

**PORTUGUESE CULTURAL STANDARDS  
FROM THE SPANISH PERSPECTIVE**

Daniel Cintado Dos Santos Ponces Bandeira

Dissertation submitted as partial requirement for the conferral of  
Master in International Management

Supervisor:

Prof. António Robalo, Director of the Master in International Management Program at  
ISCTE Business School, Lisbon, Portugal.

October 2017

- Exemplo de Lombada –

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# ABSTRACT

The main objective of this master's dissertation is to find out the Portuguese cultural standards from the Spanish perspective. The best methodology used to this research is by using the cultural standards method approach, which is an innovative qualitative research especially used to study only two countries which are very close geographically. The cultural standards method consists of three main phases: narrative interviews, analysis and identifying the cultural standards. By doing the narrative interviews, a number of participants is needed for the sample. The data was collected during the interviews with Spaniards who have an experience of living and working in Portugal.

This thesis is divided into two parts. The first one is a more theoretical background about the concept of *culture* and the importance of culture in cross-cultural business. There is a comparison between both countries regarding the historical background and the results from Geert Hofstede with the cultural dimensions scores between Portugal and Spain. The second part of the thesis is the practical one where the results of the current research are shown by describing the sample of the participants, identifying the cultural standards obtained and comparing them with Hofstede's cultural dimensions. Furthermore, real based experiences' case studies are presented as well as a proposal of a Portuguese business protocol for Spaniards which precedes the conclusion of the thesis.

The results of the current dissertation can be used to help and prepare any Spaniard – who moves to Portugal in order to live, study or work – and encounters the Portuguese context.

Keywords: culture, cultural standards, international business, Portugal – Spain

JEL classification: F23 - Multinational Firms, International Business; M16 -

International Business Administration

# SUMÁRIO

O principal objetivo desta dissertação de mestrado é encontrar os standards culturais Portugueses desde a perspectiva dos indivíduos Espanhóis. A melhor metodologia usada para esta investigação é a abordagem do método dos standards culturais, que é uma novidade na pesquisa qualitativa usada especialmente para estudar só dois países que estão geograficamente perto. O método dos standards culturais está formado por três fases: entrevistas, análises e identificação dos standards culturais. Foi necessário um numero de participantes para criar a amostra para as entrevistas. Os dados foram recolhidos durante as entrevistas com indivíduos Espanhóis com experiência de vida e trabalho em Portugal.

Esta tese está dividida em duas partes. A primeira parte é um enquadramento teórico sobre o conceito de *cultura* e a importância da cultura transversal nos negócios. Há uma comparação entre ambos países em relação ao enquadramento histórico e dos resultados de Geert Hofstede com os valores das dimensões culturais entre Portugal e Espanha. A segunda parte da tese é mais prática onde é mostrado os resultados da atual investigação descrevendo a amostra dos participantes, identificando os standards culturais obtidos e comparando-os com as dimensões culturais de Hofstede. Além disso, foram feitos estudos de caso baseados em experiências reais e um protocolo de negócios Portugueses para Espanhóis seguidos da conclusão.

Os resultados da presente dissertação podem ser utilizados para ajudar e preparar qualquer indivíduo Espanhol – que venha para Portugal para viver, estudar ou trabalhar – e que se depara com o contexto Português.

Keywords: cultura, standards culturais, negócios internacionais, Portugal – Espanha

Classificação JEL: F23 - Empresas Multinacionais, Negócios Internacionais; M16 - Administração de Negócios Internacionais

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Writing a dissertation is not an easy task. Looking for a good topic to write and choosing a good supervisor to help you was not an easy job at all! Writing this dissertation has had a big impact on me. It has been a period of intense learning, not only in the cultural scientific area, but also on a personal level. I would especially like to thank Prof. António Robalo who accepted to be my supervisor and helped me in everything I needed by giving me the right guidelines so that I could get this dissertation successfully done.

During my whole master, I met a lot of new and interesting people who turned out to be my colleagues and I also had some amazing good teachers who taught me greatly how the international business world is doing as well as all the phases to have in mind to an important internationalization of any company abroad.

I am grateful to all of those whom I had the pleasure to interview: the time they spent to meet me and the way they shared with me their life experience in Portugal. I would also like to thank my parents for teaching me since I was young to never give up; my siblings for the patience; and my friends, who are always “there” by my side, sharing happily the good things of life other than just talking about work. A special thank goes to my Sevillian grandmother who, even living in Portugal, has showed me, since I was born, the Spanish language and the Spanish culture.

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## 1. Introduction

The current master dissertation is a research with the objective to find out the Spaniards' perception of the Portuguese culture. By studying the cross-cultural confrontation between Spanish and Portuguese people from the Spanish perspective, we will realize what are the cultural standards differences between both countries. Collecting data about the experience of Spaniards living and working in Portugal will be needed in order to get the results to the current research.

Having both passports and being half Spanish (from Seville) – half Portuguese (from Lisbon) made me choose this topic in particular because of the interest and the common experience I have with both countries and cultures. Outside Europe, for instance, there is the belief that Portugal and Spain are completely similar, which is not true. Both countries have a common background and, since 1492 when the borders were officially traced, different cultures were born.

I was born and raised in Lisbon and before entering university, I studied in a Spanish school in Lisbon, where all my teachers were Spanish and all the subjects and books were held in Spanish. Despite living in Lisbon, I was quite young since I started to assimilate the differences between both cultures regarding language, food, music and people's relations. A high cultural shock came up when I entered a Portuguese university where I started having Portuguese teachers and everything held in the same language. My skills concerning both cultures were better used when I was working as a Market Analyst for half year in a marketing intelligence company in London, covering Portugal and Spain. My communication skills to speak with Portuguese companies were not the same as those to speak with the Spanish ones – I had to adapt my behavior and language accent when

working with Portuguese or Spanish people and try to be neutral when working with both at the same time. My interest in the cross-cultural management field between both cultures gave me motivation to develop this thesis dissertation. During all my research, I had to have an opened mind regarding the results without being persuaded by cultural bias.

Nowadays we live in a globalized world, where more and more the development of international business is increasing and, therefore, the number of international companies worldwide as well. But with the multiculturalism era, the large multinational corporations and the diversification of cultures, it is important for companies to be global but adapt themselves by acting “locally” to the host country. When referring about adaptations, we are talking about adaptations of the marketing, financial, commercial and logistics department but also on the human resources part, which has a vital part in any organization. The mobility rates of employees across borders are increasing and it is important to learn about the cultural differences among the countries.

Even though this dissertation is intended to find out the Portuguese cultural standards from the Spanish perspective, the results of the current research can be used by two targets: in one side by Spanish people who moved to Portugal to live and work and, before arriving, know already the cultural differences and avoid some incidents and cultural shocks when working with Portuguese people; as well as a Spanish company which moves to Portugal and will have Portuguese workers – understand how their employees’ mindset is in the workplace. In the other side, the results can be used by Portuguese companies – human resources department – that have Spanish workers, and being useful to understand how Spaniards are used to behave in the workplace and the things which are different between both cultures.

This master’s thesis is composed by eight chapters. The first one is the introduction of the topic and the objective of the current research. The second chapter is the literature review where the concept of *culture*, *culture within organizations*, *cultural standards* and *cultural shocks* are defined. Also, a theoretical background about the cross-cultural management and the authors with great importance in the field. I decided to develop more the research done by Geert Hofstede due to his important study in the ground.

In chapter three the methodology used in the current research is explained: the cultural standards method, which is an approach mainly used only between two countries that are geographically closed. After the explanation of the literature review and the methodology that will be used, there is a cross-cultural comparison between Portugal and Spain that makes the chapter four. In the cross-cultural comparison, there is a common historical background between Portugal and Spain and then, a short overview about each country separately. Also, there is a research from Hofstede with the different cultural dimensions about each country in order to have an impression of both cultures worldwide.

The chapter five is the result of the research of the current investigation. This chapter starts with the identification of the data from the interviewees and also an explanation about how the interviews were proceeded. The second part of this chapter consists of the description of the Portuguese cultural standards found out by the Spanish participants' experiences within the Portuguese context. In order to test the credibility of the results, the chapter five finishes with the feedback from other participants and a comparison between the outcomes found out with the historical background and the Hofstede's dimensions written in the cross-cultural comparison in the fourth chapter.

The sixth chapter is formed by four case studies written and based on real experiences of the Spanish participants in Portugal. These case studies can be used as material to any cross-cultural subject class. The case studies are followed by a Portuguese business protocol for Spaniards, which makes the chapter seven. This chapter was created with the purpose to guide any Spaniard who wants to do business in Portugal or come to a business meeting, having listed the main things which are different when in first contact with the Portuguese culture. The thesis is ended with a conclusion in the chapter eight.

## 2. Literature Review

### 2.1 Culture

Over the time the concept of culture was examined and defined by numerous authors and studied as a main objective by several subjects as anthropology, sociology or philosophy. The American anthropologists Kroeber and Kluckhohn (1952) compiled around 164 different definitions of culture stating that *“the essential core of culture consists of traditional ideas and specially their attached values”* (Spencer-Oatey, 2012: 2). Culture consists in patterns regarding everything we do: religion, food, music, what we wear and how we wear it, marriage, what we believe is right and wrong, how we eat, how we greet visitors, kind of gifts and so on (Zimmermann, 2017). According to Hofstede (1997: 5), culture *“is the collective programming of the mind which distinguishes the members of one group or category of people from another”*.

Alexander Thomas (2001: 3) refers to culture as an orientation system mentioning that *“Culture is a universal, for a society, organization or group, however, highly typical orientation system. This orientation system is created out of specific symbols and passed on within a given society etc. It influences the perception, thoughts, values and cations of all its members, thereby defining their affiliation in the society”*. Culture is shared by people who live in the same social atmosphere which makes the culture as a completely collective phenomenon. Therefore, culture is learned and transmitted by the cluster's environment we are dealing with (Thomas, 2001). Hofstede argues that our mind is programmed like a software and he does the division between human nature, culture and personality in the following triangle (see Figure 1):

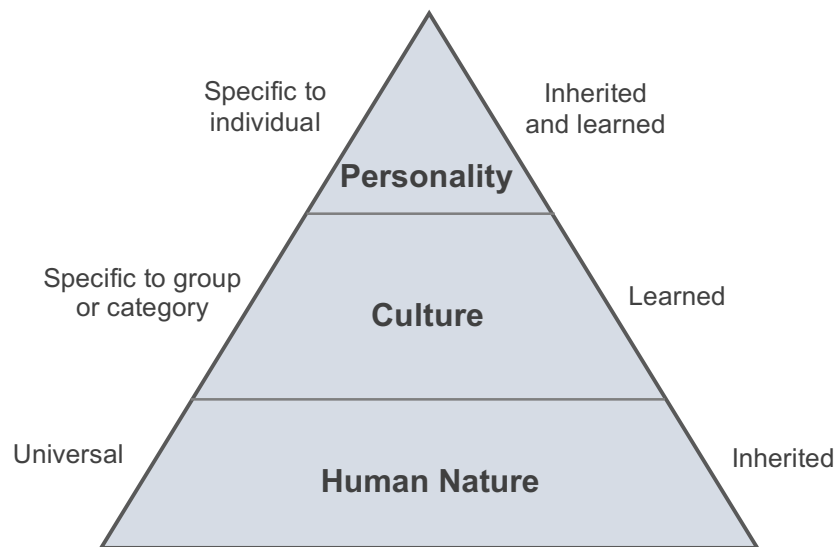


Figure 1: Three levels of uniqueness in human mental programming (Hofstede G., 1997).

**Human nature** is the base and it is completely universal – this includes ways of thinking, acting, feeling among others which people have naturally, that is why human nature is inherited. Inside of human nature is where we find specific groups of habits common to certain groups, denominated **culture**. Culture is learned, it is not from one's genes. Hofstede (1997) argues that there is not any standard considering that a culture is better or worse than other, neither superior or inferior – *cultural relativism*. Conferring by Hofstede (1997: 7), “*cultural relativism affirms one culture has no absolute criteria for judging the activities of another culture as “low” or “noble”*”. Then, no matter the culture that any of us has, each one has its own **personality**, which is specific to the individual and can be inherited as well as learned. In Hofstede's *Culture's Consequences* book (2001) he connects **Personality** with *individual*, **Culture** with *collective* and **Human Nature** with *universal*.

Hofstede created the “Onion diagram” which shows different ways culture can be perceived or manifested. It is called onion because the diagram is displayed with several layers, each one with a different cultural level (see Figure 2).

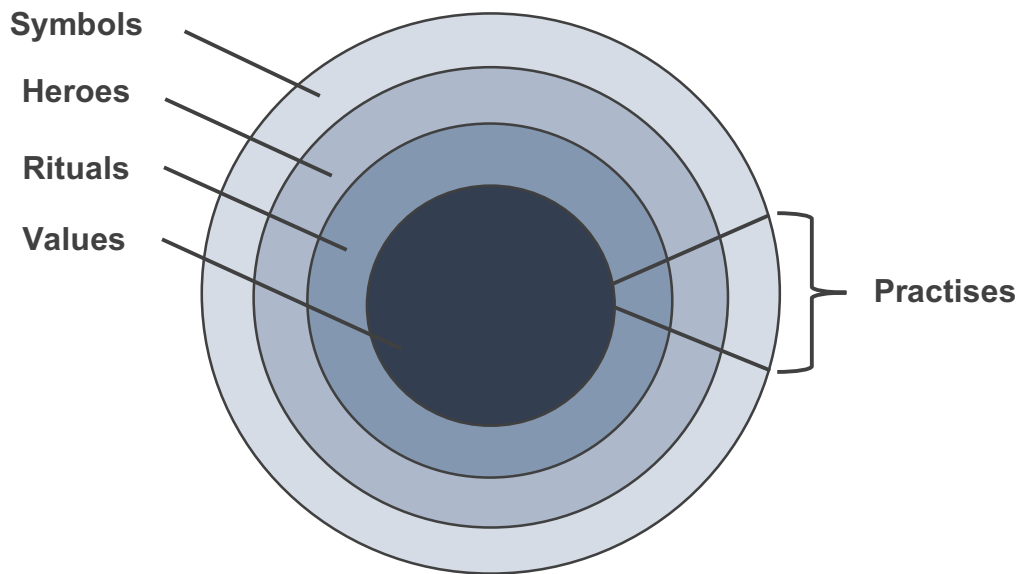


Figure 2: The "Onion Diagram": Manifestations of the culture at Different Levels of Depth (Hofstede G., 1997).

According to Hofstede (1997) culture is described by four levels. As we can see, these manifestations of culture are represented in layers around the core which are the *values*. The rest of the layers – *symbols*, *heroes* and *rituals* – are under the term *practices*. The essential is the *values*, which are part of the individual and collective, even though culture belongs only to the collective as argued by Hofstede before. A value is a strong tendency to prefer some situation to another. Values are feelings that can have a positive or a negative side (e.g.: evil vs. good; ugly vs. beautiful; dirty vs. clean). Values are also the first thing children learn, not in a consciously way but in an implicitly one. After the age of ten, psychologists believe it is very difficult to make changes in most of children's values. *Symbols* are words, gestures, pictures and objects that most of the time have complex meanings which are only recognized by the ones who share the same culture. The words we use in different languages belong to this category as well as the way of dressing, greeting, the haircut, flags and social symbols. Symbols are easily copied by other cultural groups, that is why symbols show up in the most superficial layer. *Heroes* are people who have characteristics which are highly considered in certain culture so they are used as behavioral models. Heroes can be either real or imaginary, dead or alive and even historical characters who most of the time influence the behavior of any group or society. *Rituals* are collective activities which are not technically necessary to reach desired ends, but for a culture they are considered socially essential. Some examples of

rituals in a culture are ways of greeting, pray, respect others or also religious or cultural ceremonies.

The onion diagram does not mean that a person only belongs to one culture or group. Almost every individual belongs to different groups and categories of people at the same time with different levels of culture which is something that individuals carry in their minds unavoidably. Some examples can be (Hofstede, 1997):

- a **gender level**, depending on being a female or male;
- a **generation level**, distinguishing grandparents from parents from children;
- a **national level**, associated with the country where the individual was born (or any other countries in case of migration);
- a **regional and/or ethnic and/or religious and/or linguistic affiliation level**, as most nations are composed of culturally different regions/ethnic/religious or language groups.
- a **social class level**, connected with educational level and with the person's professional career. For those who are employed, an **organizational or corporate level**, associated to how employees have been socialized by their work organization.

### **Organizational culture**

Organizational culture is the “personality” of an organization that guides how employees think and act on the job (Desson, 2010). The concept is complex and was introduced into management sciences in the late 60s with the globalization, when European and American companies increased their expansion to other continents in order to gain competitive advantages like cheap labor, new markets or/and proximity to raw materials (Fleury, 2009). *“Culture is a key factor not only in achieving organizational goals, but in attracting and keeping desirable employees, creating a positive public image, and building respectful relationships with stakeholders.”* (Desson, 2010: 1)

Inside of an organization there are structural and human aspects (Hofstede, 1997). The structural ones are regarding inside of a company who has the power to decide what and also what kind of rules will have to be followed in order to reach the desired ends – that



is the “personality” of an organization that makes the conducts to how people should perform their job within the organization, as referred by Desson (2010).

However, the cultural context of an organization is simultaneously influenced by some potential cultural identities, which are the human aspects. According to Sackmann (1997: 2), “*Members of an organization are unlikely to be restricted in their membership to one single culture or subculture, because people may identify with their gender, ethnic background, parent and spouse roles, sports club, city, the university from which they hold a degree, profession, department, division, work organization, geographical region, industry, nation, or greater region such as Europe, America or Asia.*” Shackmann shows the cultural context of an organization which includes values, customs, attitudes, norms and beliefs inside of a company (see Figure 3).

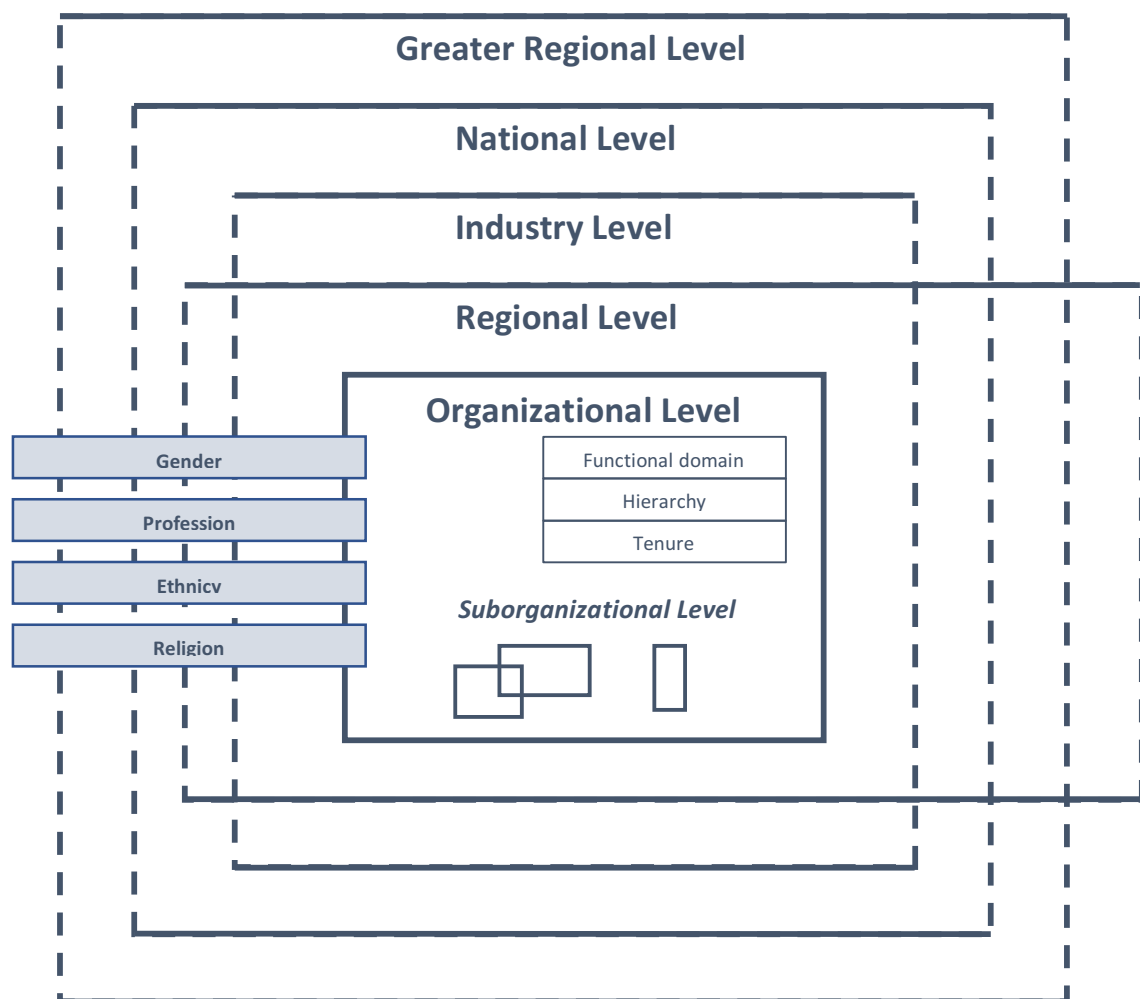


Figure 3: The Cultural Context of an Organization (Sackmann, 1997).

There are some similarities between organizational culture with Hofstede's *Onion's Diagram*: the core of the organization's culture is its values (the ideals and its principles). Around the core level, comes the level of rituals and heroes which are connected with how the meetings are arranged, how people communicate, how the position of the founder and the leaders is, the way to behave in order to be accepted, and so on. The Hofstede's last level are the symbols which is the most superficial one and can be compared with the building itself, the way people dress and the collective behavior. Besides the *Onion* layers, Hofstede also illustrates the differences between national level and organizational level (see Figure 4):

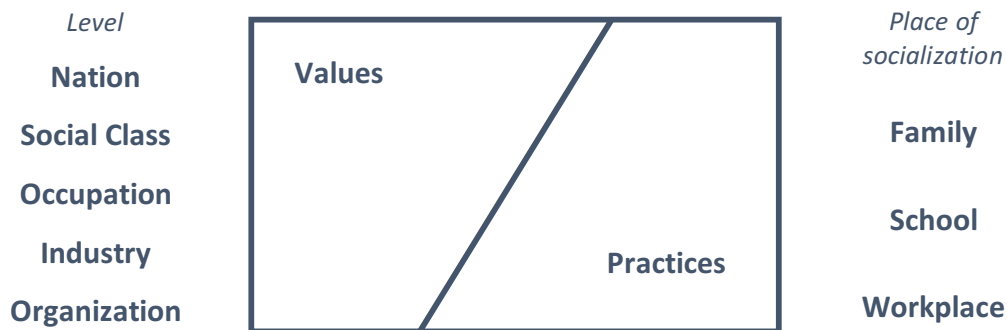


Figure 4: The Balance of Values Practices at the National, Occupational, and Organizational Levels (Hofstede G., 2001).

The differences in values and practices balanced in the illustration are clarified by the different *Places of socialization* (learning): values are obtained and assimilated at a young age inside the family or in the neighborhood, and later at school. Organizational practices are learned by socializing in the workplace at an adult age already. The socialization process inside of an organization is a matter of learning the practices: symbols, heroes and rituals of the company – “*The values of founders and key leaders undoubtedly shape organizational cultures, but the way these cultures affect ordinary members is through shared practices*” (Hofstede, 2001: 394).

The occupational values are learned through socialization in school and university and the time for this is between childhood and adulthood. On one hand, national cultural level resides mostly in values and less in practices, on the other hand, at the organizational level, cultural differences reside mostly in practices and less in values. An occupational

culture level is placed between national and organizational, meaning that entering in the occupational level is the achievement of both values and practices. Between the national culture level and the occupational culture level there is the social class culture level and, between the occupational culture level and the organizational culture level there is the industry level (Hofstede, 2001).

## **2.2 Cultural Standards**

Bearing in mind the definition of culture written by Brueck (2002: 3) inspired by Alexander Thomas, *“culture can be understood as a complex system of guidelines for groups, organizations or societies. Members of a culture share these guidelines which they have learned in the socialization process”*, we can say that a culture came from some individual cultural elements which were the result of the interaction between people with their environment. Those elements were passed from generation to generation and directly influenced the behavior of each person. Through this “behavioral guide”, a new mode of acting and thinking gave rise to the cultural structure. These cultural elements within the cultural structure are designated as cultural standards.

Alexander Thomas (1993) defines cultural standards as follows: *“Cultural standards combine all forms of perception, thinking, judgment and behavior which people sharing a common cultural background rate as normal, self-evident, typical and binding for themselves and for others. Thus, cultural standards determine the way we interpret our own behavior as well as the behavior of others. They are considered “basic” if they apply a variety of situations and determine most of a group’s perception, thinking, judgement and behavior. Furthermore, they are highly significant for perception, judgement and behavior mechanisms between individuals”* (Brueck, 2002: 3).

An interesting characteristic of cultural standards is that they can only be recognized in a cross-cultural situation, during a cross-cultural meeting between members of distinct groups. We are not aware of how much these cultural standards determine our actions in our familiar cultural environment, but as soon as we meet people from a different culture area, whose behavior is based on a different set of cultural standards, we are able to

consciously experience their existence. According to Brueck (2002: 4), “*The personal involvement in particular situations, the consuming behavior of others and the insecurity regarded as critical and caused by a confrontation with unfamiliar cultural orientation systems, are recorded in narrative interviews and so-called critical incidents*”. It is important to say that critical incidents are not essentially linked to negative experiences. The word *critical* in that sentence means that those cultural elements are unfamiliar to us and are not compatible with our culture structure. Positive experiences are also considered *critical incidents* and are just as valuable for the cultural standards’ identification.

Among people of a given country there will be dissimilarities and discrepancies regarding specific behavior within individual cultural standards. We cannot forget that it should not be expected that all the members of a specific culture have a rigid behavior regulation. The figure below demonstrates how the fusion of cultural standards occurs in different cultures (see Figure 5):

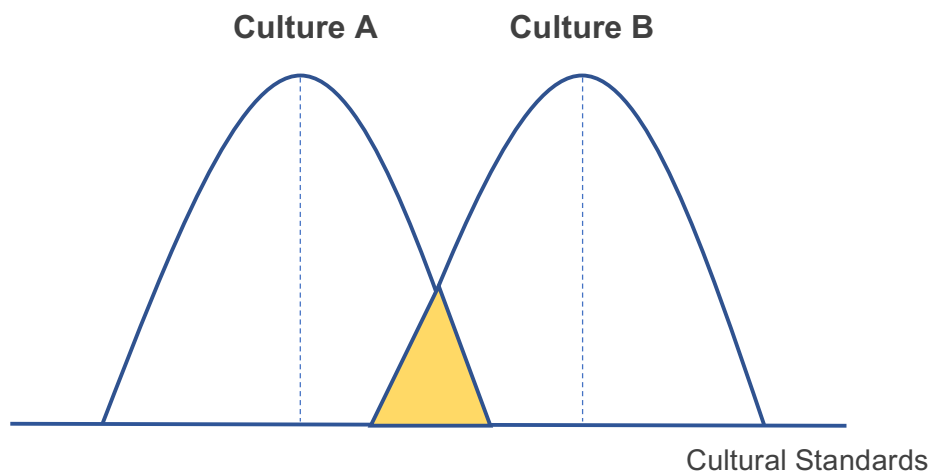


Figure 5: Distribution of Cultural Standards in two cultures (Brueck, 2002:5).

As we can see in the figure, there are two bell-shaped curves representing two different cultures – *Culture A* and *Culture B*. The statistic mean value demonstrates how recurrent the manifestation of a cultural standard shows up in each group or culture, creating in that way a different prototype of cultural standard in *Culture A* and *Culture B*. This indicates that the prototype is shared by most (not necessarily by all) of the representatives of a specific culture. As a consequence of the globalization, some cultural standards are not

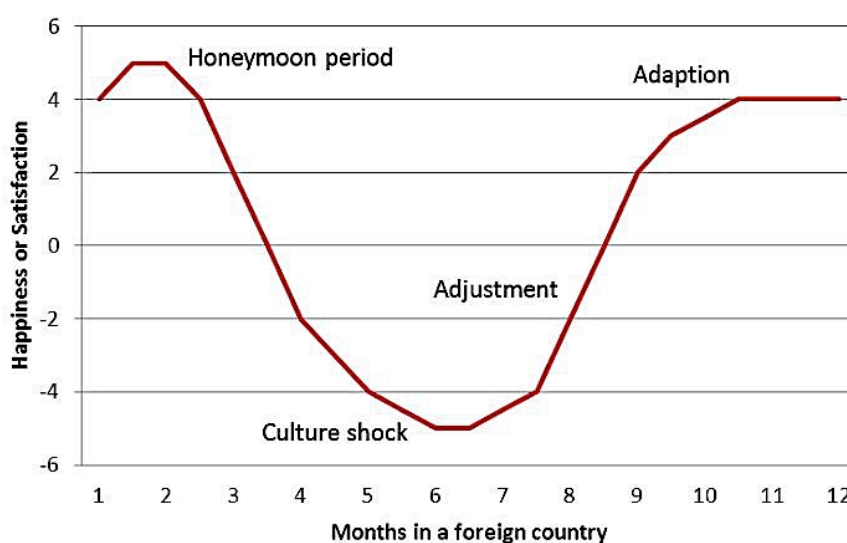
perceived by the people sharing a common cultural background, which is the area of similarity (yellow zone in the figure).

Cultural Standards are identified through the Cultural Standards Methods by analyzing people's critical incidents in a different country or in a different culture. The explanation of this method is in the chapter 3 of this dissertation.

### **2.2.1 Cultural Shocks**

The concept of cultural shock was introduced by Kalervo Oberg and is defined as “the psychological disorientation experienced by people who suddenly enter radically different cultural environments to live and work” (Xia, 2009: 97). There are different cultural behaviors from country to country and this results in incidents or cultural shocks, which happen when people are away from home and have to come into contact with many new values, practices and ways of living (Xia, 2009). Change sometimes can be painful but it is an opportunity to grow as we are outside of our comfort zone (Neil, 2017).

According to Neil (2017), one of the best models to describe the process of cultural shock is the four-stage cultural adjustment model or also known as the U-curve model created by Oberg in 1960 (see Figure 6):



*Figure 6: Culture Shock Curve (Neil, 2017).*

Cultural shock has four phases and each phase can perform only at certain times and shows different characteristics each time (Xia, 2009). The term *Honeymoon* can be used to describe the first phase which is related with an initial euphoria and excitement. There is an apparent involvement in the host culture – almost like a tourist – very motivated and with a lot of interest to learn. People in this stage are pleased by all the new things encountered and have the feeling that they are able to handle anything.

The second phase comes after few weeks due to a series of negative experiences and some problems. There is a kind of irritation and that is why this stage is named *Culture Shock*, because the critical incidents are raising and the differences between the new culture and the home country are increasing. Small differences that feel like big catastrophes and, therefore, bringing the feeling of stress and accumulative depression, anxiety and confusion. The person becomes homesick, missing his/her family and friends from his/her home country.

After the culture shock comes the *Adjustment* phase, where things start seeming familiar due the ability to learn how to adjust ourselves to the new cultural standards of that host country. Gradually the sense of humor returns as well as the new perspective. The feeling of comfort increases and the person even starts preferring some cultural characteristics aspects of the host country than his/her home country.

The fourth and last phase is the *Mastery* or *Adaptation* one, where the “new” culture is no longer new and there is the feeling of another home. This stage comes after a great experience in the host country and the person will be able to live and work at his/her full potential. These phases make us accept other cultures without the need to judge and make us all richer as people (Neil, 2017).

## **2.3 Cross Cultural Management**

Nowadays with the globalization era, most of the companies are operating in more places all around the world. During the internationalization process, it is important to know several things which are different from country to country such as political, legal,

economic or logistic issues. Cultural factors also have been considered as an aspect to take into account regarding the cross-culture communication. People from country to country have different cultural standards and, inside of an organization, communication sometimes can be difficult – what is known as *cross cultural conflict*. When a manager of a company from one country operates in any other country, it is good to have a good understanding of how people from that culture think and act and to have good skills to communicate with those people who have different cultural background. As stated by Kavar (2012: 107), culture and communication goes together: “*Culture and communication can be considered inseparable, if one is to be exposed to a certain culture, then communication becomes a must.*”

Cross-cultural management helps to explain the misunderstandings in a company among people due to their different cultural background. According to Adler (2008), “*Cross-cultural management explains the behavior of people in organizations around the world and shows people how to work in organizations with employees and client populations from many different cultures.*” This is a tool that has had a high importance as a critical success in the multiculturalism era and the good knowledge of intercultural communication gives to people the opportunity to compete internationally (Kavar, 2012: 107).

To know the different factors among cultures, a lot of cross-cultural management studies were done. There are many types of cross-cultural management studies: *Parochial Research* – single culture studies; *Ethnocentric Research* – Second culture studies; *Polycentric Research* – Studies in many cultures, among others with the purpose of identifying differences as well as similarities in business, management and employee’s styles because of the fact that they belong to different cultures (Adler, 1983).

A study was done by Simcha Ronen and Oded Shenkar (1985) clustering countries and joining them in groups with common cultural standards like *Nordic countries*, *Latin American countries*, *Anglo countries*, *Arab countries*, among others (see Appendix 1). Richard Lewis (2005) conducted a small research where the author explains the three rough categories of the world’s cultures in a very general overview:

- **Linear-actives:** Those who plan, schedule, organize, pursue action chains and do one thing at a time. Germans and Swiss are in this group.
- **Multi-actives:** Those lively, loquacious peoples who do many things at once, planning their priorities not according to a time schedule, but according to the relative thrill or importance that each appointment brings with it. Latin Americans, Latin Europeans and Arabs are members of this group.
- **Reactives:** Those cultures that prioritize courtesy and respect, listening quietly and calmly to their interlocutors and reacting carefully to other side's proposals. Chinese, Japanese and Finns are in this group.

There are two ways to research cross cultural management: by using the cultural dimension approach or the cultural standards approach:

### **2.3.1 Cultural Dimensions Approach**

When working in an organization, many of us work with people from other cultures and sometimes things can go well and sometimes can go wrong. Most of the times we do not understand why these things can go wrong. Understand the differences between cultures will make those people work more efficiently and prevent confusions and misinterpretations. In cross-cultural management, a lot of studies were done by several authors to identify the **cultural dimensions** by finding the impact of cultural values on organizational practices in a large number of countries (Fink, Kölling and Neyer, 2005).

The first authors researching about cross-cultural management measures were Kluckhohn and Strodtbeck (1961) who came up with the basic principles for all further research in the field of cross cultural research. Other authors carried out other studies changing some variations like the sample, the context and the set of value dimensions used to describe cultures. The most well-known author of cultural dimensions was the Dutch **Geert Hofstede** starting in 1960s-70s. After Hofstede, the other best-known researcher was **Fons Trompenaars** also from Netherlands who did his research in 1993. The theories from both authors were based by a quantitative research approach.



As mentioned before, the Dutch psychologist Hofstede has conducted during 1967-69 and 1971-73 the most well-known cultural dimensions study by using two large surveys data about the values of people in 72 countries all around the world in 20 different languages. This people worked in the local subsidiaries for IBM (International Business Machines), one large multinational corporation. From the surveys, a total of 116.000 IBM employees' answers were obtained covering more than 30 topics (Hofstede, 2001).

After analyzing the answers of the 32 questions, the four famous dimensions were derived:

1. **Power Distance** – PDI
2. **Individualism** – IDV
3. **Masculinity** – MAS
4. **Uncertainty Avoidance** – UAI

A 5<sup>th</sup> dimension was found in an extra international study with Chinese employees and managers giving place to **Long-Term Orientation** – LTO. In 2010 a 6<sup>th</sup> dimension was added based on the Bulgarian sociologist Minkov's label: **Indulgence** – IND (Maclachlan, 2013).

The second most influential author was Trompenaars who was helped by Charles Hampden-Turner. Their research was carried out in 1993 and is based on the basic assumptions of Kluckhohn and Strodtbeck (1961) but they concluded the study identifying seven cultural dimensions (Fink, Kölling and Neyer, 2005). Preferences and values of people around the world were developed in a model by Trompenaars spending on that 10 years of research. The author sent questionnaires to 15.000 employees of companies worldwide (Trompenaars, 1998). The seven cultural dimensions established by Trompenaars and Hampden-Turner are:

1. **Universalism vs. Particularism**
2. **Individualism vs. Collectivism**
3. **Neutral vs. Affective Relationships**
4. **Specific vs. Diffuse Relationships**
5. **Achievement vs. Ascription**

**6. Attitudes to Time (Past, Present, Future)**

**7. Attitudes to the Environment**

The dimensions identified by Trompenaars and Hampden-Turner were related with time, nature, rules, affections and relation with others. *Universalism vs Particularism* focuses on the relation of people or group with rules and laws; *Individualism vs Collectivism* focuses on the relationship of people with others; *Neutral vs. Affective Relationships* explain how people deal and show their emotions; *Specific vs. Diffuse Relationships* is to understand how people see their own lives; *Achievement vs. Ascription* focuses on representing how the society deals with accomplishment; *Attitudes to Time* explains the orientation of the society concerning the past, the present or the future and the way people organize their time and schedules; *Attitudes to the Environment* focuses on the relation between people's lives and their attitude regarding nature (Reis, 2011).

The research from these two authors to identify the cultural dimensions was very different regarding the participants, the questions and the place where the participants were. Both authors obtained the data from questionnaires: Hofstede had the biggest database with 116.000 questionnaires to a sample of people living in their own country instead of Trompenaars who had a smaller database with around 50.000 questionnaires whose participants were living outside their countries. Hofstede's participants were employees only from IBM and Trompenaars' were executives from different companies. However, Hofstede did his questions only regarding work and Trompenaars focused his questions on the employees' favourite behaviour while working and resting. Furthermore, the four cultural dimensions of Hofstede were generated with the database he collected after the questionnaires were done unlike Trompenaars and Hampden-Turner who generated their seven cultural dimensions through a study of literature first and then put it in practice with the questionnaires. Trompenaars' data cover good points of the business world of today and includes areas that Hofstede did not cover because IBM has not been present yet in those areas (Bing, 2004). One thing in common between the two authors was to find out the values which were derived from a sequence of questions about the more external levels of the "cultural onion" (Dahl, 2004).

While analyzing the dimensions from both authors, we can see some differences and some similarities. Regarding the dimensions that both authors have in common we can see that

the *Individualism* dimension from Hofstede is identical to the *Individualism vs. Collectivism* dimension from Trompenaars. Also, the fifth and last dimension found by Hofstede – *Long-Term Orientation* – is very close to the *Attitudes to Time* by Trompenaars: *Long-Term Orientation* cultures from Hofstede seem to have the same “tradition-oriented” mindset as the past and present oriented cultures from Trompenaars. According to Anbary (2009), the dimensions from both authors can be grouped into several categories:

**Relations between people:** In this category, we may insert Hofstede’s *Individualism* and Trompenaars’ *Universalism vs. Particularism*, *Individualism vs. Collectivism*, *Neutral vs. Affective*, *Specific vs. Diffuse* and *Achievement vs. Ascription*.

**Motivational Orientation:** In this category, we may find three Hofstede’s dimensions: *Masculinity*, *Uncertainty Avoidance* and *Power Distance*.

**Attitudes toward time:** In this category, it is included Hofstede’s *Long-Term Orientation* and Trompenaars’ *Attitudes to Time (Past, Present, Future)*.

A lot more authors did a similar type of research like Hall and Hall in 1990 where they raised up four dimensions that were considered valuable to American managers to better understand the behavior of their West German and French employees. In 1992, Schwartz came out with eleven dimensions to study the variable of the “present and the future in society” by using a sample of 200 teachers and students per country in 20 different countries (Brueck and Kaizenbauer, 2002). In 2002, the project GLOBE – Global Leadership and Organizational Behavior Effectiveness (Sokoll, 2011) – was a large-scale research involving 17.000 managers in 61 different countries in order to investigate business leadership worldwide. In a similar manner to Hofstede, GLOBE develops nine cultural dimensions across both actual society practice and values in the different cultural settings (Venaik, 2008).

Another study was conducted by an American author, **Richard Gesteland** (1999), who was more focused on the behavior of cross-cultural business. Gesteland did not use a specific research like Hofstede or Trompenaars, instead he came up with a study from his own experience as a manager, he used a practical experience method. Gesteland’s study has not any academic value but the results are an overlap with the studies from Hofstede

and Trompenaars. The practical work experience of this author helped him to define four cross-cultural business behavior patterns:

1. **Deal-Focus vs. Relationship-Focus**
2. **Informal vs. Formal Cultures**
3. **Rigid-Time vs. Fluid-Time Cultures**
4. **Expressive vs. Reserved Cultures**

Business cultures with *Deal-Focus* people use to be people fundamentally task-oriented, while *Relationship-Focus* are more socially-oriented. *Deal-Focus* cultures are connected with Anglo and Nordic countries whilst *Relationship-Focus* cultures are connected with Arab, Latin America and Asian countries.

Whereas *Informal Cultures* are supposed to value the status equality, *Formal Cultures* value hierarchies, power, respect and status differences. *Informal Cultures* are connected with most of Anglo and Nordic countries and *Formal Cultures* with most of European, Asian, Arab and Latin American countries.

When talking about “fixed or flexible agendas”, schedules and deadlines, *Rigid-Time Cultures* are clock-obsessed and strictly punctual while *Fluid-time Cultures* are more relaxed about time and scheduling, focusing instead on the people around them. *Rigid-Time Cultures* are connected with Nordic countries as well as North America and Japan. *Fluid-time Cultures* are connected with Arab, Latin American, Latin European, African and South Asian countries.

*Expressive Cultures* are the ones where people communicate in a radically different way whether communicating verbally, paraverbally (how loudly we speak and the silences we do) or nonverbally (body language). *Reserved cultures* are literally the contrary of the expressive ones. *Expressive Cultures* are connected with Latin European and Latin American countries. *Reserved cultures* are connected with Nordic, Germanic and most of Asian countries (Gesteland, 2012).

### **2.3.2 Cultural Standards Approach**

An innovative way of identifying cultural differences in a cross-cultural management research is the Cultural Standards method, which is a tool to identify cultural differences in a more appropriate level only between two different countries.

The Cultural Standards Methods were developed by Alexander Thomas (1996) in order to generate more detailed and accurate cultural knowledge. The concept of cultural standards was based on Jean Paul Piaget's (1962, 1976) developmental psychology and Ernst Boesch's (1980) cultural psychology and concept of action agreeing that an acting person is always considering possible views and judgments of their counterparts as well as his/her own experiences and assumed experiences of others. A person reacting will always consider the desirability or necessity to achieve a consensus with a specific partner and also the norms of judgement of his own culture (Fink, Kölling and Neyer, 2005).

The main differences when comparing the cultural standards method with any other cultural dimensions research approach like the ones identified before by Hofstede (1960s-70s) or Trompenaars (1993) is that the cultural standard factor has to be pointed out. The cultural standard method is only valid in the comparison between two cultures and the categories found after the research cannot be applied as cultural differences to other countries. This method is particularly useful in the case of European cultures, where the differences are not that visible at the first view. Hofstede's cultural dimensions gives a simple basis to know the behavioral and mindset picture of the people in more than 40 countries but do not give too many facts between two countries that are in the same "cultural cluster" which are very close due to the common history background, like European or Latin American countries (Brueck and Kaizenbauer, 2002).

According to Brueck (2002: 10), *"The Cultural Standards Method therefore proves to be a useful tool not only for researching differences in European business cultures but also for training managers in order to become more effective in their international business activities."* In chapter 3 of this dissertation a description is given of how Cultural Standards Method is applied in the field and the phases of this research.

## **2.4 Hofstede's Cultural Dimensions**

As was stated before, there are two well-known authors describing cultural dimensions comparing countries and regions worldwide. This extensive research was carried out by Geert Hofstede and Fons Trompenaars, the last one with the help of Charles Hampden-Turner. I decided to analyze only Hofstede's cultural dimensions deeply and compare them afterwards with the results of the current cultural standards method research. The choice to analyze Hofstede's Dimensions to Trompenaars' is based in two simple facts: the first one is that Hofstede's research has more scientific value and, the second one, is that Trompenaars' research does not have results of his cultural dimensions for Portugal.

Hofstede used information from two enormous questionnaires conducted during 1967-69 and 1971-73 to 116.000 local employees of IBM. In the first phase, results were obtained on the basis of information gathered in 40 countries, later this number was increased to 50 countries and three regions. After all, the data came from more than 70 countries covering more than 30 topics. In the first half of the twentieth century, social anthropology has developed the conviction that all societies, modern or traditional, face the same basic problems, but only the answers differ. Some of those basic problems are regarding (Hofstede G. , 1997):

1. Relation to authority.
2. Conception of self, in particular with the relationship between individual and society and the individual's concept of masculinity and femininity.
3. Ways of dealing with conflicts, including the control of aggression and the expression of feelings.

With the individual responses to each question, average values were obtained for each country. Those values were subjected to a factorial study resulting in six dimensions:

**Power Distance – PDI:** Hofstede (1997: 28) describes this dimension “*as the extent to which the less powerful member of institutions and organizations within a country expect and accept that power is distributed unequally*”. “*Institutions*” are the essential components of the society, like the family or school. “*Organizations*” are the work places. Power Distance represents the equality vs the hierarchy in the societies. It is represented

by a high or low power distance. A society with high power distance score like Venezuela, Brazil or France accepts the inequality of power in the society, this means that there are societies with high hierarchical distance. Countries like Austria, Denmark or USA represent a low power distance score (Podrug, 2006).

**Individualism – IDV:** Individualist societies are the ones “*which the ties between individuals are loose: everyone is expected to look after himself or herself and his or her immediate family*” while collectivist societies are the ones “*which people from birth onwards are integrated into strong, cohesive ingroups, which throughout people’s lifetime continue to protect them in exchange for unquestioning loyalty*” (Hofstede, 1997: 51). Individualist countries like USA, Australia or Canada value personal independence, pleasure, individual expression and personal time. They believe that democracy should ideally be shared by all, something which is not understood by collectivist countries like Indonesia, Pakistan or Chile where reciprocation of favors, the sense of belonging and respect for tradition are valued (Podrug, 2006).

**Masculinity – MAS:** This dimension stands for a society in which social gender roles are clearly distinct: a society can be more masculine or feminine. Masculinity concerns to societies more assertive and competitive. According to Hofstede (1997: 82), “*men are supposed to be assertive, tough, and focus on material success whereas women are supposed to be more modest tender, and concerned with the quality of life*”. Masculine individual’s preferences are achievement, heroism, and material success and the most representative countries are Japan, Italy and Mexico. In femininity societies like the Scandinavian countries, both men and women determined achievement in terms of close human relationships and quality of life (Podrug, 2006). The fundamental issue in this dimension is what motivates people, “wanting to be the best” (masculine) or “liking what you do” (feminine).

**Uncertainty Avoidance – UAI:** This dimension indicates the extent to which a society feels threatened by ambiguous situations and the extent to which a society tries to avoid these situations by adopting codes of behavior, a belief in the truths, establishing formal rules, and so on. Hofstede (1997: 113) describes this dimension as “*the extent to which the members of a culture feel threatened by uncertain or unknown situations*”. This feeling of threat is expressed through nervous stress among other things. Societies with a

high uncertainty avoidance are concerned with security in life, less likely to take risks and safe lifetime employment such as Greece, Portugal or Japan. The opposite pole is the low uncertainty avoidance where these societies are less concerned with security, rules, are more risk tolerant and have a high job mobility, such as USA, United Kingdom or Ireland (Podrug, 2006).

**Long-Term Orientation – LTO:** This dimension was called originally *Confucian Dynamism* and it is concerned with how the orientation of societies in life is done. It describes how every society has to maintain some links with its own cultural background while dealing with the challenges of the present and future. Long-term orientation societies are regarding thrift, perseverance, ordering relationships by status and have a sense of shame like China, Japan or Brazil. The opposite, short-term orientation societies are like USA, Canada and United Kingdom where individuals ‘characteristics are: personal steadiness and stability, respect for tradition and reciprocal greetings, favors and gifts (Podrug, 2006).

**Indulgence – IND:** Cultures can be described as *Indulgent* or its opposite which is *Restrained*. This dimension is defined as the extent to which people try to control their desires and impulses. This dimension has an interesting application regarding the international work place. Indulgent cultures will manage to focus more on individual happiness and well-being, leisure time is more important and there is a better freedom of speech, like USA, Australia or Sweden. In the opposite pole, restrained cultures do not have those positive emotions like indulgent cultures and freedom and leisure are not given the same importance as most of Asian or East European countries (Maclachlan, 2013).

These dimensions together cannot be assumed to exhaust the universe of difference between national cultures, but they have substantial face-validity and have been empirically demonstrated to many aspects of management and organizations (Podrug, 2006). Hofstede created a table with the score rank and the position of the country regarding each cultural dimension (see Appendix 2) as well as a map comparing two cultural dimensions and clustering the countries by its score (see Appendix 3).



### **2.4.1 Criticism**

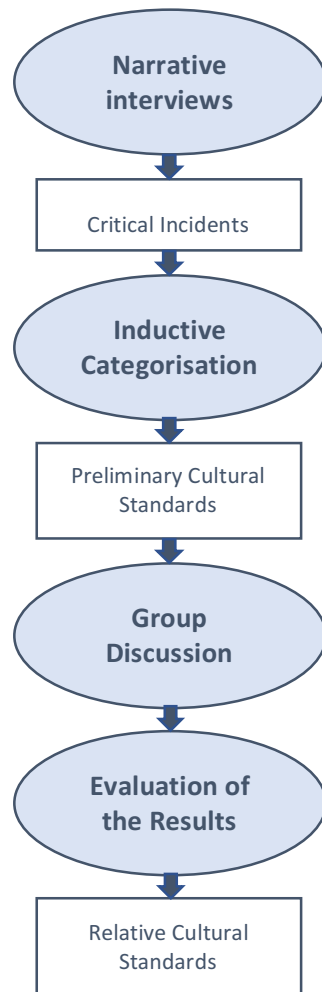
Hofstede's model is significant when it comes to analyze the culture of a particular country. It is possible to cluster countries with similar cultures into groups, but Hofstede's results do not provide more specific information about the differences and similarities between specific cultures. Numerous authors criticized Hofstede's Cultural Dimensions regarding some issues (Jones, 2007):

- **Relevancy:** According to Schwartz (1999), when researching a culture, the variable being measured is a value which is sensitive and subjective. Hofstede use surveys as methodology to measure culture, which many researchers allude to be an inappropriate tool.
- **Similar Scores:** Some countries may have really similar scores, but in reality, there are remarkable differences.
- **National Divisions:** The unit of analysis of nations is not the most suitable unit to study culture. According to McSweeney (2000), nations are not the proper unit of analysis because borders do not essentially bound the culture. Hofstede arguments that the way he did the study is the best he had to identify and measure the cultural differences.
- **Political Influences:** The questions on the survey regarding the Masculinity and the Uncertainty Avoidance may have been a sensitive topic concerning the historical period. Europe was in the midst of the cold war and had still vivid memories from the Second World War. This political instability of the time makes that the sample lacks data from socialist countries.
- **One Company Approach:** One company cannot provide information about the entire national cultures.
- **Out-dated:** Nowadays, the IBM data is already old and obsolete. Researches argue that the study is too old to be of any modern value, principally with today's internationalization and the fast changing global environment.
- **Few Dimensions:** Four or five dimensions cannot "tell the whole story", they do not give all the information regarding cultural differences. Hofstede agrees with this opinion claiming that more dimensions should be added to his original study.

### 3. Cultural Standards Method

As mentioned before, when researching cross-cultural management field, there are two main approaches to do it: clustering countries due to the overall cultural dimensions or identifying cultural standards in particular countries. *“As cultural standards we understand all kinds of perceiving, thinking, judging, and acting that in a given culture by the vast majority of individuals are considered for themselves and others as normal, self-evident, typical and obligatory.”* (Thomas, 1993, p. 381, translation by Brueck, 2002: 3).

As it was mentioned before in chapter 2, cultural standards can only be recognized in a cross-cultural situation, during a cross-cultural meeting among members of distinct groups. From those meetings, some acts, feelings and thoughts are unfamiliar and it is because of those situations that the critical incidents came up. Those critical incidents will be provided as raw material for this cross-cultural research approach. The analysis and categorization of those critical incidents will lead to the identification of the cultural standards of that specific culture. The critical incidents are identified by interviewing people of one culture who have considerable working experience in the other culture (Brueck, 2002). In the following figure the whole research process is illustrated showing all the phases (see figure 7):



*Figure 7: The identification process of cultural standards (Brueck, 2002).*

The first phase – **Narrative Interviews** – consists of identifying the critical incidents that the interviewee faced through interviews. The most appropriate interview for this purpose is the narrative interview, which is a qualitative methodology providing more information than the traditional question-and-answer strategy. The narrative interview method was created by Fritz Schütze and the main advantage is that the interviewee is encouraged to control the conversation leading the interviewer to become only a spectator on the interview (Brueck, 2002). In order to be a valuable interview, the interviewee must a) have faced something, b) still remember the incident, c) find it to be a valuable story to tell, and d) be keen to tell the interviewer (Fink, Kölling and Neyer, 2005).

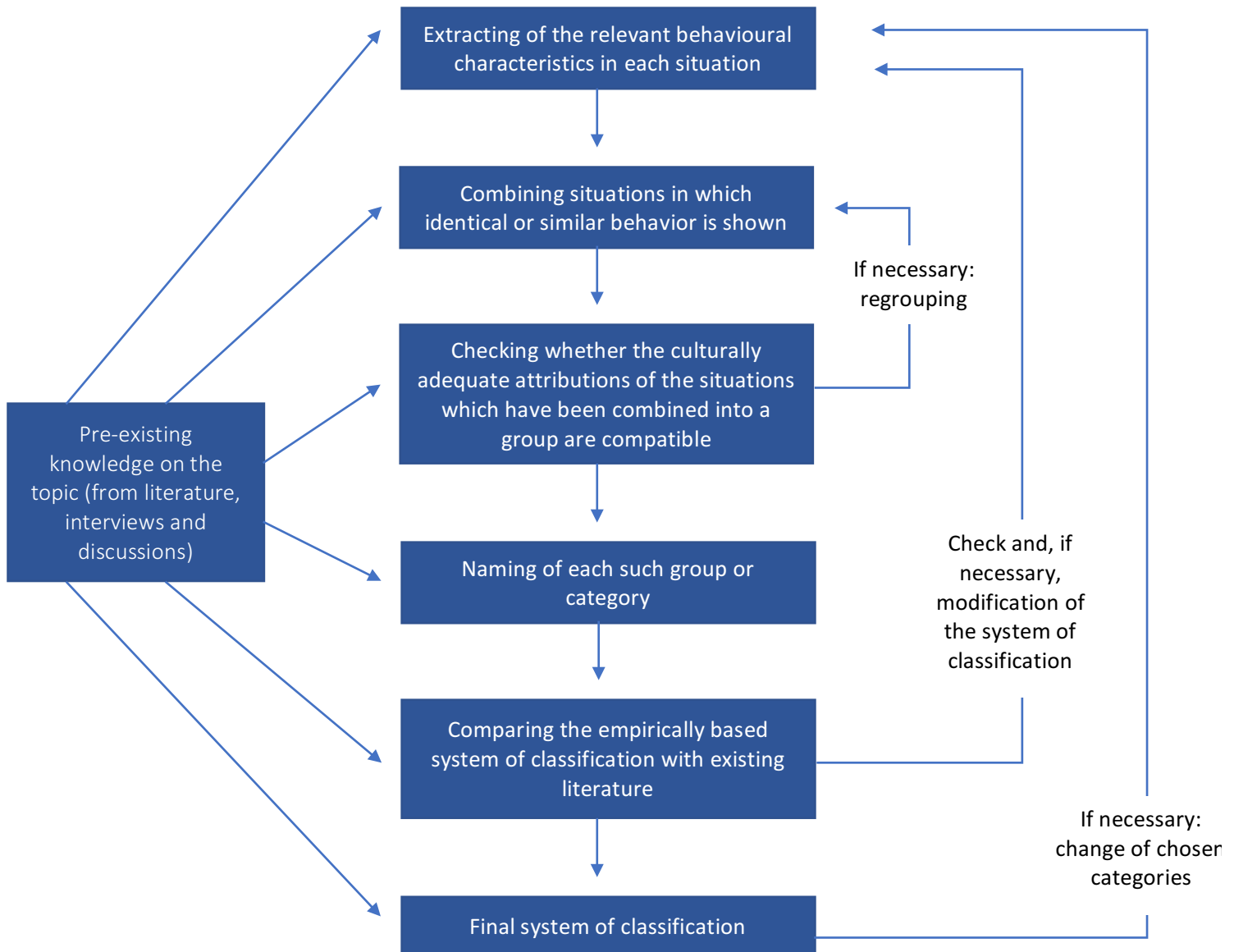
According to Schütze (1977), this qualitative interview strategy makes that the interviewee observes several chronological and structural factors (incidents) and

according to Witzel (1982) the transition between incident A and incident B has to be clear and obvious. During the narrative interview, Lamnek (1995) identified five steps outlined below (Brueck, 2002):

1. The Explanatory Stage: The main goal is to break the ice in order that the interviewee feels comfortable and not awkward with all the interview situation.
2. The Introductory Stage: As the name of the stage says, the objective is to introduce the purpose of the interview. In order not to influence the narration of the interviewee, it is better to say only the topic very vaguely.
3. The Narrative Stage: At this stage, it is the time for the narrator to speak. The interviewee or narrator is the one who chooses which incidents want to share with the interviewer. When the narration starts, the interviewee must not be interrupted until he declares the end of the story. The more the incidents were explained by the narrator, the better the results. At the same time the interviewer is taking notes and/or recording the interview.
4. The Investigative Stage: After the narration, the interviewer can ask to clarify any doubt that may have arisen by doing some questions again about that particular incident which was mentioned by the interviewee in the stage before. The main goal in this phase is the narrator to go even more into detail.
5. The Assessment Stage: At this stage it is not possible to go back to more incidents in the narrative stage. Before finishing the interview, both together interviewee and interviewer should interpret the stories told.

After the narrative interview, there are lots of short stories which have to be analyzed and, in this way, we enter in the second phase – **Inductive Categorization**. This phase requires a qualitative content analyses in order to come up with categories. According to Mayring (1999), there are three steps during the content analyses: summarizing, explication and structuring. *Summarizing* by reducing the most important content of the interview; *Explication* by using additional material to a better understanding and interpretation of the interview; and, *Structuring* by categories the characteristics that were found from during the interview (Fink, Kölling and Neyer, 2005). The analysis of the critical incidents and its classification in categories results in the basis of the cultural standards (preliminary cultural standards). The categorization is a complex procedure and it is important to go through a lot of sources – literature, interviews and discussion – where

the main ones are the interviewee's opinions. Alexander Thomas as well as Mayring shows the process of categorization to extract the cultural standards in the following diagram (see Figure 8):



*Figure 8: Process of categorization when extracting culture standards (Thomas, 2001).*

The third phase – **Group Discussion** – is to evaluate if these preliminary cultural standards from a certain country are indeed typical within its culture. This is tested with a test group in order to have their feedback to confirm the results. This process also helps to exclude any random incident that is inside any category since the objective of this phase is to demonstrate cultural standards and not personal experiences. After the group discussion, comes the last phase – **Evaluation of the Results** – where the cultural standards already identified are compared with the existing literature on cultural differences.

## 4. Cross-cultural Comparison

### 4.1 Historic Context

The cross cultural historic context can explain most of the values, beliefs, acts and behaviors of the citizens of each country nowadays. When comparing two different countries, it is important to understand their geographical location as well as their historical, political and economic background.

Portugal and Spain are located in the southwestern part of Europe and together form the Iberian Peninsula. Inside Spain, there are two small territories which are not part of the country: Gibraltar, which is British and is located in the south; and Andorra, which is a small European country located right between Spain and France. Spain has almost four times more land than Portugal and this comparison in the territory size can be seen also in the population dimension, where Portugal (10.833.816) has around 38 million habitants less than Spain (48.563.476) (indexmundi.com).

The name *Iberia* came from the Ancient Greeks due the Ebro river. The first habitants in the Iberian Peninsula were the Carthaginians and Lusitanians before the Romans' conquest, as well as the Visigoths' and the Moors'. During the Muslim invasion in the south of the Peninsula, the Moors brought with them a great knowledge in mathematics, in agriculture and the native people started speaking Latin and Arabic. Portugal and Spain have a common history until 1143 where Portugal got the independence from the Moors habitants in the Iberian Peninsula during the Christian reconquest (Villas, 2015). At that time, the Peninsula had many small states including Kingdom of Castile, Crown of Aragon, Kingdom of Navarre, Kingdom of Leon and the Kingdom of Portugal. The Kingdom of Castile and the Crown of Aragon were the strongest states and they joined in only one kingdom in order to expel the Moors from the Iberian Peninsula. As a result of the expulsion and the unification from the two crowns, the Kingdom of Spain was born

in 1492. Meanwhile, other kingdoms had been united to the Kingdom of Castile and, as a consequence of it, there were only two kingdoms: The Kingdom of Portugal and the Kingdom of Spain.

There were some conflicts between these two countries, and there are some differences as well as similarities. However, there is one thing that categorizes both countries in their history and has a strong influence nowadays it is the Portuguese and the Spanish maritime expansion.

#### **4.1.1 Portugal**

Portugal is a republic – its long form name is *Portuguese Republic* – and occupies the western part of the Iberian Peninsula and the two archipelago islands located in the Atlantic Ocean: Madeira and Azores. Portugal is formed by 18 districts and the official language is the Portuguese which is spoken in the entire country except for the Mirandese which is locally used. The Portuguese population is concentrated along the Atlantic coast: primarily in Lisbon, which is the capital located nearly in the center of the country; and in Porto, which is the second largest city located in the north (indexmundi.com).

The Roman invasion left strong signals concerning the law, the language and the religion. Portugal established its borders in 1297. During the *Age of Discovery* (Arnold, 2002), the Kingdom of Portugal expanded its territory between the XV and XVI centuries with the maritime expansion, establishing the first global empire of the history with colonies in Africa, South America and Asia which brought new species and new receipts to the Portuguese gastronomy.

One of the legendary explorer was Vasco da Gama who was the first European to reach India by sea, and Pedro Álvares Cabral who was a Portuguese navigator regarded as the discoverer of Brazil. In all those places, the Portuguese language was implemented and nowadays most of them have the Portuguese language as the official one, like Brazil and Mozambique. Other territories where we still can find people who speaks Portuguese is Goa in India and Macau in China.



The earthquake in Lisbon in 1755 destroyed almost all the city and the invasions from Spain and France during the Napoleonic Wars resulted in a political and economic instability. Portugal lost its wealth and status with all those happenings stated before but also with the independence of Brazil in 1822, its wealthiest colony. A revolution in 1910 removed the monarchy giving place to the first republic, but the country at that time was full of social conflicts and corruption and this first republic was not strong enough to solve those problems. In 1926 a *coup d'état* gave place to the dictatorship having António de Oliveira Salazar as dictator of Portugal from 1932 to 1968. During that time, the Portuguese Colonial War (1961-1974) took place where the African colonies were against Portugal and fighting for their independence. In 1974 there was a military revolution which took down the government and one year later Portugal granted independence to all of its African colonies. The end of the Portuguese empire was in 1999 when Macau officially has passed to China.

In 1986, Portugal enters in the European Union but only had the official *euro* as currency by the beginning of 2002. Until then, the historical currency was the *escudo* (which means *shield*) that was used both in Portugal and in its colonies in South America, Asia and Africa.

#### **4.1.2 Spain**

Spain is a monarchy – its long form name is *Kingdom of Spain* – and occupies the rest of the Peninsula, Ceuta and Melilla which are two territories situated in the north of Morocco and two archipelago islands: Canarias, which is located in the Atlantic Ocean; and Baleares which is located in the Mediterranean Sea. Spain is formed by 17 autonomous communities, which is a first-level political and administrative division with the aim of guaranteeing limited autonomy of the regions of Spain. There are four official languages in Spain: the Castilian Spanish which is the first official language and known by everyone all around the world; the Catalan which is mostly spoken in the autonomous community of Catalonia; the Galician which is spoken in the autonomous community of Galicia and is very similar to the Portuguese language; and the Basque, which is used in the autonomous community of Basque Country. With exception of Madrid and Seville, the Spanish population is concentrated along the Mediterranean and the Atlantic coasts. The most important cities in Spain are Madrid, which is the capital and located straight in the

center of the country; Barcelona (capital of the autonomous community of Catalonia), which is the second largest city located in the north; and Seville (capital of the autonomous community of Andalusia), which is the third largest city located in the south with a great Moorish influence (indexmundi.com).

The base of the laws, language and religion is very common between both Portugal and Spain due to the strong signals left by the Roman Invasion. After the expulsion of the Moors from the Iberian Peninsula, Spain had its *Age of Discovery* which helped the country at all levels, including economic, social and political. Still with the Kingdom of Castile leading the country, they started to finance maritime expansions in order to rivaling power with Portugal. In 1492, Christopher Columbus wanted also to find out India as Portugal had done before across the Atlantic Ocean, but what he really discovered was America and Spain immediately forced the colonization of the American Continent. At that time, the *Spanish Empire* started and it took place between the XVI and the XX century. Spain had has most of its colonies in South America, Central America and part of North America, as well as a number of Pacific Ocean archipelagos including the Philippines among others. From the American continent, Spain seized all the gold and silver (Arnold, 2002).

The subsequent failure to embrace the mercantile and industrial revolutions led Spain to start falling behind Britain, France and Germany concerning economic and political power. Furthermore, the colonies started their independence against Spain one by one. In 1873, there was the first republic due to the abdication from the King. This first republic lasted 11 months and saw four different presidents. The monarchy came again with the Bourbon Restoration but in 1931 came another abdication from the king what gave the second republic. During both World War I and II, Spain remained neutral but the country suffered through a devastating Civil War during the second republic. The Civil War started in 1936 with a *coup d'etat* from Francisco Franco and finished in 1939 when Franco, in the same year, started his dictatorship in Spain and it just finished with his death in 1975. After this, the monarchy was implemented again with the King Juan Carlos, which was a peaceful transition to democracy (Preston, 2006). The end of the Spanish empire was in 1898 with the loss of its las colonies: Cuba, Philippines, Puerto Rico, some archipelagos in the Pacific and small territories in the African coast.

As well as Portugal, Spain joined the European Union in 1986 which gave the country a dynamic and rapid economic modernization and made it global champion of freedom and human rights. Also, Spain started using the official *euro* as currency by the beginning of 2002 but, until then, the historical currency was the *peseta*. Spain is the Eurozone's fourth largest economy.

## 4.2 Hofstede's Cultural Dimensions Comparison

I decided to use Hofstede's scores to compare the cultural dimensions between Portugal and Spain (geert-hofstede.com). As it was stated before, one of the critics to Hofstede's research is that the results of the study are very similar between the two cultures which are very close, as we may see in the following graphic (see Figure 9). By using Hofstede's cultural dimensions to check the cultural differences between Portugal and Spain, we deducted that both countries have the same culture, which is wrong. There is an explanation about the scores to comment the results about both cultures but, later on, these results will be compared with the results from the current cultural standards method research.

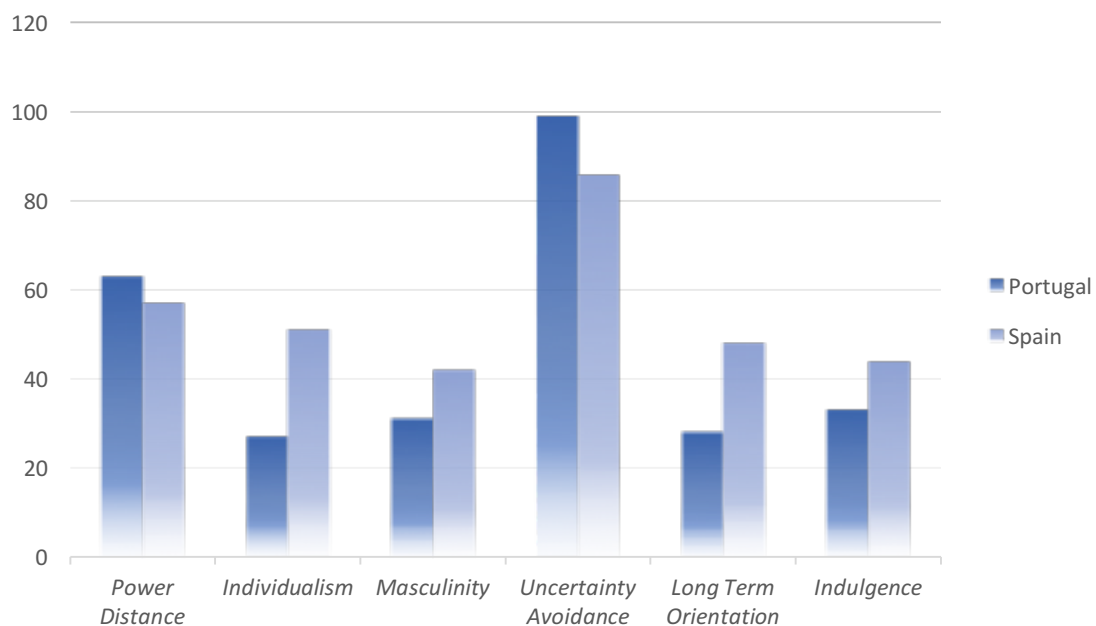


Figure 9: Hofstede's cultural dimensions scores for Portugal and Spain (geert-hofstede.com).

*Power Distance* sets a similar score between Portugal (63) and Spain (57). This reflects that both Portugal and Spain have higher hierarchical distance and this is accepted by everyone as well as the most powerful positions are admitted having privileges with their working roles. This large power distance in Portugal and Spain can be seen in different environments: in the family, school, work place or even in the political context. Parents teach children with more obedience, students treat teachers with more respect, the hierarchy in organizations reflects the existential inequality between higher-ups and lower-downs, the centralization of power is popular, there is a wide salary range between member of the organization, and the subordinates who expect to be told what to do. Furthermore, in both societies the middle class is smaller and powerful people try to look as impressive as possible.

Spain has a higher score in the *Individualism* dimension than Portugal (27 and 51 respectively), this means that Spain is an Individualistic country in comparison with Portugal which is Collectivistic. Spain for the rest of the European countries is known as a collectivist country. Portuguese society gave birth to extended families or other ingroups which continue to protect them in exchange of loyalty and their identity is based in the social network to which one belongs. Also, regarding education, diplomas provide an entry to higher status groups in Portugal, comparing with Spain where the diplomas increase the self-respect. Another aspect of the dimension Individualism versus Collectivism occurring between Portuguese and Spanish relates to the concern of the communication: Portugal being collectivistic has a higher-context communication and Spain being individualistic has a lower-context communication.

In the *Masculinity* dimension, Spain scores 42 and Portugal scores 31. Both scores are too similar and very low, which means that both cultures are comprised in the femininity society, even though Portugal is more feminine than Spain. Both countries focus on “working in order to live” and there are incentives such as free time and flexibility. Masculine societies are known for being competitive but Spain has a middle score in this dimension, which means that an excessive competitiveness is not well appreciated.

There is a dimension which defines Portugal and Spain very well, it is the *Uncertainty Avoidance* (because of its score in their dimensions: 99 and 86 respectively). Both countries have high Uncertainty Avoidance but Portugal’s is higher than Spain’s. In both

cultures there is an emotional need for rules. Portuguese have an internal need to be busy and work hard, punctuality is the norm and security is an important element in individual motivation. Spain is considered the second noisiest country in the world, confrontation is avoided because it causes stress and scales up to the personal level very quickly.

*Long Term Orientation* sets exactly a difference of twenty points between Spain and Portugal (48 and 28 respectively). Both cultures are short term orientation society, even though Spain shows a higher tendency to long-term orientation. This means that Portugal prefers normative thought over pragmatic what makes Portuguese be normative in their thinking. They exhibit a big respect for traditions and focus on reaching fast results. Spain is, as well as Portugal, a normative country. Spaniards were the ones who gave the meaning to the world of “*fiesta*”, they like to live the moment without a big anxiety about the future. Moreover, Spaniards like clear structures and well-defined rules, particularly in the long-term time.

The sixth dimension – *Indulgence* – brings to Portugal and Spain a similar score (33 and 44 respectively). Those scores are relatively low and proves that both Spain and Portugal are not an indulgent society. Both have a culture of restraint, with tendency to cynicism and pessimism. According to Hofstede, Portuguese and Spanish people give lower importance to leisure time and control the gratification of their desires.

## 5. Results of the Research

### 5.1 Cultural Standards Method

In order to know the Portuguese cultural standards from the Spanish perspective, the best methodology for this research was by using the Cultural Standards Method. The entire research process was divided into steps: Firstly, choosing the sample of interviewees and carrying out the narrative interview with each one in order to identify the critical incidents. After the narrative interview was done, the interpretation of the results from the interviews took place by uploading the data in a field. The categorization of the common results is the next step, where I came up with the preliminary Cultural Standards. Before finalizing and completing the Portuguese Cultural Standards from the Spanish perspective, I asked about the feedback to the same sample participants in order to test the results.

#### 5.1.1 Participants' Demographic Data

In order to choose the sample for this research I had to take into account some important requirements. As the current investigation is to identify the Portuguese Cultural Standards from the Spanish perspective, the whole sample had to be originally from Spain (born and raised in Spain) and have a considerable working and living experience in Portugal for at least 1 year.

The selection of the interviewees was completely random and found with the help of personal *networking* – friends and work colleagues – and also by interviewees' *networking* as well who provided me new contacts. Although my sample was with random interviewees, I wanted to approach the same number of males and females as well as approach almost every age group (see Figure 10). The sample is constituted by 30

interviewees where 15 are male and 15 are female. The biggest part of the sample (47%) is between 30 and 39 years old, then the same quantity of the sample (23%) is between 20 and 29 years old as well as between 40 and 49 years old. The smallest age group (7%) is the one which is between 50 and 59 years old. On balance, the average age is 35 years old.

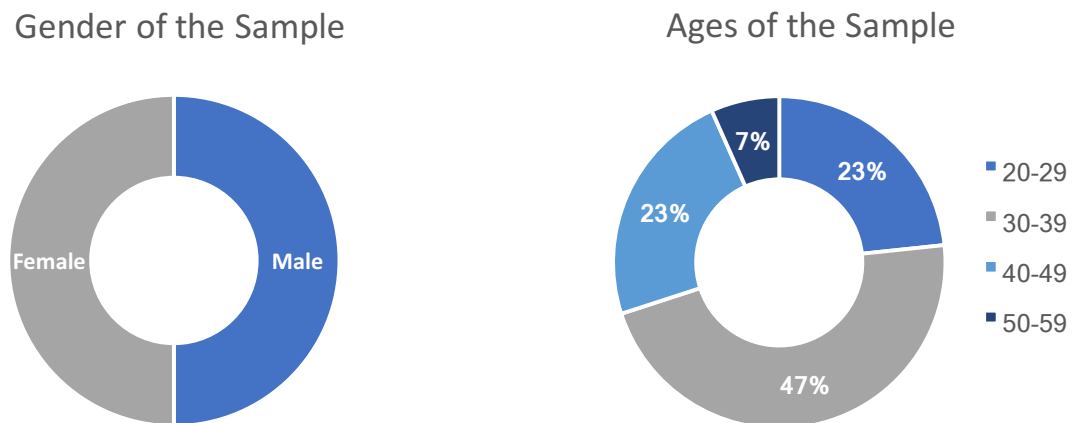
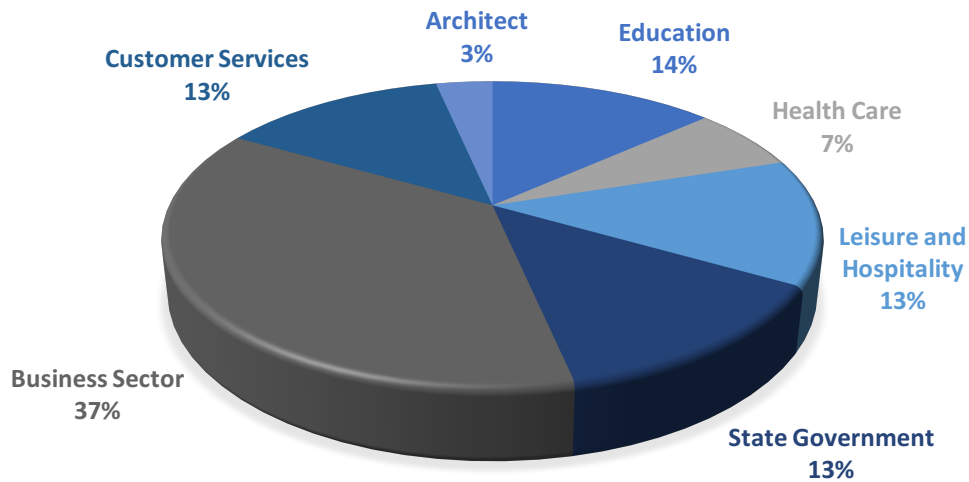


Figure 10: Ring-chart of the sample's gender and ages.

I wanted also that the sample approached all types of working sectors where the Spanish sample had an experience working side by side with Portuguese. I tried that the interviewees represent experience from different industries (see Figure 11):

The biggest percentage of the sample is in the *Business Sector* (37%) where I interviewed managers, consultants, administrative and accountants from several different companies like *PUIG*, *El Corte Inglés*, *Accenture* and *Idearis*. In the *Education* sector (14%) the interviewees are Teachers of Spanish, Portuguese and English as well as of Physical Education subject. *Customer Services* sector (13%) has interviewees who work with Spanish and Portuguese clients from companies like *HP* (Hewlett-Packard Company) or *Xerox*. The sector of *State Government* (13%) are the interviewees who work for Spain but in Portugal like workers from the Spanish Embassy or from the Spanish Ministry of Education. *Leisure and Hospitality* sector (13%) has interviewees working in Restaurants, as Travel Agents or as Real Estate of holidays' house renting like *Uniplaces* or *Airbnb*. The sector of *Health Care* (7%) englobes the interviewees who worked in a dentist clinic

and hospitals. Architects are the smallest sector of my interviewees (3%) where I have just had the opportunity of interviewing one person.



*Figure 11: Pie-chart of the sample's working sector.*

The sample participants which was chosen by me not only has the requirement of gender, age and different industries sectors but also the requirement of the place where each one was born and raised inside of Spain. As stated before, Spain has almost four times more land than Portugal and Spain, even being just one country, there are great differences between the autonomous communities from the North in comparison to the South. All those differences are regarding the gastronomy, the working time, the habits of life and so on. It is important to mention that the interviewees were not only from one particular place of Spain: A Sevillian person from the south of Spain has completely different acts, thoughts and behaviors from another person from the north, like a Galician for instance.

I clustered my interviewees in three and I wanted to have people from the North, from the Center and from the South of Spain. I also interviewed a person from Ceuta, which is a Spanish territory located in Morocco (see Figure 12).





Figure 12: Map of Spain where the interviewees are originally from.

Most of the Spanish interviewees moved out of their country because its original company in Spain shifted them to its branches in Portugal, other interviewees moved looking for a new job and the last ones came for personal reasons. In the following table (see Figure 13) there is a general overview with the demographic information of each participant. The name and the company's names are not published due to the anonymity. A small description of each participant can be found in the Appendix (see Appendix 4).

Nr.	Participant	Gender	Age	Time in Portugal	Place in Spain	Speaks Portuguese	Type of Work Sector
1	A	female	36	3 years	Catalonia	Yes	Customer Service
2	B	female	39	4 years	Madrid	Yes	Business Sector
3	C	female	37	1 year	Castile-La Mancha	Yes	Customer Service

Nr.	Participant	Gender	Age	Time in Portugal	Place in Spain	Speaks Portuguese	Type of Work Sector
4	<b>D</b>	female	46	18 years	Galicia	Yes	State Government
5	<b>E</b>	male	24	2 years	Catalonia	No	Leisure & Hospitality
6	<b>F</b>	male	33	1,5 years	Extremadura	Yes	Business Sector
7	<b>G</b>	male	30	1,2 years	Andalusia	Yes	Business Sector
8	<b>H</b>	female	27	2 years	Asturias	Yes	Education
9	<b>I</b>	male	29	1 year	Ceuta	Yes	Business Sector
10	<b>J</b>	male	30	4 years	Andalusia	Yes	Costumer Service
11	<b>K</b>	male	33	5 years	Extremadura	Yes	Education
12	<b>L</b>	female	34	1,9 years	Castile-La Mancha	No	Costumer Service
13	<b>M</b>	female	43	1 year	Extremadura	No	Health Care
14	<b>N</b>	female	30	2,5 years	Extremadura	Yes	Business Sector
15	<b>O</b>	male	22	2,3 years	Andalusia	Yes	Leisure & Hospitality
16	<b>P</b>	female	57	34 years	Basque Country	Yes	State Government
17	<b>Q</b>	male	42	1 year	Galicia	Yes	Business Sector
18	<b>R</b>	female	34	10 years	Castile-Leon	Yes	Leisure & Hospitality
19	<b>S</b>	male	41	18 years	Asturias	Yes	Business Sector
20	<b>T</b>	female	26	1,3 years	Andalusia	Yes	Business Sector
21	<b>U</b>	Male	47	8 years	Madrid	Yes	Business Sector
22	<b>V</b>	female	56	8 years	Catalonia	Yes	State Government
23	<b>W</b>	male	43	1 year	La Rioja	Yes	Education
24	<b>X</b>	female	45	22 years	Galicia	Yes	Business Sector
25	<b>Y</b>	female	31	2 years	Galicia	Yes	Leisure & Hospitality
26	<b>Z</b>	male	31	4 years	Cantabria	Yes	Education
27	<b>AA</b>	female	23	2 years	Basque Country	Yes	Architect
28	<b>AB</b>	male	39	17 years	Andalusia	Yes	Health Care
29	<b>AC</b>	male	25	1 year	Galicia	Yes	Business Sector
30	<b>AD</b>	male	33	2,5 years	Madrid	Yes	Business Sector

Figure 13: General overview of the sample group of Spanish interviewees.

### **5.1.2 Interviews' Process**

I used as methodology for this research the narrative interview, which implied meeting all the participants in person. The average time of each interview was between 30-55 minutes, through which I took additional notes and used a voice recorder in order to listen to each interview whenever I needed.

Each interviewee was contacted by text message through which I sent an introductory explanation with the essence of the interview. I contacted more than 45 Spanish people living in Portugal but, by the time issue, I decided only to interview 30 of them. When starting the interview, I always thought it was important to refer initially two things: the first was that even though I was recording the interview, this would be completely anonymous; and the second was that there were not correct or wrong answers. I realized that when I told them these two things, the participants were less nervous and more encouraged to speak.

I told them then that this interview was not the typical traditional one of question-answer and question-answer. I only did one first question in order to start with the interview which was to make them think about their experience and critical incidents in encounter with the Portuguese Culture. I avoided asking questions about a particular Portuguese cultural topic because this could influence the answers. Nevertheless, some participants needed more guidance to start speaking so I did some general assisting questions in order to encourage them to speak. Before I officially finished the interview, I did one question in order to know how each participant had seen Portugal by asking a synonym of Portugal only in one word – the answers were very interesting.

After each interview, the data was uploaded in a field where I had a whole picture with the general answers from all the participants. The common critical incidents gave me the preliminary Portuguese Cultural Standards which I had to test in order to know if they were correct or not. The way I tested the results was by comparing with the theoretical cultural dimensions, with the history background and with the feedback from the other Spanish people who are currently working in Portugal as well.

## **5.2 Portuguese Cultural Standards**

After the categorization of the results, the Portuguese cultural standards from the Spanish perspective were found. It is important to bear in mind that the cultural differences are not positive or negative regarding another culture, they are only neutral by nature. Most of the interviewees enjoy their life in Portugal and for them, the three most attractive features of the country are the good weather, the delicious food and the nice quality of life.

More than half of them stated that the wages in Portugal are too low having in mind that it is a European capital and there is a high discrepancy between the salaries and the rent of the houses. Furthermore, most of them realized that there are two kinds of Portuguese people: the ones who really like the Spanish culture and are very opened, trying to know more about Spain; and the ones on the contrary, who have a very traditional mindset and somehow have a complex that Spain is better than Portugal and do not try to have communications with Spaniards. Some of the participants, once in a while, felt discrimination for being Spanish.

After carrying out the narrative interviews with 30 Spanish people who are living and working in Portugal, I identified four Cultural Standards that any Spanish may recognize when working with the Portuguese context (see Figure 14):

Portuguese Cultural Standards from the Spanish Perspective
1. <i>Interpersonal Relationship</i>
2. <i>Hierarchy Orientation</i>
3. <i>Family Orientation and Closed Groups</i>
4. <i>Relaxed Society</i>

*Figure 14: Results of the investigation: Portuguese cultural standards from the spanish perspective.*

### **5.2.1 Interpersonal Relationship**

One of the strongest Portuguese cultural standards is the relationship between people regarding the way you treat each other. Portuguese people are known for being formal and polite and they expect that others behave in that way as well. According to the words from Participant U, *“Portuguese people, in comparison with Spanish people, tend to be extremely formal and hyper polite! If you are not being polite in the way they think you should be, you can easily be seen as rude.”*

Portuguese people like to follow somehow a formal protocol lifestyle. They speak very quietly and are more discreet, unlikely Spaniards, who speak very loudly and have expressive gestures while talking. Participant B remembers that when she used to go to dinner at her Portuguese friend’s house, everything was too formal, since the greetings until the tableware. In Madrid, when she was invited to dinner, she used to bring with her a bottle of wine or even nothing sometimes. In Portugal people are used to bring wine, flowers and some small cakes. She noticed the protocol in Portugal was higher than in Spain.

Also, the interviewees affirmed that the formality and politeness can be seen in the hospitality services as well. In Spain, the treatment service between the waiter and the client in the hospitality sector is very fast and informal, which results sometimes in an aggressive and rude communication. The Participant B believes that Spain is losing the formality regarding the treatment between people and agrees that it is better to live in a formal society with more respect for each other than the opposite way.

Regarding formality, almost all the participants realized that the interpersonal relationship in Portugal is extremely formal (see Figure 15). In Portugal and Spain there are two types of treating people: when talking with someone by using the word “you”, this can be used in a formal or informal way. The highest difference between both cultures is while in Spain there is an informal interpersonal relationship, in Portugal this relationship is enormously formal. From the 30 participants, 28 (93%) realized this incident was the most different one between both countries.

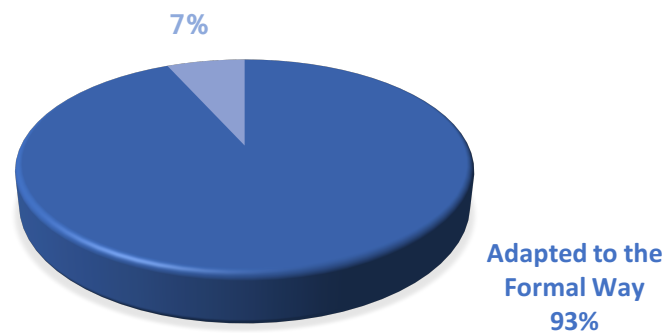


Figure 15: Pie-chart showing the proportion of interviewees who adapted their communication.

Spaniards communicate in an informal way all the time – with their family, friends, work colleagues, between teacher and student, even with people when meeting for the first time. When moved to Portugal, they had to adapt to the way they communicate with other people. In Portugal, talking with someone that we have never met before or even talk inside of the working place in an informal way is seen as very impolite and disrespectful manner. Participant AA had a big shock when she noticed this difference while she was studying in Lisbon: *“In my first day of classes, I didn’t speak Portuguese yet and I didn’t understand anything of the whole class. When the class finished, I approached the teacher talking with him in an informal way and naming him by his name – “Pedro” – as I used to do in Spain. Only one week after that, I realized this cultural difference and I got very shy thinking on what the teacher was thinking about me because I talked with him as I was talking with my parents! Then I knew that you should never name the teacher by his name but by “Professor” and always in a formal way!”*.

In Portugal, the informal communication is only with the closest friends and family in general. Sometimes, in the conservative families, there is still a formal relationship inside the family members. From the 28 interviewees who noticed this cultural difference, 8 realized this inside the family between the kids and their parents or the parents and their kids. One example of this was stated by the Participant B as soon as she arrived to Portugal: *“When I arrived, the feeling I had was that everything was too formal and there were differences regarding the way of treatment between friends or how the kids treat their mothers. I had never seen in any other country a kid talking with his/her mother in a formal way and with a lot of respect as I have seen in Portugal.”*

Formal communication in Portugal is at all levels, even the way people are polite talking by phone or writing an e-mail. The protocol regarding the use of greetings and the way everything is written is very important in the Portuguese culture. While in Spain the communication is straight to the point, in Portugal the whole conversation, both written or spoken, is very formal and polite. Participant D stated that *“sometimes, the politeness gets to the point of being boring. At work, you lose productivity because you spend a lot of time writing an e-mail by choosing the best words!”*.

Portuguese people are friendly and kind but this formality issue results in a distant relationship at the same time. Participant B stated that *“I consider myself as a formal person but in Portugal I realized that I was never formally enough. I have noticed that sometimes I gave closeness too soon and Portuguese people need more time to show how they really are.”*

### **5.2.2 Hierarchy Orientation**

The second Portuguese cultural standard for Spanish people is the hierarchical orientation which is more related with the organizational structure context within the companies. As it was seen in the first cultural standard, the formality is something very present in the Portuguese society's mindset. Formality not only as a cultural characteristic in the interpersonal relationships but also in the organizational culture.

While in Portugal, the internal environment inside the company is very formal due to the influence of the position roles, in Spain the environment is more relaxed. Participant R stated that *“the hierarchy inside the companies is very different: in Portugal, the boss is the boss and that will never change, there is the mentality that your boss is your superior. In Spain, you have a better open relationship with your boss.”*

In Spain, there are as well a hierarchical chain inside the companies but in Portugal the chain of command is longer and there are more management layers. Participant Q refers that in Portugal it is very hard to climb for a better position role, unlikely Spain or United Kingdom where the companies tend to have a flat structure and it is easier to communicate and relate with people from higher responsible level.

A certain *masculinism hierarchy* within the organizations should be referred regarding the role of a man against the role of a woman inside of a company. Eight participants have noticed that there are many more male manager positions than female ones. Furthermore, the wage variance between men and women is still very high. In Spain those two differences are not that visible as in Portugal.

This standard could be described in two different perspectives: 1) status-based society and importance of titles; and, 2) social stratification.

### **Status-based Society and Importance of Titles**

In the hierarchical and organizational structure, Portuguese people give a high importance to the positions, but also to the academic titles. Most of the interviewees referred that the use of their academic titles is to show off their level in the society and, of course, their position inside the company.

While in Spain you can call your work colleagues and even your managers freely by their first names and sometimes by their short-form name, in Portugal the usual habit is to call by their surname or by their title first followed by the surname. The Participant R referred that that was one of her first cultural incidents: *“In Portugal, I have to talk with my work colleagues by naming their titles: if he/she is a doctor by “doctor”, if he/she is an engineer by “engineer”, and so on. For me, that was one of the biggest shocks and the one which cost me more to learn and adapt!”*. If someone does not know the title of other person the common practice is to call him or her by “*senhor*” (sir) or by “*senhora*” (madam).

Participant A has noticed that *“everyone is “Doctor” in Portugal, from a teacher to a real medicine doctor”*. The reason why is that as soon as somebody finishes the bachelor degree, he/she automatically has the title of “*Doutor*” (doctor) and his/her name will appear followed by the abbreviation “*Dr.*” or “*Dra.*”. The use of the title is applied everywhere – phone calls, written e-mails, credit card, letters and so on. Most of the interviewees were shocked about this Portuguese cultural standard and 77% of the participants (23 of 30) had to adapt to it inside of the company (see Figure 16).



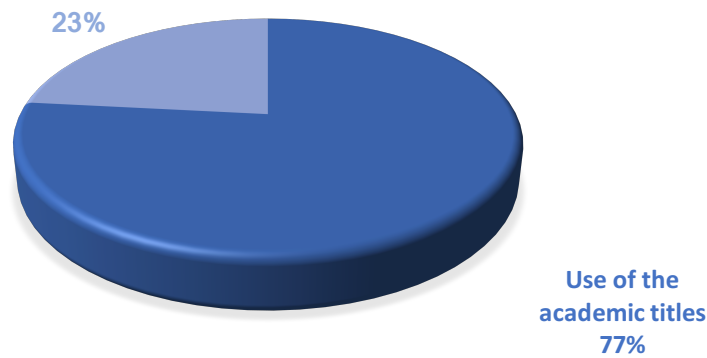


Figure 16: Pie-chart showing the proportion of interviewees use now the academic titles.

In Portugal, the use of academic titles gives a status and automatically a new position inside of the society and therefore a high difference inside of the social classes, which was seen as a big chock by the participants' experience.

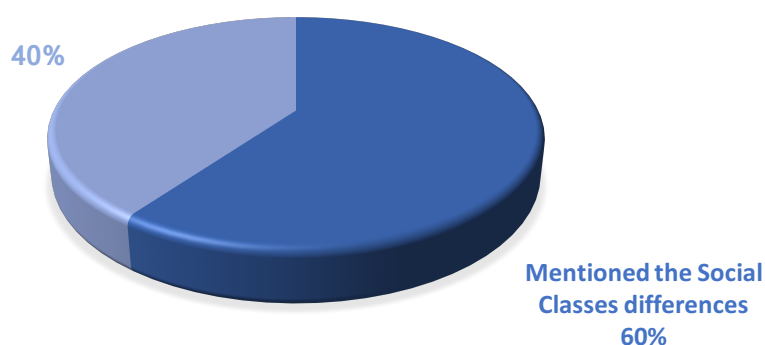
### Social Stratification

More than half of the participants stated that the social classes are too divided due to the difference of wages and the appearance and the show off is very noticeable in Portugal, more than in Spain. Participant T said that *"the social classes are very distinguished and it doesn't exist a proper medium social class. I know what I'm saying is too aggressive but just for you to have an idea: in Portugal, there are very rich and very poor Portuguese"*.

Participant P noticed that some families like to show in public that they belong to a higher social class: *"Portuguese society has a great difference regarding status social class: the formal way that some parents speak with their kids and the kids to their parents, the way some people greet only with one kiss instead of two, the way a person is treated if he/she has a bachelor or not, and so on."* Participant B remembers some conversations when she was invited to some dinners where Portuguese people were showing their status by the place they live, the school their kids go or even what their kids were studying in the university. High social class like to show off their level and sometimes medium and low social class show off as well in order to pretend that they belong to a certain social class.

Most of the interviewees referred that they have never seen so many luxury brand cars in Spain as they saw in Portugal. Participant L does not understand, for instance, how can it be possible for Portuguese people to have money to buy luxurious cars and have some luxurious habits when the Portuguese average salary is one of the lowest in Europe. Participant H indicated that one of his colleagues has a luxurious brand car but does not have money for the oil, so he uses public transports all the time but he has that car for a certain kind of party or event. Participant B also referred that she was surprised while listening a conversation at the hairdressing between the hairdresser and her made: *“I don’t understand how a hairdresser has got a made...! In Spain, a person who has got a made is someone from the high or medium-high social class, not low or medium-low social class like it happens in Portugal. I was surprised from the economic perspective because the salaries are not even that high. I still don’t understand if this is to show off, if it is a habit or if it is something cultural.”*

Participant E was shocked when he arrived to Lisbon and wanted to go to a particular beach. His friends told him that that beach was not good enough to go due to the fact of being a low social class beach. This beach situation is similar to others like shopping centers, restaurants and even places inside of the capital of Portugal. As we can see in the Figure 17, from the 30 participants, 18 (60%) referred that the social classes are very divided in Portugal and it is related with the status, appearance and wages.



*Figure 17: Pie-chart showing the proportion of interviewees who mentioned the social classes differences.*

What we can conclude with this cultural standard is that Spaniards are more relaxed in their communication manners and how to name people. Also, the titles are not that important for the status and for the social classes. After this interpretation, we can see that

Spaniards are more low profile than Portuguese people and the communication and the way of treating is almost standard to any one, not depending on the social class someone belongs to. Most of the times that does not happen in Portugal.

### **5.2.3 Family Orientation and Closed Groups**

When analyzing the data, another important cultural standard found was how Portuguese are socially closed among them. Portuguese society generally, from the Spanish perspective, are inside of closed groups which are very hard to enter. Participant I stated that he does not think Portuguese people are socially closed, he thinks they are only closed to their own friendship groups, unlikely Spaniards, who are more opened to meet new people.

Most of the interviewees were shocked about the fact that the Portuguese people do not like to socialize after work in a pub or any other place. They go straight to their homes what makes their relationships with work colleagues to be established only in the work place. Participant I remembered his first week of work in a Portuguese company: *“in the company everybody spoke with me and asked me how my experience in Portugal had been so far....! The teamwork is good, but I miss a lot the thing of going to have a drink after work with my colleagues!”*

All of them realized that there is a good organizational teamwork and this kind of relationship inside the company is a cultural habit and not a discrimination issue due to the fact of being foreigners. Participant R stated: *“I’ve worked in other companies and it has always happened the same: Portuguese people are very polite, friendly and kind. As work colleagues, they like to help you but the relationship does not go beyond that point.”* While in Spain it is easy to make friends, in Portugal it takes time to have a relationship outside work. Participant A affirms that until now she has just had Spanish friends because it was almost impossible to create a friendship with a Portuguese person: *“My Portuguese friends are quite recently made, after almost three years of living in Portugal! Last month, a group of Portuguese people who work with me asked me if I wanted to go*

*with them for a drink. I'm shocked the time you need to build a relationship only to have a drink!"*

The communication and the relationships are so formal that it is hard to create a network and enter in the circles. Some participants referred that you need to have a common friend of a particular group in order to enter, otherwise it is almost impossible of being accepted. In Portugal, it is important to have social networks and strong connections in order to achieve something – find a job, do business, look for a house, among other things. It is important to say that establishing a relationship outside work is hard, but once you manage it, it is possible to have a strong friendship that will help you to arrange things more easily. From the 30 interviewees, 18 (60%) referred that Portuguese people are very socially closed (see Figure 18):

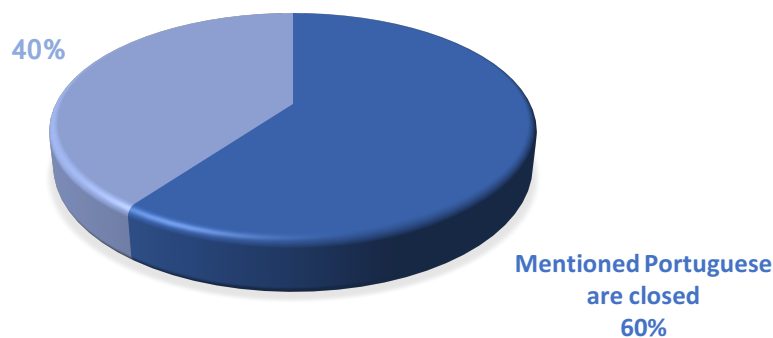


Figure 18: Pie-chart showing the proportion of interviewees mentioning Portuguese are closed.

Inside of the work place, Portuguese people help a lot and there is teamwork, but outside the work place, the reason why there are not more relationships between work colleagues is because they are focused on the relationship with their families and closest friends. Participant R affirms that *“Portuguese people don’t like to go out for a drink with their colleagues after work because they prefer to go to their houses to stay with their family. I have noticed their mindset is only work-house-family, that’s it!”*. Then she added: *“what shocks me mainly is regarding young people, who only are interested in meeting their families or old friends, even on the weekends! They don’t even try to connect with other young work colleagues.”*

From the Spanish interviewees, 40% realized that the Portuguese like to spend most of their time at home close to their family. While in Spain, during weekdays or weekends, people enjoy more the night life and the restaurants, pubs and coffee shops are full of people speaking very loudly. On the other hand, in Portugal the streets start being empty at a certain time and everybody goes home. Portuguese people like to spend their time in family and they are not used to other kind of events because they have their partner and/or kids waiting for them at home. During the weekend, close family events are created. It is very common to find families in the shopping centers, at the restaurants, supermarkets, cinema and so on.

Spaniards are family oriented as well, but Portuguese people are more. They spend a lot of time with their family and have close relations with the extended family generation – aunts, uncles and cousins. Once per week or per two weeks, Portuguese people usually spend one day with the whole family and create “family lunches” or “family dinners” where the whole family is invited.

Most of the participants realized that Portuguese people are very oriented to create a family since they are very young. Being something traditional or not, a lot of Portuguese people start thinking about marriage and having kids quite early in their lives. Participant A has met some Portuguese people who are more than 30 years old and who are divorced or divorced with kids: *“most of them had a relationship which started when they were very young and that finished for some reason but now they have kids and they are very present in their life anyway.”*

Participant I is still shocked about the tradition of creating a family when people are still very young: *“some of the university class-mates of my girlfriend, as soon as they finished their degree, they were asked to marry and on the following day they started planning the wedding!”*

Spaniards see Portuguese people much more closed to create new friends. While in Spain, in the workplace, Spaniards are used to continue the relationship with their colleagues after work in a pub. In Portugal that is something that will never happen. Portuguese people go home after work because they have a family oriented vision, which results in a hard relationship outside work among Portuguese colleagues.

#### 5.2.4 Relaxed Society

The fourth and the last Portuguese cultural standard from the Spanish perspective is regarding the relaxed behavior about work and the relaxed time management while working. Portuguese like to concentrate in doing things slowly, unlike the Spanish, who have another rhythm while doing their things. This standard could be described in two different perspectives: 1) relaxed working; and, 2) slow services.

##### Relaxed Working

One of the things that shocked Spaniards was the flexibility of Portuguese people inside their working place. Participant R was one of the participants affirming that during the interviewee: *“they are so relaxed that this can be seen in the time management regarding time to arrive at work, time to leave and the number of breaks during their work.”* From the 30 interviewees, 17 (57%) emphasized that Portuguese people are relaxed workers (see Figure 19), in the way they are not that hard-workers as Spaniards are and that they use inefficient ways of working. Furthermore, the time schedules are very stress-free and not controlled.

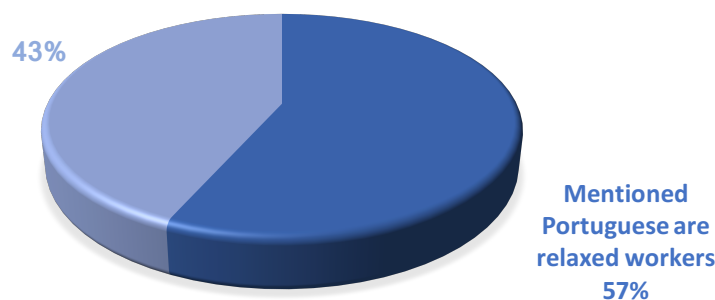


Figure 19: Pie-chart showing the proportion of interviewees emphasizing Portuguese are relaxed workers.

The “time concept” in Portugal is not present in the society’s mindset. Participant P referred that *“Spaniards are not well-known worldwide for being punctual, but Portuguese people are worse than us!”*. Interviewees say that the time management is super flexible in the workplace regarding punctuality and the quantity of breaks you can

take during the working time. Portuguese people were seen to stay long hours in the office, but at the same time spending a lot of time on the coffee breaks, on the lunch break and speaking by phone.

Participant AA affirmed that the punctuality management is not that rigorous in Portugal: *“sometimes I arrive late to work because something happened in the morning – or because I just didn’t wake up on time or I lost the bus – and no one approaches me about that because I won’t even be the last one arriving late to the work place! In Spain, it is not like that at all!”*. Once becoming aware of this, most of the interviewees learnt to live with this cultural fact regarding the time issue. Participant V does not understand how the flexibility time to arrive at work is so high: *“While in Spain people start working around 8am, in Portugal people can enter until 10am but then, they have to stay longer at work. For instance, if I want a business meeting with someone, I have to schedule it after the 10am, otherwise it is impossible, people won’t be at their workplace yet and somebody will be always late.”*

The breaks are very usual in Portugal and are often accompanied by the typical Portuguese *espresso* coffee. Almost 33% of the interviewees noticed this Portuguese cultural issue and they strongly believe that the quantity of coffee breaks taken during a day of work is too much. Participant A confirms: *“Portuguese people love coffee breaks! During a usual day of work, they go for almost four or five coffee breaks per day! If you have to discuss something or talk about something you go for a “coffee”!”*. Then she added: *“In Spain, you have coffee as well but you only drink it when you have your proper time break. In Portugal it is different, the coffee breaks are every time without a preliminary time to do it and no one says a thing.”* Portuguese look like they always have plenty of time and have a chilled behavior at the work place. Participant S believes that having breaks is good not to be stressed, not to be tired so fast and it helps to concentrate better while working but she also says that more than four breaks is already too many. Participant A confessed: *“I like it very much because it makes me more relaxed!”*.

From the experience of the Participant AA, she considers that flexibility time in the work place has advantages and disadvantages: *“For instance, the positive thing is that sometimes I needed to get out earlier from my work because I started my driving lessons. My managers gave me a total flexibility to do it as soon as my work would be done by the*

*end of the week*". Then she added the negative thing on not having an exact time to arrive and leave the workplace: *"the environment is so relaxed and chilled that stress and rigorous concepts do not exist, so sometimes, in the end of the day, you can realize that you didn't do anything at work!"*.

The time orientation also is related with setting the deadlines: the Portuguese have a flexible orientation on dealing with deadlines in the context of presenting and delivering work and tend to have often a responsibility avoidance while working. Most of the participants referred that Portuguese people are very slow while working and use the typical Portuguese act *"desenrascar"* which means the act of *"fast problem-solving"*, which is when someone can manage and solve any problem at the last minute. Participant AB refers that this is still a shock for him in the workplace: *"Portuguese people take the 'fast problem-solving' to the extreme! Instead of starting doing their work well done with a proper methodology from the scratch, they have a chilled performance regarding the deadline. They spend a lot of time in the coffee breaks and let the time go by without pressures. What happens next is that a week or even a day before the deadline, they 'make up' what is wrong and are able to deliver the work"*. Then he added: *"this is something good as well, because Portuguese people have the capacity to quick solve any problem, even though there is no way to put it well!"*.

Participant C refers that a big incident was the flexible mindset with the deadlines: *"I realized that in Portugal, if a deadline is for Friday, it can easily be changed for the following Monday or the Friday of the following week."* Participant AA experienced the importance of her hardworking against the deadline delivery in her current work: *"my boss told me that the company decided to accept me to work with them because while I was doing my internship there I managed to do the deadlines always on time. Once the work deadline was for Thursday, on Wednesday my boss approached me to remember me about the deadline and he got shocked when I told him that everything was done already and both of them just needed to be revised!"*. She believes that this incident came up because she came from a more rigorous country. She added as well that this shock was not new in the work place, she had experienced it before in the Portuguese university: *"Sometimes I had my individual homework done for the day it should be delivered and suddenly the teacher postpones the deadline because some students didn't have time. I*

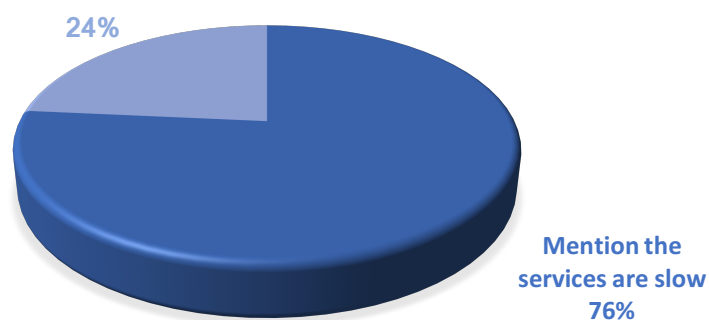


*commented this incident with other Spanish students studying in Lisbon and all of them agreed with me. This in Spain would never happen, deadlines are deadlines!!”*

The flexible behavior when facing the problems can be seen as well when avoiding the responsibility. Portuguese people do not like to take an individual responsibility which makes that everything will take more time to be done since the decision must be made by a group of people. Participant AD confers that this happens with him all the time: *“For instance each time I’m going to the bank, the assistant is never able to help me in the moment, always saying that he has to move that issue to his boss or to another department.”* Participant R believes that Portuguese people are less resolute than the Spaniards: *“each time I need help with something, I never have an answer in the moment. The decision is always taken by the highest managers”*.

### Slow Services

Another issue coming up in relation to the relaxed working environment, coming up during the interviews, was the fact that Portuguese are not only relaxed working within the companies but also that the services are very slow. As figure 20 illustrates, 76% of the interviewees who referred that Portuguese people are relaxed workers, also referred the services are too slow. When talking about services is regarding public transports, supermarkets, hospitals, and so on.



*Figure 20: Pie-chart showing from the interviewees who mentioned that Portuguese are relaxed workers, the proportion mentioning as well that the services are slow*

Most of the participants complain that the hospitals in Spain are much quicker than in Portugal, as well as the public transports. Interviewees think that it seemed like there is a

lack of organization in the services. Participant F commented during the interview a great difference between Portuguese people's passivity to this kind of services in contrary with Spaniards: *"Yesterday I went to the supermarket and from the eight stand-cashiers, only two were opened. The queues were enormous in those two stand-cashiers. While in Spain somebody would shout saying to open one more stand, in Portugal no one complains and very slowly each one pays their products and go out! I really cannot understand this!"*.

Participant L believes that Portuguese people accept everything, which makes them very passive and makes them not to complain. Somehow the reason why people do not complain has a connection with the Portuguese formality. For Participant V, the slow transports in the Portuguese capital – Lisbon – is something that still shocks her: *"Every day I take a train and two subways to come to work. Every day one of the lines is broken! Every day they do not come on time and no one complains! Sometimes I start complaining and people start looking at me like I am doing something wrong... It makes me feel uncomfortable so I shut up because it looks like I am crazy!"* Then she added that passivity is something that is deeply rooted in the Portuguese society: *"One day a lady asked me which line was broken and I told her that today was the blue one and yesterday was the green, so tomorrow is better to be careful with the yellow or the red one! She looked at me very serious and didn't get the joke."*

While in Spain people complain a lot about everything and like to have the things done quickly, in Portugal people are more relaxed and like to have their time to do the things slowly. Participant B believes the passivity has much in common with the formality: *"Portuguese society is so polite that you don't see them getting angry or discussing!"*.

### **5.3 Feedback**

In order to test the preliminary Portuguese cultural standards, I decided to get the feedback from some other participants, better saying, five more Spaniards living and working in Portugal, but who did not participate in the current research before. This phase is actually good in order to exclude any random incident of personal experiences and demonstrate the real Portuguese cultural standards which are common to other Spaniards with

experience of living and working in Portugal. All the participants agreed with the results, adding some interesting comments about their experiences as well.

All the participants said that my sample was very well chosen and that I managed to find a solid sample structure: the participants' gender, the age's differences, the high range on the business sector and the diversity of where the participants came from inside of Spain. Regarding the feedback given by the new participants, all of them confirmed me the results obtained, all of them said that I went to the main point of differences between both cultures. The methodology I used to get the feedback was to present firstly each standard individually and ask therefore the opinion concerning each one.

One of the participants added some statements from her own experience: *"On my first day of work in the Portuguese company, it looked like I was in a funeral!! Portuguese people were very serious and reserved; people were not talking with each other; the distance among people was incredibly high! Something that shocked me a lot was people talking with each other in a formal way, even from parents to kids and vice versa, in Spain this is unthinkable!"*. Regarding the use of academic titles was something that all the participants commented saying that was the most difficult thing for them to adapt and they strongly believe it is connected somehow with a status issue. The same participant referred: *"Since I am working in this company I have had two bosses already: a Spanish and a Portuguese one. The Portuguese one, even not having any academic course, he liked that people called him by "Doctor" because it was something that sounded well and at the same time gave him a better hierarchical position within the organization. The Spanish one was more "bohemian", since the first day speaking with the people in an informal way and close relationship!"*.

Other participant agreed with the Close Groups standard referring, by his own experience, his first week working for the first time with Portuguese colleagues: *"I was very surprised because no one asked me anything, neither professional or at a personal level. No one asked me if I needed something or so. I think no one asked because they are afraid that you think they may be too gossipy, I don't know... What I really know is that the formality and the politeness in Portugal is extremely high, and sometimes too much education can lead to bad education."*

Another participant referred that when talking about the Slow Services as a subcategory in the Relaxed Society standard, that the results of that are not as negative as they should be: *“The services in general, from hospitals, public education to public transports, are a really disaster! When you say that people are passive to that by not protesting, I don’t agree a hundred percent with that, because I hear people claiming... I would say that there are protests but not actions.”*

Most of the participants finished these last “feedback interviews” by saying that: *“I had a hard time adapting myself to the Portuguese culture but now, step by step, I feel that it changed my way of behaving and acting!”*, others said: *“Now, when I go to Spain, it is really when I see that I have changed the way I am... I remember that before I didn’t tolerate certain things that now I do, like for instance when it takes too much time in the supermarket in Spain, I feel that Spaniards start complaining like I used to do before, and now I am more relaxed towards that.”* The most important thing with the feedback phase is that any participant disagreed with the cultural standards established.

## **5.4 Comparison between Cultural Standards and Cultural Dimensions**

Hofstede cultural dimensions show us that Portugal and Spain have a very similar culture but do not say exactly where are the main differences between both cultures. The scores are very similar and it just explains a culture based in only six dimensions. That is why I used the methodology of the cultural standard method, which *“is especially effective when cultures which are closely related are compared with each other.”* (Brueck, 2002: 8).

After identifying the Portuguese cultural standard from the Spanish perspective, we can see that the results have some similarities but also some differences based on the cultural dimensions. It would be expected, according to Hofstede’s results, not to exist too many differences among the Portuguese and Spanish culture. But the new results show us that there is a bigger difference than what we were expecting among cultures.

Firstly, according to Hofstede, Portugal (63) and Spain (57) have a high power distance. The scores for both countries are not very well distributed, the issue here is that both scores are too similar and, according to the results of the current thesis, there should be a bigger difference between both scores, because Portugal has a much higher power distance than Spain. This Portuguese higher power distance than Spain is seen in the formal interpersonal relationship, in the formal communication, in the hierarchical channel, in the use of the academic titles within organizations and in the social stratification.

According to Hofstede, Portuguese people are more collectivistic (27) than Spaniards (51), which are individualists. This score can be mainly related with the standard of the family orientation regarding the need of socialization and relation with families. Somehow, this dimension can be linked with the importance of connections and social networks (which is a subcategory inside of the closed groups' standard), in the way people connect to other people in professional and personal settings.

The cultural standard Relaxed Society was identified with the masculinity cultural dimension of Hofstede. According to Hofstede, Portugal (31) and Spain (42) are a femininity society, where Portugal has a higher score than Spain in this category. This is in accordance with the cultural standard above stated in the way as Portuguese people are much more relaxed working than Spaniards. Portuguese people have a better flexibility time schedule and are not that handworkers, unlikely Spaniards, who are more stressed to have the work done and more competitive and faster working.

The last cultural dimension identified to have some associations with the cultural standards is the Long Term Orientation dimension. Portugal (28) and Spain (48) are considered short term orientation cultures, but Spain has a higher score than Portugal which means that Spain has more characteristics of the long term orientation culture than Portugal. Therefore, Portugal with that score is considered a traditional culture in the way of the high level of formality and the concern of the family orientation mindset. The other Hofstede's cultural dimensions could not be compared with any other cultural standards.

## 6. Case Studies

The case studies were created based in the interviews about the critical incidents that some of the Spanish participants had when arrived to Portugal. These case studies can be used as examples of some Portuguese cultural standards found from the Spanish perspective and as material to be used in cultural subject classes or exams.

### **“The Debit Card”**

Sara moved to Lisbon looking for a better job than in Spain. As soon as she got a job as a waiter in a restaurant, she went to the bank in order to create a Portuguese bank account. She went to the bank and dealt with the whole paperwork with the bank assistant. The bank assistant told her that everything would be ready in the following week. After one week, Sara went back to the bank to get her new debit card and realized that “*Dra Sara Martinez*” was written on the card.

- “*Excuse me, can you tell me what “Dra” means before my name?*” – Sara asked.
- “*Sure, “Dra” means Doctor*” – the bank assistant answered with a smile.
- “*Should have been a mistake... I’m not a Doctor, I’m a restaurant waiter!*”

How can you best explain this incident?

- a) The bank assistant saw Sara in the first meeting so well dressed that thought she would be a Medicine Doctor;
- b) In Portugal, the academic title is very important and everybody with a bachelor career is considered “Doctor”;
- c) The bank assistant mixed the paperwork and it turned out to be a bank error;
- d) The bank assistant wanted to keep Sara as a loyal customer and gave her a title that she knew that maybe would not be valid.

## “New in the Classroom”

Pablo decided to do an exchange program (*Erasmus plan*) of one year in Braga, a city located in the north of Portugal to study translation. As soon as he arrived to his class, he introduced himself to the whole classroom: “*Hello... I am Pablo, an Erasmus student from Spain... I still don't speak Portuguese that well... Nice to meet you all*”. Initially he was shocked because all of them were very serious and nobody spoke with him. He started sitting alone in the back chairs of the classroom during the whole week and on that Friday after classes, the class delegate approached him and asked him “*Hello Pablo, tonight we have a class dinner, do you want to come with us?*”. He accepted the invitation thinking that it would be good to know better his class mates. He noticed in the beginning of the dinner that everyone was very closed and reserved but as soon as more people were arriving, they started being more opened and kind and quickly he become unnoticed in the dinner. The class delegate approached him again asking him why he has his *sangria* glass empty. She filled the glass and suddenly everyone started singing a Portuguese typical song to make him drink the glass in one swallow. After he drunk the glass, everyone started being nicer with him and introducing him among them. In the following weekend, on Monday, he arrived to the classroom and sat in the back chairs as he used to do before. One of his colleagues before the class started asked in the middle of everyone: “*Pablo, what are you doing alone over there? This chair is saved for you!*”. He was amazed because the saved chair was not even in the final row, it was in the middle of his colleagues. “*I perceived that I had entered in the group already!*”.

How can you best explain the attitude of the whole classroom towards Pablo?

- a) The classroom was very shy to communicate in Spanish with Pablo because his Portuguese level was very low and they had to be forced to speak;
- b) Portuguese society initially is very reserved and closed and is important to have a common intermediate to enter in any group;
- c) There was a lack of communication and interest from Pablo to the rest of his colleagues;
- d) The classroom accepted him with a second purpose: it would be worth having a Spaniard in the team for future group works, as it was a translation course.

### **“Students, needed!”**

Maria is a strong business woman who nowadays has her own company in Madrid. While she was doing her bachelor career in sciences, she started working as science private teacher in order to earn an extra money. She started promoting herself with some advertising by using posters and newspapers and very quickly she got calls from desperate parents who needed a private educational teacher to help their kids because they were not having the expected results in classes. She started teaching and supporting subjects regarding mathematics and chemistry during some afternoons per week. As soon as Maria arrived to Portugal looking for a job, she created some posters in English and put them on the bus stops and coffee windows in order to start working as a private teacher for students as she used to do in Spain. *“Anyone call me, anyone!”*. She realized that the tools which she was using to promote herself were not good in that country. *“Since I arrived, from all the jobs I tried to apply by internet or without any intermediary, I didn’t receive any answer”*.

Out of these four alternatives, which gives an insight into the reason why Maria never received a call from anyone to accept her as a private teacher?

- a) Portuguese people are very close-minded regarding immigrants;
- b) The advertising was written in English instead of Portuguese;
- c) In Portugal everything regarding job search works better by using networking or a common intermediate;
- d) Portuguese people are afraid to accept a stranger in their place without having a feedback before from anyone else.

### **“Spain → Germany → Portugal”**

Juan was born in Malaga but moved to Madrid to study business administration. Once he finished his bachelor degree he joined a company which invited him, after two years of working there, to move to the same company in Berlin. Juan accepted because he wanted some changes in his life and new adventures. He had a high cultural shock when he arrived to Berlin due the German seriousness, the formality and to understand the



language. He was working in the company in Berlin for almost three years until the day his boss called him for a meeting: “*Juan, we need someone to manage a team in the company in Lisbon, would you like to take this place?*”. Juan accepted the invitation without thinking twice about it because he was missing a lot his home country and he was pretty sure that the Portuguese and the Spanish culture was exactly the same. After one month Juan was moving to Lisbon but as soon as he arrived he got another cultural shock.

What is the most plausible cause of the above cultural shock?

- a) Juan suffered some discrimination by his work colleagues for being Spanish.
- b) He had difficulties to understand the Portuguese language: Portuguese spoken is difficult from the Spanish perspective.
- c) Juan wanted some informal relationships among people and discovered that the Portuguese society was even more formal than the German one.
- d) He was missing the typical Spanish “*tapas*” and when he arrived to Portugal, he realized that the food was also very heavy like in Germany.

## 7. Portuguese Business Protocol for Spaniards

As seen in this dissertation before, there are great differences among cultures and between Portugal and Spain is no exception. The ways of behaving, acting, thinking and communicating are different from country to country and when doing international business between companies it is important to understand and follow the protocol for a better relationship. The international business etiquette protocol is important due to the multicultural diversity and is vital to have the ability of adaptation when communicating and negotiating with a person of another culture (Bello, 2013).

The Portuguese business protocol for Spanish consists of a set of recommendations regarding rules and formalities towards any Spanish businessman about the way to behave and communicate during a meeting business within the Portuguese context:

### **Presentation**

- One of the best categorization of the Portuguese society is the politeness and the formality. The greeting is very important accompanied with a smile and eye contact. The handshake is the most frequent and appropriate kind of greeting saying at the same time «*como está?*» (*how are you?*) or «*muito prazer*» (*much pleasure*). Sometimes the expressions are regarding the exact time of the day like «*bom dia*» (*good morning*) or «*boa tarde*» (*good afternoon*).
- Portuguese people speak in a very formal way. There are two types of “*you*”, the formal and the informal one. Unlike Spain, the Portuguese use the formal way with everyone who are not very close. When working in a company or in any business meeting, the treatment is always in a formal way.
- The academic titles are very important before saying the name and/or the surname. Portuguese use the title «*Doutor*» (*Doctor*) no matter what their profession is, it does not have to be used just with a real medical doctor. Other titles used with

technician professions are the «Engenheiro» (*Engineer*) or «Arquitecto» (*Architect*).

- In Portugal, full names are mostly composed by four surnames: two from the mother and other two from the father. The last surname should be the father's one. Instead of Spain, when the short form name is the first name and their first surname (which is the father's one), in Portugal the short form name is the first name and the last surname (which is the father's one as well).

### **Visit Cards**

- When giving a visit card to any Portuguese businessman, this should have highlighted the company's logo, the short form name of the person after the academic title. Contacts regarding mobile phone, e-mail and the company's are in the bottom in a smaller font size.
- The visit card should be given at the beginning of the meetings to all the present ones.

### **Meetings and Negotiations**

- Business meetings should be announced two or three weeks earlier and the best way to ask for a meeting is by e-mail. The hierarchy in Portugal is very distinguished, it is advisable that the interlocutors in the e-mail have the same hierarchy level and decision power.
- Unlike Spain, Portuguese people are not as direct as Spaniards. Their sense of space is high which means that they do not like face to face approach before a written formal proposal or a phone call first.
- The proposal should be quite detailed and complete. The benefits must be highlighted and the investment costs as well as the prices should be emphasized.
- Before starting the meeting, it is important to establish a personal closer contact by asking how the trip was, the first impressions about the city or possible hobbies.
- The rhythm of negotiation is slow and it is frequent to have several meetings before the final decision. The decisions are made by directors from the highest hierarchical level and is a joint decision from all those directors.
- Sometimes the business meeting drags on and it is common to use the meals time to continue. If the meeting has just finished, in order to complete and develop the

personal relationship, it is recommended to invite the Portuguese partner to a less formal social meeting, such a lunch or dinner.

### **Negotiation Meals**

- The meal is used to establish a closer relationship and possibly a future agreement. It is not the proper place to deliver visit cards or make presentations. If the meal is used to continue the business meeting, it must take place during the dessert part.
- In Portugal, the meals schedules are earlier than in Spain. The common time to have lunch is between 12h30 to 14h00 and dinner between 20h00 to 22h30.
- The meals are composed by the starters, the main dish and the dessert. Portugal has only one main dish, unlikely Spain, which the main dish is divided by first dish and second dish. After the meal, it is very common to have a typical Portuguese *espresso* coffee – very well-known and imported from the ex-colonies of Brazil and Angola.

### **Conversation**

- In order to have an ice breaking, the best topics to talk about is regarding the good weather of Portugal, the Portuguese stunning natural landscapes and the beautiful architecture. The Portuguese gastronomy is an embracing issue to comment as well.
- The topics which should be avoided are politics, football and economy because they easily fall into disagreement.

### **Communication**

- When talking by phone it is important to spend some time initially with the greeting and ask how everything is going, how the holidays were or how the family is. Portuguese are very formal and quiet, they do not say bad words that easily like any Spaniard say.
- Communicating by written e-mail is very formal as well. Portuguese people use all the titles in the beginning and like to spend a sentence to greet both when starting and finishing the e-mail. They are not straight to the point as Spaniards are, Portuguese tangle very much everything they write by e-mail – it is very common to receive a long e-mail with a short content.

- English is the main foreign language after the Portuguese. Spanish and French are the third and the fourth foreign languages. Portuguese phonetic are very hard for Spaniards due to the number of different accents, that is why Portuguese people have a good level speaking other languages with a good accent as well. It is normal if Portuguese people try to do the whole business meeting in Spanish, they have more easiness to adapt regarding languages.
- Portuguese and Spanish have similarities in the language but there are some “fake friends” which are words written in the same way but with different meanings, like *barata*, which means in Portuguese “cockroach” and in Spanish “low price” or *esquisito*, which means in Portuguese something weird but has the completely opposite meaning in Spanish which means something very good.

### **Timetables**

- The punctuality is asked but is not rigorous, a delay of 10 or 20 minutes is not a big deal. Meetings or any other event always start after the scheduled time.
- In Portugal, the worktime is continuous with an average lunch break of one hour. Portuguese people like to have their time to lunch properly – sit in the table (not standing on the bar) and eat with cutlery (not eat fast food or sandwiches). This is transversal to any kind of work sector, from business managers to builders or cleaning ladies.
- After lunch, Portuguese do not have the “*siesta*” (“nap time”) like most of Spaniards from the south of Spain do due to the high temperatures.
- The coffee breaks are very common and take between 5 to 15 minutes. It is a time for socialization between colleagues.

### **Dress Code**

- Clothing is formal, men wear apparel and tie and women wear skirt outfits or dresses. The accessories like wallets, shoes and watches are very important.
- If it is the first meeting, it is advisable to choose the conservative side of dressing and then dress down according to the partner’s code in subsequent meetings, if it is appropriate.

### **Gifts**

- Gifts must not be given in the first meeting, as it can be seen as a bribe purpose. Among the most popular offers are desk clocks, wine, pens and gourmet products. It should be avoided personal gifts, like ties or fragrances.
- When invited to home, it is kind to take flowers, chocolates or a good quality wine.

### **Gastronomy**

- A typical Portuguese meal starts with the starters which are mainly olives and bread with butter. The bread is very common to be eaten as a starter than during the whole meal with the main dishes like it happens in Spain.
- Is very usual to have a soup between the starters and the main dish. There are a great kind of soups, all of them from a particular Portuguese city. The habit of having a soup every day is from the ancient traditional times, when the country was poor and the soup was the basis of the food.
- In Spain, the typical Spanish dish is the *paella* which is cooked mainly in a party time to commemorate something. In Portugal, there are a lot of types of Portuguese traditional food which are cooked almost every day. Thanks to the Atlantic sea, there are a great variety of dishes with fish – mainly sardines and codfish. In restaurants close to the sea, fresh seafood is always a good option.
- In some dishes, the use of spices is very common. The spices were imported from the ex-colonies, mostly from India.
- During the meals, the main dish is very well composed by something of fish or meat (which is the protein), something of carbohydrates and something of vegetables. Unlike Spain where the accompaniment is only chips or salad, in Portugal it is very common to choose white plain rice as an accompaniment, something which was brought from China.
- Portuguese wines come from all over Portugal are very well-known worldwide, being the *Porto Wine* the most famous.
- There is a British influence in Portugal regarding cakes and sweet confectionary and tea. The pastry shops in Portugal are very common. The tea was imported by the Portuguese Queen D. Catarina (XVI century) from China to England and from England was known in the rest of Europe.

## 8. Conclusions

The goal of this thesis dissertation, as was stated in the beginning, is to study the cross-cultural encounters between Portuguese and Spanish people from the Spanish perspective. The final objective of the thesis is to establish which are the Portuguese cultural standards which are common to any Spaniard within the Portuguese context.

Nowadays, living in a globalized world, people move to work in other countries and the free mobility of labor has been increasing. Although a lot of people think Portugal and Spain are countries that, for the reason of being next to each other, have no cultural shocks being everything similar, this belief is completely wrong. Some people move to other culture that has the same language, the same religion and the behaviours are very similar and they think that will not have problems of adaptations and, for that reason, sometimes the shock is even bigger. The purpose of this research was to find out what is different between Portugal and Spain and alert any Spaniard with intentions to move to Portugal in order not to have cultural shocks in the host country.

The research was based on the experience of 30 Spaniards living and working in Portugal for at least one year. The best methodology for this research was the cultural standards method which ended up identifying four different cultural standards which Spaniards experienced when in contact within the Portuguese people and Portuguese culture. The four Portuguese cultural standards from the Spanish perspective are:

1. Interpersonal Relationship – The Spaniards found Portuguese to be extremely formal and a polite society. The relationships are very formal and the way people communicate with each other is in a formal way as well.
2. Hierarchy Orientation – There is a high hierarchical orientation inside of the workplace. The fact of using the academic title before the original name within

the communication, even spoken or written, is something that is seen by the Spaniards as a status issue and show off. The relation of the status and the appearance is seen as well between different social classes, where Spaniards see a higher social stratification in Portugal than in Spain.

3. Family Orientation and Closed Groups – Portuguese people were considered very reserved among them. The circle of friends is already done and it is difficult to enter. The relationship with work colleagues is only established in the workplace and, outside, the mindset is to get in touch with the family and the closest friends. The concern of doing a “life in home” after work and not in the streets or pubs; and the concern of creating a family too early, are a topic detected by Spaniards.
4. Relaxed Society – Portuguese were seen to have more flexible time than Spaniards, regarding the delivery of work (deadlines), punctuality arriving to the workplace as well as the number of breaks per day during the working time. Furthermore, the services in Portugal were recognized as much slower than Spain.

This current master dissertation has a practical and academic future perspective. The practical side of the results, with the Portuguese business protocol for Spaniards, can be used by Spaniards who are interested in doing business in Portugal. Furthermore, the results of the standards can be used inside of a Portuguese company that wants to understand how its Spaniards workers may think when moving to Portugal to work for the first time. The academic side can be used involving a Portuguese people within the Spanish culture and, with the case studies based on real experiences, the use of them as support or test material for multicultural class subjects.

To finalize this dissertation, when talking about cultures, Hofstede divides culture in four levels: values, rituals, heroes and symbols. A funny way to describe in general the Portuguese and the Spanish culture is by using a different “hero” in each culture. As it was mentioned in the beginning “*Heroes can be either real or imaginary, dead or alive and even historical characters who most of the time influences the behavior of any group or society.*” Hence, Portugal can be seen, as one of its hero, a woman in an old-fashioned and conservative black dress singing the well-known typical Portuguese *fado*, where the seriousness, the sadness and the tradition prevail; and Spain, a woman with a standout and neckline red dress dancing the well-known typical Spanish *sevillanas*, where the happiness, the rhythm and spontaneity succeed.



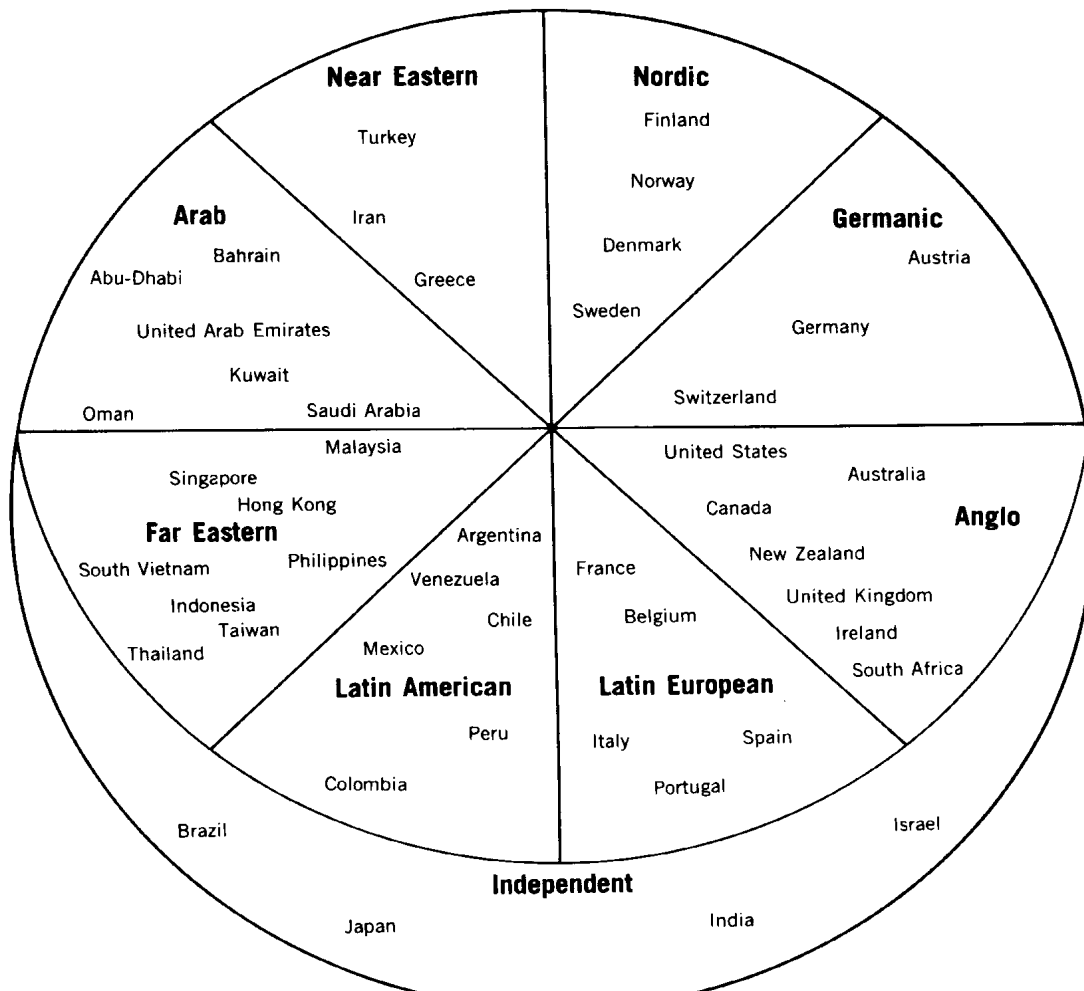
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## Appendix

### Appendix 1 – The different country clusters



(Source: S. Ronen and O. Shenkar, 1985)

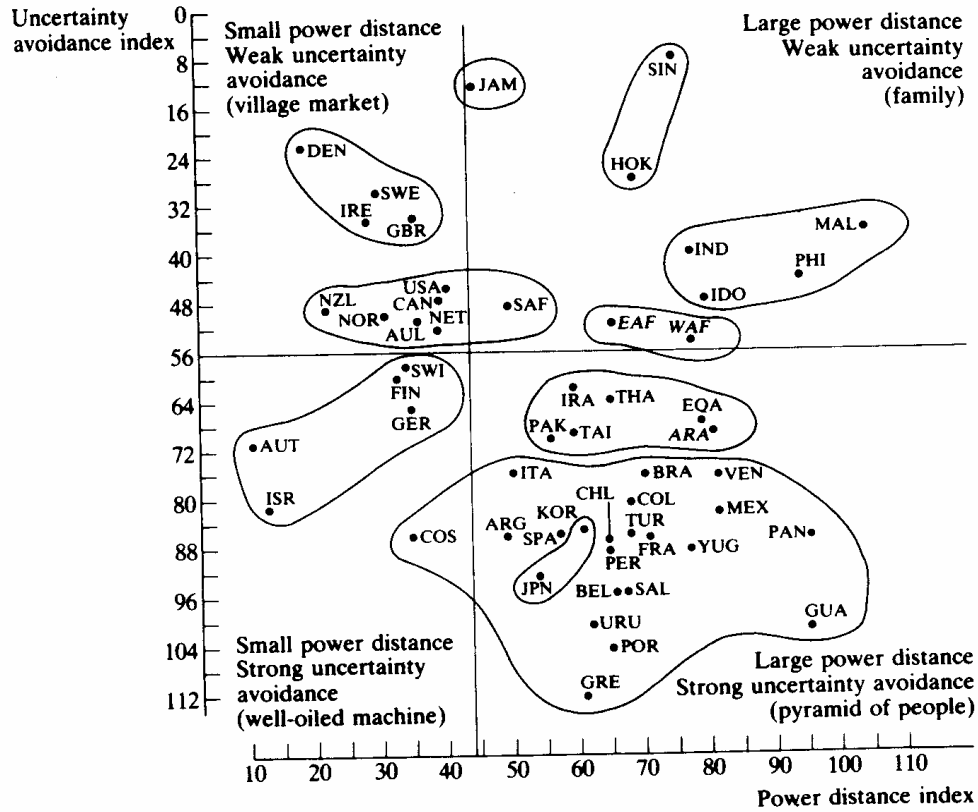
## Appendix 2 – Index Scores and Ranks for Countries and Regions

Country	Power		Uncertainty		Individualism/		Masculinity/		Long/Short-Term	
	Distance		Avoidance		Collectivism		Femininity		Orientation	
	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank
Argentina	49	35-36	86	10-15	46	22-23	56	20-21		
Australia	36	41	51	37	90	2	61	16	31	22-24
Austria	11	53	70	24-25	55	18	79	2	31a	22-24
Belgium	65	20	94	5-6	75	8	54	22	38a	18
Brazil	69	14	76	21-22	38	26-27	49	27	65	6
Canada	39	39	48	41-42	80	4-5	52	24	23	30
Chile	63	24-25	86	10-15	23	38	28	46		
Colombia	67	17	80	20	13	49	64	11-12		
Costa Rica	35	42-44	86	10-15	15	46	21	48-49		
Denmark	18	51	23	51	74	9	16	50	46a	10
Ecuador	78	8-9	67	28	8	52	63	13-14		
Finland	33	46	59	31-32	63	17	26	47	41a	14
France	68	15-16	86	10-15	71	10-11	43	35-36	39a	17
Germany	35	42-44	65	29	67	15	66	9-10	31	22-24
Great Britain	35	42-44	35	47-48	89	3	66	9-10	25	28-29
Greece	60	27-28	112	1	35	30	57	18-19		
Guatemala	95	2-3	101	3	6	53	37	43		
Hong Kong	68	15-16	29	49-50	25	37	57	18-19	96	2
Indonesia	78	8-9	48	41-42	14	47-48	46	30-31		
India	77	10-11	40	45	48	21	56	20-21	61	7
Iran	58	29-30	59	31-32	41	24	43	35-36		
Ireland	28	49	35	47-48	70	12	68	7-8	43a	13
Israel	13	52	81	19	54	19	47	29		
Italy	50	34	75	23	76	7	70	4-5	34a	19
Jamaica	45	37	13	52	39	25	68	7-8		
Japan	54	33	92	7	46	22-23	95	1	80	4
Korea (South)	60	27-28	85	16-17	18	43	39	41	75	5
Malaysia	104	1	36	46	26	36	50	25-26		
Mexico	81	5-6	82	18	30	32	69	6		
Netherlands	38	40	53	35	80	4-5	14	51	44	11-12
Norway	31	47-48	50	38	69	13	8	52	44a	11-12
New Zealand	22	50	49	39-40	79	6	58	17	30	25-26
Pakistan	55	32	70	24-25	14	47-48	50	25-26	0	34
Panama	95	2-3	86	10-15	11	51	44	34		
Peru	64	21-23	87	9	16	45	42	37-38		
Philippines	94	4	44	44	32	31	64	11-12	19	31-32
Portugal	63	24-25	104	2	27	33-35	31	45	30a	25-26
South Africa	49	35-36	49	39-40	65	16	63	13-14		
Salvador	66	18-19	94	5-6	19	42	40	40		
Singapore	74	13	8	53	20	39-41	48	28	48	9
Spain	57	31	86	10-15	51	20	42	37-38	19a	31-32
Sweden	31	47-48	29	49-50	71	10-11	5	53	33	20
Switzerland	34	45	58	33	68	14	70	4-5	40a	15-16
Taiwan	58	29-30	69	26	17	44	45	32-33	87	3
Thailand	64	21-23	64	30	20	39-41	34	44	56	8
Turkey	66	18-19	85	16-17	37	28	45	32-33		
Uruguay	61	26	100	4	36	29	38	42		
United States	40	38	46	43	91	1	62	15	29	27
Venezuela	81	5-6	76	21-22	12	50	73	3		
Yugoslavia	76	12	88	8	27	33-35	21	48-49		
<b>Regions:</b>										
Arab countries	80	7	68	27	38	26-27	53	23		
East Africa	64	21-23	52	36	27	33-35	41	39	25	28-29
West Africa	77	10-11	54	34	20	39-41	46	30-31	16	33

NOTE. 1 = highest rank. LTO ranks. 1 = China; 15-16 = Bangladesh; 21 = Poland; 34 = lowest  
a - Based on EMS consumer survey.

(Source: Hofstede, 2001)

### Appendix 3 – Position of 50 countries and 3 regions on the power distance and uncertainty avoidance dimensions



(Source: Hofstede, 2001)

#### Appendix 4 – An overview of the sample group of Spanish interviewees

Nr.	Participant	Gender	Age	Time in Portugal	Place in Spain	Speaks Portuguese	Type of Work Sector
1	A	female	36	3 years	Catalonia	Yes	Customer Service
		Was born in Barcelona and before moved to Portugal by the company which is currently working with, she lived in Ireland and USA. For her, Portugal is a “ <i>small paradise</i> ”: always sunny and full of free cultural events.					
2	B	female	39	4 years	Madrid	Yes	Business Sector
		Originally from Madrid but with roots from Equatorial Guinea. She strongly believes that Portugal is synonym of “quality of life” because is small and people have more time to do more things in one day with less money.					
3	C	female	37	1 year	Castile-La Mancha	Yes	Customer Service
		Moved to Lisbon to find a better job. What she likes most from Portugal is the way she feels “ <i>welcomed</i> ”. She was not a coffee addicted but with the influence of the Portuguese <i>expressos</i> , she started drinking an average of 4/5 per day!					
4	D	female	46	18 years	Galicia	Yes	State Government
		Currently works in the Consulate of Spain in Portugal and for her Portugal is synonym of “ <i>education</i> ”. She has the opinion that Portugal nowadays was Spain 40 years ago regarding fashion and tourism.					
5	E	male	24	2 years	Catalonia	No	Leisure & Hospitality
		He moved to Portugal because as soon as he finished his university studies, he wanted to have new experiences in other country. Portugal was the destiny because is close to Spain. He defines Portugal as “ <i>cordial</i> ”.					
6	F	male	33	1,5 years	Extremadura	Yes	Business Sector
		He came to Portugal looking for a better job than in Spain. What he likes more in Lisbon is the way people are relaxed and have a chilled behavior concerning everything. He defines Portugal as “ <i>tranquility</i> ” country.					
7	G	male	30	1,2 years	Andalusia	Yes	Business Sector
		He was born and raised in Seville and moved to Lisbon with his girlfriend in order to have new experiences. For him, Portugal is comfortable to live, “ <i>without problems</i> ”.					
8	H	female	27	2 years	Asturias	Yes	Education
		Something that choked her when she arrived was the way of a lot young people create startups! She thinks that Portugal has a lot of potential regarding agriculture and technology but still there is the complex that Portugal is small in Europe in comparison with Spain or France. For her, Portugal is “ <i>light</i> ” due the fact there is sunny weather no matter being summer or winter.					
9	I	male	29	1 year	Ceuta	Yes	Business Sector
		He was born and raised in Ceuta, placed in Morocco. For his university studies he moved to Granada, in Andalusia and then he had some internships in Madrid. He moved to Portugal for personal reasons. For him, Portugal is still “ <i>unknown</i> ” worldwide.					

10	<b>J</b>	male	30	4 years	Andalusia	Yes	Costumer Service
		He was born in Jaen but moved to Portugal to find a new job. In Spain, he was writer and published 4 books of his own. He thinks Portugal is a “ <i>delighted</i> ” society and he confirms that the unique coffee he likes is the Portuguese one!					
11	<b>K</b>	male	33	5 years	Extremadura	Yes	Education
		He came to Lisbon to study and now is teacher of Spanish and Portuguese. He believes that his transition from Spain to Portugal was the best decision he ever had and for him, Portugal is “ <i>formality</i> ”.					
12	<b>L</b>	female	34	1,9 years	Castile-La Mancha	No	Costumer Service
		She moved to Portugal as well looking for a new job and now is working as costumer service in a Portuguese company. She stated that “ <i>Portugal is 20 years behind Spain</i> ” regarding slow infrastructures, supermarkets, hospitals and so on.					
13	<b>M</b>	female	43	1 year	Extremadura	No	Health Care
		Working as Dentist right now and for her, the continuous working time without a break after lunch is a big shock. For her, Portugal is synonym of “ <i>obrigado</i> ”, which means <i>thank you</i> .					
14	<b>N</b>	female	30	2,5 years	Extremadura	Yes	Business Sector
		She is working as a Manager and she is totally in love with Portugal. She thinks that Portugal is full of quality of life even though economically is not balanced.					
15	<b>O</b>	male	22	2,3 years	Andalusia	Yes	Leisure & Hospitality
		He moved to north of Portugal as an <i>Erasmus</i> student and then he came to Lisbon to start working. For him, living in Portugal is more relaxed than in Spain and there are more alternative events than in his home country.					
16	<b>P</b>	female	57	34 years	Basque Country	Yes	State Government
		Currently working in the consulate of Spain in Portugal. She married with a Portuguese man and they have two kids. She loves Portugal and part of her life with strong memories were spent there, that is why she relates Portugal with “ <i>happiness</i> ”.					
17	<b>Q</b>	male	42	1 year	Galicia	Yes	Business Sector
		Was born and studied in Galicia but moved to Madrid due work before coming to Portugal. He sees Portugal as “ <i>rustic</i> ” for being a small and quiet European capital. One of the things that shocked him was the quantity of people with a university certificate but without job.					
18	<b>R</b>	female	34	10 years	Castile-Leon	Yes	Leisure & Hospitality
		Now working in <i>El Corte Inglés</i> , she had some problems initially due the fact of being Spanish when talking with clients. She thinks Portuguese people still live with a “ <i>traditional</i> ” mentality.					
19	<b>S</b>	male	41	18 years	Asturias	Yes	Business Sector
		He moved to Portugal to finish his studies and nowadays is working as a manager of an optical section. For him, Portugal is synonym of “ <i>quiet</i> ” and he loves his quality of life due that. He has the opinion that even though the Portuguese wages are lower, having less money there are more things to do than in Spain.					
20	<b>T</b>	female	26	1,3 years	Andalusia	Yes	Business Sector

		She was invited to come to Portugal to work as Manager of a Portuguese team. Her first impression about Portugal is that the society is very well prepared and very polite. Portugal for her is “ <i>cosmopolitan</i> ”.					
21	U	Male	47	8 years	Madrid	Yes	Business Sector
		Moved to Portugal due professional reasons. Since his first day in Portugal, he had the feeling that Portuguese people have a lower complex of Portugal regarding Spain. He likes the country due its beauty and safeness. For him, Portugal is synonym of “ <i>nineteenth century</i> ” because it is still living in the past.					
22	V	female	56	8 years	Catalonia	Yes	State Government
		Working in the consulate of Spain as Spanish Language Adviser in Portugal. She likes Portugal because of its quality of life. She relates Portugal with “ <i>stability</i> ”.					
23	W	male	43	1 year	La Rioja	Yes	Education
		Nowadays working as Spanish teacher. In his opinion, Portugal has an inferior complex regarding Spain, as well as Spain has it regarding France. For him, Portugal is synonym of “ <i>quiet</i> ”.					
24	X	female	45	22 years	Galicia	Yes	Business Sector
		She moved to Germany because of the company she is currently working with and then the same company moved her to Portugal. She loves the sun in Portugal that is why she relates the country with “ <i>light</i> ”.					
25	Y	female	31	2 years	Galicia	Yes	Leisure & Hospitality
		Moved to Portugal looking for a better job and currently is working in a restaurant. She believes Portuguese people have more educational level regarding studies than Spain. For her, Portugal is synonym of “ <i>soul</i> ”.					
26	Z	male	31	4 years	Cantabria	Yes	Education
		Moved to Portugal due professional reasons. What shocked him initially were positively the good beaches and negatively the low salaries. He relates Portugal with “ <i>freedom</i> ”.					
27	AA	female	23	2 years	Basque Country	Yes	Architect
		She studied his last career year in Lisbon and then she got an internship in the company where currently is working with. For her, Portugal is synonym of “ <i>flexibility</i> ” because she had a big shock regarding flexible deadlines and punctuality.					
28	AB	male	39	17 years	Andalusia	Yes	Health Care
		Working as Analysis Technician at the Hospital, he strongly believes that Portugal moves with a relaxed rhythm regarding Spain. He connects Portugal with the Portuguese word “ <i>saudade</i> ”.					
29	AC	male	25	1 year	Galicia	Yes	Business Sector
		He moved to Portugal due professional reasons where nowadays is working in an IT Company in Lisbon. He was amazed with the diversity of the different ethnic groups from the ex-colonies. For him, Portugal is “ <i>tradition</i> ”.					
30	AD	male	33	2,5 years	Madrid	Yes	Business Sector
		Moved to Portugal looking for a better job and new experiences. What he loved most about Portugal is the sea and the beaches. “ <i>Atlantic</i> ” was the word he gave when talking about a synonym of Portugal.					