

The background features a green-to-white gradient with a central circular motif. Silhouettes of people holding hands are arranged in a circle around a globe, with some figures appearing to be on top of the globe. The overall theme is global unity and education.

The Global People Landscaping Study

**Intercultural Effectiveness in Global
Education Partnerships**

GlobalPeople

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Intercultural Effectiveness in Global Education Partnerships**

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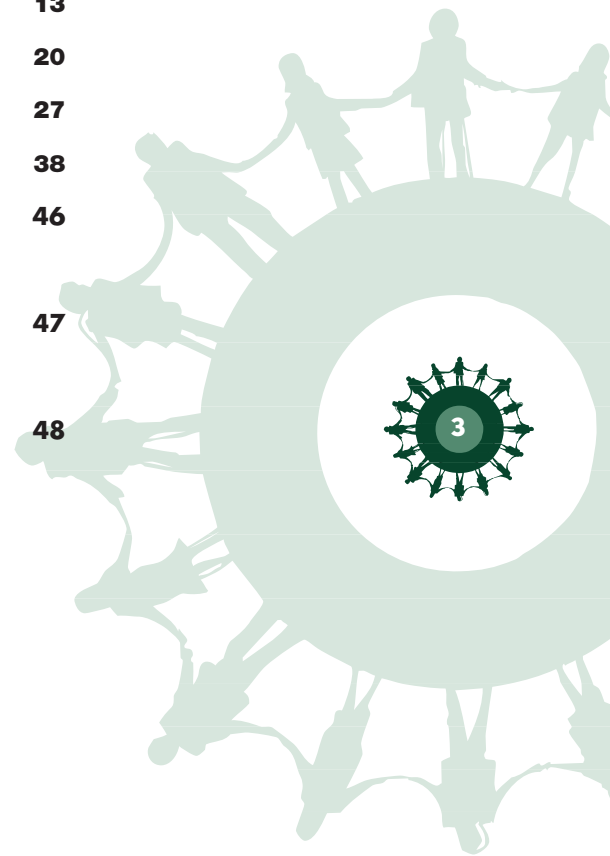
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Executive Summary

The Context

The Higher Education sector in the UK is experiencing a period of rapid and competitive internationalisation. The market for higher education, at undergraduate and post-graduate levels, is now truly global: many potential students can make choices about study destinations between an enormous range of institutions in any of the five continents. The audience for research is also global, with a proliferation of domestic and international journals, a multitude of international conferences in every discipline and widely-disseminated international indices, ranking universities in terms of their publication and teaching performance. In particular, the recent growth of the major Asian economies has re-shaped the profile of many UK universities both in the composition of their student bodies and also in the number, nature and importance of their overseas partnerships.

This Study

It is within this context that the Global People project has been established, with the objective of providing knowledge and resources that will support those in the UK Higher Education sector who work, or wish to work, in international collaborations. Phases 1 and 2 of the eChina Programme (see Section 1, Introduction) generated a great deal of learning about managing international education projects and Phase 3 of the Programme, the Global People project, was instigated with the aim of capturing this emergent knowledge for the benefit of others. This current report is a Landscaping Study that argues for the value of developing intercultural competence in order to better understand, create and manage productive and enjoyable partnerships with educational institutions outside the UK. Our arguments are supported by data from a wide range of research in disciplines as diverse as applied linguistics and international management.

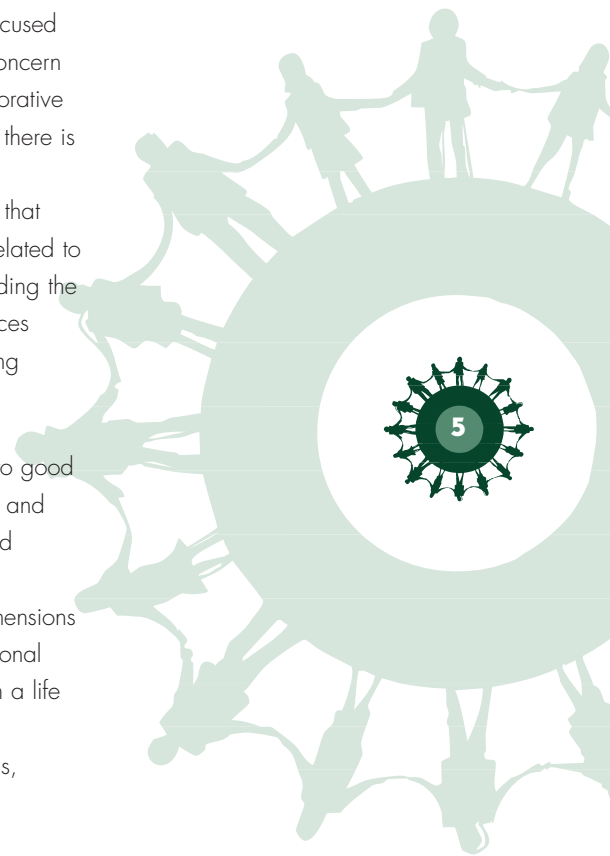
Key Findings

- a) The need for *cultural awareness and sensitivity to diversity* has been well established from studies in a range of disciplines. The high risks of mishandling intercultural interaction have prompted the development of a substantial literature both on perceived cultural differences and on the competencies that might be acquired to deal with this challenge. Although this concern has been driven by the financial requirements of international business, the internationalisation of Higher Education has imposed similar requirements on universities engaging in international collaboration. The challenge for academics and project managers is, within limited resources, to develop effective ways of identifying and acquiring the competencies needed to be interculturally effective.
- b) Interest in the *cultural values of Chinese society* has never been higher as global interaction with China, through business, government, education and science expands exponentially. There is a real danger in generalising about any nation's



cultural values and especially one where society and economy are changing so rapidly. However, the recent literature on China – from a number of disciplinary perspectives – argues that the influence of traditional Confucian values on Chinese behaviour is still strong. This means that values such as propriety, trustworthiness and the desire for harmony are still reflected in behaviour that is more relationship-based, restrained and consensual than may be normal in Western business relations. Working with Chinese partners will still be facilitated by an understanding of the centrality of social networks to Chinese private and public life and interaction in working teams will benefit from an appreciation of the Chinese respect for hierarchy and reluctance to pass judgement openly on colleagues.

- c) The majority of the work done on *the impact of culture on e-learning* has focused on issues of content and materials design. Too frequently this has been a concern for adaptation of existing materials for a local audience, rather than collaborative development of new materials by an intercultural team. As a consequence, there is limited insight into the complexities of designing and delivering learning programmes in different cultural contexts. What the research does show is that learning styles and preferences can vary between cultures and that this is related to the varying pedagogies dominant in particular national cultures. Understanding the implications of this diversity of pedagogies and reconciling cultural differences remain substantial challenges for those adapting or designing online learning programmes across a variety of cultures.
- d) Research into *the performance of international teams* offers many insights into good management practice. Principles of team selection, development, leadership and collaboration are well-established in the literature on global management and multinational partnerships. These principles recognise the importance of organisational culture, occupational culture and team roles as additional dimensions to that of national culture in influencing behaviour in project groups. International collaborations are viewed as complex dynamic systems which move through a life cycle, with valuable opportunities for reflection, learning and performance improvement. The implementation of transparent, and mutually agreed, norms, procedures and objectives is regarded as crucial to effective collaboration.
- e) At the level of the individual, an extensive literature exists on *the competencies required to be effective in intercultural interaction*. There is an apparently high degree of consensus on the core competencies that should be acquired by the culturally effective individual. Chief among these are self-awareness, cultural knowledge, language proficiency, openness, flexibility and communication skills. However, in many cases there is, at best, limited data to support the theories put forward. There is also a lack of clarity in the use of terminology, with no guarantee that researchers are using terms in the same way. The more detailed, applied research has succeeded in teasing out the knowledge and skills that may be critical in successful interaction by further breaking down broad competencies (e.g. 'openness') into more detailed behaviours ('openness to new thinking; positive acceptance of different behaviour').



A Way Forward

A major obstacle to accessing and utilising the current knowledge and guidance on intercultural effectiveness is its dispersion across a large number of disciplines and the consequent disparity of the conceptual models and terminology employed. *A framework for understanding intercultural effectiveness in international projects* has a very high potential value to a wide range of professionals engaged in cross-cultural collaboration. There is substantial learning to be gained from the insights of different research disciplines but these insights need to be brought together in a way that practitioners from any field can access them without specialist knowledge. These ambitions have materialised in the form of the *Toolbook*, which is specifically designed to be used as a self-explanatory guide, complete with tools to stimulate awareness-raising and to encourage reflection on available resources and current practices.



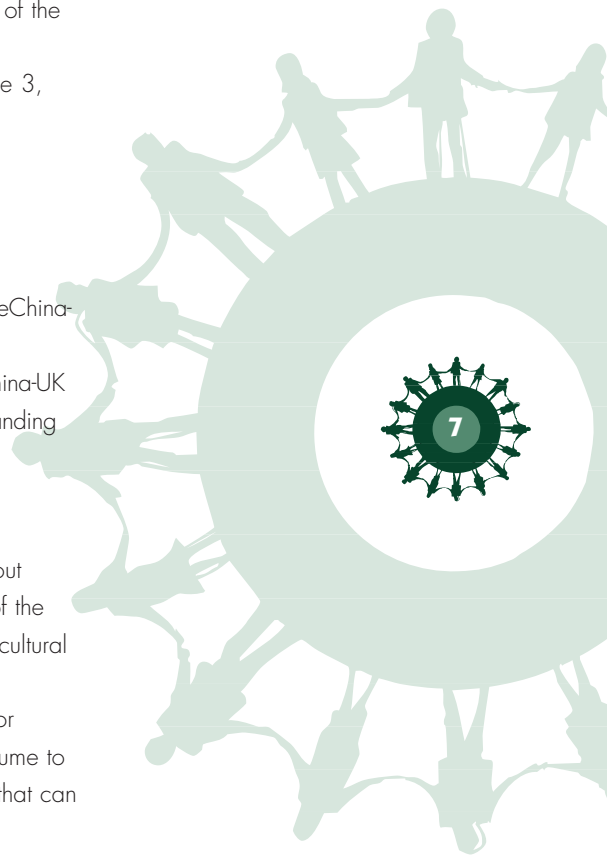
1. Introduction

The eChina-UK Programme was established in 2002 and originally comprised a number of teacher training projects in which British and Chinese teams worked collaboratively to develop and pilot e-learning materials. Phase 1 of the Programme spanned the period 2003 to 2005 and produced a number of practical outputs. Three follow-on projects were funded in Phase 2, which started in October 2005, and these included research reflecting on issues of pedagogy as well as the creation of further teaching and learning materials¹. These projects are all now complete and, in December 2007, Phase 3 of the Programme was put in place to capture insights from the experiences of all of the individual projects in their collaborations with Chinese institutions. The goal of Phase 3, therefore, was to draw out the learning from Phases 1 and 2 of the eChina-UK Programme with respect to the management of intercultural aspects of international education projects.

Phase 3 of eChina-UK lasted for twelve months, with the final outputs from the project completed in December 2008. In addition to the learning gained from the individual eChina-UK projects, the Phase 3 work includes new research into other sources of knowledge relating to intercultural effectiveness. The focus is on situating the learning from the eChina-UK projects into a wider intellectual context that will maximise the potential for an understanding of the intercultural management of international education projects and will enable the production of resources for those engaged in current and future projects of this kind².

This Landscaping Study presents an overview of the current state of knowledge about intercultural effectiveness relevant to international education projects. The purpose of the Landscaping Study is to provide an account of the most important insights into intercultural effectiveness from a number of academic disciplines, including applied linguistics (intercultural discourse analysis), international business and management, cross-sector partnerships, cross-cultural psychology, and intercultural interaction. It does not presume to be a comprehensive literature survey but rather a wide-ranging review of research that can contribute to our ability to be effective in contexts of international diversity.

The anticipated audience for this work is primarily the UK academic community, specifically those in UK Higher Education Institutions (HEIs) who are planning to establish international collaborations with HEIs outside the UK. The organisation of this study is therefore intended to make it as accessible as possible to the reader looking for practical help in planning or managing an international project. Further outputs from eChina-UK Phase 3 include more explicit guidelines and tools to support international education projects but it is hoped that the current report will also be of practical value to those working in international collaborations. We provide a select bibliography of reading and of research resources for those wishing to look deeper into any one particular area.



¹ Details of Phases 1 and 2 of the eChina-UK Programme can be seen at <http://www.echinauk.org>

² For further details of Phase 3 of the Programme see <http://www.globalpeople.org.uk/>

The focus of eChina-UK has been collaborative e-learning projects between UK and Chinese HEIs. As a result, we include in this study reviews both of the 'received wisdom' about working with China and of the research into the impact of culture on e-learning. However, our focus is wider than these two fields and we believe that much of the knowledge regarding intercultural effectiveness has an application beyond any one particular culture or a single teaching methodology. Consequently, we also include reviews of important research from a number of other disciplines which provide insights on working effectively across cultural boundaries.

The Landscaping Study is organised into six sections. In Section 1 we present a rationale for the Phase 3 project as a whole by arguing for the importance of intercultural awareness and effectiveness in collaborative projects. In the context of the rapid internationalisation of higher education provision, the UK HE sector cannot afford to ignore the knowledge and competencies required to establish and run effective partnerships with institutions abroad: being culturally competent needs to be embedded in educational project management.

Section 2 presents an account of the prevailing views on working with China. In seeking to map out the landscape of this literature, we do not endorse all of the material that is discussed. Rather, we hope to provide a good working overview of what constitutes the current 'received wisdom' about understanding Chinese cultural values and using this understanding to interact effectively with Chinese collaborators. In Section 3, the focus turns to learning and, in particular to the influences of culture and pedagogy on e-learning, a key concern in the eChina-UK Programme and an area of explosive growth in the past decade. Some areas of research into e-learning have been very rich – notably studies of course design – but attention to specifically intercultural issues has been uneven. So, in this section we look across the available data to identify what seems to be the most valuable learning for those engaged in developing or managing online programmes with culturally diverse user groups.

Sections 4 and 5 cover a wider field than that in which the eChina-UK Programme itself operated: we aim to provide a larger intellectual context for the programme by reviewing material on intercultural effectiveness from a number of very different academic disciplines. In Section 4, the focus is at the level of the organisation and the project team. Material is presented from disciplines such as business management and the study of international teams and cross-sector partnerships. The key concern is how the cultural characteristics of systems (institutions, project teams, working procedures) can impact the success of an international project. In contrast, Section 5 looks at the issue of interactional competence, drawing from fields such as psychology and applied linguistics to present learning about the individual and interpersonal competencies relevant to successful management of diversity.

In Appendix 1, we describe the methods that we followed in researching and producing this study and provide a Select Bibliography. We very much hope that readers of this study will be able to use this material to research further into areas that are of interest to them, following our initial 'mapping' of the main fields of research activity.



2. Rationale

2.1 The Value of Developing Intercultural Effectiveness

In any form of international co-operation, the need for participants to be aware of differences rooted in national, regional or local cultures has long been recognised. That need has been driven by a number of factors – a fascination with other cultures, a desire to build bridges between peoples, the commercial imperative of international trade and the recognition of the interconnectedness of nations in the industrialised world. The emergence of truly global companies is not easily matched by the development of ‘global people’. There is a gap between the aspiration of organisations and the abilities of the people who staff them: human beings must adapt their individual cultural experience to operate in an international environment. The result has been the development of a substantial literature aimed at providing the practitioner with insights and guidance on operating in situations of cultural diversity.

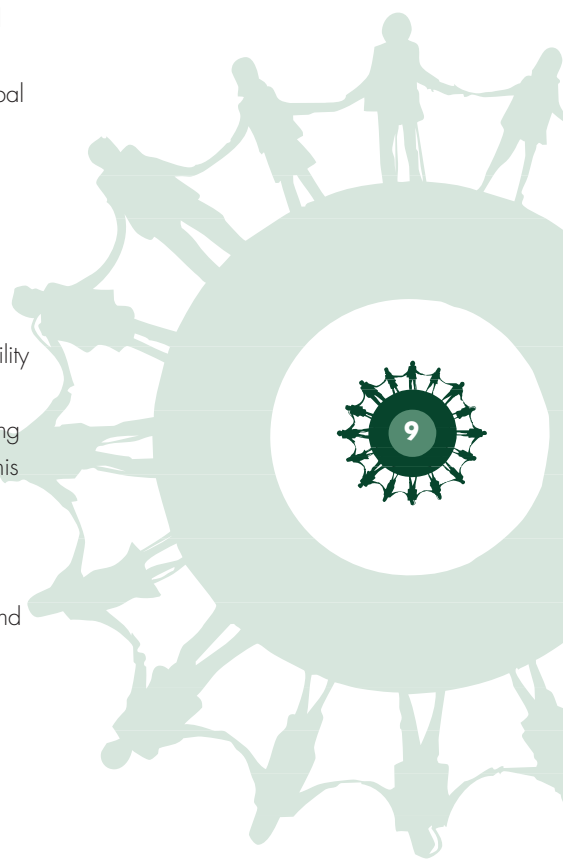
The value of being able to operate effectively across cultures has been seen both in its ability to optimise positive outcomes (e.g. the reduction of prejudice; the building of trust; the generation of creativity) and to minimise the potential negative consequences of mishandling intercultural interaction (low cohesion; high levels of miscommunication; personal stress). This has been especially true of fields of activity such as international business management where cultural misunderstanding can prove financially costly. The business management literature is full of examples of relationships soured, deals lost and mergers undermined through a lack of cultural sensitivity (Kavanagh and Kelly, 2002). As Rugman, Collinson and Hodgetts comment on a case study of international business practice:

“All this proves is that going global is hard work. Not all of these problems could have been foreseen, but a real lack of awareness of cultural differences did lead to many of the organisation difficulties and people problems with a real impact on the bottom line.” (Rugman, Collinson and Hodgetts, 2006: 129)

2.2 Intercultural Effectiveness and the Higher Education Sector

Little of the evidence on cross-cultural differences, and the competencies to handle them, has derived from the Higher Education sector. Despite the long history of intellectual and personnel exchange between universities across the world, there has been little attention to these issues beyond those disciplines (such as linguistics or anthropology) where cultural diversity is a core element in their research. The mainstream debate has centred on the world of business and, overwhelmingly, commercial companies have been both the subjects of, and the clients for, such knowledge.

Higher Education is, however, entering a new phase of rapid and competitive internationalisation. The market for higher education, at undergraduate and post-graduate



levels, is now truly global: many potential students can make choices about study destinations between an enormous range of institutions in any of the five continents. The audience for research is also global, with a proliferation of domestic and international journals, a multitude of international conferences in every discipline and widely-disseminated international indices ranking universities in terms of their publications and teaching performance. In particular, the recent growth of the major Asian economies has reshaped the profile of many UK universities both in the composition of their student bodies and also in the number, nature and importance of their overseas partnerships. In this context, UK HEIs find themselves in a role more similar than ever before to international business enterprises: they must compete for the best students internationally; they must develop sustainable income streams from teaching, research and consultancy; they must balance the need for high academic quality (and the rewards that accompany that status) with the necessity of being commercially effective in a highly competitive market. For virtually all institutions this has meant pursuing a strategy that includes an increased intake of overseas students; more (and more ambitious) partnerships with foreign universities; increased pressure on academic staff to research and publish on the world stage.

These trends are acknowledged in a recent report by Middlehurst and Woodfield for the UK's Higher Education Academy:

"Significant levels of international activity now require large-scale investment and increasingly sophisticated business models...Therefore, higher education institutions are first, looking for distinctive and sustainable approaches to their international activity...and second, investing more heavily in international activities which are increasingly underpinned by comprehensive international or 'internationalisation' strategies and resource frameworks." (Middlehurst and Woodfield, 2007: 21)

This investment of resources, and the search for a sustainable (i.e. long-term and fiscally effective) strategy will, the authors argue, rely on the establishment of sound, long-term relationships with counterpart institutions overseas:

"[...] we would suggest that for UK institutions, 'mutual understanding approaches' that seek to build broad and deep academic alliances between institutions and countries may need to become a preferred option." (Middlehurst and Woodfield, 2007: 27)

It would be hard to imagine such alliances being established and maintained successfully without the development of skills in the management of relations across cultures: Higher Education, just like business, will need to develop and improve competence in the complex matter of achieving intercultural effectiveness. This has already been tacitly recognised by the establishment of dedicated functions within universities to handle internationalisation:

"Most UK institutions have some form of international 'office' [...] which can enable them to undertake both strategic (e.g. strategy development and implementation, market research) and student-facing (e.g. advice and guidance) functions." (Middlehurst and Woodfield, 2007: 36)



Moreover, the importance of intercultural effectiveness for HEIs lies not only in the value it can add to the creation and management of crucial international partnerships: HEIs also have a responsibility to manage the experience of their own foreign students. So, developing a higher level of sophistication in handling intercultural encounters will also become a valuable internal strategy:

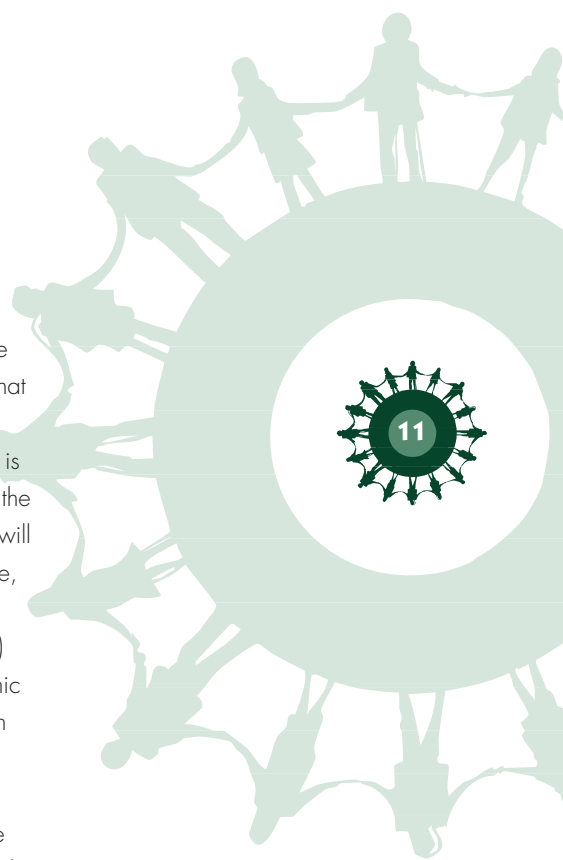
"[Our] main conclusions identify a need for: cultural sensitivity in the orientation and support of students; continued monitoring of students' needs and expectations throughout their relationship with the institution; and the need to consider issues of integration among students." (Middlehurst and Woodfield, 2007: 57)

The purpose of this Landscaping Study is to provide an introduction to the available knowledge, from a number of disciplines, which can support those in UK Higher Education who need to engage in international collaborative projects.

2.3 Embedding Intercultural Effectiveness in International Education Projects

Skills for working across cultures, sectors, nationalities or even academic disciplines, are not intuitive. Although some individuals may have innate abilities, or prior experience, that make it easier for them to work with cultural diversity, the overwhelming message of the literature is that specific competencies need to be acknowledged and developed. This is not necessarily welcome news for academic collaborators, more used to assuming that the international *lingua franca* of English and the shared jargon of an academic discipline will guarantee successful interaction with those beyond the UK. In the eChina-UK Programme, it became obvious that characteristics apparently common to the UK and Chinese participants (e.g. academic status, university location, specialist disciplinary knowledge) did not ensure shared understanding. Indeed, very fundamental issues, such as academic autonomy and models of pedagogy, emerged as potentially contentious lines of division between the respective teams.³

From the outset, it is necessary to recognise that what we routinely consider appropriate behaviour is often only appropriate for our own culture and time – and probably, indeed, only for our own particular sub-stratum of our culture. It is intrinsically difficult for most people to recognise their own culturally-governed behaviour – simply because it is part of the world that they take for granted – so interacting with another culture can be an important source of learning about one's own cultural values and behaviour. The first step in developing intercultural effectiveness is simply to be aware that cultural diversity exists and thus to take steps to anticipate it through preparation. Those steps might be fairly basic - ensuring, for example, that there is someone in your team who speaks the partners' language – but it is not uncommon to find university collaborations being initiated without even this level of forethought. Much of the mainstream literature on intercultural effectiveness focuses on cultural values. Early work in the field, such as that by Hofstede (1984) or Trompenaars (1997) used large-scale survey research to establish patterns which distinguished the fundamental attitudes of different (national) cultures. Although being aware of such putative values can aid preparation for an international encounter, the approach needs to be handled with care. There can be worth in recognising broad



differences between national values and the behaviours which they are believed to affect (e.g. in the management of time or in the respect for formal hierarchy) but there is also the risk of oversimplifying, stereotyping and ignoring the huge variation within any one cultural group. These dangers become acute at the individual level where there is no guarantee that individual behaviour will follow 'typical' cultural patterns.

Nevertheless, knowledge of such cultural patterns might, at least, warn us against making thoughtless transfer of our own cultural assumptions onto others. Indeed, one of the main benefits of acquiring knowledge of this approach may, in fact, be to improve self-awareness: looking at your own culture and questioning the values, attitudes and behaviour that may be taken for granted.

The cultural values approach provides us with potentially valuable information but at a level of generality where it needs to be used with caution. More practically applicable work has been done on the development of skills for working with specific cultures: research into the nature of communication and interaction between different cultures can furnish us with skills and strategies for improving performance in specific intercultural situations. Finally, there is evidence that there are competencies that can be developed that will enhance the ability to be intercultural effective in a range of situations irrespective of the specific cultural groups involved. These skills and attitudes are ones that enable us to develop, in an open way, our ability to work with others, and are an enhanced version of the competencies needed in building almost any effective team or collaboration.

In the subsequent sections of this Landscaping Study, we will review and discuss important avenues of research relating to intercultural effectiveness, with a view to demonstrating both the value of intercultural competence to the international practitioner and to presenting some of the ways in which that competence can be acquired. It is intended that this review and analysis will be of both intellectual interest and practical benefit to those in UK HEIs confronting the complexities of international engagement.



³ See, for example, McConnell D., Banks S. and Lally V. (2007)

3. 'Received Wisdom' on China

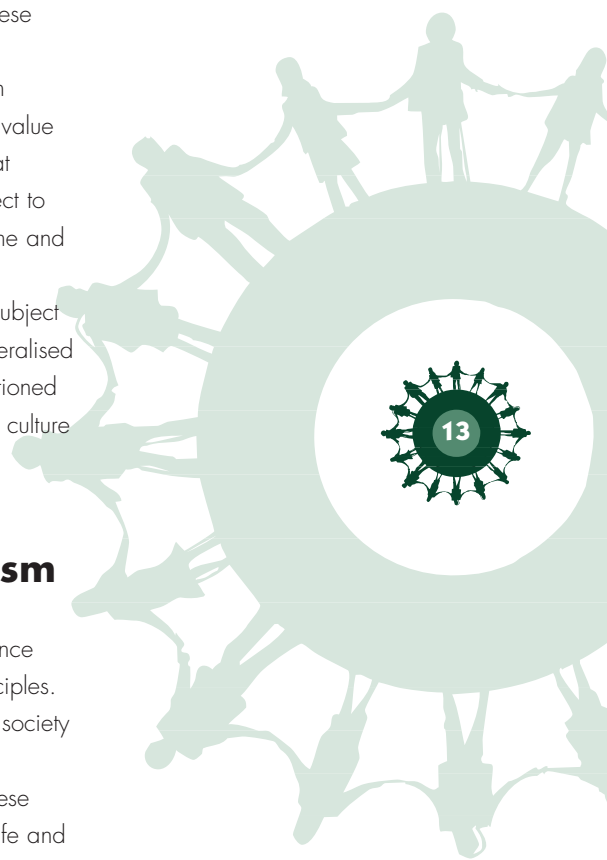
3.1 Introduction: Chinese Cultural Values

Chinese cultural values are addressed in the literature of a large number of different disciplines. With a growing global interest in working and collaborating with Chinese partners and conducting business in China, fields as diverse as management, communication studies, sociology and the travel industry, as well as Chinese/Asian studies, are all concerned with exploring Chinese culture and values. However, as value systems represent what is expected and hoped for in a society, not necessarily what actually occurs, such literature will at best be able to indicate what one might expect to encounter in a society at the time of writing. Since cultural values change all the time and evolve hand in hand with economic and social changes (Fan, 2000), it is almost impossible to gain a wholly reliable insight into a culture such as China, which is subject to rapid growth and change. One needs to bear this in mind when reviewing generalised cultural trends. Nevertheless, some cultural concepts and values are frequently mentioned in the literature and appear to be more or less 'globally' applicable to the Chinese culture (including Mainland China, Hong Kong and Taiwan).

3.2 The Continuing Influence of Confucianism

The literature appears to agree that Confucianism still exerts a strong societal influence and that cultural values, practices and norms are heavily based on Confucian principles. This influence is said to be visible in terms of the virtues that are valued in Chinese society and in relationships. Confucianism describes five virtues: humanity/benevolence, righteousness, propriety, wisdom and trustworthiness. According to Xing (2001), these virtues are still highly valued in contemporary Chinese society and influence daily life and normative behaviour. Benevolence toward other people is particularly relevant in a society that places greater emphasis on the importance of the community than the individualistic ideals that are so prevalent in Western countries. The virtue of trustworthiness is particularly relevant for business dealings with the Chinese, in that they place enormous emphasis on establishing good relations and building trust with partners before engaging in business.

Confucian tradition stresses that "man exists through his relationship to others, that these relationships are hierarchical and that social harmony rests upon honouring the obligations they entail" (Tang and Ward, 2003: 14). Confucianism describes five basic human relationships, each of which is governed by a set of principles by which people are expected to abide in order to maintain interpersonal and social harmony (Fan, 2000). These relationships include the sovereign-subject relationship, which is governed by principles of loyalty and duty; the father-son relationship, which is governed by principles of love and obedience; the husband-wife relationship, which is governed by principles of obligation and submission; the elder brother-younger brother relationship, which is



governed by principles of seniority and modelling, and the friend-friend relationship, which is governed by principles of trust. The community is central to the Chinese culture and people are seen less as individuals than as relational beings. People are expected to act in the interest of the community, which entails acting in their respective roles of, for example, 'son' or 'husband' depending on who they interact with at the time. Such normative standards for social exchanges serve the maintenance of interpersonal harmony, which is regarded as a prevalent and dominant virtue (Hwang, 1987). Indeed, so much emphasis is placed on the community that any notion of individualism is regarded as egoism, to the extent that people may be addressed by relational terms (e.g. younger sister, cousin, uncle), rather than by their first name (Martinsons and Westwood, 1997; Kuan and Häring-Kuan, 1995).

The importance of interpersonal harmony and respectful interaction with other people in the community, however, extends far beyond the family network. The literature frequently mentions the concept of '*guanxi*' which refers to the building and maintaining of good social relationships. However, the maintenance of social harmony is not necessarily the primary drive for people to maintain good social relations. Rather, relationships function as a type of social security system. Good relations are, therefore, highly important in the Chinese culture and are central to the Chinese, as knowing people in the right position can open many doors and can therefore help in securing a good job, a place at a respected educational institution or accommodation (Kuan and Häring-Kuan, 1995). '*Guanxi*' is a concept that the literature also presents as an indispensable prerequisite for collaborating with Chinese partners (Riekkinen et al., 2001).

According to the literature, the Chinese have a great respect for power, status and authority and rarely challenge or criticise a superior. In contrast to Western cultures, the Chinese apparently readily accept authority. Hwang (1987) reports that in comparison to Americans, Chinese have been found to be less autonomous, less aggressive, less extroverted, more submissive, more conforming and more subservient to authority.

However, Hwang (1987) and Tang and Ward (2003) raise an important issue in relation to relationships, which much of the literature seems to ignore: there is a great difference in the way Chinese interact with fellow Chinese and the way in which they interact with foreigners. Their sense of community does not appear to extend to outsiders. While Chinese are strongly bound by social obligations to insiders (family, social network, work-place, China), there are very different rules governing interaction with outsiders (e.g. foreigners). According to Tang and Ward (2003: 11), "there is a strong drive to distinguish between those who belong to the group and those who don't, between us and them, the former trusted, the latter ever suspect". The maintenance of harmony, for example, discourages aggressive behaviour within the social network, but to outsiders the level of aggression can be drastic (Hwang, 1987). This notion is highly relevant as it shows that – no matter how reliably the Chinese culture is represented in the literature – what one might encounter when embarking on a collaboration with the Chinese as an outsider can be quite different from what a fellow Chinese might expect to encounter.



3.3 Working with the Chinese

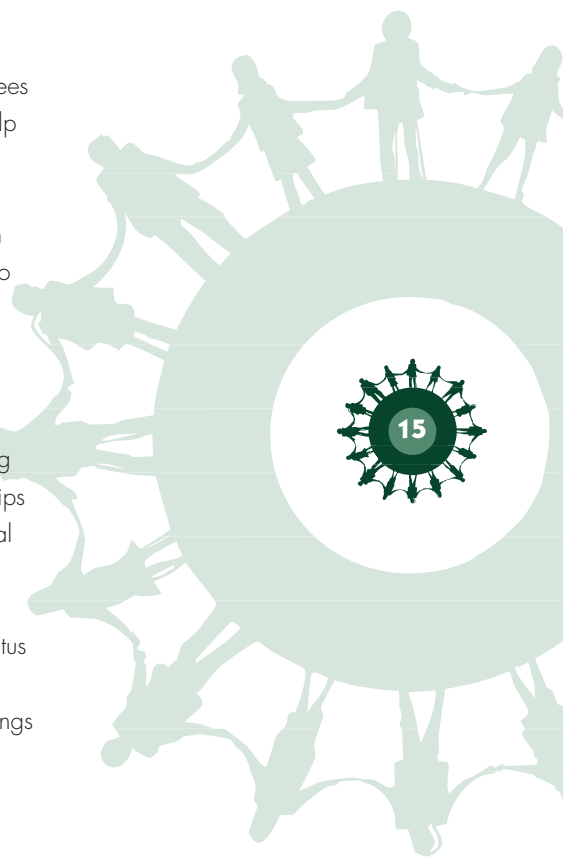
Perhaps not surprisingly, the challenges of working with the Chinese are predominantly discussed by the management and the diversity literature. The focus is as much on management and working style as it is on business etiquette and values.

One aspect of management style that is frequently mentioned in the literature is the resemblance to a family. The family is the basic unit in Chinese society and the nation is seen as a large family (Kuan and Häring-Kuan, 1995). It is also applied to business, with businesses being run like family organisations and management functioning like parents of extended families (Xing, 2001). The Confucian father-son role relationship is applied to business organisations, with the Chinese management style represented as very paternalistic (Fan, 2000). Both Smith et al. (1989) and Xing (2001) claim that employees expect managers to show leadership, but at the same time they expect managers to help solve their personal and private problems. Employers, on the other hand, appear to expect filial piety and loyalty from the employee. The literature proposes that the family-oriented structure of organisations can also be seen in the fact that boundaries between work and private life are often blurred. It appears to be common practice for Chinese to socialise with work colleagues privately after hours and to know about one another's personal circumstances (Xing, 2001).

The notion of '*guanxi*', discussed in the previous section, is also frequently mentioned in connection with business, where good relationships are seen as the basis for conducting successful business (Kuan and Häring-Kuan, 1995). With business relying on relationships rather than on written documents, the maintenance of relationships is regarded as critical (Tang and Ward, 2003; Riekkinen et al., 2001; Xing, 2001). According to Hwang (1987) and Kuan and Häring-Kuan (1995), an important means of establishing, maintaining and improving relationships is the sharing of meals. Food enjoys a high status in Chinese society: dinner invitations and hospitality are highly valued constituting a common practice in international business. In fact, the authors state that important meetings often take place over a meal and that there is a perception that the best business deals are struck at the dinner table rather than at the conference table.

With regard to business conventions, it is mentioned that business cards are very important to the Chinese, as they like to know immediately who they are dealing with, including the person's name, unit/company/organisation, position and address. Kuan and Häring-Kuan (1995) also claim that business cards should be passed on with both hands. However, beyond the mention of business cards, there appears to be considerable lack of insight into conventions regarding, for example, meetings and communication protocols, such as how to conduct introductions and who is expected to conduct them.

The literature does, however, discuss different perceptions of what constitutes appropriate working styles and concepts, drawing on comparisons between Chinese and Western business styles. Riekkinen et al. (2001) argue that in contrast to Western culture, the Chinese are not a society driven by the concept that 'time is money', but instead perceive time as a process of eternity and so approach life in an unhurried manner. They maintain that this different approach to time management can have detrimental effects on Western business practices. Martinsons and Westwood (1997) refer to another stark contrast in



business practice: they maintain that Chinese have a 'situation-accepting' orientation that clashes with the 'problem-solving' orientation of Westerners. They argue that the Chinese see little value in trying to influence external events or alter their surroundings. They also claim that Chinese prefer to rely on experience and intuition and to apply common sense and judgment, rather than seek scientific solutions, and that this contrasts with the Western preference for systematic and formal planning procedures.

3.4 Interacting with the Chinese

Observers report that the Chinese have a preference for moderate emotional demeanour, as this is seen to promote harmony both with others and within oneself. So restraint and caution in speech are encouraged in order to avoid imposing on others, while hostile and emotional behaviour are avoided (Bond, 1993; Walker et al., 1996). Much is left unsaid and common knowledge and shared opinions are relied upon to fill the gaps (Tang and Ward, 2003). Hwang (1987) attributes this circumlocutionary communication style, as well as the avoidance of confrontation and public criticism, to the concept of 'face'. According to Hwang (1987), 'face' reflects the perceived social position and prestige one holds within one's social network and is an extremely important concept to the Chinese. Preserving other people's face is crucial in Chinese society and this includes not only preventing others from feeling embarrassed but also positively 'giving them face'. This high regard for face is reflected in the communication style that is common in China: ambiguous and conditional statements are the norm because they maintain flexibility, promote harmony and thereby preserve face. According to Chan (1999), the Chinese also have a strong belief in modesty and self-denigration, which is reflected in their communicative preference not to express their true opinions so as not to embarrass or offend others.

Chinese communication style, like that of many other Asian languages, is thus a high context style (Hall, 1981) in which people rely heavily on the addressee's ability to deduce meaning from the context of the interaction. According to the literature, Chinese people's preference is thus for implicit and indirect communication rather than for explicit and direct communication (Martinsons and Westwood, 1997). In contrast to the Western style of communication where people tend to state more or less explicitly what they have to say, the Chinese usually avoid saying things directly to people they do not know well (Riekkinen et al., 2001). Strangers and acquaintances thus need to perceive and correctly interpret subtle cues, such as intonation, tempo, hesitation and non-verbal behaviour, in order to fully understand a verbal message (Martinsons and Westwood, 1997). However, it is vital to remember another very important point: Chinese may act very differently around foreigners than they would around insiders, because of the sharper distinction they typically make between insiders and outsiders.

Communication differences have not only been found in terms of style but also in terms of what is communicated. While Westerners seem to prefer transparency in business dealings, the Chinese are more selective in what they choose to communicate.

"In the Chinese business culture [information] is fundamentally a personal asset rather than an organization resource. The power structure in a Chinese organization is



best represented in a concentric circle with the patriarch in the centre. Power is maintained by carefully controlling key information. Much of it remains in a soft form – in the mind of the manager – and is verbally communicated. Key details, ideas and knowledge are selectively passed on to chosen individuals.” (Martinsons and Westwood, 1997: 222)

There appears to be a strong sense that information is a key source of power and thus to be kept within the in-group rather than disclosed for public scrutiny and use. Private, face-to-face meetings prevail and are preferred over written memos. The amount of information that is shared with a person reflects the degree to which that person is trusted (Martinsons and Westwood, 1997). This finding once again suggests that as an outsider, one is treated quite differently and that important information may therefore not be disclosed to foreign business partners. It also reinforces the importance of building good relations and gaining the business partners’ trust prior to transactions.

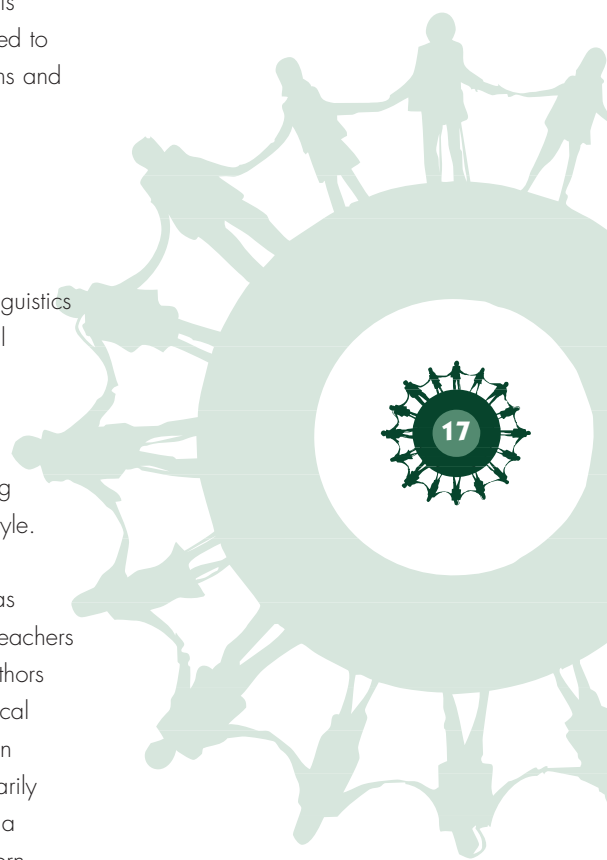
3.5 The Chinese Learner

Literature on the Chinese learner stems primarily from the education and applied linguistics sectors and preoccupies itself with both the typical Chinese learner and with typical Chinese learning and teaching practices.

The notion of ‘The Chinese learner’ is hotly debated for two main reasons. Firstly, researchers such as Cortazzi and Jin (1996) argue that Chinese society is changing rapidly and this is leading to changes in student-teacher relations and in learning style. They argue that the picture painted by many researchers is outdated and does not represent the reality of constant progress and change. Secondly, researchers such as Harvey (1985) argue that the Chinese learner is often misunderstood by Western teachers and that Chinese learning and teaching style is unwarrantedly condemned. The authors argue that Chinese learning and teaching practices make sense in their own historical contexts and, although they may not conform with Western teaching styles, they can nevertheless be highly effective. Moreover, such traditional methods are not necessarily unworkable alongside modern EFL teaching methods. Harvey (1985: 186) makes a strong point that “EFL in China needs Western experience and expertise, not Western dogma”. He strongly resents what he calls the English imperialist ‘we’ve got it right’ attitude. Despite such contestations, there is agreement that the Chinese learner does differ from Western learners in certain respects and that there are some coherent trends that are generally observable.

The finding that Chinese people have a high level of respect for authority and are very accepting of authority figures can be observed in the classroom as well as in other areas of Chinese society. This orientation to authoritative instruction needs to be seen in relation to China’s history and cultural heritage, and the influence of Confucian principles discussed in section 3.2 above.

According to Cortazzi and Jin (1996), more recent history has also had a strong impact on this learning and teaching approach. China’s one-child policy has led to kindergarten teachers having to deal with spoilt, wilful children who are not used to playing or working



with others. Teachers thus attach great importance to obedience, self-control, conformity and awareness of others, and as a result, their teaching style is authoritative, didactic and trainer-centred (Chan, 1999). However, the fact that Chinese students have been brought up to respect and regard highly those who provide them with knowledge can, as a consequence, lead to classroom behaviour that conflicts with Western doctrines of learning. In Chinese classrooms, active and critical enquiry is discouraged, including asking questions in class, and behaviour that challenges the teacher is avoided. Western teachers typically lament this lack of active student participation (Walker et al., 1996; Kennedy, 2002; Chan, 1999; Cortazzi and Jin, 1996). In fact, a further factor discourages students from 'participating actively' in classroom activities. Chinese students are often afraid of being wrong and/or laughed at and, as a consequence, fear losing face, which in Chinese culture is seen as particularly shameful (Kennedy, 2002; Cortazzi and Jin, 1996).

According to Kennedy (2002), Chinese culture is conducive to conformity and to reinforcing passive, compliant roles in class, which discourage learner autonomy. In fact, the literature reports that learners do not feel comfortable with student-centred learning approaches, as they have a low tolerance for ambiguity and uncertainty. Chinese learners expect their teachers to have deep knowledge and to provide all the answers. They appear to feel the need for rapid and constant correction. For a teacher continually to ask students to express their opinions and solve problems would be seen as ineffective teaching. Chinese learners reportedly believe that asking students questions wastes time and that group discussions are fruitless as they run the risk that students will learn errors from peers, when they could learn the correct answers straight from the teacher (Chan, 1999; Kennedy, 2002; Cortazzi and Jin, 1996).

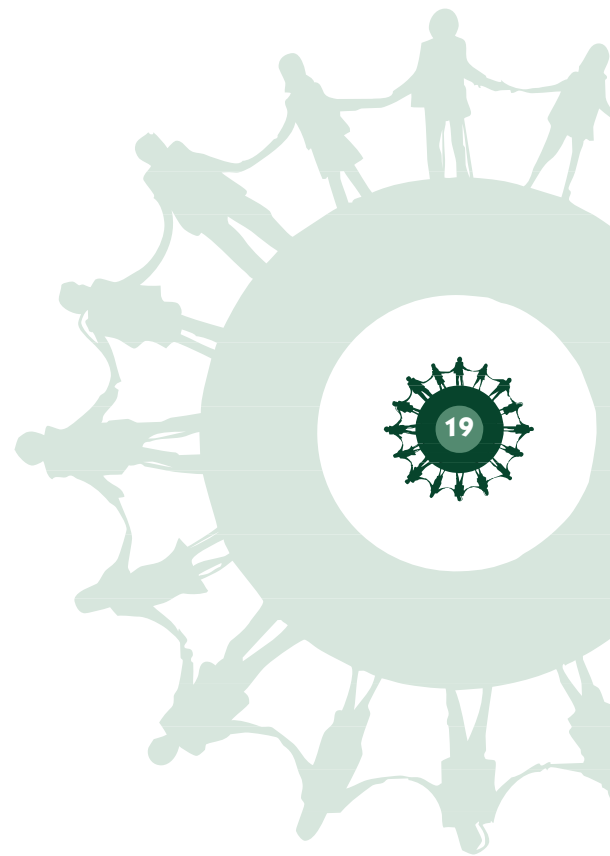
However, while Western educationalists may frown upon the traditional Chinese learning style, one has to bear the country's circumstances in mind as well as a discrepancy in goals. Chinese learners experience high levels of stress through parental pressure and are expected to perform, sometimes from as little as two years of age. A failure to perform brings shame to the entire family. Consequently, the students' main interest lies in being well prepared for exams. While the West strives to instil critical thinking in its students and puts emphasis on the learning process and on the acquisition of communication skills, Chinese learners are less interested in acquiring communication skills which are not tested in evaluations (Chan, 1999; Kennedy, 2002). Similarly, observers have noted that the Chinese classroom places a strong emphasis on the perception of the concrete and neglects a development of abstract thought (Chan, 1999). Hence, while the West focuses more on the learning process as a means in itself, the Chinese tradition is more oriented to learning outcomes.

Another typical element of the Chinese learning style also has its roots in the country's history, albeit reaching further back than the previously mentioned one-child policy. The learning of Chinese characters, due to their complexity, requires careful memorisation and repetition. These learning methods, however, have not been restricted to the acquisition of Chinese characters, but have also been applied to other forms of knowledge acquisition (Kennedy, 2002). In fact, the literature reports that China has a strong tradition of 'copying' classic works through memorisation and rote-learning in a wide range of subjects, including painting and literature. The aim is to acquire a vast store of knowledge



through modelling, with the expectation that enlightenment will come once the learner has mastered the basics and internalised them through intensive repetition (Chan, 1999; Cortazzi and Jin, 1996). This Chinese tradition of intensive reading and memorisation may be condemned by Western practitioners, but makes sense if one bears in mind the country's circumstances. In the case of China, they have to deal with enormous student numbers and – as a developing country – with limited resources (Cortazzi and Jin, 1996).

While learning in China is undergoing changes and slowly moving away from traditional methods, Jin and Cortazzi (2006) concede that there is still a gap between Chinese aspirations and current practice.



4. Culture, e-Learning and Pedagogy

4.1 Culture and e-Learning Design

The majority of research into culture and e-learning has focused on the design of content and materials for online programmes. However, despite this focus, there is a curious lack of discussion of what appears to be a fundamental issue: what is the starting point for the development of e-learning material? The starting point for materials design has an enormous impact on the issues that designers need to consider. If the model is one of transfer, i.e. an already existing module is implemented in another cultural context, then the concerns may be quite different from those arising in a collaboration model. The latter refers to a materials design model where two or more partners (potentially in different countries) work together to jointly develop a new module. Rather than discussing the various different approaches, the general assumption seems to be that people opt for the transfer model, with the consequence that much of the literature focuses on discussing the pros and cons of localisation and adaptation (e.g. Dunn and Marinetti, n.d., 2007; Edmundson, 2007; McLoughlin, 2007; Australian Flexible Learning Framework, 2004).

According to Dunn and Marinetti (n.d.), localisation is a process where minimal changes are made to the e-learning material in order to embed the material into a familiar context, e.g. by replacing 'Wal-Mart' with 'Tesco', 'Tengelmann' or 'Foodtown'. However, this approach does not go beyond superficial changes and therefore does not address different learning styles and different cultural and pedagogical values. Cultural adaptation is therefore preferable, but far more complex and difficult to achieve. Dunn and Marinetti draw a comparison between the adaptation of e-learning material and the marketing strategy of McDonalds: while core values and content stay the same, the packaging and promotion is adapted to the culture in which the product is sold. Likewise, e-learning can be adapted so that the core content and key learning messages remain the same, but the way in which it is presented is altered just enough to engage, motivate, challenge and test learners. The aim is not to take every single idiosyncrasy into account, but simply to incorporate the minimum necessary changes for learning material to be effective in a different cultural context. While such literature is highly beneficial for educationalists approaching a transfer project, it offers no clues as to what they might want to consider if they engage in the intercultural collaborative construction of new material.

When it comes to developing an e-learning module, the literature emphasises that it is not sufficient to create excellent learning material according to the designer's standards; it is of crucial importance also to take the target audience's cultural background into account. Without doing so, otherwise outstanding learning material may be doomed to fail. Learners in different cultures appear to have differing preferences and practices in terms of learning styles and pedagogical values (Liu, 2007). Such learning orientations have a considerable impact on how material should be tailored for maximum learning satisfaction, enjoyment, comfort and efficiency. Prior to elaborating on the impact that



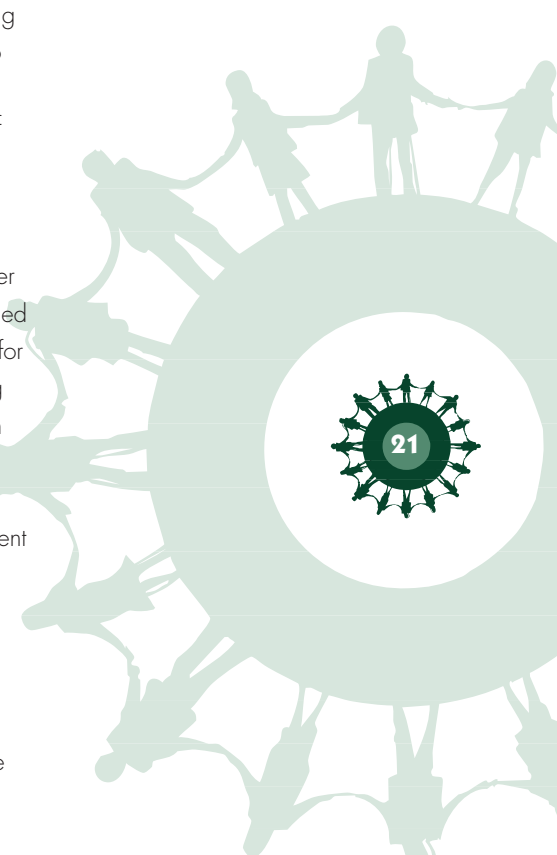
national culture may have on material design, it is crucial to address the following question: Why should culture be taken into account in e-learning material design? The answer is quite simple: Research has revealed that there is an extraordinarily high drop-out rate in e-learning courses and that the predominant reason for this can be traced back to a lack of cultural adaptation (Australian Flexible Learning Framework, 2004; Dunn and Marinetti, n.d.). If pedagogical values, which may work in one culture, are not compatible with those in another culture, the likely result is that students start to question the quality of the course, the teacher and the merit of participation (Australian Flexible Learning Framework, 2004).

The most important starting point in creating culture-friendly e-learning modules, according to Downey et al. (2005) and Collis (1999) is to show a flexible and open approach to materials design and to free oneself from pre-conceptions. One should avoid the assumption that the content of the course, the web layout and design, and the choice of technology and platform are bias-free (Schneider and van der Emde, 2005; Zahedi, 2006; Australian Flexible Learning Framework, 2004) and instead one should carefully consider how to approach integrating culture-friendly design choices into the instruction material. Even basic design choices (including colour, graphics, phrases, icons, character sets, pictures, symbols etc.) can be culturally sensitive and should therefore be approached thoughtfully (Downey et al., 2005). According to Sibagraphics (2006), the colour red, for example, symbolises joy and good luck in Chinese culture, but is the colour of mourning in South Africa, and was the colour worn at funerals in parts of Japan at certain times in history (Wikipedia, 2008). While the colour red may be a good colour choice in a Chinese context, it may be seen as inappropriate in another culture or may simply be ineffective. However, even within a Chinese context, the colour red communicates different messages, depending on how it is used. As a background colour, red does appear to symbolise happiness and good luck, when used in moderate doses. However, red as a font colour signals alert rather than happiness. Likewise, different cultures may have differing preferences for the visual load they expect a website to carry. While Western websites usually appear to prefer a simple, clear and concise visual information load, Asian websites tend to carry a high visual load, including flashing images and extensive amounts of written text.

Such seemingly insignificant differences in preference can have a considerable impact on the general conceptions a person holds of another culture – albeit unwittingly. This is evident in an experience recounted by a participant of the eChina-UK Programme who stated:

“The ‘busyness’ of Chinese websites [...] is also apparent in Powerpoint presentations. We see a few brief bullet points as a more effective communication medium than the ‘kitchen sink’ style of the Chinese Powerpoint. I always thought that was because the Chinese just didn’t understand Powerpoint - now I know that it was me not understanding the Chinese.”

As this example demonstrates, even basic design considerations can become cultural pitfalls; cultural differences and preferences thus need to be taken into consideration in every phase of design and delivery.



According to the Australian Flexible Learning Framework (2004), culture not only affects design choices, but also influences people's perceptions of and attitudes towards technology-based learning. Consequently, the literature suggests that culturally influenced perceptions and attitudes to e-learning also need to be carefully considered by materials designers and tutors alike. How successful and efficient an e-learning module is depends to a large extent on the user's attitude to technology and to computer-mediated education. Such attitudes can differ culturally, in that people in one culture may see computer-mediated learning as prestigious, progressive and desirable, while those in another culture may regard it as an inferior substitute for face-to-face classroom education, as appears to be the case in China (Joyes and Wang, 2007). Negative attitudes towards this kind of learning mode may entail a lack of motivation and dedication and can have a serious impact on the successful delivery of an e-learning module.

In different countries, there may also be differing levels of access to technology and while some populations may be highly skilled and computer savvy, others may be largely computer illiterate. Such unfamiliarity with technological advancement can lead to inhibitions. Likewise, people in some societies may be fairly flexible and adaptable and may welcome new technologies, while those in others may be more resistant to change and meet computer-mediated learning with reluctance. According to Dunn and Marinetti (n.d.), poor technological infrastructure and fear of technology are factors frequently mentioned as a reason for the high drop-out rates of e-learning courses. Material designers and tutors may be faced with varying degrees of techno-phobia, inhibition and reluctance to engage in this unfamiliar form of instruction, which may discourage learners from participating and thus have a negative impact on their learning success (or indeed the completion of a course). The Australian Flexible Learning Framework (2004) suggests that cultural gaps do not exist only between individuals from different countries, but also between individuals and cyberspace. E-learning materials designers thus need to be aware of differences in attitudes and to tailor the 'usability' of their module to a level that users will feel comfortable with.

Nielsen (1993) discusses the term 'usability' and claims that designers need to assess a module's usability attributes before its implementation in order to be able to assess how successful and enjoyable the learning experience will be for students. His model involves five different aspects of usability: learnability, efficiency, memorability, errors and satisfaction. Learnability refers to the ease of use of the programme, measured by how long it takes a novice to reach a certain proficiency level. Efficiency refers to how productively an experienced user can learn from the module. Memorability refers to how easy it is to remember how to use the system. Errors refers to how many wrong mouse-clicks a user makes while navigating the system, and satisfaction refers to how pleasant the system is to use and how satisfied its users are. While these issues are of a more generic nature and less culture-related, culture adds an extra degree of complexity to design consideration issues. It might well be that different cultures with different pedagogies might find different designs more memorable or have certain preferences in terms of how to navigate a site. Zahedi (2006) refers to the more appropriate term 'culturability' which emphasises the relation between culture and usability in web design.

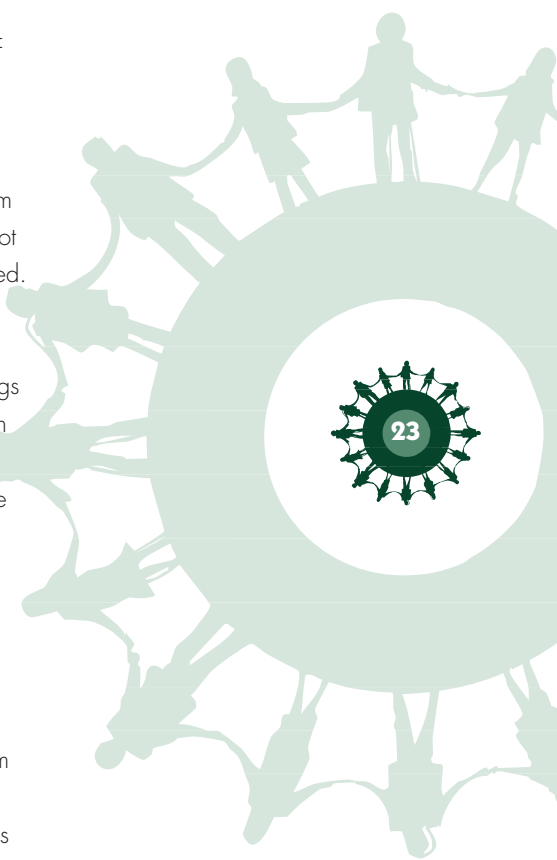


4.2 Culture and Online Interaction

The level to which a learner feels comfortable with the use of technology may also impact the level to which a learner will engage in online interaction. The literature suggests that online communication differs from face-to-face communication in several aspects. Not only is online communication mostly asynchronous, i.e. temporally delayed, but it also often lacks features such as voice quality or intonation and non-verbal cues (Liu, 2007). As with many other variables, this may not have much of an impact on some students, but may be detrimental to the learning experience of others, who may feel more at ease with conventional, synchronous (i.e. co-temporal) and multimodal communication (i.e. communication including audiovisual information). The question that poses itself to programme designers and deliverers is: should synchronous and asynchronous means of interaction be combined? Should different modalities be incorporated into the learning module, and if so, to what extent and how? There is a need to find the right balance between the various forms of communication and which combination is best suited to a student community. While asynchronous communication may be the most convenient form of communication, especially if users are dispersed across different time zones, it may not be sufficient and effective. Synchronous communication may also have to be implemented. This could take the form of a weekly Skype session, with the potential to provide both audible and non-verbal cues for communication, or a conference call via telephone, offering at least audible information. Alternatively, if feasible, regular face-to-face meetings could be scheduled or a combination of all of the above. Preferences for communication modes may have to be assessed for each different group of students. In the view of McConnell et al. (2007), it is important not to impose pre-conceived ideas and etiquette guidelines on students, but to let them develop their own protocols instead, while tutors merely provide an atmosphere that is conducive to active online communication.

Nevertheless, even if the right combination of synchronous and asynchronous modes of communication are facilitated, as well as suitable combinations of the different communication tools and modalities, this alone does not guarantee that participants will be willing to engage in online communication. Krüger (2006) found that an online forum may work for some students, but be rejected by others. Both Krüger (2006) and Bayne (2005) claim that online interaction allows otherwise silent voices to become audible, as shy and disadvantaged students may feel more confident communicating online where they have more time to consider their contributions and where there is a lack of immediate consequences for contributions. However, because online discourse creates potential anonymity, some participants may reject online interaction. Krüger (2006) believes that some participants see learning as a social activity and feel that e-learning cannot compensate for social interaction and therefore lack motivation. Consequently, the question arises as to how tutors should/can provide feedback and motivation in a largely teacher-decentred learning approach. Do students have enough intrinsic motivation or do they rely on the teacher to push them forward? How much feedback do students want and need? What impact does the physical absence of a teacher have and how can this be addressed in materials design?

The issue of online communication discussed in the majority of the literature seems to revolve primarily around questions of online culture, classroom culture and idiosyncratic tendencies, and less around questions of national culture. However, some studies do



appear to address the influence of national culture on online communication. Liu (2007) and Banks et al. (2007) mention that national culture does determine to some extent how much participants are willing to engage in online communication. Liu (2007) calls Asian students 'silent learners', who will refrain from interaction for fear of making mistakes and being ridiculed by classmates. Banks et al. (2007) reinforce Liu's (2007) findings, stating that Chinese learners have a tendency to postpone communication until they are able to provide the 'correct' answer. Tutors need to be able to interpret correctly such online silence and understand that a mixture of problems with internet access, difficulties with language and content and the fear of making mistakes are responsible for a lack of communication. Tutors should move away from the Western perception that only vocal students are active learners and not misinterpret online silence for a sign of disengagement, but understand that learners from different cultural backgrounds have a different understanding of what active learning entails.

While the literature appears to argue that online communication is largely a question of personal preferences, there is also some literature that confirms that the degree to which a learner will engage in online communication may go far beyond a preference for different modes of communication and the level to which a participant feels comfortable with the use of technology.

Interestingly, considering the amount of attention e-learning has received over the past decade, there is virtually no research available on the impact of culture on the training and preparation of e-tutors. While some writers mention issues such as the role of the e-tutor – with regard to the teacher's role in implementing new technologies in the classroom and helping students make the transition to new ways of working (Wang and Reeves, 2007; Joyes and Wang, 2007) – there is a lamentable lack of literature discussing the training of e-tutors and there is even less literature focusing on the impact of culture on e-tutor training.

4.3 Culture, Pedagogy and the Curriculum

Literature in this area focuses predominantly on three concerns: a) the relationship between culture and pedagogic values and beliefs; b) how Eastern pedagogic practices compare to Western pedagogic beliefs and c) what influence culturally informed pedagogic beliefs have/should have on materials design.

One issue that has been identified as possibly the most important difference between Western and Asian teaching practices is the notion of learner autonomy. The literature generally asserts that Western students have adopted a more independent learning style, favouring the development of critical thinking and emphasizing the learning process *per se*. Asian students, on the other hand, have been described as more teacher-dependent, as more focused on learning outcomes and as more unquestioningly accepting of the teacher's input. The discrepancy between learner autonomy in different cultures affects e-learning particularly strongly, because e-learning, to a large extent, presupposes and fosters autonomy.

Computer-mediated learning constitutes a shift towards a more autonomous model of learning. In contrast to the traditional classroom, where the teacher is the focal point, e-learning demands more initiative on the part of the learner and thereby enables the

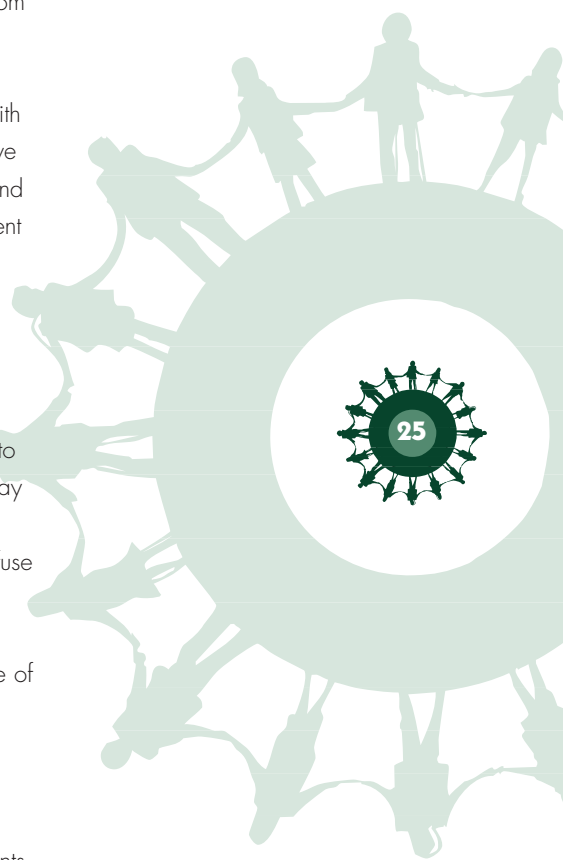


learner to develop autonomy (Rollin and Harrap, 2005; Krüger, 2006). While teachers still provide input and feedback, students are not only encouraged to be more responsible for their own learning and success, but are forced to be more proactive by the very nature of e-learning and by a computer-mediated learning mode. E-learning can offer freedom from temporal and spatial constraints and, theoretically, it can offer students the option to choose for themselves how to navigate the content, the pace at which they prefer to learn and the order in which they choose to approach their learning. However, such an approach may not be suitable for every culture and it is therefore vital that materials designers assess how much learner autonomy is appropriate for the respective culture in which the material is presented. More mature students, individualistically oriented students, and students with a high degree of intrinsic motivation may favour an approach that allows them more freedom (Krüger, 2006). On the other hand, students from cultures that favour a teacher-centred approach and students from cultures with a high degree of uncertainty avoidance, who avoid ambiguity and expect the teacher to have all the answers, may not feel at ease with unstructured learning (Downey et al., 2005). Chinese and UK learners, for example, have been found to hold different expectations regarding the learning and teaching process and regarding teacher-dependence, preference for concrete tasks and whether learning content is set (Banks et al., 2007). The degree of autonomy and structure an e-learning module assumes, therefore, needs to be carefully tailored to the learning preferences and pedagogical values prevalent in the particular culture.

A problem that seems to emerge from the literature is that e-learning courses are often designed by Western practitioners for Asian learners and the issue of autonomy seems to cause headaches for materials designers. The problem is twofold: material designers may not be aware of or fully comprehend the Asian pedagogic approach of learner dependency or they may simply not accept the different pedagogic values and may refuse to create material that is not compatible with their own pedagogic beliefs.

This discussion of the degree of learner autonomy, however, raises the much wider issue of whether material should be presented in a form students are used to or in a form that designers think is more suitable. The Australian Flexible Learning Framework (2004) argues that materials writers need first to consider what kind of learning environment is most familiar to students. Once they have assessed the typical learning environment of their target audience, they need to decide if they consider it preferable to present students with a learning mode that is familiar to them or if they consider a different learning mode superior and preferable. In the latter case, designers and tutors alike need to be able to bridge the gap between the students' comfort zone and a new and unfamiliar learning mode and thereby facilitate the transition to these new ways of learning (Joyes and Wang, 2007). Despite the fact that a different approach might be superior in theory, it may not necessarily be more successful if designers do not manage to introduce it in an accessible way. Hence, care needs to be exercised in how a new approach is introduced and what tools are used for induction.

However, the problems for materials design do not stop there. Challenges arise where core pedagogical values in one culture are inappropriate in another and learner autonomy is only one of those challenges. Other pedagogical concerns include, for example, the level of vocalised participation different cultures are used to (as discussed in the online communication section) or the creation of an assessment system which will do a



particular culture justice. Liu (2007) states that assessment systems also differ in different cultures. In Eastern cultures, Liu claims, assessment systems tend to ignore students' social competency and limit innovation and creativity, and hence are fundamentally different from many Western pedagogical practices. They may also differ greatly with respect to the weight they hold. In Western cultures, assessments are used as a measure of learning and also to provide closure on a course, but so long as students pass their course, the results may not have serious social and economic consequences for students. In Eastern cultures, on the other hand, assessments are vital to the future career and high test scores mean everything (from entering top schools to obtaining high salary jobs, a high quality of life, a high social profile or even access to political careers) (Liu, 2007). The Australian Flexible Learning Framework (2004) asserts that materials designers need to consider what kind of assessment task is fair and unbiased. It is certainly a challenging task for materials designers to take different assessment systems adequately into account.

The overwhelming conclusion to draw from these insights is that cultures do differ in their pedagogic values and beliefs and that instruction courses can only be maximally effective if they are compatible with the learner's background. Students learn how to learn depending on their cultural background. Instructional design is simply a product of culture and it thus needs to take culture into account (Wang and Reeves, 2007). Liu (2007: 36) states that "we need to understand cultural value differences regarding educational systems in order to create a learning environment where all students [feel] valued and capable of academic success". Most researchers seem to echo Liu's view and there seems to be a general consensus that conceptions of what constitutes effective pedagogies differ across cultures. For inclusivity in teaching and learning, therefore, it is important to recognise that learners have different strategies and to offer choice in tasks and adaptation of methods (McLoughlin, 2007). Despite the recognition of the need to base learning modules on culturally compatible pedagogies and to avoid cultural imperialism, what seems to emerge from the literature is that this is more of a future goal than current practice.

5. Culture, Partnerships and Project Teams

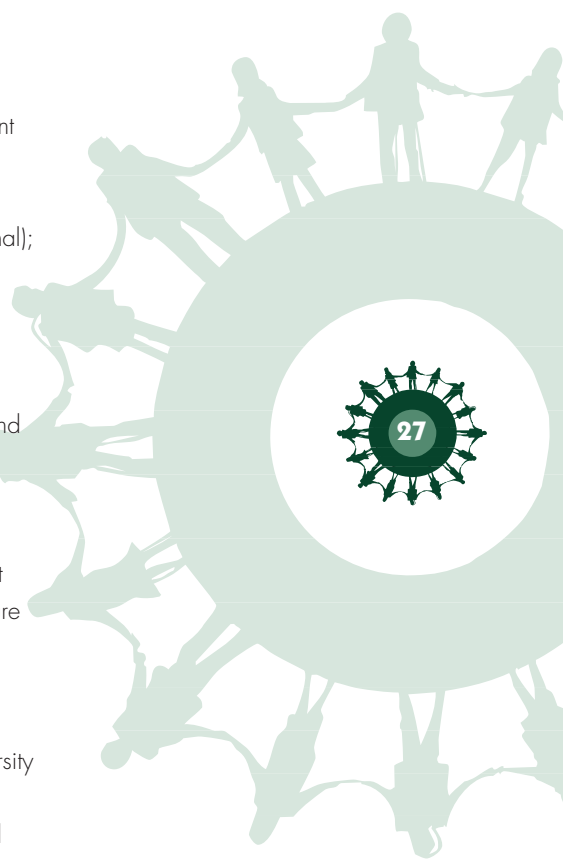
5.1 Introduction

The focus of the international business, management, team-building, project management and cross-sector partnership literature has been on:

- building sound long-term relationships across boundaries (national, sectoral, institutional);
- developing the competence to operate internationally without major constraints;
- acquiring specialist knowledge about specific cultures and their institutions/systems;
- minimising risk through better management of diversity.

Although there is an emphasis in one part of the business literature on cultural values (and the behaviour that is inferred to derive from those values), there is another tradition of literature that is less concerned with culture-specific behaviour and more focused on the generic issue of managing teams. The former is reviewed briefly in Section 2.3 of this study; the latter is the main focus of this section. The notion of culture here may refer not just to national culture but to organisational and occupational culture, to the formal culture of systems and symbols or to the informal culture of unwritten rules and shared understandings.

The common factor in much of this literature is the management of diversity, where diversity might describe intercultural interaction, cross-sectoral or cross-disciplinary teams, ethnic diversity within a common national culture, or project teams combining mixed functional skills and experience. Reviews of relevant research (Earley and Gardner, 2005; Kirkman and Shapiro, 2005) indicate that “national and cultural diversity generate conflicts that may reduce the ability of a group to maintain itself over time and to provide satisfying experiences for its members” (Earley and Gardner, 2005: 18). The desired outcome, therefore, of any management intervention is to create a ‘high-performing’ team which capitalises on its diversity rather than being constrained by it (Katzenbach and Smith, 1994; Shapiro et al., 2005). In order for a multicultural team’s full creative and alternative problem-solving potential to flourish it is necessary for differences to be explicitly recognised, understood and accepted: what Maznevski (1994) refers to as a high level of integration. Suppressing differences leads to a suppression of creativity and results in mediocrity (DiStefano and Maznevski, 2000). The difference, Adler (2002) argues, is not the presence or absence of diversity but the extent to which diversity is widely managed.



5.2 Organisational Culture

Much of the management and organisational behaviour literature utilises the concept of organisational culture (see Brown, 1998, for a summary). Definitions of organisational culture demonstrate the parallel that can be drawn with the concept of national or ethnic culture:

“Organizational culture entails the shared beliefs, values and norms in the organizational context. Culture may determine individual behaviour, but it is also concurrently constituted through human behaviour.” (Ayas and Keniuk, 2004: 272)

This is important for a study of intercultural effectiveness for two major reasons: i) an understanding of organisational culture will improve understanding of individual and interpersonal behaviour; ii) organisational culture may be shaped by core elements of national cultural values. In the practical context of a collaborative project, it may be difficult (but useful!) to recognise which values or behaviour derive from the culture of the specific organisation. This is a balance to the assumptions that might be made about expected behaviour on the basis of national cultural stereotypes: an individual's behaviour may be more influenced by the culture of the employing organisation than by what is assumed to be a 'typical' shared national culture.

Goodall and Roberts (2003) present an example of this complexity in their article on international teamwork in which they highlight the difficulties encountered by Chinese employees in learning the organisational culture of a Western-based multinational company.

“Learning Chinese isn't easy but learning Euroil culture isn't easy either.” (Goodall and Roberts, 2003: 161)

Here, interpreting signals from another culture was hampered not just by differences of language, national cultures and geographical remoteness but by the unfamiliarity of the concepts and terminology used in the company's shared internal culture:

“It is hard, perhaps, to remember that what is obvious and clear at headquarters level becomes a mystery when seen from a distance.” (Goodall and Roberts, 2003: 162)

In such a context, simply having a good knowledge of the participating national cultures would not be sufficient to be effective. That depended on successful integration of employees into a common institutional culture – not just Chinese, not just UK, but the organisational culture of Euroil.

Differences in organisational cultures can lead not just to interpersonal challenges, of the sort described by Goodall and Roberts (2003), but to fundamental mismatches in the way that organisations work together, in their co-ordination, systems and expectations. Stott's (2007) case study of a 'failed' partnership between two international organisations highlights the practical problems of collaboration which arose from contrasting values deeply embedded in each organisation. In this case the collaborating institutions differed not in their national cultural values (they were both culturally diverse in terms of their staff

and locations) but in their sectoral cultures: one was a large international aid and development agency; the other a multinational computer services business. The two partners “could not have been more different in organisational behaviour and styles” (Stott, 2007: 10) but, to the detriment of the project, this was never explicitly dealt with:

“In spite of recognition of these differences, no attempt was made to establish how this organisational diversity could be positively capitalised upon and learned from.”
(Stott, 2007: 10)

A number of writers (e.g. Earley and Mosakowski, 2000) have argued that the successful development of an intercultural project team can, in fact, create a ‘hybrid’ culture. This new culture emerges from the multiple individual cultures that are brought into the project as a result of the efforts made by the participants and/or the project managers, to generate common norms and processes to which all participants can subscribe. This parallels the concept of organisational culture found in the management literature. However, it may only be prevalent in smaller project teams with high levels of interaction: certainly Hanges et al. (2005) found no evidence of a hybrid project culture emerging in their study of the very long-term, large-scale GLOBE project.

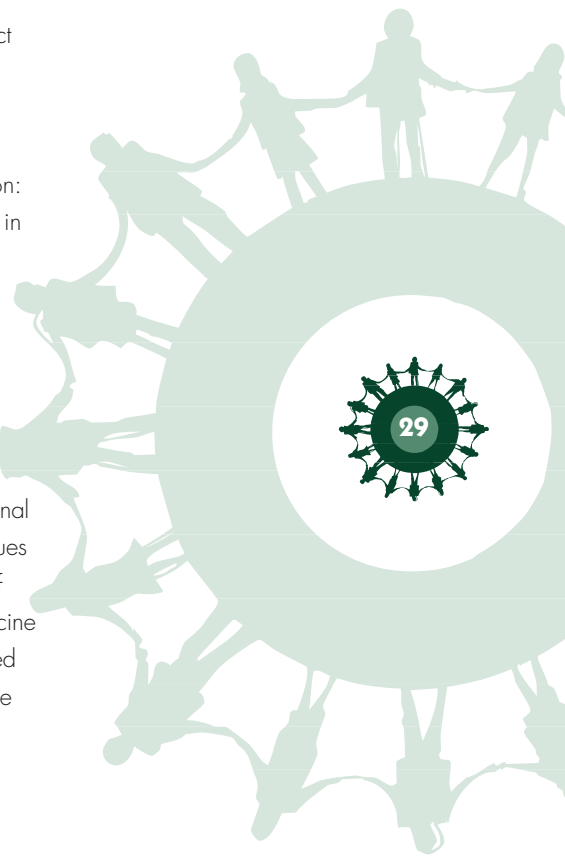
5.3 Occupational Culture

Alongside the concept of organisational culture, attention has also been paid within the sociology and organisational behaviour literature to the concept of occupational or role culture. This research started with studies of particular occupations, especially the traditional professions, and demonstrates that many occupations carry with them sets of beliefs, values and norms that are characteristic of the job role rather than of the individual person or of their national culture. This would be most obvious in traditional professions such as medicine or law, where the practice of the profession implies adherence to certain, long-established values and practices: new entrants to the profession will tend to accept and assume these values and practices as part of an acculturation or socialisation process⁴.

The importance of this field with respect to intercultural effectiveness is the need to recognise the cross-cutting influence of occupational culture on national cultural values. This can work in two basic ways and either may introduce complexity into the management of an international project. Firstly, an individual’s allegiance to an occupational culture may be stronger than their adherence to the national cultural values into which they were socialised or they may experience a tension between those sets of values. In the words of Earley and Gardner (2005: 19):

“Because people generally seek to reinforce their self-concept through an enhancement of their existing roles, they tend to be attracted to others from a similar background (Turner 1987). However, this does not necessarily mean that the Germans will group together, the Brazilians will group together, and so on, because a sense of national origin may not be the hierarchically dominant identity for a person. Thus, a German team member may wish to interact with others on the team having a similar functional background [...]”.

⁴ For a summary, see MacDonald, 1995.



Conversely, the shaping of an occupational culture may be heavily determined by national culture, i.e. the occupational values may not be universal but culture-specific. We may assume that, because someone is an academic researcher they will hold certain beliefs about, say, research ethics, but this may not be true for all and every national or ethnic culture. In other words, professional status and occupational roles may cross-cut both national and organisational culture and, in putting together an internationally diverse team, there needs to be an awareness of this potential complexity.

5.4 Team Roles

Within the mainstream management literature, there is considerable research into how to create successful teams and, more specifically, into the roles that team members adopt or are prescribed⁵. The literature on team-building has been dominated by a small number of sophisticated typologies that have been widely adopted in the practical analysis and management of teams (Belbin, 1996; Myers and Myers, 1995). Such typologies can be used both as a way of analysing a team's performance (e.g. a team has not met its objectives because it is dysfunctional in some respect) and as a way of selecting or recruiting members into a team. The usefulness of this to the creation of specialist project teams is immediately obvious and this approach has been used extensively by companies in team selection and team-building processes (Belbin, 2003).

When we consider the cross-cultural team, we will need to reflect on the extent to which roles are determined or constrained by cultural considerations. For example, someone who is, by nature, a facilitator in their own culture may find that this role is not valued by another culture or that their skills are hard to transfer to an alien cultural context:

"[...] often those who are socially adept at home have internalized their own culture so much that it is difficult to step outside and be flexible elsewhere." (Earley and Gardner, 2005: 24)

The success of prescribing a formal role for a member of the group (e.g. chairing meetings) will depend on all participants recognising a common set of behaviours that constitutes 'being a chairman'. It will also be influenced by culturally-specific perceptions of power and status: in some cultures it is acceptable for someone to take the formal role of chair without being the most hierarchically senior person in the group – in other cultures this would be unthinkable. As with both organisational and occupational cultures, there can be no safe assumption about roles within a team: roles will need to be made explicit, their constituent behaviours spelled out and proper attention paid to differences in cultural norms⁶.

The complexity of these cultural 'strata' - national, organisational, occupational, role - can also be a negative influence at the outset due to participants' expectations, which can influence behaviour and lead to stereotyping or 'labelling' of counterparts. In a study of a partnership between a private company and a not-for-profit organisation, Laufer Green Isaac (2004) (a marketing company) found that each side was operating with a stereotype of the other that was not only inapplicable to the collaboration but could negatively influence behaviour towards the partner.

⁵ See, for example, Katzenbach and Smith, 1994.

⁶ See Canney Davison and Ward, 1999: 50–52 for an interesting discussion of chairing styles.



"[...] it is clear that the existence of negative stereotypes, combined with deep-seated cultural differences, make partnerships between nonprofit and for-profit enterprises difficult. Within each of these cultures, the day-to-day activities and work habits can unknowingly undermine the trust necessary for the establishment and implementation of partnerships." (Laufer Green Issac, 2004: 17)

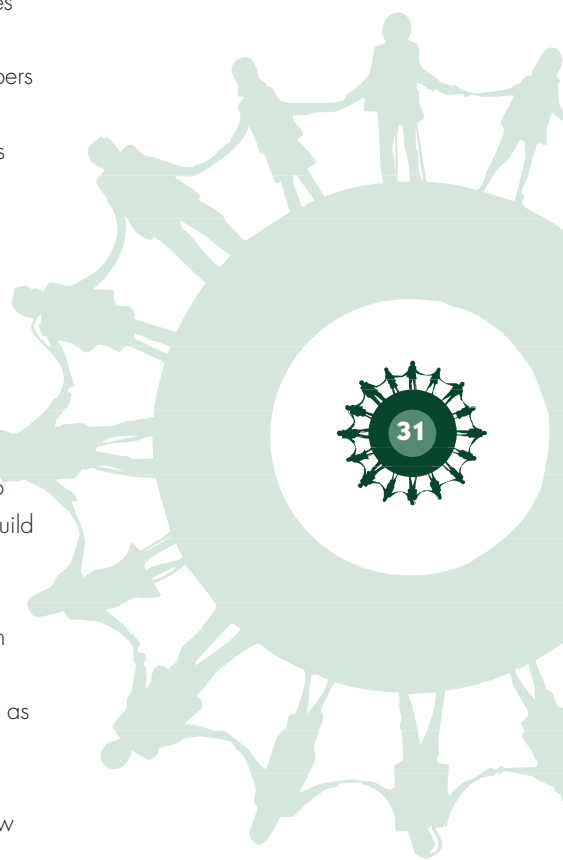
Such negative stereotyping can arise around both national and organisational cultures and, as in both Stott's (2007) study and the Laufer Green Isaac (2004) work, a failure to address diversity can contribute to project failure (Gibson and Grubb, 2005). Joshi and Lazarova (2005) consider the role of leadership in the multinational team but conclude that the existing research provides very little reliable data on what distinguishes a successful leader of a culturally diverse team from a less successful leader. Their own research focuses on the leadership competencies valued by leaders and by team members in multinational teams but produces a list that could equally refer to almost any form of management team. The most highly rated factor – by leaders and team members – was 'Direction and Goal Setting', a vital leadership function for all teams. However, as we demonstrate in the following section, literature on building the effective cohesion of international teams, does underline the need for clear goals, norms and processes.

5.5 Team Cohesion and Trust-Building

If, as we posited earlier, the aim of good project management with a culturally diverse group is to create a 'high-performing' team, then the issue of cohesion would appear to be crucial. This is reflected in the literature. Much has been written about the need to build trust between team members in order to achieve the best performance from the group collaboration. It is regarded as vital to build good relationships: a failure to do so can lead to a decrease in mutual interest and the development of trust between partners can suffer (Riekkinen et al., 2001). While establishing good relationships can take a lot of time and effort and can put a strain on resources, in the long run it is seen as worthwhile, as good relations will enable better communication and faster outcomes during the actual work processes. As Janssens and Brett (1997: 160) put it: "It is important to work on the relationship first and then on the task, as it is better to start slow and end fast than to start fast and maybe not end at all."

Building trust, therefore, has been seen as an important role for those who are leading, or facilitating the team. Adler (2002) believes that multicultural teams face substantially greater challenges than single-culture teams in integrating and achieving productivity due to what she describes as 'process loss'. This is due to the lack of cohesion (shown in terms of mistrust, miscommunication and stress) created by diversity. In describing how to manage culturally diverse teams she places the focus on team leaders who must learn to integrate the team's diversity if the team is to function productively. In this view, managers should give teams positive feedback on their process and output – early in the team's life cycle, serving to teach the team to value its diversity, recognise contributions made by each member, and trust its collective judgment.

Trust is, however, a complex process and cannot be taken for granted. Indeed, some writers have taken a more pragmatic approach to the issue of trust. Caplan (2003) argues that building trust is less important than being open about motivation and



objectives: transparency and mutually agreed procedures will underpin co-operation strongly enough to achieve goals without also aspiring to create trusting personal relationships. However, this approach, in itself, may be culture-bound as there are many cultures (especially Asian) for which the personal relationship element needs to precede any practical co-operation.

Ewington's research on trust in diverse emergency response teams (Oxfam, 2007) distinguishes between 'swift trust' and 'deeper trust'. The former resembles more closely what Caplan (2003) describes above and is based on four main elements: a demonstration of competence, openness with information, integrity (keeping promises) and reciprocity. It is a level of trust that can be achieved within teams through relatively simple but thoughtful actions and can reduce some of the influence of cultural diversity. Moving to a situation of 'deeper trust' brings into play factors that are more culturally determined such as compatibility (common values and beliefs), goodwill and accessibility (sharing personal feelings). Consequently, establishing such trust is a longer-term process and may be more strongly influenced by cultural differences.

Senge (1999: 248) quotes a business manager at Ford:

"[...] you cannot create trust directly. You can only create conditions conducive to trusting."

These "conditions conducive to trusting" will include technical and organisational factors as well as personal behaviour. In all collaborations there are particularly sensitive areas where differences might manifest themselves: these include time frames, expectations of progress, public relations or dissemination. These are areas that need to be among the first addressed by new collaborators. A key element of training used in cross-sector partnership is the conscious creation of ground-rules on these key areas so that potential differences of practice are brought to the surface early on and are then transcended through common agreement (Tennyson, 2003). Good operational procedures remove some of the dependence on personal relationships that, at the start of a project, may be weakly established and fragile.

Organisational factors are also important in Ewington's (Oxfam, 2007) analysis of diverse teams working in crisis situations. If effective organisational systems, structures and processes are already in place before an emergency happens, then they can play an important role in providing some clarity and certainty in what otherwise may be a chaotic situation. Because of the difficult and uncertain circumstances in an emergency situation, the need for structure and certainty for team members becomes even stronger. The processes that an organisation adopts can send out strong messages about whether the organisation trusts people or not. There needs to be clear and efficient systems in place for delegating authority and assuring accountability, and these need to be perceived as fair and appropriate (Oxfam, 2007).

There also needs to be a sense of equity between the co-operating parties – especially if their motivations for involvement are different, as may commonly be the case in international projects. In the Partnering Toolbook, Tennyson (2003) highlights equity of power as an essential prerequisite of successful collaboration, yet this is rarely considered openly in Higher Education projects as there is an assumption that the institutions are comparable and therefore, in some undefined way, equal. In fact, universities very often come to projects with inequalities in terms of reputation, status, the priority of the project, the allocation of funding, the local resources committed to the project etc. These



inequalities can set up problems from the outset. This was evident in eChina-UK Phase 1, both in the UK perception that the project was of lower priority for the institutions in China than for them and, conversely, by the perception by some Chinese partners that the UK's main role was to transfer educational resources to China that could then be marketed.

Alongside a sense of equity in resources and benefits, there should be a reciprocal perception of technical competence. Basic technical issues can dog projects from the beginning unless they are discussed openly and fully at an early stage. Ewington states:

"My own interviews with both international and national staff suggested that mutual perceptions of 'technical competence' were a key criterion for trusting each other, and in many cases initial perceptions of lack of competence undermined the ability to work together. In most emergency situations national staff are 'on the ground' and managing the crisis at least a week before international staff arrive. Procedures and systems have often already been put in place. There was a sense from field staff that on arrival international staff rush into spending budgets and setting up procedures without looking into what has already been established. Thus in the Emergency Response of 2002 in Malawi the result was the existence of parallel operating procedures that led to lower levels of motivation and direction, and low resulting trust." (Ewington, 2008)

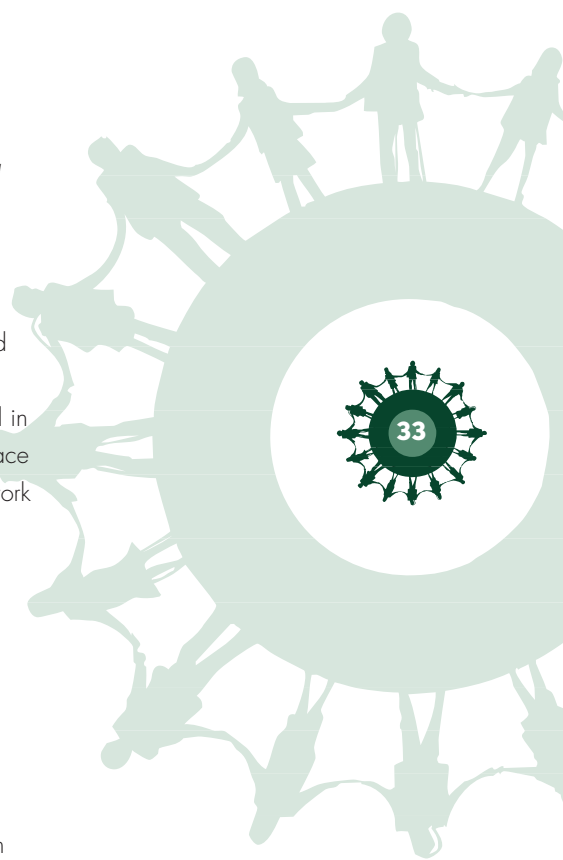
Sound project management can, then, contribute significantly to the building of trust and the cohesion of the team: this may be a procedural matter as much as a personal one. The emphasis is not necessarily on having a particularly skilled or charismatic individual in a leadership role – success depends far more on having someone who can put into place the processes, systems and shared understandings that the team will need in order to work well together:

"Managerial intervention to set norms early in a team's life can really help the team start out with effective processes." (Goodall and Roberts, 2003: 90)

One response to these issues, used in the cross-sector partnership field, has been the employment of a skills audit. This exercise, carried out at an early stage of the project planning constitutes a review of the capacity of existing partners to deliver the project, and will also impact positively on the issue of roles discussed above (Hanges et al., 2005). A skills audit can become a valuable focus for those co-operating, both to learn more about each other and their respective capacity levels. It may also help to identify what training and development team members will need in order to fulfil their roles competently. This, in turn, will contribute to the establishment of trust between the participants (Rein et al., 2005).

Another strategy has been the use of a broker or intermediary (Tennyson and Wilde, 2000; Tennyson, 2005). This is a role that does not figure largely in the research into intercultural effectiveness but has its genesis in the literature on team roles and facilitation. Work in cross-sector partnerships has explored the benefits (and the potential drawbacks) of introducing specialist brokers as agents to help overcome the problems of diversity in multi-sectoral collaborations. The broker acts as a mediator, interpreter and facilitator between partners whose cultures, language and organisational structures are divergent. In this model, the intermediary function is seen as a key catalyst in managing diversity effectively⁷.

⁷ See Brett, Behfar and Kern's (2006) paper for an example of a project manager as mediator.



There are risks to using an intermediary role in this central way to facilitate collaboration between diverse parties. Chief among these is the development of dependence on the broker and the tendency of partner organisations to focus interaction on the broker rather than try to build workable relationships with their counterparts from other cultures (Rein et al., 2005). The parallel with intercultural projects is obvious and, in some collaborations, individuals have emerged from a team to take on a brokering role without this ever being formalised. Brokers are, then, not always deliberately appointed: sometimes they emerge 'naturally' but are never explicitly recognised.

5.6 Knowledge and Skills Transfer

Central to many international education projects is the transfer, between participants, of specialist knowledge or skills. There have been a number of studies of the cultural obstacles that exist to the transfer of knowledge and skills between different international organisations. These may be particularly germane to the challenges facing educational projects both in the transfer of teaching methodologies or content and in the sharing of research knowledge. According to Berger (1998: 123) "people's natural tendency is to transplant the skills that work in their home culture into a new culture" and they are often surprised if their transferred skills/norms do not work, resulting in destabilisation, culture shock, intolerance and resentment. In order to prevent communication barriers due to ill-transferred language and/or skills, it is essential to understand that what works in one culture does not necessarily work in another and that just because people do things differently does not mean it is worse or wrong.

Fan (2004) looks at this issue in some depth from the specific perspective of the transfer of Western management knowledge to China. He is interested in the extent to which knowledge is 'culture-bound' and, from a review of the existing literature, concludes that there is no evidence that Western management knowledge is universal or can be applied to business contexts regardless of local culture. Fan (2004) characterises the transfer of a body of knowledge as a process of selection and adaptation.

"[...] the transfer of western management to China is a complex and long-term task which is subject to the influence of many factors, among which the cultural factor is the most important." (Fan, 2004: 339)

This cultural factor is evident at a number of levels: differences in core values and philosophy (e.g. the Confucian disdain for commerce); a mismatch of concepts and theories (e.g. the absence in Chinese of a concept equivalent to the contemporary notion of 'marketing'); unfamiliarity of specific techniques, methods and practices. Overcoming the obstacles that such divergence presents may be easier in the realm of 'hard' elements, such as practical tools and techniques but highly problematic in the 'soft' elements such as personal relations and beliefs:

"Functions like production, R&D, innovation, finance and accounting, have more hard elements, while other functions such as organisation, marketing and HRM have more soft elements. Hard elements are less subject to the influence of cultural and environmental variations and can be applied immediately with little or no adaptation; soft elements are more culture-bound and context-specific, and require more adaptation during the transfer." (Fan, 2004: 336)



5.7 The Project Life Cycle, Learning and Evaluation

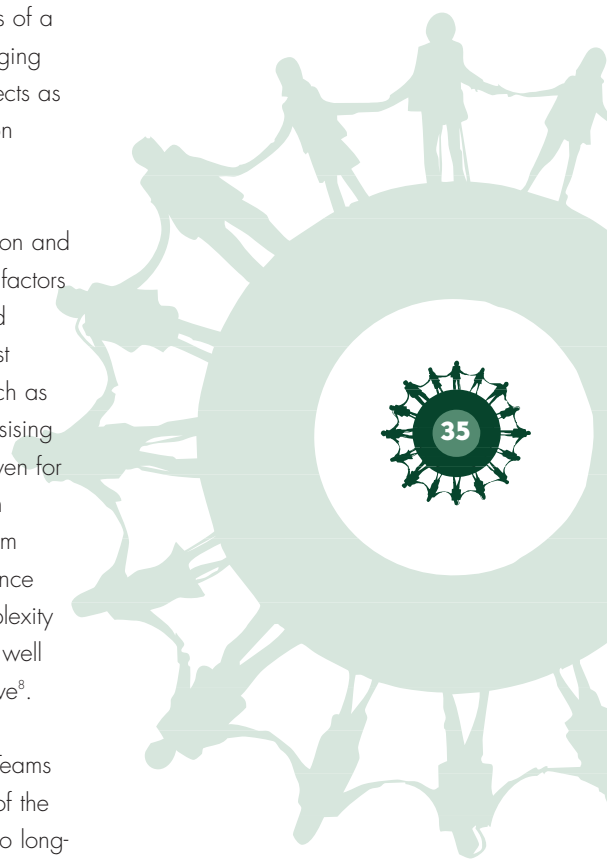
It would not be feasible for any international collaboration to be able to acknowledge and manage all of the factors mentioned above at the instigation of the project. Practical constraints of time, money and human resource mean that project participants must often begin their co-operation with imperfect knowledge of their respective partners. Literature on international projects has frequently recognised that each collaboration goes through a series of stages – a life cycle – not to an unchanging template but in ways that are, to some degree, predictable and can therefore be planned for. Work, for example, by Tennyson (2003), and Stott and Keatman (2005) has presented conceptual models of a partnership cycle that can be used both to understand and to prepare for the changing challenges of collaboration. These models can be valuable in the planning of projects as they help both to manage the expectations of all partners and to provide a common ‘language’ through which to discuss and monitor the project partnership.

A similar approach, specifically in the study of multicultural teams, is Canney Davison and Ward’s (1999) 4-phase model for implementing best practice. This model looks at factors that need to be ‘identified, acknowledged and accounted for’ by team leaders and members at four critical stages in the life cycle of an international team: start-up, first meetings, mid-point and closing stages. This includes factors already mentioned such as ‘planning the communication technology support’ at the start-up phase and ‘emphasising building interrelationships when face-to-face’ during first meetings. The argument given for establishing procedures is based on the natural tendency for teams to over-focus on content issues at the expense of process. Even when there is more sensitivity to ‘team process’ issues, there is often a need for team leaders to have procedural competence around certain team assessment and development tools which respond to the complexity of challenges in diverse teams. Canney Davison and Ward’s (1999) argument sits well with the observations on team-building and cohesion reviewed in Section 5.5 above⁸.

Teagarden et al. (2005) review the research on Academic International Research Teams (AIRTS) and draw on a number of ‘life cycle’ models to present their own analysis of the key stages of a research project’s progress. This analysis is especially applicable to long-term, internationally dispersed projects from which much of their data are drawn but their characterisation of stages has similarities to models from other contexts, such as the work on cross-sector partnerships. Teagarden et al. (2005), for example, propose a seven-stage model consisting of vision, strategic formation, focus, execution, interpretation, reporting and end-game. Compare this with Stott and Keatman’s (2005) five stage model of scoping, initiating, implementing, consolidating and sustaining/terminating.

One of the often undervalued stages in the life of a project is its termination. Almost every project is time-limited and so the participants need to understand very clearly *what* the end-goals are and (just as importantly) *how* they will know when they have been achieved. This means that the partners can then agree, in advance, *how* they will move on from the project and *whether* they seek a longer-term, institutional relationship. This has

⁸ See Spencer-Oatey and Tang, 2007 for an application of this to the eChina-UK collaboration.



formed an important strand of discussion in cross-sector partnership literature (Zadek, 2003) as there is considerable pressure on partnerships both to show results and to demonstrate financial effectiveness and/or sustainability. But the principle applies equally to other kinds of projects: it is sometimes ignored in academic projects because the motivation for setting up a project may be short-term and primarily driven by the need for funding, employment or reputation. However, as international collaborations are complex, expensive and time-consuming to establish, there is every reason to build in questions of long-term sustainability and/or sensible strategies for exit from the relationship. Teagarden et al. (2005) acknowledge this in their description of an academic research project life cycle. They recognise that any joint agreement between participants needs to “delineate what happens when a member wishes to exit or enter the (team)” (Teagarden et al. 2005: 327) but they also identify what they call the ‘end game stage’ of the life cycle, which is concerned with exactly those issues raised by Zadek (2003) of dissolution, institutionalisation or reinvention:

“The key challenge in the end game stage is whether to dissolve or reinvent the (team).” (Zadek, 2003: 326)

It is at the end-point of a project that, traditionally, any evaluation takes place. The conventional evaluation model has been one of *post-hoc* judgement, looking over the whole project and assessing whether it has met its objectives. This model, however, neglects the potential to use evaluation in a formative way, as a means for improving the project during its lifetime. Operating an international project with a multicultural team presents a rich opportunity for learning. Both the management and the partnership literature have paid attention to the value of learning as a process within complex projects and have proposed practical procedures by which the learning, both of individuals and of the project team, might be enhanced. Rein and Reid (2005) posit a model of ‘iterative’ evaluation which is well suited to education projects in that it focuses on evaluation as a learning process and suggests a procedure that captures and utilises learning for the improvement of the project during the project’s lifetime, rather than implementing a single, terminal evaluation.

A good example of this emerges in Ewington’s (Oxfam, 2007) research on trust in diverse emergency response teams to which we referred previously. While team leaders and their members were sensitive to observable symptoms of high and low levels of trust from their considerable experience in the field, they had no ways of assessing trust factors as a platform for focused emergency work. One of the outputs of the research was a Trust Index questionnaire and guidance notes, designed to assess factors enhancing or destroying trust within their team and to provide a framework for actively managing them. Thus, the use of a practical tool, available to the participants during the project, may provide valuable learning which can be used to enhance performance.

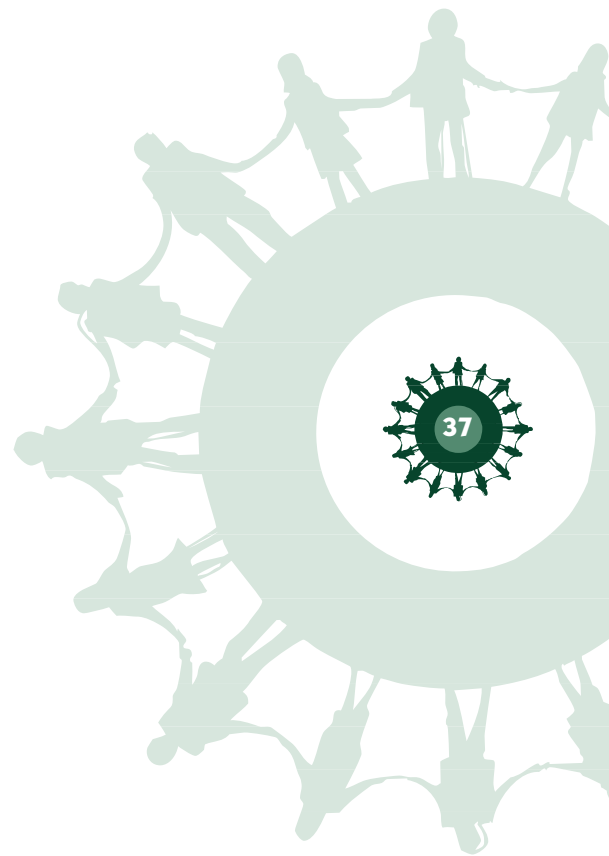
Ayas and Keniuk (2004) use evidence from two major industrial case studies in order to demonstrate how consciously applied procedures to encourage individual and group reflection can significantly enhance the performance of the project team. They demonstrate the potential for the employment of tools and techniques that support the participants’ ability to review their collaboration and to use the insights they acquire in order to enhance their practice.

“Reflective practices that help develop learning capabilities in projects include the use of various organizational learning tools...These are all practices that empower project members to reflect on task and team related aspects of project work and



help them understand how their behaviour impacts on others. The aim with such practices is to improve project performance and refine learning capabilities of individuals.” (Ayas and Keniuk, 2004: 273)

Research by DeSanctis and Jiang (2005) confirms the value to team performance of frequent, high-quality sharing of information and collaborative learning through communication.



6. Personal Competencies in Intercultural Interaction

6.1 Introduction

The literature on intercultural interaction competence in the fields of applied linguistics, foreign language education, intercultural studies, psychology, and international business and management focuses predominantly on the following aspects:

- generic competencies for intercultural effectiveness;
- personality traits and acquired skills;
- communication skills.

Much of this literature takes a strong theoretical stance, identifying relevant skills, knowledge and competencies at the level of the individual but does not attempt to suggest practical solutions to intercultural interaction problems. This is in contrast to the majority of the literature reviewed in Section 5, which has a strongly pragmatic orientation.

There is a great deal of overlap and agreement between the different fields on what constitutes key competencies for intercultural effectiveness. Although each field approaches intercultural interaction competence from a different angle, they all focus on what an individual should ideally know before embarking on intercultural collaboration and on what skills and predispositions an individual should possess. The intercultural interaction competence literature and the applied linguistics literature both attribute critical competencies to five main categories, which include: awareness, attitudes, skills, knowledge and proficiency (Fantini, 2000; Byram, 1997; Prechtl and Davidson Lund, 2007). In order for an individual to be able to communicate effectively in a different cultural environment, competencies need to be acquired in all of those areas.

6.2 Awareness

Awareness is the first step to intercultural effectiveness, in that it enables a person to notice and perceive differences and similarities. The literature stresses that both self-awareness and other-awareness are required. Self-awareness and the awareness of how one's own culture works, what it values and what its norms are is a vital prerequisite to effective intercultural interaction. People tend to start with an ethnocentric world-view, at the very heart of which lies the (often unconscious) assumption that their culture has 'got it right' and that its norms, behaviours and values are globally applicable. The danger with such



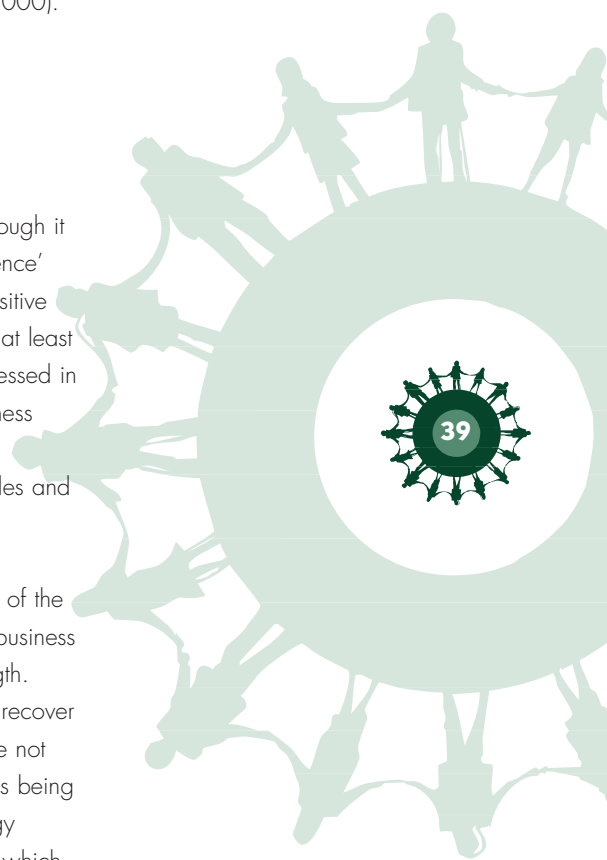
an assumption is that a person is incapable of recognising that his/her actions as well as the actions of an interactional partner are culturally performed (Rehbein, 2001). That is to say, each person's linguistic choices, expectations and interpretations are informed by culture (Meier, 2005). Moreover, a lack of awareness means that interlocutors are more likely to attribute differences in behaviour to the other person's presumed malevolence rather than to culturally informed differences in norms and behaviour. Consequently, a well-informed degree of awareness of one's own culture as well as of one's own idiosyncratic tendencies is necessary for objective self-assessment (Barham and Devine, 1991; Fantini, 2000; Bennett, 1993; Chen and Starosta, 2005). A high degree of awareness of cultural differences and of another culture's norms and values is equally important for establishing a well-founded basis for intercultural interaction effectiveness (Fantini, 2000). The importance of awareness-raising cannot be overestimated.

6.3 Affect (Attitudes and Emotions)

The literature pays a great deal of attention to affect in intercultural interaction, although it is debatable if one should indeed talk about it as competence. The word 'competence' implies that it can be acquired, but the degree to which positive affect, such as positive attitudinal and emotional qualities, can be acquired, or whether they are innate or at least largely shaped through acculturation and upbringing, is a question that is not addressed in the literature at present. In order to determine what constitutes intercultural effectiveness and how to train people to gain a greater degree of intercultural effectiveness, it is necessary to establish whether such competence is trainable. With regard to attitudes and emotions this is an issue that needs to be addressed in future research.

One of the aspects of affect that is most frequently mentioned and agreed on in all of the different types of literature reviewed is that of emotional strength. The international business and management literature distinguishes between different kinds of emotional strength. Among those, resilience refers to the ability to 'bounce back' after setbacks and to recover from mishaps, criticism, or negative feedback. Coping refers to the ability to handle not only stress, but also to deal with change and with situational circumstances, such as being removed from one's support network (WorldWork Ltd., n.d.). The field of psychology places particularly strong emphasis on the ability to deal with psychological stress, which an individual, dealing with intercultural interaction, is invariably exposed to (Hammer, Gudykunst and Wiseman, 1978).

Contributions from all of the fields mentioned earlier agree that the most vital attitudinal qualities for effective intercultural interaction are openness, mindfulness, respect for other cultures and for the interactional partner, cultural empathy, flexibility, patience, cultural sensitivity, interest, curiosity, non-judgementalness, tolerance for ambiguity and a sense of humour. While these key words appear in nearly every article, very few of the studies make an effort to elaborate on what constitutes 'openness' and 'flexibility' or on how they enable more effective intercultural interaction. Such vague and abstract terminology is only marginally helpful, partly because it fails to acknowledge that a person may well exhibit some of the competencies in some areas of their life, but not in others. For example, while a person may have a high level of tolerance for uncertainty in some aspects of their life, e.g. moving to an unfamiliar culture, they may have very little tolerance for uncertainty in



other areas, e.g. job security. Likewise, a person may be very flexible in making adjustments to a project plan regarding organisation and time management, but may be inflexible when it comes to making changes to the product itself, which may conflict with fundamental personal and professional values and beliefs. Such distinctions are both relevant and necessary. The more that the terms used in the literature are expounded, the easier it is to assess whether a person exhibits these critical characteristics.

The only attempt to transcend such vague terms, by providing more meaningful subcategories, comes from the international business literature. The WorldWork framework of international competencies offers useful insights into attitudes that an individual should ideally possess for successful intercultural encounters (World Work Ltd., n.d.). For the concept of 'openness', the report authors distinguish between three different types of openness, including being open to new thinking, being prepared to welcome strangers and being positively accepting of different behaviour. With regard to flexibility, they distinguish between flexible behaviour, flexible judgment, and showing willingness to learn languages. Such categories are far more meaningful and provide a better basis for (self) assessment.

6.4 Skills

Writers agree that social skills play a major role in the intercultural interaction competency set. While good social relationships between individuals, within a group and between different groups are an asset to any form of interaction, they are particularly relevant and critical for communication across cultures. Relationships are important in any society, yet are more highly valued in some cultures than in others. Among the cultures that place a particularly strong emphasis on good relationships among business/collaboration partners is the Chinese society, in which good relationships even outweigh the importance of contracts. The ability to build and maintain interpersonal relationships with people from different cultural backgrounds, therefore, forms a particularly valuable competency for intercultural interaction (Schneider and Barsoux, 1997).

One of the most important skills highlighted in the literature, and one that is emphasised particularly strongly in the field of applied linguistics and communication studies, is the skill to communicate effectively and efficiently in intercultural contexts. The research identifies message skills, mindful listening, perceptiveness, transparency, clarity, active listening, and a willingness to listen for meaning beyond style differences, as some of the most critical communication skills (Chen and Starosta, 2005; Ting-Toomey, 1999; Berger, 1998; WorldWork Ltd., n.d.). However, communicative skills go far beyond the competent sending and interpreting of verbal messages. A sense that speed, pauses, length of speaking turn, silences, and non-verbal actions also differ between cultures is just as important. Canney Davison and Ward (1999) claim that communicative aspects such as speaking pace can be associated with credibility, with a slow pace being attributed with high levels of credibility in Japanese culture, while a fast speaking pace holds more credibility in American culture. Similar differences can be observed with regard to silences and pauses, which in Japanese and Scandinavian cultures are a sign of respect and show that one is absorbing and reflecting on what the other said. In American culture, on the other hand, silences and pauses often cause unease, as they are associated with communicative problems and signal that something is wrong (Canney Davison and Ward,



1999). The fact that these aspects of communication are less immediately obvious does not make them any less meaningful or less significant.

However, even the mastery of all verbal and non-verbal communication aspects are not sufficient to ensure effective communication if teams are dispersed. Establishing a good balance between synchronous and asynchronous communication is also critical, as is the choice of communicative tools and an agreement as to how best to make use of different modes of communication (Kayworth and Leidner, 2002; Smith, 2001). Smith (2001) argues that collaborative partners should establish rules on how to use each particular communicative tool, such as email, fax, voicemail, or videoconferencing. He argues that when people establish clear rules, for example on the timeframe in which a person is expected to respond, there is less ground for frustration and confusion.

No less important is the choice of a working language and native speakers' skills to use the chosen working language in a way that does not alienate non-native speakers, who are already put at a clear disadvantage (Bournois and Chevalier, 1998; Janssens and Brett, 1997). Hence, native speakers need to acquire the skill to tailor their level of language use to the non-native speakers' capabilities and avoid the use of jargon and idiomatic expressions. Canney Davison and Ward (1999) also point out the importance of avoiding the assumption that both parties will understand each other, simply because they are native speakers of the same language. Meaning can differ even between different regional varieties of the same language, which is to say that appropriate meaning transfer is not guaranteed between speakers of American English and British English or between speakers of Australian English and South African English. There appears to be widespread agreement that communication skills are not only among the most important skills, but also among the most manifold and complex skills to acquire.

6.5 Knowledge

Unlike skills, which refer to the ability to deal with a situation *impromptu*, knowledge refers to wisdom that is acquired prior to an intercultural encounter. Preparation and the prior acquisition of knowledge forms an important part of the intercultural collaboration process. Gudykunst (2004) identifies the importance of the following: knowledge of how to gather relevant information; knowledge of group differences and of personal similarities; and knowledge of alternative interpretations. The literature is generally in agreement that it is vital to acquire knowledge of how international businesses work and in particular how the organisation of the collaborative partner works, as well as knowledge of social groups and their practices (Byram, 1997).

Although it is reported in the literature that gathering information about the collaborative partner's culture before embarking on the collaborative process is of great importance, people with personal experience of intercultural collaboration admit that previously acquired cultural knowledge may hinder rather than facilitate interaction if it is too stereotypical (cf. Motteram et al., 2007). Knowledge that is too generalised leads to expectations of how interactional partners will behave that rarely matches reality, and this leads to potential confusion and complications. It could be argued that some of the literature overestimates the importance of cultural knowledge and fails to address whether



a predetermined set of expectations can impact too negatively on a person's ability to remain open and flexible during an interaction. The key seems to be the type of knowledge that a person tries to acquire – objective, 'factual' knowledge is less problematic for interaction than subjective, more personalised knowledge.

6.6 Proficiency

Proficiency refers to proficiency in the communicative partner's native language. The literature conveys a strong sense that making an effort to acquire another language is not a waste of time and resources (as professionals tend to believe, according to Ewington et al., 2007), but a valuable component of a person's set of skills. Interestingly, the same study states that professionals think of clarity of communication as one of the most valuable attributes, which is noticeably enhanced if both conversational partners have a better understanding of the other's language. It seems therefore somewhat surprising that professionals who recognise the importance of communicating clearly fail to recognise that language proficiency is a key ingredient to achieving mutual understanding. Not only does language proficiency enable an individual to understand the other better, but it also gives useful insights into the other's culture, values and norms. It will help understanding not only of the other's verbal outputs, but also of his/her actions and behaviour. Learning the other's language is also a generally much appreciated sign of good-will and will enhance the relationship and trust building process, while a lack of willingness to acquire even a handful of key phrases is met with resentment by interactional partners who are more or less forced to interact in the majority language (mostly English). The acquisition of the collaboration partner's language would prevent native speakers dominating non-native speakers, as it provides more of a balance. While the non-dominant language may not be used as the working language, its acquisition would, at the very least, make native speakers of the dominant language understand the difficulties and problems non-native speakers face when communicating in the working language. Consequently, some proficiency in the other's language is generally regarded as desirable (Fantini, 2000; Smith, 2001).

6.7 Points of Contention

What has been reviewed above suggests that there is consensus between the different disciplinary approaches. However, the use of similar terminology may be somewhat misleading. According to Spencer-Oatey and Franklin (2009), the use of the same terms does not necessarily mean that researchers are referring to exactly the same thing. For example, even within the field of psychology, one researcher may refer to empathy as a behavioural feature while another may refer to it as an affective feature. In other words, the use of the same terminology does not ensure that terms are being used with equivalent meaning, and if there is discrepancy within the same field, there is likely to be even less consensus between different fields, even though on the surface the same terms and concepts seem to emerge.

Furthermore, while there is agreement in all of the literature reviewed that these competencies/personality traits are relevant and necessary, there remain problematic aspects which the literature fails to discuss. With regard to the concept of awareness, there is doubt about the level of objectivity one might gain. While self-awareness is certainly a crucial



aspect, both of one's own personality and one's own culture, self-awareness rarely reflects reality, as there is a tendency for people to want to see themselves, as well as their own culture, in a positive light. The picture of self-awareness that a person has of him/herself and his/her culture tends to be rosier than an outsider's view would suggest.

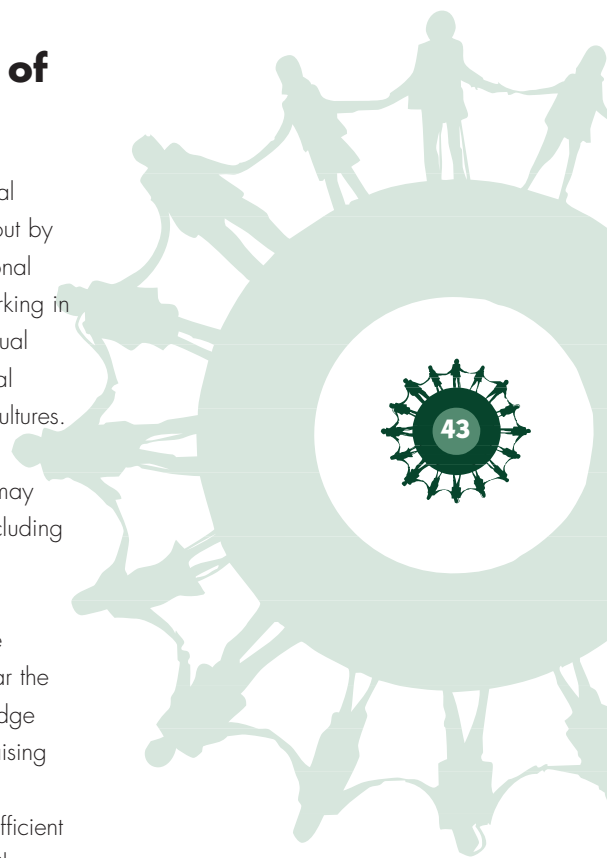
Much of the literature also tends to paint a black and white picture, conveying the impression that a person either does or does not possess a certain quality. It fails to acknowledge that a person may well exhibit some of the competencies in some areas of their life, but not in others: more fine-grained distinctions are both relevant and necessary, but are currently not sufficiently acknowledged in the literature.

6.8 Differences among the Various Fields of Literature

While all of these fields identify important personality traits and skills, the intercultural competence literature and international business and management literature stand out by including a contextual element in their research output. The former discusses situational and contextual factors that influence the degree of effectiveness and success of working in and interacting with people from another culture, which apply regardless of individual competencies. The authors of the TCO report (n.d.) claim that a person's intercultural effectiveness depends in part on the degree of difference between the respective cultures. While a UK institution collaborating with a New Zealand institution may encounter relatively few discrepancies, a UK institution collaborating with a Chinese partner may experience very pronounced differences in many aspects of collaborative work, including leadership, language and a multitude of other elements.

A major contributing factor is the degree of exposure the collaborative partners have previously had to the respective culture, as well as to other cultures. The more familiar the interactive partners are with one another's cultures, the more awareness and knowledge they will possess. Prior exposure to other cultures serves as an important means of raising cultural awareness and of developing cultural sensitivity, which will help facilitate intercultural interaction. No less important is the level of preparation and support. Sufficient time and resources to research the host culture, organisation and partners increases the chances of success. Support also plays a major role in enabling effectiveness. There are two vital types of support. Institutional support is needed in order to provide resources, encouragement and motivation, and to pave the way for collaboration (be it technically, simply through providing consent, or any other way of facilitating the collaboration process). Social support is equally critical, as a lack of support from family and friends can lead to feelings of alienation and lack of motivation, and can entail quitting or failure of the project. No matter how apt and suited an individual might be, if they do not receive the necessary support, an intercultural collaboration project may be doomed to fail.

The international business and management literature also discusses these social and situational influences on intercultural success. Tung (1987) states that family-related problems (for example, a lack of good schools or a safe living environment) and failure of the spouse to adjust to different physical and cultural environments often lead to failure. While Tung's (1987) research refers to working overseas, collaboration that does not require a person to



move overseas nevertheless requires a stable network and supportive social environment, as intercultural collaboration can still be stressful, problematic and frustrating at times, even if one does not have to give up the comforts of one's familiar surroundings.

Tung's (1987) research also offers further important insights on a number of levels. Firstly, her research clearly shows that personality is only one important criterion for success. It demonstrates that professional, social and situational factors, that have little to do with an individual's personality and personal suitability for working overseas, play a major role in the level of success of the outcome. Secondly, her study points to a crucial factor which lies at the very heart of the Global People project, but has been (and often still is) overlooked by businesses, namely the balance between professional competence and intercultural suitability. Tung (1987) claims that all too often people are delegated to intercultural activities purely on the basis of their professional competence and merit. Such overemphasis of technical competence to the disregard of other necessary attributes is in part due to the fact that identifying and measuring attributes appropriate for intercultural interaction is difficult. Nevertheless, the high failure rate of expatriate managers clearly demonstrates the need for such assessment prior to deployment. Tung (1987) and Schneider and Barsoux (2003) further add a particularly relevant point, namely 'motivation'. Regardless of how suited a person is to working overseas, if they lack the motivation to do so, there is little chance for effectiveness and success. Commitment and motivation are crucial, but not very frequently mentioned in other types of literature.

The international business and management literature adds further important professional skills and personality traits to the overall picture. Marx (1999) mentions the importance of both professional excellence and of self-reliance and independence. The latter is particularly critical if a person is removed from his/her usual social support network, but is also an important professional attribute. Schneider and Barsoux (2003) mention a related factor, which they refer to as ego-strength, i.e. possession of a strong sense of self. Both independence and a strong sense of self are critical if a person finds him/herself in an entirely new and different environment and cultural surroundings. It will provide a sense of stability where there otherwise is none and will thereby enable an individual to be more resilient and cope better with change.

The psychology and communication studies literature adds a number of complementary personality traits, which are not discussed in other fields. Gelbrich (2004) mentions the importance of self-confidence, which is in line with Marx's (1999) and Schneider and Barsoux's (2003) notion of independence and ego-strength, but Gelbrich also adds a particularly critical element to the picture, namely that of realistic expectations. The fact that 'realistic expectations' does not receive more attention is somewhat surprising, given that other fields, such as the intercultural competence literature readily acknowledges factors such as 'projected similarity', i.e. the tendency to imagine that others are more similar than they actually are (TCO, n.d.). 'Projected similarity' clearly demonstrates that people have a tendency to approach intercultural encounters with unrealistic expectations. Both awareness-raising, sound preparation prior to the inception of a collaborative project, and intercultural training are necessary to enable people to approach a project with more realistic expectations.



The psychology literature adds a further interesting notion, not discussed elsewhere, namely the different kinds of intercultural competencies required for different purposes. According to Cui and Awa (1992), intercultural collaboration entails both cross-cultural adjustment and effective job performance. Both aspects are crucial for effective intercultural collaboration, but the types of intercultural competencies they each require may vary in relative importance. Cui and Awa (1992) claim that for successful cross-cultural adjustment, suitable personality traits and interpersonal skills are particularly important, while managerial ability and cultural empathy are less critical; effective job performance, on the other hand, requires first and foremost interpersonal skills, cultural empathy and managerial ability, with personality traits being the least important factor for effectiveness. Distinctions between different types of intercultural interaction purposes could thus potentially serve as meaningful and useful mechanisms for establishing intercultural interaction competence needs.



7. Concluding Remarks

In this study we have sought to present a wide landscape of research derived from a selection of academic and professional fields. The common thread to that research is the desire to understand, and thus to manage better, the complex task of working across cultures. Despite the diversity of the theoretical approaches represented here, the level of agreement seems to us to be high: authors from quite distinct disciplines appear to hold broadly shared views on the attitudes, communication competencies and management strategies that support and enable intercultural effectiveness. It is the recognition of that common ground that lies behind the Global People work done in Phase 3 of the eChina-UK Programme: we have drawn on the generic learning acquired in a series of intercultural partnerships to develop resources that present information, ideas and practical guidance to those wishing to operate across cultural boundaries.

The work of the Phase 3 project has resulted in a series of outputs aimed primarily, but not exclusively, at colleagues in the Higher Education sector who would benefit from guidance on working in an international environment. These outputs are now represented by the Global People website (including its Resource Bank) and the Global People Toolkit. All of these resources address concerns that are evident in the research and that are presented in this initial study: we have developed a detailed model for managing the life cycle of an intercultural project and have underpinned this with a specification (with examples) of a full set of competencies for intercultural effectiveness; we have looked in detail at the learning process that facilitates the development of such competencies and at the practical tools needed to promote good practice in an international collaboration; and we have revisited the specific issue of working with China, on the basis of the eChina-UK Programme experience..

It is hoped that this review of literature provides not only valuable grounding for our continuing work on intercultural effectiveness but also a rich source of theory, concepts and data for colleagues wishing either to extend research in this field or to turn research insights into practical activities in their own intercultural partnerships.



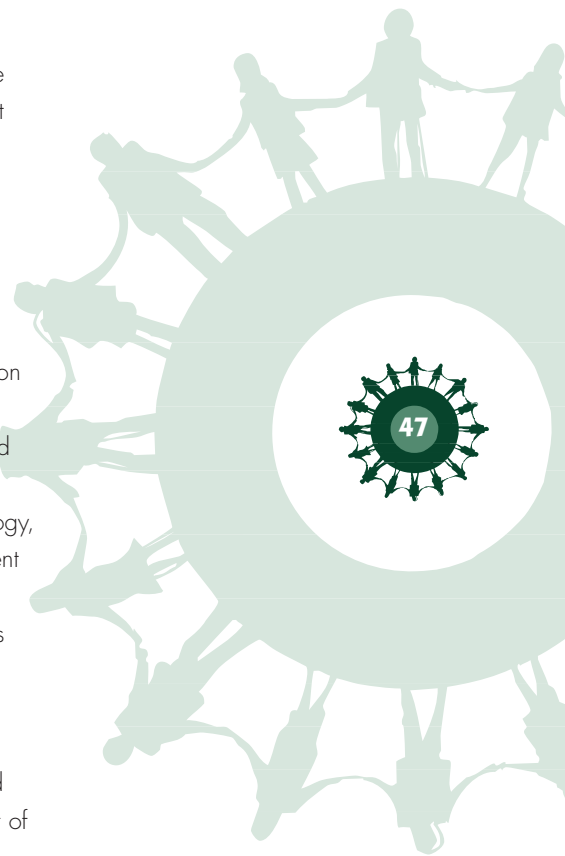
Appendix 1: Producing the Landscaping Study

The primary objective of this project output was to provide an intellectual context for the intercultural learning that emerged from the eChina-UK Programme as a whole. Without this context, the lessons drawn from the eChina-UK experience, useful as they might be, would remain limited to that particular programme and constrained by the lack of reference to other research data. To make the best possible use of these lessons, we wanted to be able to locate them in wider debates and theoretical models.

We did not set out to produce a comprehensive literature review of material on intercultural competence: that would be an enormous project in itself. Rather, we drew on the combined – and diverse – research knowledge of the project team to identify disciplines where significant work had been done that was germane to the issues raised by eChina-UK. Each member of the project team initially produced reviews of key literature in the area of their own expertise. These included applied linguistics, psychology, communication studies, intercultural management, competence profiling, the management of teams, organisational behaviour and cross-sector partnerships. Sharing these initial inputs led to further research into relevant areas to follow up on what were identified as the most relevant research findings or theoretical models.

The raw material was re-organised by the team into a format that reflected the primary concerns of the eChina-UK Programme, with dedicated sections for work on China and on e-learning. Working together as a group on this material prompted the development of the analytic framework set out in the Life Cycle Model.

In the Select Bibliography below we present many of the sources that were used in preparing this Landscaping Study. We hope that, in itself, it will offer a valuable resource for those interested in these issues, helping them initiate their own research into aspects of intercultural effectiveness that are relevant to their work.



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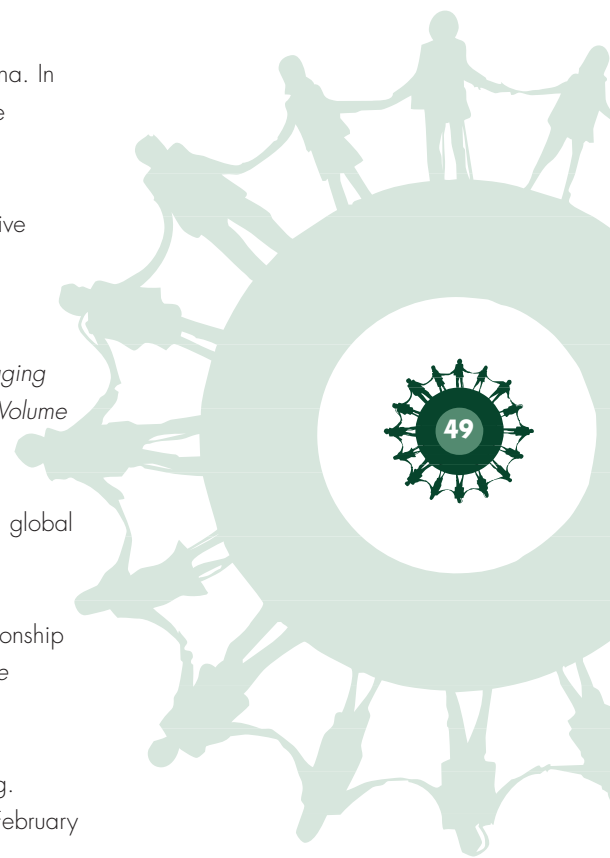
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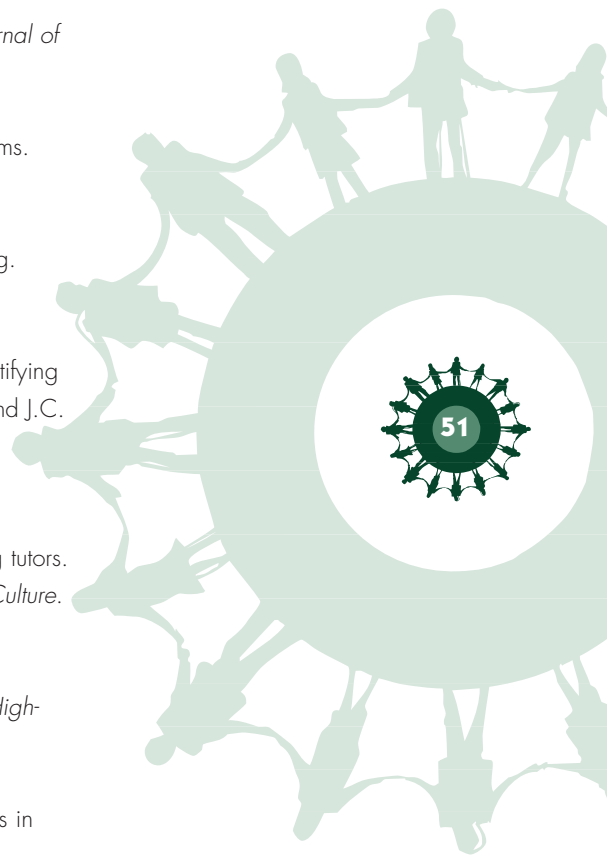
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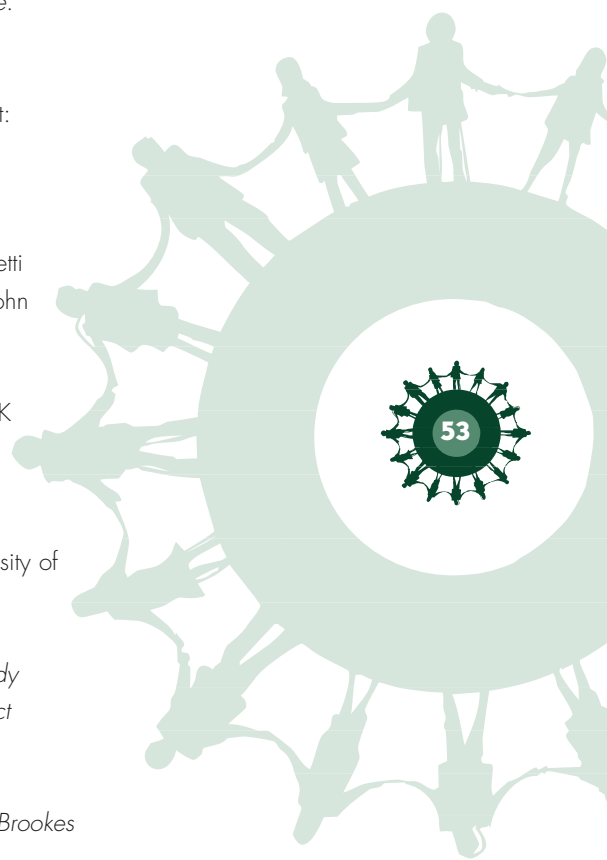
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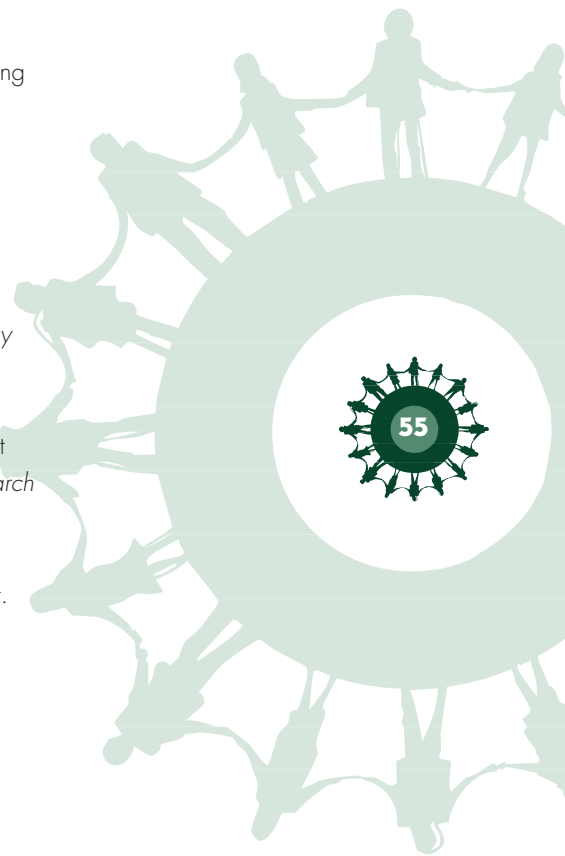
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