

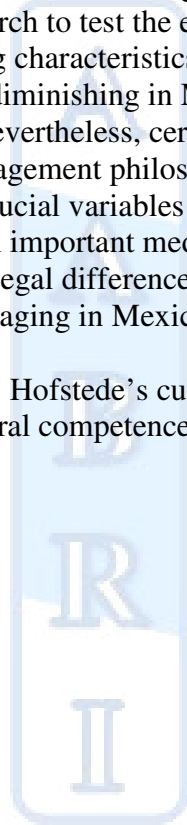
Managing in Mexico – An Ethnographic Comparison to Theory and Previous Research

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Abstract

The purpose of this study is to compare the author's experience in founding and managing a company in Merida, Mexico to existing literature on cross-cultural management. The results should prove useful for non-Mexican managers working in Mexico and can provide a basis for devising empirical- based research to test the ethnographic results reported. The author concludes that most of the discriminating characteristics associated with Hofstede's seminal study on cross-culture management are diminishing in Mexico and that to a great extent convergence of cultures is occurring. Nevertheless, certain cultural vestiges remain intact and operable and must be considered in management philosophy. The author found that creating trust and a stakeholder mentality were crucial variables to melding the cultural differences. A high level of cultural competence was an important mediating force in melding the cultural differences. However, the political and legal differences of the Mexican system, compared to the U. S. continue to create obstacles to managing in Mexico.

Key Words: Cross-cultural management, Hofstede's cultural dimensions, cultural convergence, strategies for managing in Mexico, cultural competence



Introduction

Many researchers hypothesize that managing in cross cultural environments will require adaptation of management methods to accommodate the host culture (Hofstede, 1983; Newman and Nollen, 1996; Morris and Pavett, 1992; Jarvis, 1990; Stinson, 1989; Kras, 1989, de Forest, 1994). There is contradictory evidence concerning the degree that cultural differences within a specific country imply behaviors that would require adapted managerial strategies of foreign managers to address cultural differences to achieve company goals (Petersen et al, 2003; Harrison and Hubbard, 1998; Teagarden and VonGlinow, 1990; Tatto et al, 2001; Davis and Nayebpour, 2004).

Purpose

The purpose of this study is to compare the author's experience in founding and managing a company in Merida, Mexico that grew to over 500 employees in 8 years to existing literature on cross-cultural management. Previous literature on cross-cultural management issues, in general, as well as studies specifically focused on Mexico is reviewed to provide a basis for comparison. The results should prove useful for non-Mexican managers working in Mexico and can provide a basis for devising empirical- based research to test the ethnographic results reported.

Methodology

An ethnographic methodology is utilized. Ethnographic research refers to fieldwork conducted by a single investigator who 'lives with and lives like' those who are studied, usually for a year or more (Van Maanen, 1996 cited by Genzuk, 2003, p.1). Through the ethnographic methodology, the author's experience will be related to previous research and theories concerning management in cross cultural environments. Necessarily the experiences are described in a subjective fashion from the author's perspective, but can provide insight concerning cross-cultural management theories in a practical sense. The paper is further limited in that the experiences relate to only one company in one region of Mexico.

Literature Review

The seminal study on cross cultural management theory was done by Hofstede (1980). He extended his research in subsequent studies, confirming his original findings (1983, 1994). He indicates that there are three reasons for cultural differences: political, sociological, and psychological. Nations are political units that have different institutions, legal systems and so forth. Sociological differences derive from the fact that citizens within each country have an identity with that country. Finally, the psychological differences result from early life experiences which are partly formed as a result of the other two differences mentioned.

Ultimately, Hofstede interviewed employees from more than 50 countries concerning attitudes and values. He noted that employee values, as opposed to attitudes, demonstrated very stable differences between countries. This clearly was an important finding with managerial implications.

Through factor analysis, he identified differentiating criteria all of which were largely independent of one another. He called these criteria “dimensions”. The dimensions identified were: individualism versus collectivism, power distance, uncertainty avoidance, and masculinity versus femininity (Hofstede, 1980).

The first dimension refers to values within the society of the home country with respect to an individual’s dependence upon others within their society. The U. S. is an individualistic society and Mexico is a collectivist society where individuals strongly identify with a particular group of which they are members, such as family. Interestingly, Hofstede found that at the time of the survey that countries with more individualistic values had more per capita wealth (1983).

Power distance, according to Hofstede, fundamentally relates to how a society deals with inequality. Some societies are more accepting of inequalities and tolerant of growth of these inequalities over time. This, Hofstede posits, is “because this situation satisfies the psychological need for dependence of the people without power” (1983, p. 81). The U. S. has values representative of small power distance and Mexico is characterized as large power distance, where inequalities can grow.

Uncertainty avoidance refers to a society’s values about the reality that the future is uncertain. Members of some societies are socialized into accepting what will be, will be. Each day is taken as it comes, risks are taken more cavalierly and work ethic is less strong, according to Hofstede. On the other end of the spectrum are societies that socialize their members to the idea that you can beat the future, which creates higher anxiety and aggressiveness. These societies have strong uncertainty avoidance, like the U. S., and the former type has weak uncertainty avoidance, like Mexico (Hofstede, 1983).

The last dimension identified is masculinity versus femininity. Basically, Hofstede found that societies can be classified as to whether they minimize or maximize the social sex role division. The U. S. and Mexico are closer on this dimension than on any of the others Hofstede, 1983).

Hofstede notes that prior to his research there was a prevailing belief that management principles were universal and, therefore, had general applicability. Further, that any deviations from these universal principles would self-correct over time, leading societies to become more alike. These ideas were described as the convergence hypothesis. However, Hofstede notes that it is clear that culture does matter; culture is a collective mental programming that conditions each member within their particular society to hold certain values. Therefore, Hofstede concludes, “the convergence of management will never come” (1983, p. 89)

Despite this conclusion, it is interesting to note that Hofstede relates the familiar experiment with the ambiguous drawing where one can see either a young, attractive girl or an old, ugly woman. He notes that it is amazing that the students in the experiment can be conditioned easily and quickly into seeing the other perspective in the drawing (1983). This could be interpreted to contradict his conclusion that convergence will never happen, since convergence of cultures would require a deprogramming.

Hofstede’s findings were well-received and held promise as a guide to managing in cross-cultural environments. Other research is supportive of Hofstede with respect to Mexicans’ attitudes toward work. Kluckhohn and Strodtbeck (1961, cited in Davis and Nayeypour, 2004) classify Mexico as a “being” rather than a “doing” culture, which implies that relationships are more important than work; unfinished tasks or jobs are not a worrisome thing. The notion that the Mexican culture values non-work activities above work activities is supported by Kras (1989), Slocum, et al (1971) and Flynn (1994).

However, Peterson, et al (2003) point out that cultural interactions within and between cultures are more complicated than suggested by Hofstede's findings. Furthermore, Mexican values about work are being challenged. Chandler (1999) found an increase over time in Mexicans' placing more emphasis on work than leisure. Totto, et al (2001) had similar findings. Harrison and Hubbard (1998) found that the Mexican workforce exhibited values different from what Hofstede would have predicted. Also, Teagarden and VonGlinow (1990) found that the context of the workplace was more predictive of job satisfaction and organizational commitment than culture. Davis and Nayebpour (2004) concluded from questionnaire responses of workers from five different factory locations that Mexicans exhibited a stronger work ethic than would have been predicted by previous research.

With respect to the implications for leadership, Hofstede believes that the dimensions of individualism and power distance would be most important (1983). For these two dimensions, U. S. and Mexican cultures are quite different based on Hofstede's results. Hofstede notes that U. S. leaders in a U. S. culture focus on the needs of individuals who are, in turn, focused on their self-interests and that this would explain leadership behaviors in the U. S. However, in a collectivist society such as Mexico, leadership will be more effective in the form of autocratic behaviors by the leader.

Hofstede's observations concerning the desire for autocratic leadership in Mexico are confirmed through other research (Morris and Pavett, 1992). However, other research sheds doubt on these findings (Harrison and Hubbard, 1998, Peterson, et al 2003 and Davis and Nayebpour, 2004), which indicate a desire for a more participative style management, especially if the participation comes in the form of groups, rather than individuals.

Participation in the form of groups does conform to Hofstede who notes that in collectivist societies it is all about the group. The work group is not the same as the natural "ingroup". Therefore, in order to have effective leadership, the leader will have to make the work group into an ingroup for the employees. If that is accomplished, the workers will tend to be more loyal to the organization, especially if the employer provides the protection that individuals within these type of societies want from their natural ingroups.

In collectivist societies, the family is an important group. DeForrest (1994) suggests that an important managerial strategy to pursue is to promote the image that the company is a second family, thereby leveraging the natural tendency of Mexicans to bond through groups.

Loyalty, or commitment, to the organization by employees is clearly an important characteristic that managers are desirous of engendering. Harrison and Hubbard (1998) found that job satisfaction, organizational effectiveness, and participation in decisions, among other factors, were predictive of organizational commitment. These findings contradict logical extensions of Hofstede's study which would imply that employees would be comfortable with autocratic bosses and that job satisfaction would take a back seat to more collectivist desires. Furthermore, Hofstede posits that weak uncertainty avoidance countries, such as Mexico, will have a weak work ethic. There is a logical supposition that job satisfaction and work ethic are correlated, therefore, it seems that Hofstede's conclusion about work ethic is not supported by the more recent research.

Peterson, et al had similar findings with respect to commitment. Interestingly, their research found that not only are employees desirous of participation in job decisions, but they desire leaders who treat them with consideration. Based on their findings that commitment is correlated to organizational effectiveness, the researchers hypothesized that Mexican workers are beginning to recognize the effects of global competitiveness and that jobs may be difficult to

obtain. Again, this would imply that Mexican workers place more emphasis on work than Hofstede concluded.

In a case study of a successful joint venture between a U. S. and Mexican companies, it was noted that cross-cultural friendships began to develop as a result of a recognition that there were shared values between the cultures with respect to work ethic and attitudes concerning work and quality (Gordon and Williams, 2001). Those interviewed for the case study indicated that mutual respect developed also as a result of obvious interest by parties from each culture toward the other culture and this resulted in a motivation to become cross-culturally competent similar to the model posited by Johnson, et al (2006).

Another important variable for managing in Mexico is trust. Rajagopal (2006) reviewed the extant literature regarding trust in cross-cultural settings. Mexico is generally considered to be a low-trust culture. It might be hypothesized that collectivist societies tend to be low-trust cultures. Most of the literature suggests that Mexicans prefer not to speak out independently but remain interdependent with a group (Rajagopal, 2006). This could be a symptom of low trust.

Rajagopal cites Hodgson, et al (2000) as supporting the hypothesis that Mexicans tend to avoid unpleasant consequences and negativity in their conversations to the extent possible. Rajagopal predicts that these types of personality traits will create ambiguity in the workplace in order to hide unpleasant topics and consequences. Further, he hypothesizes that these conditions may develop into desires to bend the truth or withhold information in order to not create bad feelings. Therefore, he claims that interpersonal relationships remain obscured and business will develop as a beauracracy requiring evidence other than mere trust.

Rajagopal (2006) concludes success in cross-cultural contexts is dependent upon trust, commitment, group dynamics, as well as skills of the management team. He also opines, similarly to Carlos (2005) that developing a strategic fit of values within the organization that balances the individual values will ease the challenges of cross-cultural management.

One area of research that has not been tapped with respect to managerial implications in Mexico is the cultural effects of the Conquest and the Hacienda system. The Spaniards came to Mexico with the intention of conquering, extracting resources and exploiting the indigenous population and accomplished their mission with ferocious abandon. Mexican anthropologists have written that the heritage of the Conquest and the Hacienda system has numerous behavioral implications for Mexican society in general that often result in cruelty toward social inferiors, engenders a desire to exercise power harshly, creates an irrational distrust and promotes an attitude that if there is no danger of being caught, laws are to be violated (Hewes, 1954).

The presence of the aforementioned traits in Mexicans would further support Hofstede's findings that Mexicans prefer (or at least tolerate) autocratic leadership styles. A low trust level in Mexican society is well-known and documented and further supports the notorious Mexican beauracratic requirements for evidence that Rajagopal would predict to overcome the lack of trust present in society. Further, there is some logical support to Hofstede's uncertainty avoidance dimension for these traits described by Mexican anthropologists; if authority will be exercised harshly and even cruelly, Mexicans might accept the idea that whatever will be, will be and one cannot change or "beat" the future under these controlled circumstances.

Experience Versus Theory

Prior to founding the company, the author was familiar with the research of Hofstede and others, as well as his own case study and previous experience. The author is fluent in Spanish and is relatively culturally competent.

This study, to a great extent, posits that the convergence hypothesis that Hofstede predicted would never occur is, in fact, happening. The study confirms that the dimensions of power distance and collectivist society are strong tendencies in Mexico, although, as will be described, the power distance tendency is diminishing. Strong power distance is anathema to modern leadership and empowerment principles. The collectivist society tendencies remain strong and managerial strategies to foment a feeling of family within the company were employed to leverage this tendency to the benefit of the organization. Finally, this study does not find that Mexicans exhibit uncertainty avoidance to the extent that Hofstede would have predicted in the workplace.

Development of trust within the organization appears to have been the key to solving many of the issues related to cultural differences. The apparent, initial lack of trust may be a vestige of the cultural effects of the Conquest, as Mexican anthropologists have suggested, and manifests itself in various ways in society and in the workplace. Lack of trust did not appear to be associated with cultural differences between the author and employees, but between everyone in the organization and this characteristic permeates Mexican society. There were several key strategies to strengthen trust at all levels.

In the early years of the business, the author noted that the employees were politely stand-offish and that the supervisors were as a rule stand-offish from their subordinates, and not necessarily politely so. Hofstede's power dimension was clearly at work and the employees seemed to like this arrangement in some ways. One of the reasons is that employees in Mexico often try to avoid responsibility. While this is a natural human characteristic, it seems exaggerated in Mexico. If something goes wrong, employees like to have an out -- they were simply following the boss' orders; they can't be held responsible for mistakes if they are simply following orders.

Among other problems created by the attitude of responsibility avoidance, suspicions run rampant.

The responsibility-avoidance conditions made it difficult to find root causes to problems and eliminate the root cause. When there was a problem, the author interviewed every person involved until a basic picture developed of what really happened. While the purpose of the interviews was carefully explained as a method to find root causes and not to assess blame and point fingers, for a long time no one believed that was the true intention. The prevailing thoughts expressed in these interviews always seemed focused on assessing, assigning or diverting blame to someone, and doing so based on authority, or ability to do so, rather than fact. There was a sense that if blame could not be assigned to a subordinate, the facts were intentionally "fuzzed up".

Over time, the author was more successful promoting the idea that discovering the source of a problem was the way to learn from mistakes and represented the road to improvement. Part of the reason for avoiding responsibility may stem from a desire to avoid unpleasant confrontations. Hofstede and others suggest that the collectivist dimension predicts unpleasantness would be avoided in order to preserve group dynamics (Hofstede, 1983; de

Forest, 1994; Rajagopal, 2006). Eventually, the managers overcame their cultural fears of unpleasant repercussions to a great extent, perhaps, through efforts to increase trust.

Part of the strategy to overcome the issue was to explain, while no one seeks blame, the idea of shifting blame or managing autocratically to avoid blame goes against the grain of modern management practices. The concept of empowerment was broached. No one knew the Spanish word. The concept was described; it was anathema to them. But through numerous informal discussions about empowerment, the concept became more accepted and understood.

The author noticed another feature of their natural autocratic management style. Once we became a bigger factory and needed a more professional work force, the production management team made the point with me that to become more productive we needed more discipline with the operators and supervisors. It soon became apparent that their method of managing to increase discipline was based entirely on negatives. If an operator or a supervisor did not perform as expected, punishment by an autocratic manager was needed, at least in their view; punishment was the tough medicine needed to create a solution to lack of discipline.

A simple example will illustrate the situation. On one of the author's morning factory walk-through, an operator requested to work at her machine in a sitting position rather than standing. Since the machines are designed so that the heights are adjustable, this did not seem to be a problem. The supervisor said it could not be done due to an electronic box that contained the computer that operated the machine. The box did not appear to be a limiting factor to lower the machine. Upon further conversation it became apparent that the real reason that the machine had not been lowered was the operator does not cooperate with us when we need overtime and that we need more discipline in the production line, more commitment to the company.

The possibility was raised that maybe she is not committed because we are not accommodating her, and if we were more accommodating it is possible she would feel more of a commitment. Besides, all the other operators in the line had heard her asking for the machine lowered and that this was a great opportunity to show to this operator and to all the others that we wanted to accommodate them when we could. The supervisor was focused on the punishment aspect and clearly did not want to accommodate her. After lowering the operator's machine, the next day all the other operators working on the same type of machine in this line had asked to have their machines lowered as well. This is one of a thousand examples where managers got their feathers ruffled by an employee and wanted to punish them for not doing as the manager wanted, as if the manager's desires alone and without explanation or understanding of the situation of the employee, are sufficient cause for punishment.

Apparently managers found it easier to punish, or to threaten punishment, than to convince employees of the wisdom of their decisions through leadership; managers were taking the easy way out in the short run without concern to long-term implications. The punishment aspect of management is part and parcel of the autocratic management style. Nevertheless, the managers were receptive to the idea of the "power of the *por que*." *Por que* means "why". Explaining to a subordinate *why* an order is issued is not done in an autocratic environment. The managers began explaining to their subordinates why we were making policy changes. The managers recognized that the employees were more likely to accept the changes and implement them when there was a rationale that they understood behind the changes.

With respect to the collectivist tendencies embedded in the culture, we tried to use the cultural prominence of the family to the advantage of the organization. This was an easier task when the company was small. We wanted to create a family atmosphere within the company to attract and retain workers. As we grew, it became more difficult, but we did try to maintain a

balance between disciplined production and a relaxed, almost familial atmosphere. As part of creating the family atmosphere, the company makes interest free loans to employees. The company has a company-wide Christmas Party. At the Christmas Party we give away through raffles numerous Christmas gifts as would happen at any family Christmas party. The gifts are plentiful and significant by employee standards. The company has an annual retreat at a resort on the beach where management and supervisors interact on a social level. The company has held what a Thanksgiving Lunch for the entire factory that was catered and the local newspaper covered. At each of these events management always stressed the idea that “we are all in this together” to promote the collectivist tendency.

An important opportunity to manage by example presented itself with respect to the benefits of informing employees about the reasons behind certain decisions and to further develop the collectivist idea of “we are all in this together.” Through a misunderstanding of the byzantine labor laws, the work week we worked was three hours less per week than actually allowed under Mexican labor law. The Chinese threat was developing and a number of Mexican factories had closed in the area and moved to China. We knew that we had to become more productive. One way to do so was to work another three hours, but pay the same amount we were currently paying, in accordance with Mexican labor law.

Clearly, the reaction of our employees would be unfavorable. However, the concept of selling your ideas to employees through the power of the *por que* had been stressed and now the author had the perfect opportunity to demonstrate commitment to the concept. Accompanied by the top management team, a speech was given to each production line that used the collectivist concept of everyone in the company, stockholders and employees at all levels, had a stake in becoming more productive in order to save jobs. We were not competitive with China and increasing the work week to the maximum that the law allowed would make us more competitive. Furthermore, the China threat was real; over 12,000 jobs had been lost in the Yucatan in the last few years to China.

It took two complete days to give the speech and to answer questions. Once the longer work week was implemented, as far as we could tell, only three workers resigned. This experience convinced the author without a doubt of the power of the *por que* – the why. That is, the vast majority of employees are reasonable and if the reasons behind actions taken by management are explained and justified, employees will get behind the decision, even in Mexico. While culture can make some difference in the degree to acceptance of management actions, it seems that the power of the *por que* can overcome a great deal of resistance, especially when coupled with a stakeholder explanation in a collectivist society such as Mexico.

An additional strategy to leverage the collectivist tendencies was a morning walkthrough. While the walkthrough had other purposes as well, the author took the opportunity to go through each line and greet operators and supervisors. Initially, there was little interchange, only stilted and polite responses to the author’s questions. Eventually, taking time to stop and talk to workers created the image that they were important to the CEO and, I think, leveraged the stakeholder concept which in turn promoted the idea that we were all part of the same collectivist group.

The idea that the CEO and the workers are all part of the same group is not an idea that is well developed in Mexico. There is a history of exploitation by the *patron* (owner/boss). Therefore, the natural tendency, and a corollary to autocratic management philosophy, is to think of owners and workers as two distinct and often opposing groups. Nevertheless, I believe the traditional suspicion of workers toward management was diminished as a result of overtly

attempting to establish personal relationships with the workers. The walkthroughs enabled this process.

Once the walkthroughs became daily, and an expected occurrence, the workers would point out small inconveniences such as a burned out bulb above their machine. They saw that the immediate reaction was to call maintenance to correct the problem and this was corroborating evidence of my concern for their comfort.

An additional benefit to the walkthroughs was the creation of trust. Creating trust with the managers was an easier task that was accomplished primarily through earnest attention to fairness and explanations of major strategies. Once trust is created there is a natural tendency to perceive that you are part of their group, further enhancing the collectivist tendencies.

Furthermore, trust diminishes the tendency for autocracy. Trust also creates a more receptive audience for concepts which are somewhat unusual in the context, such as empowerment.

Uncertainty avoidance, which is perhaps best described as an acceptance of whatever will be, will be, seemed a strong tendency, especially at the beginning. Uncertainty avoidance promotes a laissez faire attitude about life and work. The author understands fully why Mexicans would take this attitude as most have been conditioned to the reality that there is little prospect of improving one's economic station in life if from the lower economic classes. In the early stages of the business a trainer from another established factory was hired to work with our sewers after regular business hours. This trainer had successfully worked his way from a sewer to a supervisor through the ranks to an on-the-job trained production engineer. He was successful enough to have a car and a home – something very unusual for someone from his original socio-economic background. He was used as an example with our workers to illustrate that even in Mexico it is possible to advance economically. It seems that over the years, there was always someone in our organization that could be used to illustrate economic advancement.

We also had small seminars from time to time to promote the concept of the dignity of work and the self satisfaction that comes from a job well done. Other studies have shown that Mexican workers seek job satisfaction. These studies contradict this aspect of Hofstede's conclusions about uncertainty avoidance and its implications for work ethic.

The author is amazed at the level of commitment that most managers and supervisors have to the organization. This is another contradiction to what other researchers have inferred from Hofstede's comments and implications deriving from uncertainty avoidance.

However, the major obstacle to management in Mexico remains – the political differences that Hofstede described that exist in all cultures due to differences in institutions and legal systems. For example, the Mexican Federal Labor Law has not had any serious modification in over 80 years and remains a political hot potato. Any company in Mexico remains almost completely vulnerable to unfounded labor charges and facts or proofs to the contrary or often of little importance.

Conclusion

This study is limited in that it reports experiences with one management team in one company in one region in Mexico. However, the experiences and strategies described here can provide general guidance to others that are presented with management issues in Mexico. The most important variable, in the author's opinion and noted in Rajagopal, is the creation of trust with and between management and employees. While each company is different, the strategies discussed for trust creation with Mexicans should work if implemented in a sincere manner.

Also, managing in Mexico has been made easier through the convergence of cultures that Hofstede predicted would never happen. The proliferation of television in Mexico with re-runs of hit shows in the U. S. has no doubt mediated the convergence and the mental deprogramming that Hofstede illustrated with his drawing of the old-ugly/young-beautiful woman. Also the internet is available to almost all Mexicans if not through a home computer through affordable cyber cafes. Therefore, Americans and their social and professional culture are more easily accepted by Mexicans, which makes the teaching of modern management practices easier. Our employees learned and adapted more easily due to convergence of the cultures.

Therefore, the autocratic management style associated with Hofstede's power dimension is being modified, if not eradicated. In our case, my opinion is this happened because the teaching of management principles was more readily understood through the convergence of cultures and the creation of trust. Furthermore, teaching and learning may have been made easier due to the author's relatively high level of cross-cultural competence.

Collectivist tendencies do not appear to have been affected to a great extent through convergence. Our strategy was to convince employees that they were part of a group constituted by the organization and that the employees are as much stakeholders in the outcome of the business as are the stockholders. Again, my opinion is our strategies to do this were assisted by the development of trust.

Uncertainty avoidance is still a strong tendency in my opinion due to the bleak prospects for most citizens who are on the lower end of the socio-economic spectrum. However, employees can be shown that their plight can be improved if they have the will to try. But for them to believe someone who is from another culture and on a much different point on the socio-economic continuum there must be a high degree of trust.

Hopefully, the trust levels in the organization can be tested empirically in the future. While worker satisfaction with the work environment has been measured over the years, no direct empirical test has ever been made of the trust levels within the company.

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