the second floor, I saw a man knocking at a door, so of course I said *buenos días*. He muttered something to me, (all this is in Spanish, but for those who don't speak Spanish, I'll tell it in English). So I said, "What?" and he muttered it again. I just continued going up the stairs, and he said something again. So as not to be rude, I stopped and told him that I did not speak Spanish. He asked me if I spoke Portuguese. I said no, that I spoke English. Then in English he said, "Wait, wait!" and he was trying to tell me something else in broken English as I continued up the stairs.

He started following me and he was trying to speak English, but I still couldn't understand this man. I finally told him in Spanish, "I still don't understand what you are saying, talk to me in Spanish." He asked me if I lived in the building, and I told him, "No, I'm going to see an *amigo*." I don't know if he believed me, since I did have keys in my hand. I tried to get away from him because he was getting assertive and he was right in my face. He kept following me, so I stopped and asked him where he was going. He pointed up and said he was going with me. I asked, "For what?" and he said in a very explicit and crude way that he was going to have sex with me. I couldn't believe what this man had said to me. And then it dawned on me; he thought I was a prostitute.

I then realized what he was muttering when I first came up the stairs. He was asking me if

I was a *puta*.<sup>1</sup> I decided that I was not going to my apartment if he was following me. I just walked around him and left my building. There's a plaza just outside and I went and sat down. I was still in shock. I don't think I've ever been treated like that in my life. It took me a few minutes to comprehend what had just happened.

Like my friend Shante, I've had the experience of old men grabbing at me or muttering at me in a club, but for a man to just tell me he's following me to my apartment because he feels like it. It's not just what this man said; it was also how he said it. He just had this unassuming manner, like it was his right. And when I told him "no," he actually acted surprised. Plus he was blowing smoke in my face all the time. He didn't even say *buenos días* back to me! Basically, to him, I was nothing.

So that made me think, Robin made an entry about an old woman interrogating us while we were trying to open our front door, asking us what we were doing. She really watched us walk all the way up to our apartment, struggling the whole time with all our groceries. Did she think we were prostitutes also? Every time we see someone in our building, although they are cordial, we always get "the look," a confused expression about what we are doing in this building, *their* building. Do they think we are prostitutes? We thought it was because we were black, but maybe it's more than that.

Why does being a young, black female in Madrid mean you are a prostitute? That whole experience disgusted me. That man made me feel dirty, and I'm upset with myself for giving someone the power to make me feel so bad about myself when none of this was my fault. Every single time this whole "mistaken identity" thing has happened, I haven't been dressed in anything that could be considered provocative.

I went back to my building about 10 minutes later, after the shock had worn off, and I was very angry. I don't know whether it was fortunate or unfortunate that he was no longer there because I really wanted to use all the colorful phrases I've learned since being here. But I figured, unfortunately, this might happen again, and I'm better

prepared now. I will get a chance to use those phrases—eventually.

**Shante (African-American, Spain)**—Sure you can get over people staring at you all the time and never knowing whether they think you are a prostitute or not, but when you have old nasty men grumbling in your face all the time, when you're walking down the street in normal clothes with your backpack or bag of groceries, it's scary, insulting and potentially dangerous. Thank God nothing has happened and people don't appear violent here. At first you don't expect it, but now that I understand the language a little bit better, I realize that some people who start muttering in my direction aren't asking me for directions! And that happens at least once, usually a couple times a week.

**Belinda (African-American, France)**—I realize it is very difficult to shrug off. But it is even harder if you take it personally. Hopefully, as everyone's language skills improve, we will all be able to better defend ourselves. I am really sorry to hear that you are having such a difficult time with people's opinions, stereotypes or whatever it is that is making them act so rudely.

## EPILOGUE

Seven months later, Felicia and Robin were on a bus tour to Mátalascañas, a little beach town in Andalucía, where they planned to spend the long weekend. Soon after boarding the bus, they realized they were among their "mortal enemies," a term they used to refer to older Spaniards, who always seemed suspicious of them and, at times, made their lives a living hell in Madrid. As they began the long ride, they prepared themselves for a torturous journey. Instead, both students came away with newfound understanding. Felicia explained,

A lot of my bad experiences in Spain have been with older people. But on this trip I learned that not all old Spaniards are bad. In fact, most of them were nice—after they realized we weren't on the

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trip to pick up some old sugar daddies. At first we kept to ourselves, due to the “what are they doing here” looks we got when we first boarded the bus. During the trip we were told that we were missed when we did not join in a couple of the excursions. And we were even invited to sit with some of them during the party hours.

As usual we stuck out, but we’ve become good at dealing with it. One thing I know that I have

learned in Spain is to be comfortable in my own skin. I always thought I was, because that was how I was raised, but being in Spain has definitely reinforced it.

## NOTE

1. Translated: prostitute, literally “slut.”

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## THE CHANGING FACE OF EUROPE: A NOTE ON IMMIGRATION AND SOCIETAL ATTITUDES

*Prepared by David Wesley under  
the supervision of Professor Henry W. Lane*

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By the end of the 20th century, many Europeans may have imagined that they were being invaded by immigrants from Africa, Asia and Latin America. These newcomers were people who looked different, spoke different languages and practised different religions and customs. According to a widely held belief, immigrants were responsible for soaring crime rates, and they threatened to “jeopardize [Europe’s] common values.”<sup>1</sup>

Historically, the European and American models of immigration mirrored those of ancient Greece and Rome respectively. Under the Greek model, foreigners were excluded from the rights of citizenship, except those “under perpetual exile from their own country, or [those who] came with their whole family to trade there.”<sup>2</sup> Under such exclusion, few foreigners could become Greek citizens, and most were treated as second class members of society. In contrast, Rome welcomed foreigners from all known corners of the world. They were given the same rights as native-born Romans, and many achieved high social status. Among them are counted some of

Rome’s most famous poets and philosophers, such as Virgil, Cato, Horace and Cicero. Writes Edward Gibbon,

The narrow policy of preserving, without any foreign mixture, the pure blood of the ancient citizens, had checked the fortune, and hastened the ruin, of Athens and Sparta. The aspiring genius of Rome sacrificed vanity to ambition, and deemed it more prudent, as well as honorable, to adopt virtue and merit for her own wheresoever they were found, among slaves or strangers, enemies or barbarians.<sup>3</sup>

Therefore, while the number of citizens of Athens gradually declined to only 21,000, the number of Roman citizens multiplied from less than 100,000 in the sixth century BC to approximately seven million in 47 AD.<sup>4</sup>

In 2002, Europe, like ancient Greece, faced a crisis of demographics. Its population was rapidly ageing, while birthrates continued to test new lows. If current trends were to continue, by 2050, Europe’s population will have declined, while America’s will have doubled. According to an *Economist* special report on demographics,

If the rising fertility rate among native-born Americans persists, it will mean that the growth is steady—there will be no sudden addition of a huge pool of poor, as occurred with German unification—and a bit more balanced ethnically than was previously assumed. The most important aspect, though, can be summed up in one word: youth. While Europe's population will, on average, be ageing, America's will stay much younger.<sup>5</sup>

Driving this divergence in population was immigration (see Exhibit 1 for a comparison of

selected countries). In 2002, approximately half of all children in America were of Latin American origin, and Hispanic Americans had a birth rate of three children per woman, higher than in most developing countries. That translated into a younger society. Thus, by 2050, the median age in the United States was expected to be 37 years, while Europe's would be almost 53.<sup>6</sup> In countries like France, where the retirement age was 55 or less, retirees would come to outnumber workers.

	<i>Annual Inflows</i>	<i>Foreigners</i>		<i>Annual Inflows</i>	<i>Foreigners</i>
<b>Australia</b>			<b>Germany</b>		
New Zealand	22.2	7.5	Poland	10.9	3.8
United Kingdom	10.4	27.4	Fed. Rep. of Yugoslavia	10.2	9.8
China	7.3	2.8	Turkey	8.0	28.6
South Africa	6.0	1.4	Italy	5.9	8.3
Philippines	3.9	2.4	Russian Federation	4.7	2.3
<b>Belgium</b>			<b>United States</b>		
France	14.6	11.5	Mexico	19.9	21.7
Netherlands	12.3	9.1	China	5.6	2.7
Morocco	8.5	14.7	India	5.5	2.3
Germany	6.3	3.7	Philippines	5.2	4.6
United States	5.6	1.4	Dominican Republic	3.1	1.8
<b>Canada</b>			<b>Netherlands</b>		
China	11.3	4.6	Morocco	6.5	20.0
India	8.8	4.7	Turkey	6.3	16.9
Philippines	4.7	3.7	Germany	5.8	7.9
Hong Kong/China	4.6	4.8	United Kingdom	5.8	5.8
Pakistan	4.6	—	United States	4.0	1.9
<b>Denmark</b>			<b>France</b>		
Somalia	8.6	4.1	Algeria	14.3	16.4
Former Yugoslavia	7.1	13.5	Morocco	13.8	16.9
Iraq	6.3	3.4	Turkey	5.8	5.2
Germany	5.5	4.8	China	4.9	0.3
Norway	5.3	4.8	Tunisia	4.6	6.3
<b>Finland</b>			<b>Sweden</b>		
Former USSR	29.8	23.6	Iraq	15.1	4.5
Sweden	9.6	9.3	Finland	8.4	18.4
Estonia	8.1	12.0	Former Yugoslavia	5.4	6.1
Somalia	4.3	6.5	Norway	4.6	5.6
Iraq	3.2	3.0	Iran	4.1	4.8

**Exhibit 1** Top Five Nationalities of Immigrants in Selected Host Countries (1998)

Source: Organisation for Economic Cooperation and Development.

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This note will consider the impact of immigration on attitudes and government policy in Western Europe's three largest countries, Spain, France and Germany. It will also examine how the histories and political structures of these countries have influenced immigration policy and the integration of immigrant populations.

## SPAIN

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As early as 750 BC, Greece established colonies along Spain's Mediterranean coast. The next 1,000 years saw the establishment of Phoenician and Roman colonies, the latter of which developed an intricate road system connecting all corners of the Iberian Peninsula with the rest of Europe.<sup>7</sup>

In the fifth century, marauding vandals of Germanic origin, known as Visigoths, sacked Rome and eventually settled in Spain where they converted to Roman Catholicism and became important allies of the Romans. At this time, Spain's population was mainly Roman (six million), while others, such as the Visigoths, made up only 200,000 of its inhabitants.<sup>8</sup>

By the eighth century, the Visigoth kingdom was rife with dissension, much of which was blamed on Jews, who were either compelled to convert to Christianity or forced into slavery. Their liberation came at the hands of Muslim invaders (mainly Arab and Syrian) between 711 AD and 713 AD, after Islam had already spread across much of the Middle East, North Africa and parts of Europe. The surviving Spanish monarchy was exiled to the rugged north regions of the peninsula. With the invasion of Spain, a spirit of toleration abounded, in which "Jews and Christians of the Turkish Empire enjoy[ed] the liberty of conscience that was granted by the Arabian caliphs."<sup>9</sup>

Under Muslim rule, Spain prospered to become one of the great centres of learning. Rivaling Baghdad in splendor, the imperial city of Cordoba became the greatest and most advanced in Europe. Historian Jawaharlal Nehru described the condition of the city as it stood at the end of the first millennium.

This was a great city of a million inhabitants, a garden city 10 miles in length, with 24 miles of suburbs. There are said to have been 60,000 palaces and 700 public baths . . . There were many libraries, the chief of these, the Imperial Library of the Emir, containing 400,000 books. The University of Cordoba was famous all over Europe and even in western Asia. Free elementary schools for the poor abounded.<sup>10</sup>

When civil war erupted between the country's Muslim rulers in the 11th century, it took a severe toll on the country's defences. Taking advantage of the situation, the Spanish monarchy in exile began to retake captured territory. After securing Cordoba in 1236, Spain's Christian kings continued to advance on the Muslims, eventually expelling the last remnants of Muslim resistance in 1492.<sup>11</sup> Spain would not come into direct conflict with its Muslim neighbors again until the invasion and colonization of Morocco in the 19th century.

As soon as it had dealt this final blow to its Muslim occupiers, the Spanish monarchy turned its attention to the Jewish population, the largest in Europe. With the demise of Muslim Spain, Jews were no longer permitted freedom of religion. Instead, they were forced to convert to Catholicism or face exile. In 1492, some 170,000 Jews were expelled from Spain, while the remainder became converts to Christianity, known as *conversos*. Many of the latter came under suspicion of the Spanish Inquisition, which exercised authority over members of the Catholic Church. As a result, "several thousand *conversos* were condemned and burned for Judaizing practices," while their property and other assets were appropriated by the crown and added to the general treasury.<sup>12</sup>

Spain's Muslim inhabitants faced a similar fate as their Jewish counterparts.

Though many Muslims chose conversion, the problem became virtually insoluble. There were never enough Arab-speaking priests or money for education to make outward conversion a religious reality. The *Moriscos* (Muslim converts) remained an alien community, suspicious of and suspect to the "old" Christians.<sup>13</sup>



Nevertheless, Spain's rich Muslim heritage continued to play an important role in the country's art, architecture, music and language. To this day, many commonly used Spanish words have Arabic etymologies, such as *Ojalá* (Oh Allah)<sup>14</sup> and *Jarra* (Jar). For all that, the purging of religious minorities from Spain's ethnic landscape produced a relatively homogeneous white Catholic society.

In the 1920s, French and Spanish forces combined to overthrow Morocco's Arabic government and subsequently split that country into French and Spanish protectorates. Despite the repression of the Franco dictatorship, Spanish Moroccans enjoyed many more freedoms than their French African neighbors.

Though the Spanish had fewer resources than the French, their subsequent regime was in some respects more liberal and less subject to racial discrimination. The language of instruction in the schools was Arabic rather than Spanish, and Moroccan students were encouraged to go to Egypt for a Muslim education.<sup>15</sup>

Both the French and the Spanish relinquished control over the region in 1956.

Until the 1970s, Spain's only attempt at democratic government had been a short-lived experiment in the early 1930s. Civil war ensued when a secular constitution met stiff opposition from Royalists and the Roman Catholic Church.<sup>16</sup> In 1936, General Francisco Franco successfully launched an attack on Spain's Republican government from his base in Spanish Morocco. For nearly four decades, the Franco regime banned political parties, trade unions and private associations. He also showed support for the Fascist regimes of Hitler and Mussolini, though he shrewdly avoided any direct confrontation with the Allies.

In the late 1960s and early 1970s, Spain had the second fastest growing economy in the world after Japan. With the death of Franco in 1975, his successor, King Juan Carlos, re-established democracy and decriminalized political parties and private associations.

The economic boom of the late Franco period facilitated democracy by rendering authoritarian institutions anachronistic. It also afforded Spaniards the opportunity to travel abroad and experience firsthand the freedoms enjoyed by people elsewhere. The boom also undermined the traditional influence of the Catholic Church, which itself ceased to support the Franco regime by the late 1960s, and lessened the tendencies toward political extremism.<sup>17</sup>

In the post-Franco years, Spaniards liked to boast of their tolerance towards minorities. Yet most minorities had been assimilated, expelled or killed during five centuries of totalitarian rule and few remained to enjoy claims of Spanish forbearance. That changed in the 1990s as economic refugees began arriving from North Africa and Latin America. Despite the increase in immigration, Spain continued to have one of the lowest levels of immigration in the developed world (see Exhibit 2).

Because of its proximity to Africa, Spain was a particularly suitable transit point for illegal migrants destined to other European countries. (Statistics on foreign nationals in Spain are provided in Exhibit 3.) At the Strait of Gibraltar, the crossing was less than nine miles. Yet, thousands died attempting to reach Spain in poorly constructed rafts, which sometimes resulted in disturbing images of dead refugees washing up on Spanish shores. To "protect" itself from the threat of immigration, Spain began to install a monitoring system of radar and night vision units along its coastal border with Morocco.<sup>18</sup>

### A Test of Tolerance<sup>19</sup>

The increase in the number of immigrants in Spain severely tested Spanish claims of tolerance. In fact, by the end of the 1990s, race-related violence and discrimination were at least as bad as other European countries. The number of racist organizations, such as neo-Nazis and skinheads, quadrupled between 1995 and 2002, claiming some 10,000 members.

The most serious racist violence in Southern Europe occurred in February 2000 in El Ejido on Spain's southern coast.

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			<i>Total Population (%)</i>				<i>"Total Labor Force (%)"</i>	
	<i>1988</i>	<i>1998</i>	<i>1988</i>	<i>1998</i>	<i>1988</i>	<i>1998</i>	<i>1988</i>	<i>1998</i>
France	3,714	3,597	6.8	6.3	1,557	1,587	6.4	6.1
Germany	4,489	7,320	7.3	8.9	1,911	2,522	7.0	9.1
Ireland	82	111	2.4	3.0	35	48	2.7	3.2
Italy	645	1,250	1.1	2.1	285	332	1.3	1.7
Spain	360	720	0.9	1.8	58	191	0.4	1.2
United Kingdom	1,821	2,207	3.2	3.8	871	1,039	3.4	3.9
Australia	3,965	4,394	22.9	23.4	2,182	2,294	25.7	24.8
Canada	4,343	4,971	16.1	17.4	2,681	2,839	18.5	19.2
United States	19,767	26,300	7.9	9.8	11,565	16,100	9.4	11.7

**Exhibit 2** Foreign or Foreign-Born Population and Labor Force in Selected OECD Countries (000s)

Source: Organisation for Economic Cooperation and Development.

	<i>Total</i>	<i>"% Increase From 2000"</i>
Morocco	234,937	17.6
Ecuador	84,699	174.3
United Kingdom	80,183	8.4
Germany	62,506	3.2
Colombia	48,710	97.2
France	44,798	5.9
Portugal	42,634	1.5
China	36,143	26.0
Italy	35,647	15.5
Peru	33,758	21.0
Dominican Republic	29,314	10.7
Romania	24,856	126.3
Former USSR	22,230	85.8
Cuba	21,467	12.0
Argentina	20,412	22.9
Netherlands	17,488	4.6
Algeria	15,240	10.1
Philippines	14,716	11.8
Rest of countries	239,322	—
<b>Total</b>	<b>1,109,060</b>	<b>23.8</b>

**Exhibit 3** Foreign Nationals in Spain: 2001

Source: Instituto Nacional de Estadística.

According to reports, hundreds of immigrants in El Ejido came under repeated attack between 5–8 February when Spanish nationals, armed with sticks, knives, stones, iron bars or baseball bats,

and cans of petrol, entered the vicinity in vans or trucks, threatened, insulted, stoned and pursued Moroccans, burned their homes and destroyed or looted their possessions. Instead of intervening to prevent the extensive criminal damage that took place in the area, action by police officers appears to have consisted in getting immigrants away from their homes—sometimes by firing rubber bullets, using tear gas, or physically attacking the Moroccans—and in forming a barrier between the immigrants, on the outside, and the invading rioters on the inside, thereby actually favoring the arson attacks.<sup>20</sup>

Justification for such attacks usually amounted to a perceived increase in crime and insecurity associated with immigrants. For example, 40 per cent of incarcerated criminals were of foreign origin, and many were implicated in prostitution and drug rings. The attitude of one Barcelona resident reflected widespread opinion.<sup>21</sup> He noted,

It is becoming hard for people to maintain their goodwill towards immigrants. It is undeniably them robbing people, tourists and Catalonians alike, and throwing their garbage anywhere it suits them.<sup>22</sup>

Although the Spanish constitution of 1978 expressly provided foreigners with the same

rights as Spanish citizens in all matters except participation in public affairs, a new law enacted in 2000 set out to limit those rights. Under the Foreigners Law, only documented immigrants were entitled to protection under the law. Moreover, in the same year, the constitutional court ruled that skin color or foreign appearance could be used by police officers as criteria for carrying out identity checks.<sup>23</sup>

In most cases, those detained by police were undocumented foreigners. Many were sent to detention centres as they awaited deportation. According to human rights organizations, because of their vulnerability and their inability to file complaints, many deportees, including children, have been raped or tortured by police and guards in such centres. “Undocumented women immigrants have been particularly vulnerable to torture in the form of rape or sexual assault while in custody.”<sup>24</sup>

Criminal gangs frequently transported female immigrants into Western Europe with offers of legitimate work as nannies, housekeepers or laborers. Upon arrival they were sold to brothels and forced to become chattel prostitutes. In Spain, the problem had become so visible that women immigrants were often mistaken for sex workers.

In many cases, the precarious legal situation of undocumented immigrants prevented them from pressing charges. Thus, government officials, such as police and guards, often acted with impunity. According to Amnesty International,

Impunity casts a dark shadow across this landscape of human rights abuse: victims, or alleged victims of ill-treatment who are immediately served with counter-complaints, victims unable to even contemplate the bringing of complaints, through fear, lack of adequate legal aid or the apathy and bias of the judicial authorities. Police officers with criminal records, or against whom disciplinary proceedings are still pending, have not only been allowed to continue to work as public officials in situations which demand respect for human rights and sensitivity to racial discrimination, but have been roundly supported by the political authorities.<sup>25</sup>

Other forms of assault have also become increasingly commonplace.<sup>26</sup> Men of African descent are particularly targeted by police and racist gangs. In one incident, an American citizen was severally beaten by police because of his African racial origin. Rodney Mack, a cousin of the famous trumpeter Wynton Marsalis, was in Spain as the principle trumpet player for *Orquesta Sinfónica de Barcelona y Nacional de Cataluña*.

[On January 15, 2002, he was] attacked by four police officers who mistook him for a car thief, who had been described as a black man of about the same height. Rodney Mack had just finished a rehearsal when he was approached in an underground garage in central Barcelona by plainclothes officers wearing jeans and leather jackets. The men grabbed his arms and threw him to the ground, pressing his face onto the concrete. He said he was beaten on the back and legs and there was an attempt to cram an object into his mouth. He thought he was being mugged and shouted to them to take his wallet. The Spanish police reportedly admitted there had been a “misunderstanding” and that, owing to “the color of his skin and his height,” the officers had believed him to be a car thief who had been operating in the garage.<sup>27</sup>

Police charged Mack with resisting arrest, even though he believed he was being assaulted by thieves. Meanwhile, the undercover officers involved in the attack remained on duty. Mack’s wounds were so severe that he had to cancel appearances at Carnegie Hall in New York the following month, and he spent several months recovering from his injuries.

## FRANCE

France distinguished itself from other European nations by its republican values borne of the French Revolution. According to the First Article of the “Declaration of the Rights of Man and of the Citizen” ratified by the National Assembly in 1789, and reaffirmed in 1958, “Men are born and remain free and equal in rights. Social distinctions may be based only on considerations of the

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common good.”<sup>28</sup> Based on that defining principle, the entire social structure was designed to eliminate ethnic, linguistic and religious differences. Moreover, foreigners enjoyed many of the same rights as citizens, regardless of their legal status.

### Demographic Transformations

France had always been an important destination for artists, students and other elitist segments of the population. By the late 19th century, however, immigrant demographics underwent a radical transformation as France began to import labor to fuel the industrial revolution and stem a decline in the population brought about by the lowest birth rate in Europe. Working class laborers and their families began to pour in from Spain, Poland, Russia, Italy, the Ukraine and elsewhere. The program was further intensified following the First World War as a way to replace the labor capacity of some 1.4 million war casualties.<sup>29</sup> France continued to import labor until the mid-1970s, when a continent-wide ban eliminated the practice.

Even though France, much like America, had been built on immigration, it was never considered to be a country of immigrants. The reason was simple. For most of its history, French immigration was characterized by an influx of white Christians who easily blended into the local population. The school system, in particular, became an instrument of integration, requiring all children to learn French and the cultural values of The Republic. Within one generation, immigrants were no longer identifiable by their ethnic heritage, but had become French in every sense of the word.

The Republican ideal of cultural and linguistic assimilation began to be tested in the 1960s and 1970s during the height of the Cold War. A new front for the struggle of ideologies was developing in North Africa, Asia and the Middle East. French colonies, such as Vietnam and Cambodia, became Cold War battlegrounds, while leaders of various independence movements embraced communism as a way to rally public support and to solicit military and economic

<i>Nationality</i>	<i>Total</i>	<i>“% of All Resident Aliens”</i>
1. Portugal	649,714	18.1
2. Algeria	614,207	17.1
3. Morocco	572,652	15.9
4. Italy	252,759	7.0
5. Africa (other)	239,947	6.7
6. Southeast Asia	226,956	6.3
7. Spain	216,047	6.0
8. Tunisia	206,336	5.7
9. Turkey	197,712	5.5
Other	420,272	11.7
<b>Total</b>	<b>3,596,602</b>	<b>100.0</b>

**Exhibit 4** Foreign Nationals in France 1990

*Source:* INSEE (National Institute of Statistics).

aid from the Soviet Union. These wars devastated local populations with millions of dead, wounded and homeless. Moreover, the tyranny of colonialism was, in many cases, replaced by the tyranny of local warlords. Africa, in particular has seen a continuous succession of civil wars as tribal factions battled for control.

Against this backdrop, France became an important destination for its former colonial subjects as they sought to escape a seemingly endless cycle of poverty and violence (see Exhibit 4).

According to a 1999 national census, France had 4.3 million immigrants (7.4 per cent of the total population). Net annualized immigration stood at 60,000 in 2001, an increase of 10,000 over the previous year. Full-time workers accounted for the largest number of immigrants, followed by refugees and relatives of immigrants granted residency under the country’s family reunification program, known as *regroupement familial*.

### Race and Racism

In some respects, France was ill-equipped to deal with the ethnic transformation of its

immigrant population. For example, Muslim girls were sometimes excluded from the education system for wearing identifiable religious symbols (headscarves) prohibited by law. A secular education system that had been created to assimilate foreigners and break down ethnic differences suddenly became an instrument of exclusion and segregation.<sup>30</sup>

Illegal immigration, which stood at more than 200,000, was blamed by many for a perceived increase in crime across most of the country, particularly in French cities where pick pocketing had become commonplace. The link between crime and immigration often centred on low-cost housing in poor Parisian suburbs. In one Paris suburb, where unemployment was around 50 per cent, police have been “unable to prevent second or third generation French citizens of North African descent from terrorizing neighbors.”<sup>31</sup>

Despite the perception that immigration was partially to blame for higher crime rates, socio-economic status, more than ethnicity, seemed to define the propensity to commit serious offenses. While research conducted in the late 1990s demonstrated an overrepresentation of foreigners among criminal suspects and convicts, many of the offences were immigration related. Excluding these, the differences in crime rates between foreigners and native French were much smaller than what was commonly assumed to be the case.<sup>32</sup>

Responding to public concerns about crime, the French cabinet approved an anti-crime bill aimed at “beggars and prostitutes.”<sup>33</sup> The bill did little to address violent crime, which increased four-fold between 1994 and 2002.<sup>34</sup> Nor did it address a wave of hate crimes directed against visible minorities, such as the October 2002 shooting of several teenagers believed to be of North African descent and, in the same month, the burning to death of a 17-year-old North African girl outside her home near Paris.<sup>35</sup>

A less dramatic but more pervasive problem was the systematic discrimination exhibited toward foreigners, notwithstanding legal protections. For instance, employers used code words in job advertisements, such as BBR (Bleu, Blanc,

Rouge—the colors of the French flag) and 001, which told employment agencies that only ethnic Europeans should apply. Immigrants have also been excluded from housing in some areas on account of visible racial or religious differences.<sup>36</sup>

The growing resentment toward foreigners of African and Middle Eastern descent was reflected by the fortunes of the neo-Fascist National Front Party, whose leader, Jean-Marie Le Pen, was the second most popular presidential candidate in the 2002 election, garnering nearly 20 per cent of the vote.<sup>37</sup> In his campaign, Le Pen announced that his first priority as president would be to “defend poor white families menaced by North African immigrants.”<sup>38</sup> He also promised to reverse 150 years of Republican law by placing illegal immigrants in “transit camps” and deporting any immigrant convicted of a crime, including permanent residents.<sup>39</sup> The popularity of Le Pen’s sentiment was reflected in the book “The Rage and the Pride,” “an extremist tirade against Muslims” that spent several weeks on France’s bestseller list.<sup>40</sup> Yet, most French were appalled by Le Pen’s strong showing in the French election, and not a single National Front candidate won a seat in the French parliament.<sup>41</sup>

Le Pen’s hatred of Africans may have started with his involvement in the Algerian war of independence. In 1957, as an officer in the French army, Le Pen was involved in suppressing a rebellion by Algerians opposed to colonial rule.<sup>42</sup> Years later, several prisoners of war accused Le Pen of torture that included “beatings, kickings, floggings with whips and chains, submersions and electric shocks.”<sup>43</sup> At the same time, white French settlers formed a paramilitary organization known as the Secret Army Organization, which, with the tacit approval of the French military, engaged in terrorism against the local population. By the time Algeria finally secured its independence in 1962, “some 10,000 French troops and officers and possibly as many as 250,000 Muslims had lost their lives in the fighting; scores of villages had been destroyed, and two million peasants had been moved to new sites.”<sup>44</sup>

In the decades that followed, Algerians represented a large portion of France’s immigrant



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population. Le Pen and his followers continued to view these and other Muslim immigrants as enemies of France. "Despite their French citizenship," Le Pen explained, "these Muslims feel an affiliation with another entity. They naturally become suspect in the eyes of those who one day will be compelled to confront them."<sup>45</sup>

In unlikely solidarity with France's neo-Fascists, the country's Jewish leaders blamed North African Muslims for a series of attacks against synagogues and other Jewish assets. However, the French Interior Minister played down any connection between the attacks and Muslims after police failed to find evidence that could implicate Islamic groups.<sup>46</sup> Nevertheless, tension between Muslims and Jews continued to escalate as a consequence of the Israeli occupation of Palestine.

Many French of European ancestry showed little sympathy for the plight of immigrants. In a March 2000 poll of French citizens, 60 per cent believed that there were "too many people of foreign origin in France, 63 per cent said there were too many Arabs and 38 per cent said there were too many blacks,"<sup>47</sup> even though immigrants as a percentage of the total population remained constant between 1975, when Italians, Portuguese and Spaniards represented the largest number of immigrants, and 1999, when North Africans dominated immigration.<sup>48</sup>

Nevertheless, discrimination more often suggested social rather than racial differences. Thus, successful professionals encountered less discrimination than poor immigrants who found it difficult to integrate. Accordingly, Asians, who tended to be more financially independent and well educated, experienced significantly less discrimination than North Africans, who were often unskilled, uneducated and underemployed.<sup>49</sup>

## GERMANY

Germany possessed a diverse and breathtaking landscape, from the coastal plains of the north, through the Rhine Valley spotted with medieval castles, to the majestic Bavarian Alps. Cultural

festivities revolved around the country's world-renowned beer and wine industry. As home to some of the world's most advanced and innovative companies, Germany's reputation for scientific and engineering achievement was well deserved.

Yet, for all its achievements, Germany had a dark history of racism and ethnic intolerance. As early as the late 19th century, German eugenicists distorted the evolutionary theory of Charles Darwin by asserting that "a struggle for survival was taking place between a productive German-Aryan race and parasitic Semites."<sup>50</sup> As this view began to disseminate among the populous, the National Socialist regime of Adolf Hitler capitalized on it by blaming minorities for the country's economic woes. What began with the vandalism of Jewish assets soon escalated to personal assaults and finally resulted in the systematic and ignominious enslavement and extermination of millions of Jews, Gypsies and other minorities.

Although most Germans repudiated the ideas that gave rise to the horrors of the Holocaust, the underlying sentiment remained entrenched in some elements of the German population, as manifested in the type of extremist violence described in Dietmar Schirmer's *Identity and Intolerance*:

A mob of extremists firebombs a shelter for asylum seekers in the German town of Rostock. A crowd of bystanders applaud. The police stand idly by. The police in the town of Mölln receive an anonymous call saying, "There's a house burning in Mühlenstrasse. Heil Hitler!" The arson attack leaves nine Turkish immigrants injured and three women dead . . . At a bar in Oberhof, Thuringia, Duncan Kennedy of the American bobsled team, which is using the local training facilities, is injured by skinheads when he attempts to defend his African-American teammate, Robert Pipkins, against a crowd of 15.<sup>51</sup>

Hate crimes of this nature were more of a problem in the formerly communist eastern *Länder* (states), despite having the lowest foreign population in the country (two per cent). A report of the European Commission against Racism and



Intolerance (ECRI) expressed concern about the apparent proliferation of racist Internet sites that provided an outlet for xenophobic propaganda.<sup>52</sup> The ECRI also noted that while acts of violence were perpetrated by a small number of extremists, “a much greater number of people sympathize with some of the racist, xenophobic, and anti-Semitic ideas that are part of the ideology of these groups; as such these acts may be viewed as an extreme manifestation of a broader climate of racism, anti-Semitism and intolerance.”<sup>53</sup> The extent of the problem was highlighted in a July 2002 poll in which 78 per cent of respondents sought curbs on immigration, 59 per cent wanted restrictions placed on the right to seek asylum, and 52 per cent thought that Germany already had too many immigrants.<sup>54</sup>

Despite the anti-immigrant feeling, Germany needed more immigrants. As it entered the 21st century, Germany faced a crisis of demographics. Declining birth rates in particular placed increasing strain on the social welfare system, as fewer working-aged Germans were available to support the country’s aging population. Immigration offered the only hope for continued economic prosperity and growth.

At the turn of the century, Germany’s population stood at 82.2 million. To maintain that level, Germany would have to admit 310,000 immigrants a year. On the surface, Germany appeared to be meeting this level with more than 300,000 arrivals per year. However, more than a third of these arrivals were ethnic Germans who had been repatriated under the 1949 Basic Law, which provided citizenship to Eastern Europeans of German descent. Those numbers were expected to decline to near zero by 2010, at which point the overall population would also begin to decline.<sup>55</sup>

While recognizing the need to increase immigration, the political establishment was loath to ignore the concerns of the electorate. Therefore, when the government approved legislation that would, for the first time, allow some residents of non-German descent to obtain citizenship, it fell well short of the radical changes that would be needed meet Germany’s future labor requirements. For instance, restrictions continued to

limit the number of foreigners that could qualify and left many lifetime residents without citizenship. Although limited provisions for *jus soli*, or citizenship by place of birth, were included for the first time, the immigration reform bill of 1999 continued to favor those born of German parents and particularly those with German fathers. According to the reformed law,

Children of foreign nationals can acquire German citizenship upon being born in Germany [after] 1 January 2000 and therefore [the changes] do not apply to children born prior to this date. The new law does however grant a segment of this latter group special entitlement to naturalization. Children who are born in Germany prior to 1 January 2000 can also acquire German citizenship upon application when they are under 10 years of age on 1 January 2000 and have their lawful place of abode in Germany. The respective child’s legal guardians must submit a corresponding application by 31 December 2000.<sup>56</sup>

Germany liked to boast that, at nine percent, the number of immigrants surpassed France and several other European countries. Yet that number included large numbers of non-Germans who have known no other country, including second- and third-generation descendents of migrant workers from Turkey and elsewhere (see Exhibit 5). In France, they would have been granted citizenship and classified as French rather than “foreigners.”

The lack of permanent status for many of Germany’s foreigners prevented their integration into German society. Children of immigrants were often placed in special schools and denied access to an academic education in traditional grammar schools. Their visibility also made them targets for discriminatory hiring, and many had a difficult time obtaining housing in white German neighborhoods.<sup>57</sup>

## CONCLUSION

According to a United Nations estimate, France alone will need 1.7 million immigrants a year to

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<i>Nationality</i>	<i>Total</i>	<i>"% of All Resident Aliens"</i>
1. Turkey	2,110,223	28.8
2. Yugoslavia	719,474	9.8
3. Italy	612,048	8.4
4. Greece	363,514	5.0
5. Poland	283,604	3.9
6. Croatia	208,909	2.9
7. Bosnia-Herzegovina	190,119	2.6
8. Austria	185,159	2.5
9. Portugal	132,578	1.8
10. Spain	131,121	1.8

**Exhibit 5** "Foreigners" in Germany: The 10 Largest Nationality Groups 1998

Source: www.german-info.org.

maintain its population base and to support its retirees.<sup>58</sup> Even so, on average, fewer than one million immigrants arrive on European shores each year.

In some European countries, the population has already begun to decline. Italy, for example, is shrinking despite the arrival of 70,000 new immigrants a year. All the same, the Italian government has put new restrictions on immigration. Notes Professor Andrew Geddes of the University of Liverpool, "The Italian government and a broad swathe of Italian public opinion appears to see immigration as a poisoned chalice rather than a magic bullet."<sup>59</sup>

By severely limiting legal immigration, Europe had to contend with the arrival of large numbers of illegals. As such, they were denied the right to work, to social services, to education, etc., and many have had to resort to stealing in order to survive.<sup>60</sup> This has created an image in Europe that immigrants are habitually thieves and criminals.

By contrast, in Canada, where immigration as a percentage of population is an order of magnitude larger than European levels, most citizens believe that immigration has a positive effect on

their communities and that immigration provides the country with a stronger culture.<sup>61</sup> Likewise, a 2001 Gallup poll in the United States found that most Americans favor increasing the number of immigrants.<sup>62</sup>

Canada has had a long history of immigration. At beginning of the 20th century, approximately 25 per cent of the population was foreign-born. By the end of the century, that number had declined to about 15 per cent. Despite the decline, Toronto, Canada's largest city, boasted a foreign-born population of nearly 50 per cent, a large number of whom were skilled professionals arriving from every corner of the world.<sup>63</sup> A few European countries have tried to copy Canada's example, by which large numbers of immigrants enter the country by passing a point system that rewards education, language skills and work experience. However, when Germany tried to attract skilled workers, it did so only halfheartedly. For example, whereas Canada offered citizenship to immigrants who resided more than three years in the country, Germany's immigrants perpetually remained on work permits. Under the so called "green card" system, losing one's job could result in loss of residency and even deportation. More importantly, immigrants had to have high-paying job offers prior to arriving in Germany. The result: Canada admitted nearly a quarter of a million immigrants in 2000, while Germany admitted fewer than 20,000 under its new green card system.<sup>64</sup>

At a summit convened by Spain in June 2002, the European Union agreed to jointly increase border controls, to expedite deportations, and to "adopt measures" against originating countries that fail to co-operate on migration, thereby reflecting the growing intolerance of the electorate. Despite the obvious need to increase immigration, Europe's continued refusal to welcome foreigners assured that matters of crime and racism would worsen in the coming years. Observed BBC World Affairs correspondent Paul Reynolds,

Fortress Europe is willing to lower the drawbridge for the few but keep it firmly up for the many ... All this is driven by recent electoral trends

which show that people across Europe are reacting against others they regard as strangers in their midst. And yet those strangers might have been born and bred in the same [European] town.<sup>65</sup>

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