

## METHODOLOGICAL ASPECTS IN THE STUDY OF CULTURAL AND INTERCULTURAL DIFFERENCES

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### Abstract

*This article makes a series of methodological clarifications that are of the uttermost importance for the construction of cultural/intercultural research. The cultural and intercultural diagnosis methods that might be used, as well as the difficulties that might arise in this type of research, generally valid difficulties, but also difficulties derived from the particularities of a specific culture, which could be avoided if identified in time, are revised. Other methodological clarifications refer to what should be known before building the design of research. The criteria that should be met by the data collected for the purposes of ensuring the validity of the methodological construction are also discussed.*

**Key words:** methodology, methods, culture, intercultural, equivalence, validity

**JEL classification:** Z19

### Introduction

Any type of research follows a certain methodological design, construed in such a way as to suit the nature of the researched topic, its purpose and the established objectives. Generally valid rules cannot be provided, but research experience can and must be valorized in order to build adequate approaches, which will lead to efficient results, by overcoming obstacles, difficulties, especially if they have already been noticed. The offered synthesis can be a starting point for a researcher interested in the field that is the object of the analysis. This article does not wish to treat this topic in an exhaustive manner, but to review the main issues that such a researcher may face at a given time. This topic may be of interest, especially for particular constructions, such as performing cultural/intercultural research, in which case the documentation sources are poor.

### 1. Cultural and intercultural methods of diagnosis

Why *cultural* and *intercultural*? Scientific rigor compels us to state what the meaning of the two concepts is, within the context of this article: cultural research may refer to a particular culture, to the elements of cultural specificity, that can or cannot be compared with elements belonging to other cultures, whereas intercultural research is characterized with the

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help of two essential elements: 1. it refers to two or more different cultures; 2. it also deals with the reciprocal effect of the interaction between the individuals and the analyzed cultures.

Before presenting some general elements concerning the research methodology in cultural/intercultural studies, we have to say that any type of cultural/intercultural diagnosis necessary for understanding differences and exploiting them in management, is approached implicitly or explicitly via cultural values. Values actually represent “the heart” or “the roots” of national culture [Dupriez, 2000, 98]. Almost all the traits that are accepted as cultural differentiation criteria (except for the socio-economic ones) comprise cultural values and/or norms that can be integrated, or, sometimes, they can be considered integrating values and/or norms in themselves, as mentioned, among others, in the theory of the hierarchical system of values, provided by Tudor Vianu in his *Esthetics*<sup>1</sup> treatise. Nevertheless, cultural specificity is not acknowledged only by relating it to a certain system of cultural values and norms, but also with the help of elements that refer to behavior, attitude or position in relation to action [Zaiț, 2008, 47], elements that are part of the cultural dimensions, together with cultural norms and values, and which actually reflect the latter (there are also inconsistencies, situations when individuals feel uncomfortable and they seek to reduce this “gap”).

Usually, when analyzing cultural/intercultural differences, national cultures are taken into consideration, but the rules are the same for other cultural systems/subsystems as well. For example, the methods employed in the research of regional cultural differences coincide with the ones used in any other type of cultural/intercultural research, the difference being that the scope referred to can be broader (when region refers to a space which comprises, for example, several nations) or narrower (when the regions are part of the same nation). The same rules, principles and methods, but customized, are applied, depending on the nature of the research. Moreover, the same dimensions that were identified for distinguishing between national cultures also apply to regional, ethnic and religious differences within countries [Hofstede, 1996, 32].

A systematization of the information concerning methodological and epistemological categories that may be used in cultural/intercultural research is shown in the following table:

Table no. 1 – Methodological and epistemological characteristics

	<b>CATEGORIES</b>	<b>CHARACTERISTICS</b>
<b>Reference models</b>	- <i>the formal deductive system</i> (Leibniz)	-based on exploratory theoretical reflections and logical and mathematical constructions; can be used for problems that can be structured and quantified;
	- <i>the inductive – consensual system</i> (Locke)	-involves collecting the opinions of specialists in the field, with objective positions concerning the topic under discussion; it starts with a consensus on the problems and attempts to generate information regarding these problems;
	- <i>system of synthetic representation</i> (Kant)	-based on the construction and operation of two competitive alternative models; new ideas are obtained for each model and then the most appropriate one is selected;

	- <i>the conflictive – dialectical model</i> (Hegel)	-it relies on debates where demonstration and argumentation are essential for the clarification of ideas;
	- <i>the interdisciplinary – pragmatic model</i> (Singer and Churchman)	-it involves the clarification of the essential data by resorting to synthetic constructions of holistic and interdisciplinary nature.
<b>Types of research</b>	- methodological <i>holism</i>	-based on objective data and prevalingly quantitative methods; -analyzes homogenous systems (quasi-homogenous) -purpose: enunciations, general laws;
	- methodological <i>individualism</i>	-analysis of structural, particular components; - purpose: grasping diversity;
	- <i>synchronic</i> approach	-independence in relation to time; -the situation at a given time is analyzed;
	- <i>diachronic</i> * approach	-time is a variable; -facts are analyzed during their evolution;
	- <i>phenomenological</i> ** approach	-description of the facts and their evolution; -introspective investigations;
	- <i>reconstructive</i> *** approach	-reconstruction of the situational and historical context of the analyzed moment;
	- <i>experimental</i> approach	-field or laboratory; -it involves the control of some variables and the manipulation of others in order to identify the influence of the latter;
<b>Methodological combinations</b>	- <i>analytic -reductionist-quantitative</i> methodological system	-decomposition of the ensemble into its constituent elements; - “freezing” at two different moments; -correlation of the observed variables via a model of the type “if A, then B” -reunion of the elements; -limits: the interdependences between the elements of the cultural system cannot be analyzed; the effects the elements may produce when functioning non isolated can be lost sight of;
	- <i>holistic-contextual-qualitative</i> methodological system	-the analysis of the ensemble and of the interactions between the elements; -the analysis of the contextual circumstances in which these actions occur; -qualitative interpretation;
	- <i>constructivist</i> methodological system	-interpretative – quantitative approach; -analysis of the subjective processes, and not of behavioral patterns;
<b>Epistemological posture</b>	- positivistic paradigm	-explanation of the reality;
	- interpretative paradigm	-understanding phenomena, their interpretation;
	- constructivist paradigm	-building recommendations, models, in-

		struments, theories etc.;
<b>Approach</b>	- <i>ethic</i>	-deals with general aspects and with cultural universality;
	- <i>emic</i>	-focuses on understanding particular situations;
<b>Reasoning</b>	- <i>inductive</i>	-involves shifting from individual premises to general conclusions;
	- <i>deductive</i>	-obtaining genuine enunciations from other genuine enunciations, based on logics;
<b>Methods and techniques</b>	- <i>quantitative</i> (deduction, formal constructivism, inquiry, quantitative analysis, systematic observation, statistic indices, correlation and regression, analysis of the factors etc.); - examples in intercultural studies: interdependence analysis (Ajferuke and Bodewyn), analysis of the factors (Hofstede), analysis of the components (Tzeng and Ozgood), multidimensional scales Raveed and Sekaran);	
	- <i>qualitative</i> (induction, phenomenological interpretation, participative observation, natural observation, interview, biographical study, qualitative analysis);	

Source: Systematization (A.N.O) according to Zaiț [2002, 143-150], Zaiț&Spalanzani [2006], Vanderlinden [2007, 4-13], Ionescu&Toma [2001, 76-78]

There is no universal recipe for such an approach. For each type of research one must choose the optimum methodological mix, the most appropriate methodological strategy, depending on the objectives and particularities of that research, which can offer results which match the objective reality best.

## 2. Difficulties in cultural/intercultural research

When building a methodological approach, the researcher must be aware of a series of problems related to intercultural research, problems that may even lead to irrelevant results in case they are ignored. Among such difficulties, stressed in cultural/intercultural research, we mention: the cultural subjectivity of the researcher, functional equivalence, language equivalence, instrumentation and administration, other generally valid difficulties, as well as a series of difficulties specific to the analyzed culture or cultures.

### *The cultural subjectivity of the researcher*

As proven by Bertrand Russel, the British philosopher, the findings of scientific research depend, to a great extent, on the researcher. The human being perceives things selectively, depending on his life experience [Hofstede, 1996, 279-282]. The collected data, the observations “are testimonies of a selection process performed by the researcher in relation to the material provided by the resources in the environment, depending on the orientation and object of his research” [Jodelet, in Moscovici, Buschini, 2007, 190-191]. This phenomenon, called “cultural irrationality” by Hall or “cultural unconscious” by Jung “is manifested through and within each of us, due to our belonging to a specific culture” and “limits the perception and vision on reality, bringing them every time to what we know, have, want or wish. The analysis of a culture, as well as the action in a certain cultural environment, depend to a considerable extent on the things preserved voluntarily or involuntarily

within us and determines the obtaining of results that are marked rather by this type of subjectivity than by the objectivity that we like to display and that we would like to induce to others, as an image of ourselves. This cultural subjectivity is difficult to overcome, since it manifests especially via the unconscious [Zaiț, 2002, 72-73].

Sacks [*apud.* Silverman, 2004, 92], considering that the researcher's impressions on what is supposed to have happened have their origin in the non-reflexive knowledge that each society member possesses, offers the following advice in relation to what "seems" to happen during the research: "When you establish what was the thing that seems to have happened, before solving the research problem, you must not allow the notions that you already have about what is supposed to have happened there to decide in your place regarding the fact that must have happened". Nevertheless, some studies show the fact that any attempt of describing things *the way they are* is doomed to failure. This shows that, in order to have something to state, we must first embrace a certain perspective on what is studied, since facts never speak through themselves [Moerman, *apud.* Silverman, 2004, 104].

#### *Functional equivalence, the equivalence of language, instrumentation and administration*

*Functional equivalence* refers to the fact that the sample extracted from the population of the country/region A is equivalent with the sample from the country/region B under all aspects, which means that the research is performed on corresponding samples, similar from all perspectives (age, sex, level of education, job, etc.), except for nationality/regional affiliation/ethnic affiliation, etc. It is considered (in the case of comparison between cultures) that, if this condition is fulfilled, the samples must not necessarily be representative [Hofstede, 1996, 284-288].

*The equivalence of language* involves the transmission of a common message via data collection instruments, as well as with the help of interpreters or field operators. The translation or interpretation must not be literal, it must be equivalent, have the same meaning, the same semantics and be performed according to the two-way technique. The used vocabulary must be common, the ideas must be expressed via simple sentences, and one must take into consideration the syntax and grammar of the respective language, avoid idioms and exclude redundancy [Ionescu, Toma, 2001, 84]. The use of specialized language and conceptual elements is also significant, since these are extremely important for the research architecture. A literal translation may lead to confusions since the significance attributed in another region can differ [Zaiț, 2002, 96]. Concepts such as culture, national culture, regional culture, values, cultural dimensions, intercultural diagnosis, determinant factors and others, depending on the particular nature of the research, must be clarified in a rigorous and scientific manner.

*The equivalence of instrumentation* consists of ensuring equivalence regarding tests, scaling, instrumentation and experimental manipulation. The analyzed problems must be equally relevant, and the variables must be equivalent and have the same importance for the analyzed cultures. The same data validity and confidence level must be ensured. Equivalent scales, as well as equivalent procedures, must be developed individually in each culture. Other aspects that must not be omitted are related to the use of similar correlation and equivalence models for manipulation and experimental processing [Ionescu, Toma, 2001, 84].

*The equivalence of administration* refers to the fact that the place of research, the instructions, and the synchronization must be equivalent, not identical. Since observation changes what is observed (the Heisenberg effect), the influence on the subjects must be

equivalent, which means that the planning and administration of research must produce the same response to the stimuli and to the situation.

This can be achieved if there exists intercultural similarity in relation to the following aspects: *familiarity* – the interviewed subjects must have a similar level of familiarity with the testing instruments, the format and the social situation of the research; *psychological answer* – similar levels of anxiety and other psychological reactions during the testing; *the effect of the one who performs the experiment* – similarity in the communication of research hypotheses, verbally and non-verbally; *characteristics of the subjects' request* – similarity as concerns the scope of the requested information, through which the subjects try to discover the hypotheses of the researcher, subsequently helping or hiding intercultural variations based on sensitive issues – religion, politics, sex, etc., *the characteristics of the person in charge of the research* – equivalence concerning aspects such as origin, race, sex, status, foreigner or native, *the characteristics of the presentation* – equivalence concerning the introduction of the research, the introduction and characteristics of the researcher, the task-instructions, the appropriate remarks, the synchronization of the presentation and data collection, localization of the presentation and data collection (*ibidem*).

*Common difficulties [Ralea, 1997, 60-72]*

- *The psychological structure is not everlasting.* In some cases, one may find more resemblances between different contemporary peoples than between different moments in the history of the same people. There are some cultural traits well established in time and others which are subject to change or even lost.
- *The mentality of a people in their early evolution stage differs from the mentality of a mature people.* Almost all peoples undergo cultural changes on their way to maturity.
- *Different peoples have different development rhythms.* There are peoples living their life feverishly and rushing into consuming their historical mission, and there are peoples that prefer a slower and less energetic development.
- *There is, in every people, a need of local soul decentralization, a regional soul.* This is determined by differences in the living conditions, by rejected traditions, by geographical conditions, etc.
- *Urban mentality is different from rural mentality.* While urban people have an agitated, energetic, intellectual and mobile life, rural people are “soft, reactionary and sentimental”.
- *Human soul borrows something from the place where it lives.* The psychological structure of people living in mountainous regions is different from that of people living in the plain. Moreover, smoother or rougher landscapes shape human soul.
- *Foreign influences are different on a nation's territory.* Some parts of a nation may be subjected to certain influences, other parts, to different influences.
- *A nation's idea about their “calling” may influence their evolution* (examples: “the chosen people”, “the pure race”).

*Difficulties arising from the specificity of the culture under survey*

For the Romanian culture, for instance, Ralea [1997, 60-72] identifies the following:

- *Radical skepticism versus megalomania* – divergent, even contradictory opinions, subjectivism of the Romanian people related to their siblings, to Romanian customs, institutions and culture influence the observer's perspective;

- *Confusions and complications related to the studied material* – multitude of races and influences that contributed to the creation of the Romanian people and culture, which resulted into a certain character *neutralization*;
- *Lack of adequate and objective study tools, lack of a methodology and lack of our own culture that could enable us to study these issues* – Romanians study on Western books and methods, which results into a deep dualism between the Romanian nature of the events occurred and the Western judgment criteria applied to these event, between national customs and rations principles thoroughly explained in books;
- *Lack to literary and cultural tradition*, whose continuity would be a source of signs of our becoming and specificity;
- *Too big social differences in our past* – the fact that the bourgeoisie (a buffer class, able to diminish class differences) was an “insignificant social class” led to the deepening of this gap.<sup>ii</sup>

All these factors bring about variations between the individuals’ cultural specificities. Nevertheless, the ethnic soul may be defined, since all the deviations from it are mere “variations on the same theme”, and the specific cultural elements are able to show through and beyond them, becoming a common background [Ralea, 1997, 60-72].

### 3. Other methodological clarifications

Among the issues one should consider when carrying out a cultural/intercultural research, we should note: the distinction between what is appropriate and what is wished for, that is between ideology and practice, the relation societal needs and values, the definition of the cultural comparison terms, the possibility of using a mixed approach and the avoidance of generalizations through stereotypes.

#### *Distinction between appropriate and wished for*

When developing a data collection tool, one should consider the distinction between *appropriate* and *wished for*, in order to be able to construe individual options related to values. The *appropriate* approach is aimed at understanding how people think the world should be, thus having rather to do with ideology. The *wished for* approach refers to what people want for themselves, which is more or less virtuous and which has rather to do with the practical side – for this reason being closer to real behavior, but not necessarily corresponding with the actual behavior choices. The difference is given by the nature of the norms<sup>iii</sup> involved. When talking about *appropriateness*, the norm is absolute and is related to what is ethically right, while when considering the *wished for*, the norm is only statistical, revealing the actual choices of the majority. When the questions refer to what is appropriate, answers may be given in which ideology serves as a compensation for everyday relations. Therefore, questions should refer to what people want for themselves [Hofstede, 1996, 26].

#### *Relation between societal needs and values*

The cultural values and the needs existing in a society are closely connected. According to the needs hierarchy theory, people perceive as more stringent and more wished for the needs whose level of satisfaction is the lowest [Maslow, 1970/2007, chap. 2]. It is these needs that will motivate their actions rather than others. Depending on their societal charac-

teristics, they will perceive certain needs as more stringent than others. For instance, in a society where uncertainty is highly controlled [Hofstede, 1996, 148], individuals experience an acute need for safety, for security; therefore they will be motivated to fulfill this need, which becomes a desirable concept in that society, in other words, a societal value. And vice versa, in societies where individuals were deprived of the fulfillment of some of their needs, social and cultural mechanisms develop designed to diminish those needs; “specific problem solving means” are hence created, that is cultural elements. Examples may be given starting from the Romanian history itself, from its political, institutional and legislative instability, which contributed to the development of defense mechanisms (rules, religious and philosophical explanations, etc.), designed to avoid uncertainty. The events of 1989 (Revolution, social chaos, authority collapse) deepened people’s preferences for a safe yet poorly remunerated job, or for a military regime. The latter may seem at least odd, especially after the collapse of a dictatorship; however, people’s perception of existing law order and authority threats deepened their security needs. Inglehart showed the connection between social needs and values [*apud.* Voicu&Voicu, 2007, 17], and classified societies starting from the *traditional* versus *secular-rational* aspects and *survival values* versus *self-expression values*. In underdeveloped societies emphasis is laid on fulfilling basic needs. Resources are scarce, hence the preference for survival values. In collectivities with abundant resources, individuals focus especially on superior needs / on self-expression values. Value study does not consist only of the study of the dominant needs in a society (reductionist approach!), but it also includes the correlation between the high values and needs in a society, leading to the idea that the intercultural study of motivational values serves as cultural difference analysis grounds. For instance, the study carried out by Bilsky and Koch [p. 7], who employed the personal value questionnaire items provided by McClelland, items that refer to the three types of needs identified by the latter (enhancement, power, affiliation). The outcome of this study was a positive correlation between the needs-values types and one of the two cultural aspects suggested by Schwartz: focusing on the self (hedonism, power, and self-enhancement) versus universalism, benevolence, (transcendent) preoccupation for the others<sup>IV</sup>.

#### *Cultural comparison terms*

It is extremely important in an intercultural research to know what is compared to what. Can we compare one researcher’s remarks to another researcher’s findings? Only when compatibility and equivalence are involved. Not any type of research can rely on certain remarks without stating the cultural comparison terms. According to Blaga [1944], for examples, who compares the Romanians of Ardeal to the Saxons of Transylvania, the latter seem pragmatic. According to an inhabitant of Moldova, this feature that Blaga ascribes to the Saxons of Transylvania is rather characteristic of the Romanian of Ardeal. We therefore think that qualitative data are only objective if they come from several sources, and sometimes it is more than necessary to clarify things by direct observation or by asking for the subjects’ own opinions.

#### *Quality versus quantity*

There is no principle opposition between quantitative and qualitative approaches: “Quantity has long ceased to be the opposite of quality, as number is the opposite of word: encoded data can be interpreted; they are often determined thanks to a series of tools devel-



oped starting from qualitative investigations, just like in most questionnaires. Also, the qualitative approach is not limited only to verbal data, and their summaries do not equal plain text” [Jodelet, in Moscovici, Buschini, 2007, 197]. The mixed approach is better grounded, it helps achieve reconfirmations or fill in blanks not revealed by other approaches. The universal concepts resulting from comparative quantitative research may be used as support in looking for, finding and using cultural specificity elements [Zaiț, 2007, 16].

#### *Avoiding stereotypes*

The results achieved further to cultural/intercultural research express basic answer trends in each analyzed culture/subculture, average scores, which do not necessarily reflect each individual’s values. They cannot be generalized, since there may be individuals who distinguish themselves, at individual level, from the average values achieved, which makes them different from most of the members of a statistical population regarding a certain number of values of the ones analyzed. Stereotypes can therefore be dangerous. As George Călinescu used to say [*apud.* Lascu<sup>v</sup>]: “Specificity is not unique, but it just is above everything else”.

#### **4. Validity of the methodological constructions**

As regards the validity of a methodological construction, one should keep in mind that it may provide *valid data* sources on the analyzed cultures if the information gathered fulfills the following criteria [Hofstede, 1996, 281]:

- it is descriptive and not normative (otherwise it includes more information on the values system of the one supplying it than on the population considered);
- it may be supported by several sources (otherwise it expresses the author’s subjective perception);
- it applies to the statistical majority of the population under survey (otherwise it is a false generalization);
- it is distinctive, meaning that it includes those characteristics that distinguish a population from the others (otherwise it is not important).

#### **5. Conclusions**

Any cultural/intercultural approach is a challenge. The researcher has the difficult assignment of breaking into the unseen of things, of decoding often hidden meanings, which reveal themselves at an unconscious level. Visible manifestations may have many explanations, however only some of these actually correspond to the analyzed reality, which means that all the research work performed in this field, although seductive and exciting, is very complex and most of the times involves interdisciplinary approaches triggered by the very nature of the concepts tackled, methodological construction, analysis, explanations, etc. This complexity should be anticipated, just like the problems that such an undertaken assignment may raise.

The methodological approach may be qualitative, quantitative or mixed, as the researcher may choose between an emic or ethical approach, between a synchronous or

asynchronous approach, from a positivist interpretative or constructivist epistemological viewpoint. The best methodological mixture is a particular one, which considers the specific data of the research involved. Recipes, especially copying (see box hereunder), may generate failure. Each research must be considered as having unique components, considered upon strategy development.

One cannot disregard the problems that such a research may involve. Most of them are insurmountable, and awareness raising is the first step towards their prevention. Common problems or problems derived from the specificity of the analyzed culture may be foreseen, and methodological construction may support their diminution or even prevention.

An extremely important component of cultural/intercultural research comparing two or more cultures is ensuring equivalence from all viewpoints: functional equivalence, language equivalence, instrumentation and management equivalence. If this equivalence fails, results are compromised, since differences rather originate in functional (at sample level), language, instrumentation or management differences, than in cultural differences.

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“What is common or universal in different cultures (in all human cultures, actually) may be just as well a theoretically limited but practically difficult-to-determine number of organization principles applying to social relations and the symbolic representations they generate. What distinguishes them or makes them specific is how these principles and the prototype nature of certain situations chosen to distinguish them from other cultures are put in use, depending on their relations to the latter” [Doise, Spini, in Moscovici, 2007, 418-419].

“The greatest flaw of this procedure (that of copying tools developed in another country, usually the USA, tested in the USA – n.n. A.N.O) is that such techniques only deal with topics considered relevant in the society where they were developed, excluding however the questions that are not acknowledged by the person who drafted them, since they are not present in the former’s society. They may however be extremely relevant in other societies. Culturally speaking, such questions are undoubtedly some of the most interesting. There is a hidden ethnocentrism in this kind of copying, which generated many worthless intercultural studies” [Hofstede, 1996, 286-287].

“Even when ethnographers are silent and spend their time observing, their presence tells people that certain aspects concerning “identity” had better be focused on rather than others” [Silverman, 2004, 102].

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## Note

<sup>i</sup> Morar, V., *Estetica – interpretări și texte*, <http://www.unibuc.ro/eBooks/filologie/morar/13-1.htm>;

\* diachronic chains;

\*\* historical facts can accurately explain cultural evolutions and the clauses that led them in a direction or other;

\*\*\* an event in the past can be wrongly interpreted if we do not take into consideration the contextual factors of that moment;

<sup>ii</sup> Communism has erased all social classes; however, after the revolution, other types of differences began to be experienced, between the rich and the poor, significant differences that are due to the same reason – the lack of a middle class. We are currently witnessing a visible development of this middle class (n.n. A.N.O.). A survey carried out in March 1998 (*Democracy Strengthening*, coordinated by I. Mărgineanu), shows that 40% of the respondents considered themselves as belonging to the working class, 28% considered themselves peasants, 28% belonging to the middle class and 0.4% to the upper class. The national sample included 1136 people (Mărginean, 2000, p. 111);

<sup>iii</sup> (cultural) norms are value standards existing within a group or a category of people (Hofstede, 1996, p. 26);

<sup>iv</sup> *self-enhancement* and *self-transcendence* in original; the other cultural dimension is *conservatism* versus *openness to change*.

<sup>v</sup> Lascu, G., *Imagologia literară comparată. Câteva repere teoretice și metodologice*, (Literary Compared Imagology. Theoretical and Methodological References) <http://www.phantasma.ro/caiete/caiete/caiete2/10.htm>;