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Case-Based Business Education in the Arab Middle East and North Africa

Kate Gillespie, PhD

The University of Texas at Austin, Austin, Texas

Liesl Riddle, PhD

The George Washington University, Washington, DC

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ABSTRACT

The MENA business environment recently has experienced dramatic change. We argue that the case method can provide students with an opportunity to exercise problem-solving and decision-making skills, which are crucial to coping with today's changing business environment. Instructors seeking to utilize cases in MENA educational institutions should be aware of how high collectivism, uncertainty avoidance, and power distance associated with MENA culture give rise to a learning environment divergent from the Western context. The existing corpus of MENA cases is limited and requires development. Casewriters face several challenges when conducting research in MENA countries, including government intervention, respondent reticence to participate in research, and cultural adaptations in the data-collection process. These obstacles can be mitigated by careful casewriter preparation.

Case-Based Business Education in the Arab Middle East and North Africa

“The world has changed—almost overnight. My employees’ commercial background is too ‘by the book’ for today’s economy.”

--CEO of a recently privatized textile company in Alexandria, Egypt, January 6, 2003

“I’ve only been in an American [business] school for 12 days but already I can see a big difference from my university [El Akawayn in Morocco]. You emphasize examples, applying the ideas. In my university, we memorize definitions and theories. We ignore the examples—most of our textbooks are American textbooks, and those examples just don’t apply to us.”

--Undergraduate exchange student at The George Washington University, September 16, 2003

Managers in today’s Arab Middle East and North Africa region (MENA)¹ face a business environment that is dramatically different from the recent past (Al-Shamali & Denton 2000). Today, economies once dominated by the state are privatizing, and the size, role, and responsibilities of the private sector are increasing. Growth within the private sector has intensified local competition (Schwab & Cornelius 2003). Trade liberalization has increased the presence of global competition through imports and foreign direct investment (Abed and Davoodi 2003). Globalization has required managers to expand their strategic environmental scanning beyond the confines of national borders to include the political, economic, cultural, legal, and technological changes occurring around the globe. Political and legal reforms undertaken by MENA governments have affected how business is done in the region (Henry and Springborg 2001).

These changes have not generated an increase in economic prosperity in the region. Although in the 1970s, most MENA countries benefited from increased oil prices and substantial inflows of worker remittances, trade, and capital, in the latter part of the twentieth century, the economic condition of the region deteriorated. During the 1990s, MENA average annual growth

¹ Here we employ the term, Middle East and North Africa (MENA) region as it is referred to by the International Monetary Fund: the Arab states of Algeria, Bahrain, Djibouti, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Mauritania, Morocco, Oman, Qatar, and Saudi Arabia.

was a mere 1.3 percent—compared to an annual average of four percent for all developing countries (Abed and Davoodi 2003). Trade liberalization has not generated substantial increased employment opportunities in the region (Dasgupta, Nabli, Pissarides, & Varoudakis 2003), and labor productivity has gradually declined since the 1990s (Gardner 2003).

Managers in the MENA region may find that their educational training has not sufficiently prepared them to deal with today's challenges. The educational opportunities now available to MENA youth were lacking just four decades ago. Many MENA managers only may have received a primary school education. During the latter part of the twentieth century, the MENA region witnessed a dramatic increase in educational access and duration (Rugh 2002). Today, average tertiary school enrollment in MENA countries is 15 percent, which is just slightly below the world average (17 percent) for tertiary enrollment (UNESCO 2002).

Still, MENA managers fortunate enough to have benefited from tertiary education may not have been exposed to a business curriculum. Business is a relatively new field of study in the MENA region. Most MENA university programs in management emerged in the 1960s, but enrollments were small until the 1980s when “explosive growth” in management education occurred in the region (Ali and Camp 1995:11). There are now more than 70 colleges of business in MENA countries (Al-Shemali & Denton 2000). Business is one of the most common fields of study in tertiary education in a handful of countries in the region, including Lebanon, Morocco, and the Palestinian Autonomous Territories. But in most MENA countries, education, engineering, law, medicine and social science studies are more favored and commonly pursued fields of study (UNESCO 2002).

Post-graduate, part-time education also is on the rise in the MENA region (Mojab 2000). A limited number of educational institutions are expanding their programs to include executive education. For example, King Fahd University in Saudi Arabia offers an executive MBA program modeled after executive MBA programs common in the United States. Recently, Alexandria University in Egypt announced its intention to start an executive MBA program and has received a Fulbright grant to support its development. Several management training centers in the MENA region offer part-time, executive education, such as the Management Development Center in Syria and the Institute of Public Administration and the Royal Commission for Human Resource Development in Saudi Arabia.

Despite these apparent improvements, Middle East business leaders often complain that the MENA workforce is ill-prepared for today's business environment. Many have called for educational reform because of an overemphasis on rote learning and memorization pedagogy common throughout all levels of education in the region (Rugh 2002). Educational reform has moved slowly in MENA countries (UNESCO 2002). Rugh (2002) notes that at a 2002 international conference on Arab higher education "a leading Arab businessman stated that the Middle East would not achieve its full economic potential 'unless we revolutionize our educational system and adopt a total change in our mindset'" (p. 406-407). A recent World Bank report on Arab education argues that this educational revolution must "impart skills enabling workers to be flexible, to analyze problems, and to synthesize information gained in different contexts" (World Bank 2000: 18). This sentiment also has been echoed by educational academics (e.g., Cassidy 2003).

We argue that the case method can provide students with an opportunity to exercise problem-solving and decision-making skills, which are crucial to coping with the changing

business environment that MENA managers face. But how should the case method be used in the MENA classroom? Specifically, how well suited is the case method to the MENA classroom experience? What case resources are available for business education in MENA countries? What are the obstacles for developing cases in the region? We address each of these issues in turn in this paper.

SUITABILITY OF THE CASE METHOD FOR THE MENA CONTEXT

As institutions, educational entities are embedded in the local cultural context. They are both affected by and affect change within local culture. To be effective, pedagogy must have a connection with local cultural values and norms. How suitable, then, is case-based teaching for the MENA classroom?

In business education, the case method is employed to develop and hone students' analytical skills. A business case is a description of a real business situation including a particular set of problems where the protagonist is most commonly a manager (Shapiro 1984). In the case method, students are called upon to analyze the situation and decide on a plan of action. The case study acts as a vehicle to practice analytical skills as well as a base from which to generalize managerial lessons. The case method is experiential learning in which students are encouraged to learn from semi-structured experiences. While utilizing a common core of generally validated concepts, students construct individual interpretations of the case (Bonama 1989), thus resulting in the oft-mentioned lack of "right" answers to case studies.

The seminal work on the case method was written by Charles Gragg and published in the *Harvard Alumni Bulletin* in 1940. Entitled, "Because Wisdom Can't be Told," this essay is available today as a note through Harvard Business School Publishing (HBS 9-451-005). It may

be useful to examine key extracts from this work to better understand the limitations as well as the promise of case-method learning for business education in MENA countries today. The following are quotes from that essay with italics added by ourselves:

- “Thus, the key to an understanding of the Harvard Business School case plan of teaching is to be found in the fact that this plan *dignifies and dramatizes student life* by *opening the way for students* to make positive contributions to thought and, by so doing, *to prepare themselves for action*” (p.1).
- “A significant aspect of *democracy in the classroom* is that it provides a new axis for personal relationships. No longer is the situation that of the teacher on the one hand and a body of students of the other...The valuable art of exchanging ideas with the object of building up some mutually satisfactory and superior notion is cultivated” (p.5).
- “In making the adjustment to the democratic disciplines of the case system, students typically pass through ...discernable phases. ..The second phase is that of *accepting easily and without fear the need for cooperative help*. ..The third and final phase toward maturity ...[is] *the recognition that the instructors do not always or necessarily know the “best” answers*, and, even when they do seem to know them, *that each student is free to present and hold to his own views*” (p.5).
- “*In short, students, if they wish, can act as adult members of a democratic community*” (p.7).

The statements above suggest several potential flashpoints when bringing case learning to the MENA countries. Roles and norms in the MENA classroom differ from their Western counterparts. In MENA countries

“the classroom is basically controlled by the teacher, who as a rule lectures constantly to the students. The students are to copy, memorize, and when asked, recite these lectures...This style of classroom instruction does not leave much room for creativity or for problem-solving behavior on the part of students” (Massialas and Jarrar 1990: 34).

Rote learning and memorization exercises are the primary pedagogy employed throughout the educational system—including tertiary education—in the MENA region (Massialas and Jarrar 1990; World Bank 2000; UNESCO 2002). There is little emphasis placed on higher-order

cognitive skills such as flexibility, problem solving, theory application, and decision-making (World Bank 2000, Rugh 2002, Cassidy 2003). Large class sizes and overcrowding make teacher-student and peer-to-peer interaction often impossible (Massialas and Jarrar 1990, Rugh 2002, Cassidy 2003). Interaction is further constrained by hierarchy norms, impeding not only teacher-student interaction but also peer-to-peer interaction (Massialas and Jarrar 1990).

The case method puts the student front and center. This upsets the hierarchal education system described above where instructors profess and students listen subserviently. A look at the Hofstede (1980) measures of culture for the Arab countries (scores for separate countries are not available) suggests that MENA society reinforces this style of learning. Arab countries are hierarchal, scoring 80 (versus 40 in the United States) on power distance, the degree to which unequal power distribution in society is expected and accepted. Arab countries also score 68 on uncertainty avoidance versus only 46 in the United States. Teachers in uncertainty-avoidant cultures are expected always to have the answers. Uncertainty-avoidant cultures do not like ambiguity. Events should be clearly understandable and predictable. Such cultures are less innovative, and radical new ideas tend to scare them. So the problem is not just that the instructor does not have the correct answer but that there is no correct answer.

The collectivist nature of Arab culture also poses other difficulties for the case method. Arab countries score 38 on the Hofstede measure of individualism (the opposite of collectivism) versus 91 for the United States. Collectivism reflects the degree to which individuals are integrated into strong, cohesive in-groups. Case studies require that students assume the role of the manager protagonist—to get inside the skin of the person facing the decision. This is arguably easier for students from the United States, where recreating oneself is a national pastime. But individuals from collectivist cultures, which are characterized by their worldview of

in-groups and out-groups, may find it more difficult to play this role unless the protagonist closely resembles members of the student's in-group. Otherwise, they may continue to look in from the outside, mere observers to the protagonist and the situation he or she faces. This would inhibit the nature of the learning experience which is the goal of case experiential learning, one that Bonama (1989:3) describes as "powerful, intimate, and personal." Collectivism may also present a challenge to the ability of students to learn from one another—if the others are not from one's in-group. Trust is not easily given to outsiders in collectivist societies. Will students listen to and learn from other students if they inherently distrust them?

A final obstacle to the case method in the MENA region may lie in its democratic vision. Some have argued that Arab states may be reticent to pursue radical changes to existing education curriculum and pedagogy since educational institutions often historically have been hotbeds of revolutionary activity (Mojab 2000). In case learning, critical thinking is hard to contain. Will all Arab leaders truly welcome learning environments that encourage students to act as "*adult members of a democratic community*"? Bernard Lewis (2002) contends that the spread of education in the Middle East today imposes limits on the autocracy of rulers. Azar Nafisi's autobiographical novel, *Reading Lolita in Tehran*, chronicles the contentious relationship between an autocratic government and its university students in neighboring Iran—an antagonism that has even resulted in government forces firing on students. Nafasi reflects upon how even the study of literature—another form of experiential learning—threatened this totalitarian regime. In the past, revolutions have either begun in university classrooms or have received their momentum there. A number of current regimes attempt to be sure new revolutions receive no such nurturing. To this end, large lecture classes with enrollments in the many hundreds would suit their agenda.

Of course, the problems outlined above are also the promise of the case method. It encourages students to practice analytical thought, to take charge of their own thinking, and to include others beyond their in-group in the task of solving problems. Not only do managers in a global world require these skills, but these skills also are necessary to foster a strong civil society in the MENA region.

On the positive side, while waves of anti-Americanism sweep over the Arab World, American-style education remains immensely popular there. But even this popularity is tarnished by the realization that most consumers and would-be consumers of American education remain uninformed as to what it actually entails. In the words of John Waterbury (2003):

The new “American” schools address an audience that by and large may have little real knowledge of what American higher education is all about. What they do know is that the U.S. system has been hugely successful and has had global impact. This audience... recognizes English as the key to technology and business...and their...ladder to success. They do not know much or care about the real keys to this success—flexibility and choice, critical thinking and problem solving, academic freedom...” (pp. 65-66).

USING CASES IN BUSINESS COURSES IN THE MENA REGION

The case method places students in the role of a business decision-maker. Business cases force students to develop analytic and problem-solving skills to navigate the uncertain waters of the problems posed in the case scenario. This experience can be valuable for MENA managers but the implementation of the case method may need to be amended to leverage the full benefits of the technique in the MENA environment.

Because the case method strongly differs from the educational experience of MENA students, instructors wishing to utilize the case method in their classrooms must recognize that students will need to be socialized into the norms of the case-based learning experience. In situations where the case method will be employed throughout a university’s curriculum,

university and program administrators also may be involved in the socialization process.

Expectations for teachers and students regarding preparation and roles during case discussions should be clearly communicated and explained to students. Offering students a “dry run” with the method, such as allowing students to sit in on a class employing the case method, watching a video of a case-method class discussion, or executing a small, quick, initial in-class case discussion will demonstrate the roles and norms related to the case method. Some institutions may find it helpful to offer mini-courses on case analysis and discussion, making case preparation techniques, teacher-student roles during case discussions, in-class note taking during case discussions, and other case-related activities explicit and transparent to students.

Successful use of the case method in the MENA classroom may require a reduction in the number of students in each class. Increasing the homogeneity of participants (particularly in terms of gender and age) also may decrease the discussion-inhibiting effects of power distance and hierarchy. This may be particularly important for executive-level education, where classrooms may contain a wide array of management status levels, from first-tier management to CEOs. In situations where such class homogeneity is impossible, it may be advisable to first place students in small homogeneous teams to discuss various aspects about the case, then share their conclusions with the broader group, beginning first with the lower-status groups.

Still, how to address issues of collectivism during case discussions is problematic. Arguably, collectivist mindsets could pose obstacles in the case classroom. Collectivism is associated with a strong adherence to established group norms or views, and is a cultural aspect associated with MENA economies. One might conclude that students in a collectivist culture would work well in groups, *accepting easily and without fear the need of cooperative help*. By one must wonder when Gragg (1940) wrote those words if he was not envisaging that working

together was to the end of discovering a new idea, a new truth—not working together to restrict individual thought and to enforce established ideas and behaviors. Furthermore, the cooperative help that Gragg alludes to is a reflection of individualistic society in which persons with no prior relationship come together to get a job done, a phenomenon that Fukuyama (1995) calls spontaneous sociability. Collectivist societies lack this spontaneous sociability. Group membership is not self-defined but is pre-defined by the society. The distrust of the outsider found in collectivist societies may prove to be a formidable challenge in a global economy where interacting with and trusting outsiders is unavoidable.

An example of how one case-based business school in the Middle East attempted to counter collectivism is the Iran Center for Management Studies. In the early 1970s, the Harvard Business School was under contract to run and develop this school in Iran based on its case format. As was the norm in Boston, MBA students were required to meet in assigned groups the evening before classes to prepare and discuss among themselves the cases for the next day. In Iran, these groups mixed genders and religions. In order to assure that students took this assignment of “spontaneous sociability” seriously, the administration required students to live on-campus during the five-day work week and only return to their families on weekends. This requirement was strictly enforced even during the Iranian Revolution of 1976-1977. During that year, ICMS became the only Iranian institution of higher education to graduate a class. Sadly, the school was abandoned in the wake of regime change when religions and sexes entered a new era of segregation.

MENA CASE RESOURCES

Instructors in MENA countries choosing to incorporate cases into their curriculum have two options: utilizing existing, published cases or researching and developing their own.

Utilizing Existing Cases

With a few exceptions, business texts used in MENA university classes are primarily mere translations of American textbooks; little local content is incorporated in terms of examples or theory (Ali and Camp 1995). The suitability of these materials for the MENA context has been questioned. Critics cite a disconnect between the cultural and economic environment of the United States and the MENA region (Alhashemi 1988, Ali and Camp 1995, Rugh 2002).

A search of case offerings on Harvard Business School Online for Educators (<http://harvardbusinessonline.hbsp.harvard.edu>) reveals only 12 cases focusing on the Arab World (see Appendix). In comparison, a similar search revealed 11 cases for Turkey alone. A word search on the site returned 78 hits for Mexico, 40 for Brazil, 35 for Argentina, 33 for Taiwan, 21 for Thailand, and even 42 for Russia. Of the 12 cases focused on the Arab World, only seven involve Arab protagonists—and of these, three are Arabs who have returned to their homelands after sojourns in the West. A relative spurt in case writing (seven cases) appears between 1995 and 1999, with only four cases written in the 2000-2003 period.

This poses a problem as to case materials that are appropriate to the Arab World. An argument could be made that emerging markets have issues in common and instructors could use cases from these other countries in classes for Arab participants. However, clear differences in culture and history are apparent when cases outside the Arab World are examined. Management scholars have observed that the Arab cultural milieu gives rise to management values and behaviors that are different than in other parts of the world (e.g., Hofstede 1980; Weir 2000; Robertson, Al-Khatib, Al-Habib, & Lanoue 2001). The few available cases based on Arab

cultural settings provide limited opportunity for students to examine the impact of these managerial practices on business activities. Even the Turkish cases often involve the successful Turkish business groups, whose strong industrial foundations are hard to match in the Arab Middle East.

Developing New Cases

Ali and Camp (1995) suggest that developing local cases in Arab countries accomplishes two purposes: it “sensitize[s] students to the reality of management in the Arab environment and sensitize[s] students to the cultural relativity of foreign management theories” (p. 15). Recently, an Internet survey of members of the Academy of International Business and the Middle East Studies Association who have conducted qualitative data collection in the MENA region on business-, economic-, or trade-related topics was administered to investigate their research experiences in MENA countries.² Follow-up interviews were also conducted with several sample volunteers. Study results reveal three major challenges to qualitative data collection in the MENA region that could affect casewriters’ efforts as well as explain why there are so few extant cases from this region. These challenges comprise government involvement in the research process, respondent reticence to participate in research, and the impact of local culture on data-collection activities.

² The sample frame consisted of two components. First, the email addresses of scholars listed in the Academy of International Business’ (AIB) membership directory with the research field “Country/Area study: Africa and Middle East” were included in the sampling frame. A total of 37 AIB members were associated with this research field. The 315 social scientists with email addresses listed in the Middle East Studies Association’s membership directory were also included. Filter quests were employed in the survey to identify respondents who had collected data concerning business-, economic-, and/or trade-related issues in MENA countries. Surveys were mailed to the 324 addresses on January 28, 2003, and a reminder email was sent two weeks later. Fifty-three total responses were received (19 percent response rate). Twenty-four surveys were returned from researchers with qualitative data collection experience in MENA countries on business, economic, and/or trade issues. Since most case-based research requires the use of in-depth interviews, observation, focus-groups, and other qualitative methods, the results described in this paper reflect the responses of these 24 scholars.

Government Involvement. Many cases written on firms in emerging economies have been written by academics at the Western business schools that value and employ the case-study method. However, unlike most governments in Asia, Eastern Europe or Latin America, governments in the Arab World are often hostile to outside researchers. When queried by an open-ended question about the distinctive characteristics of the MENA research environment, about one-fifth of survey respondents (21 percent) cited government involvement as an important characteristic. Included in these mentions were phrases such as “political constraints” on the researcher (3 mentions), necessary “research visas” (2 mentions), and “registration requirements” (1 mention). One-third of the survey respondents mentioned that government involvement was the greatest obstacle that they had personally faced while collecting data in the MENA region. Ten survey respondents (42 percent) claimed to have sought formal permission from a MENA government authority before commencing a research project.

In some MENA countries, such as Turkey, foreign researchers are compelled to acquire a specific research visa. In many countries, casewriters staying beyond the duration of a tourist or business visa—which can be as short as 15 days or as long as four months—may have to submit a description of his/her research project in order to acquire a residence permit. In others, a local sponsor (e.g., Saudi Arabia) or a letter of invitation (e.g., Yemen) must be presented to a government authority before a visa (tourist or business) will be granted to the researcher. Sponsors and those offering letters of invitation to research visitors often are held accountable for researchers’ actions and therefore may seek official government approval for the researcher’s project before the visa is granted. Casewriters may need to apply for research permission from a country’s Ministry of Education or some other agency before beginning a research project.

In some cases, governments may restrict the data collection methods that the casewriter (particularly foreign casewriters) may employ. For example, one survey respondent explained that the Egyptian Ministry of Education had told him that he could “only use archival materials or interview government officials” as he conducted research in Egypt, but he was specifically “forbidden from conducting fieldwork.”

Some countries may not have a formal process by which researchers seek government permission for their activities, but government approval—or at least awareness of the researcher and his/her project—may still be necessary and sought on an informal basis. Informal permission may be necessary for both foreign and local researchers. As one in-depth interview respondent native to a MENA country observed,

“you must invest the time calling on particular government officials, giving them an overview of what you are doing, even if you don’t think that they will be immediately useful to your project. Just visit them periodically; sit and drink tea with them. If they are aware of what you are doing, doors will open up to you. You will be protected.”

Another interview respondent told a story of what happened when she failed to seek informal government approval in Jordan, a country that does not formally require researchers seek data collection permission. After a couple of weeks of conducting in-depth interviews, she was intercepted on the street by the *muhabbarat*, the secret police, prevalent in many MENA countries, and was interviewed for several days about her research. Several times during the inquisition, the researcher was asked “for proof that [she] had acquired formal permission from government authorities to conduct [her] research project.” They could not accept that she had proceeded with the project without receiving some type of approval to conduct the interviews.

Without government approval, researchers may be more prone to research material sabotage or confiscation by local security, particularly if the research topic is of a politically or economically sensitive nature. For example, one in-depth interview respondent who conducts

research in the West Bank and Gaza Strip claimed that “it is absolute hell getting in and out of the airport in Israel [for me]. Everything is taken out. They go through my notes, my computer. My computer has been deliberately broken. Sometimes stuff just disappears.” Another in-depth interview participant told a story of how a box of her data (interview transcripts, notes, etc.) was taken by Yemeni authorities at the airport as she prepared to leave the country. Months later the box was returned to her U.S. residence. In it she found copies of her original materials (the originals were never returned) along with duplicates of some materials belonging to other researchers.

Government involvement in researchers’ activities may extend beyond up-front approval. MENA governments also may monitor researchers’ activities. Seventeen percent of the survey respondents mentioned government surveillance as the greatest obstacle that they faced when conducting research in MENA countries. One of the survey respondents claimed, “I was aware that they were monitoring my activities and probably tapping my phone.” Another described how “the government checked up” on her informants. In some countries, such as Yemen, researchers are assigned an official “mentor” to, as one in-depth respondent put it, “keep an eye on what they are doing.” Some mentors have been known to keep track of a researcher’s publications after they have left the field. One in-depth interview respondent mentioned that her mentor had attended a presentation she made at an academic conference in the United States.

Difficulties related to government involvement in the case-writing process may be alleviated by the use of a local co-author. Local co-authors may not be subject to the same level of scrutiny as outsiders, and they may have personal contacts within the government and the business community that may be useful. Most importantly, local co-authors provide keen insight into the cultural, economic, political, and legal environment in MENA countries. It may be

difficult to identify local co-authors with interest and/or experience in case writing. Rugh (2002) has noted that faculty research production in Arab universities is low because faculty are “hampered by top-down bureaucracies” or have left the Arab World for “more conducive research environments” (p. 410). Business academics often must supplement low salaries with consulting. While this consulting can lead to possible case leads, the remuneration for case writing is essentially non-existent; as such research seldom is required by Arab universities and rarely results in higher pay.

Reticence to Participate in Research. Bonama (1989) suggests three reasons why companies/managers cooperate in the creation of real-life case studies. Managers can gain insight into their situation from the casewriter, who, like a consultant, has experience with similar situations in other firms. Managers may feel a debt to the process of management education. Finally, they can observe intelligent students engaging in a discussion of their company and its issues, consequently providing new insights.

However, 21 percent of the scholars surveyed cited the reluctance of potential respondents to participate in research as a defining characteristic of the MENA research environment. Three respondents stated that it is often difficult to get “accessibility to individuals.” Two others commented that they often observe a reticence to participate in research in MENA societies because they “fear how the research will be used” and are “not willing to be interviewed.”

Three of the in-depth interview respondents mentioned that foreign researchers in MENA countries are often assumed to be undercover spies. “You get used to it,” explained one respondent, “after a while, once people get to know you, these accusations tend to go away. But

in her dissertation about the Egyptian tourism industry, Lisa Wynn (2003: 27) relates that this suspicion may not fully dissipate over time:

“My [Egyptian] friends joked about [me being a spy] often, and once, finally, I asked a close friend if he really thought I was working for the CIA."Look," he said, "I don't really think that you are, but I don't know for sure. Let's say I think there's a 90 percent chance that you're not working for the CIA. But there's still that 10 percent chance that you are, so I would be a fool not to keep it in mind. But even if you're not actually working for them, your research will still be used by the CIA and other U.S. government organizations to compile information on Egypt."

Uncertainty about the researcher's intent and how collected data will be used means that when people in MENA countries participate in a research study, they often are very careful with what they say. Dealing with participant self-censorship and fear was mentioned by one-fourth of the survey respondents as the greatest obstacle that they had faced while in the field in a MENA country. Researchers complain of an “absence of free flow of information,” a “fear to give a judgment that might be used against them,” and a “reluctance of participants to comment on relevant issues.” In some cases, the stakes of participation may be very high for individuals, particularly in MENA political contexts where government control and monitoring are strong and the nature of the research questions is politically sensitive. In such cases, protecting the anonymity of sources assumes paramount importance for researchers in MENA countries. One in-depth interview respondent explained, “you have to remember that you are going into an area where people are at risk...people will put themselves at risk to help you. But you don't want to put your sources at risk.”

In addition, managers in the MENA region often believe that knowledge is market power and are likely to be reluctant to share company information with the casewriter, especially if it contains any information useful to a competitor. Most business are not publicly owned, and giving anyone (including investors) information is an alien concept. Business owners and

executives also may be wary of information that could be used against them by either the government or the press. While the option of disguising the case exists, in these markets where everybody knows everybody else, it can be difficult to disguise a case adequately. Furthermore, appealing to managers to support case education may not fall on sympathetic ears. In Arab hierarchal societies, managers may not enjoy the thought of students discussing—and criticizing—their actions.

Impact of Culture on Data Collection Activities. Thirty-three percent of respondents mentioned “cultural differences,” “need for cultural sensitivity,” or “cultural issues” as distinctive characteristics of data collection in MENA countries. Cross-cultural studies of management values and practice have sought to isolate the key cultural characteristics of the MENA region, and a plethora of studies have observed a marked dissimilarity between the MENA region and the West, particularly in terms of individualism/collectivism and power distance (e.g., Hofstede 1980; Ali 1993; Ali & Wahabi 1995; Bakhtari 1995; Elsayed-Elkhoully & Buda 1997; Robertson et al 2001; Kabasakal and Bodur 2002; Robertson, Al-Khatib, & Al-Habib 2003). Although researchers’ nationality was not collected in the Internet survey of scholars with MENA data-collection experience, the majority of the sampling frame—members of the Academy of International Business and the Middle East Studies Association of North America—originate from Western countries and/or have been socialized by Western educational institutions. Most of the survey and interview respondents’ comments regarding the role of culture in the data-collection process focus on the ways in which high collectivism and high power distance affect data-collection activities.

Forty percent of the survey respondents mentioned “introductions” or “networking” as essential for access to respondents and gaining detailed and valid responses from them. In-depth

interview discussions reveal that in MENA countries, introduction by merely a single individual is often insufficient to establish initial trust. One interview respondent explained, “your contact just gets you in the door. The first meeting usually consists of informal conversation about this-and-that, but all the while they are name-dropping, and you are expected to name-drop. This is where you set the context of who you are.” Another respondent, commenting on the distinctive character of data collection in the MENA region mentioned, “most of this [research] centers on the personal aspects, knowing the researcher, and how well-known the researcher is.”

Once embedded in a network and identified as such, a casewriter may discover that his/her social network may actually restrict his /her access and ability to acquire detailed and valid data. An interview respondent observed,

“The elites [in the MENA region] have known each other since childhood. They see themselves as related. There are multiple networks. If you get too closely related to the group, you get branded as ‘you belong to them.’ Networks can cut both ways.”

The MENA collectivist and power-distance worldview can affect how individuals within the firm participate in conversation and who within the firm is willing to talk to the casewriter. Case writing rarely involves interviewing only one person. Instead, many individuals in a firm are contacted to develop a larger corporate memory of an event and to receive input from a variety of persons involved. In the MENA context, however, it is not uncommon for a request to speak to others to be dismissed by the higher manager. Talking to others would suggest that the higher manager could be wrong –or at best not omniscient. This can be difficult to accept in MENA culture. For example, during a reported focus group of several MENA industrialists, participants typically waited for the powerfully connected individual to speak first and then agreed with whatever he had to say. If called upon to speak before the powerfully connected

person, weaker connected people demonstrated their discomfort non-verbally, looking to the more powerfully connected person and offering a non-committal answer.

There are several steps that a casewriter can take to minimize the obstacles involved in data collection in MENA countries. First, casewriters should investigate the formal and informal government approvals that may be needed in the country they intend to visit. Whereas embassies and consulate offices may provide information about any required formal approvals for foreign researchers, casewriters may need to consult the advice of colleagues with data-collection experience in their country of interest to learn about requisite—or suggested—informal approvals. In some cases, foreign researchers with data-collection experience in the country may be better sources of this information than local researchers because local academics may be unfamiliar with the government's perspective and procedures related to foreign research.

Before leaving for the field, casewriters should develop a familiarity of local journalism in the country of interest. Analysis of news reports—and the company, family, and individual names mentioned within them—may provide the casewriter with a better understanding of power and hierarchy within the society. In most MENA countries some—if not all—national newspapers are owned and operated by the state. Positive or negative portrayals of firms and/or individuals within state-owned newspapers may reveal information about business-government relations within the country.

Casewriters seeking to conduct research in MENA countries should recognize the importance of developing a large and diverse social network comprised of individuals with strong ties to the region. Fellow academics are a good place to begin. Although there are few members in the Academy of International Business with research interests in the Middle East and North Africa (37 researchers listed in the AIB database specifying MENA as a geographic

specialty), many social scientists, including anthropologists, economists, political scientists, and sociologists conduct research related to business, industry, and/or trade in the MENA region and may be extremely valuable contacts. Many are members of the Middle East Studies Association (<http://w3fp.arizona.edu/mesassoc/>). While in the field, some casewriters may choose to visit one of the six American Overseas Research Centers in the MENA region (Egypt, Jordan, Morocco, Tunisia, West Bank, or Yemen. See <http://www.caorc.org>). These non-governmental institutions can be good places to meet fellow foreign academics engaged in field research in the region. Western-trained business academics, firm or NGO managers, and government officials also are useful resources since many may be familiar with the case-study method. MENA students, particularly executive MBA students, may also serve to be helpful social network contacts.

Local casewriting should also be encouraged in the region. MENA academics and/or businesspeople may find that co-authoring with experienced casewriters may help to shorten the case-writing learning curve. Arab business schools that aspire to be elite should take the initiative to write cases. In some situations, powerful business supporters could provide funding to support this initiative. Local MBA programs, particularly those that are executive-oriented, should make case researching and writing an integral part of their curriculum. Some programs may offer awards or some other form of recognition for quality case publications.

CONCLUSIONS

Instructors seeking to utilize cases in MENA educational institutions should be aware of how differences in MENA culture and classroom norms might impact case-based learning in this region. In particular, high collectivism, uncertainty avoidance, and power distance associated

with the MENA cultural milieu give rise to a learning environment that is divergent from the Western classroom context, where the case method was born and developed. Case method socialization and classroom-composition or process adaptations may be necessary to better fit the case method to local cultural values and norms.

There is tremendous opportunity to contribute to a greater understanding of MENA management challenges by adding to the small, existing corpus of available MENA business cases. Casewriters face several challenges when conducting research in MENA countries, including government intervention, respondent reticence to participate in research, and cultural adaptations in the data-collection process. But these obstacles can be mitigated by sufficient and careful casewriter preparation.

There is a need for case-based business education in the MENA region. The case method simulates the real-world business environment, placing students in the position of the managerial decision-maker. Case-based learning experiences can help prepare MENA students for the challenges that await them in a global economy, enabling them to better navigate uncertainty by employing analytic and problem-solving skills to seek solutions to complicated business problems.

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APPENDIX

CASES AVAILABLE THROUGH HARVARD BUSINESS ONLINE

Casablanca Finance Group

9-700-063

January 6, 2000

Country: Morocco

Discipline: Business and Government

Protagonists: Two Moroccan expatriates returned from Paris who enter the brokerage business.

Disney Consumer Products in Lebanon

9-596-060

October 5, 1995

Country: Lebanon

Discipline: Marketing

Protagonist: The managing director of Disney Consumer Products for Europe and the Middle East.

Dubai Ports Authority(A)

9-603-061

February 5, 2003

Country: Dubai

Discipline: Operations Management

Protagonist: Dubai Ports Authority

Ellen Moore (A): Living and Working in Bahrain

90C019

January 1, 1990

Country: Bahrain

Discipline: General Management

Protagonist: A Western expatriate manager working at a multinational financial institution in Bahrain.

EMDICO (A)and (B)

9-597-029 and 9-597-030

September 25, 1996

Country: Saudi Arabia

Discipline: Marketing

Protagonist: The Indian general manager of Fuji Film's Saudi distributorship.

Euro-Arab Management School

99E024

June 30, 1999

Country: Arab countries

Discipline: Management of Information Systems

Protagonist: Dean of Academic Affairs.

Hikma Pharmaceuticals

9-598-019

November 5, 1997

Country: Jordan, Other Arab

Discipline: Marketing

Protagonist: The president of a Jordanian pharmaceutical company.

Khalil Abdo Group

9-898-011

July 10, 1997

Country: Egypt

Discipline: Organizational Behavior and Leadership

Protagonists: Members of a family-owned business.

Peace Winds Japan

9-503-055

June 17, 2003

Country: Iraq

Discipline: Competitive Strategy

Protagonist: Young entrepreneurial founder of an international Japanese nongovernmental organization.

Lucent Technologies: Provisioning and Postponement

GS02

May 22, 2001

Country: Saudi Arabia

Discipline: Operations Management

Protagonist: Spanish operations director of Lucent's Spanish factory.

SADAFCO

9-599-021

Country: Saudi Arabia

September 10, 1998

Discipline: Marketing

Protagonist: Dominant firm in the milk and ice cream markets in Saudi Arabia.

Solidere: Rebuilding the Future of Lebanon

9-897-163

March 10, 1997

Country: Lebanon

Discipline: Finance

Protagonist: A recent Harvard Business School graduate from Lebanon.