PMBA 8303 – Study Tour to Spain and Portugal
Spring, 2016

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Course Description:
This course provides students with an opportunity to explore the international business environment of both Spain and Portugal as participants in the European Union. This course will highlight the major economic and cultural aspects of the business environments in Spain and Portugal, as well as the management practices utilized by today’s organizations in these countries. The course has three major components:

- Part I of the course consists of a series of five pre-departure class meetings to examine the role of Spain and Portugal within the European Union and the current state of management practices in these countries. More specifically, students will investigate Spain and Portugal’s major industries, examine common management trends, and conduct case analyses of specific companies.
- Part II of the course includes a ten day study tour to Lisbon and Barcelona to directly experience the business and cultural environment of Spain and Portugal. During this portion of the course, students will be responsible for keeping a personal journal of their study tour activities.
- Part III of the course includes the completion of a required research paper and a post-departure meeting with student presentations and discussion of the study tour experience.

Learning Objectives:
The major learning objectives of this course are:
1. To provide an understanding of the business environment of two participants in the European Union.
2. To develop an understanding of the major industries in Spain and Portugal and the management practices commonly used by these organizations.
3. To gain an appreciation of the cross-cultural differences that affect these two business environments.
4. To develop an awareness of the globalization of the marketplace.
5. To gain an appreciation for Spanish and Portuguese culture.

Required Reading:
- The World Is Flat 3.0: A Brief History of the Twenty-first Century by Thomas L. Friedman (2007)
  o http://www.buyusainfo.net/docs/x_49528.pdf
  o http://www.buyusainfo.net/docs/x_902825.pdf
- 20 Years of Spain in the European Union. Textbook developed by Elcano Royal Institute.
  Can be downloaded at the following address:
  o http://www.realinstitutoelcano.org/wps/wcm/connect/3cc45b804f0189cb92cef63170bae4d1/20%20years%20of%20Spain.pdf?MOD=AJPERES
• Cabral, R., & Soromenho-Marques V. (2014). “Portugal: 40 Years of Democracy and Integration in the European Union”. Can be accessed at:

  o Full electronic text available through the Rider University library

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• Additional readings will be assigned and posted on Blackboard throughout the semester.

Language Resources:
We recommend that you work on developing your knowledge of basic phrases and vocabulary that will assist you on this trip. Some free resources that you can use to learn more about the languages we will be encountering are:
  o Byki – Free introductory language lessons for Spanish and Portuguese (requires registration; http://www.byki.com/)
  o BBC audio and video language lessons (http://www.bbc.co.uk/languages/)

Course Requirements:
Class meetings and Assignments 20% of final grade
Case Study 15% of final grade
Participation in Study Tour Activities (Including completion of site visit questionnaires) 25% of final grade
Journal and Personal Reflection Paper 20% of final grade
Final Paper 20% of final grade

Class Meetings and Assignments:
Students are expected to attend all pre-departure and post-departure meetings. You will be assessed on your preparation and contributions in class and your site visit presentation. If you must miss a class for a documented reason, please contact us to find out how to makeup the materials from the missed class.

Pre-Departure Meetings:

Meeting 1 – 5/1/15 – 5:30-7:00 p.m.
• Organizational meeting and introduction to study tour
• Discussion of course requirements
• Assigned of group presentation topics for 9/18 class
• Assignment of required reading for 9/18 class:
  o The World Is Flat 3.0: A Brief History of the Twenty-first Century
  o Blackboard readings

Meeting 2 - 9/18/15 - 5:30-8:30 p.m.
• Discussion of research paper proposals
• Group presentations on assigned topics
• Background of Spain and Portugal and discussion of current business environment and business practices
• Analysis of similarities and differences with U.S. business practices
• Assignment of companies for group analysis and presentation for 10/11 meeting
  o Groups will present an analysis of the companies to be visited on the study tour.
  o Students are expected to provide an overview of the company (including management practices) and financial performance relative to the domestic and international marketplace.

Meeting 3 – 10/9/15 – 5:30-8:30 p.m.
• Discussion of the European Union and the major industries in Spain and Portugal
• Case Study and Case Study Presentation
• Assignment of topics for presentations on the current economic environment in Spain and Portugal (readings to be assigned and posted on Blackboard)

Meeting 4 – 11/8/15 – 5:30-8:30 p.m.
• Group presentations of current economic environment in Spain and Portugal
• Wrap-up of discussions of business and economic reality of doing business in Spain and Portugal

Meeting 5 – 12/6/15 – 5:00-6:30 p.m.
• Final trip preparations, discussion of logistics

Post-Departure Meeting – 3/4/16 –5:30-8:30 p.m.
• Summary of major study tour experiences
• Presentation of student papers
• Completion of course evaluation materials

Participation in Study Tour Activities: (Learning objectives 1-5)
You will be evaluated based on your participation at the site visits. You are expected to attend each session well prepared with knowledge of the company history and key company objectives. You are expected to be an active participant and ask questions when appropriate. A completed site visit questionnaire (attached) is required for each visit. Your grade for the course will drop one entire letter grade for each absence from a scheduled activity or site visit.

Organization/Site Visit Questionnaires: (Learning objectives 1, 2, & 3)
As a part of each scheduled visit to the selected organizations and sites in Lisbon and Barcelona, you are required to fill out an Organization/Site Visit Questionnaire that documents the information learned during that particular visit. These completed questionnaires will be turned in at the completion of the trip. Students are responsible for bringing enough copies of the questionnaire to cover all scheduled visits during the study tour (a copy of this questionnaire form is included in this syllabus).

Daily Journal: (Learning objectives 3, 4, & 5)
You will be expected to keep a daily journal of your experiences on the study tour. Below are some guidelines for your journal.
You will be a participant/observer in two cities: Lisbon and Barcelona. What do you see going on? How are the people dressed? Are people friendly to strangers? How do people interact? Notice the architecture, the way the streets are laid out, the traffic patterns, and the natural environment. Would you be comfortable as an American studying or working here? What kinds of problems are you having if you don’t know the language?

As we drive and walk around, keep an eye out for evidence of globalization in terms of familiar brands of products and services. What global brands do you observe? Are they presented in a manner that is similar to that with which you are familiar or are they presented differently? Does the presence or lack thereof, of global brands surprise you – why or why not?

Each day you are expected to make an entry including:
- What activities you participated in that day
- Your reaction to the activities (i.e. how the experience was different than what you had expected)
- What you learned from that day’s experiences

At the end of your visit in both locations answer the following questions:
- How did you spend your free time? Do you feel that you got to know the place?
- How did being in Lisbon or Barcelona enrich your understanding of the culture?
- What was your opinion of the food, the hotels, and the transportation?
- Would you like to visit these places again? Why or why not?

**Personal Reflection Paper: (Learning objectives 3, 4, & 5)**
Upon our return, you will draft a Personal Reflection Paper (no more than 3 typed, double-spaced pages) in which you will respond to the following questions:
- What amazed you or struck you emotionally?
- What disappointed or concerned you?
- What did you think of the people you met? Socially? Professionally?
  - Did you like them? Trust them? Feel comfortable with them?
- What did you perceive to be the major differences between living in Spain/Portugal versus living in the United States? Were you surprised by these differences?
- How did this trip impact your understanding of the way business works in a global environment?
- Overall, what was the most valuable lesson you learned and how has it changed you?

**Case Study: (Learning objectives 1-5)**
Students will be divided into groups and a company will be selected by the group in consultation with the professors. The case study will include a discussion of the company’s industry and how that industry relates to the economy of the country and the international marketplace. Relevant financial information and strategic opportunities will be included in the analysis. The case study will be presented to the entire class. Additional information will be posted under Assignments on Blackboard.

**Final Research Paper: (Learning objectives 1-5)**
After the completion of the study tour, you are responsible for writing a 15 page research paper that addresses a topic that is directly related to the experiences provided as a part of the study
tour and the materials covered in the pre-departure class meetings. The paper is expected to be a critical analysis of the topic including a thorough review of previous research and an in depth analysis of how the research question has evolved over time.

You will be asked to come up with your topic for this paper during the pre-departure class meetings based upon the assigned readings and materials discussed in these classes. All topics must be approved by the professors prior to the beginning of our travel to Lisbon and Barcelona and all students are expected to develop their own topics (i.e., students may not form a group to research a single topic).

Once your topic is approved, you will be researching your topic both independently (prior to departure) and during our travels. All students are expected to incorporate their experiences or knowledge gained during the study tour into this final research paper.

This paper is due by the post-departure class meeting on 3/4/16. During this class, students will be asked to give a brief presentation on their final research paper to the rest of the class.
ORGANIZATION/SITE VISIT QUESTIONNAIRE

Please review this Questionnaire prior to our organization/site visits and complete one Questionnaire for each visit. You may use the Questionnaire to help you formulate questions that you would like to have answered during our visit. Not every question will apply to every organization or site. If a question is not applicable, simply answer it “N/A.”

Your Name: ___________________________________________________________

Organization/Site Name: ________________________________________________

Date/Time of Visit: _____________________________________________________

Name(s) of Presenter(s): _________________________________________________

1. What was your impression of the offices/physical plant/facilities of this organization/site?

2. What did you learn about this organization/site? Was there anything that really surprised you?

3. What were the biggest challenges or obstacles faced by this site/organization?

4. What was the atmosphere in the organization/site (for example, do the employees/workers seem to work collegially with each other; did the organization/site employ both men and women and, if so, did male and female employees occupy similar positions)?

5. How did supervisors interact with their subordinates? How would you characterize the management style of these supervisors?

6. What benefits does the organization/site provide to its employees/visitors?

7. In light of your knowledge and experience with the same type of American businesses/organizations/sites, what similarities and differences did you observe? Were the organizations in Portugal/Spain run differently than the typical American business?
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<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>Activities</th>
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</thead>
<tbody>
<tr>
<td><strong>January 5 Tuesday</strong></td>
<td>Depart Newark</td>
<td>Depart from Newark (Flight TBA)</td>
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| **January 6 Wednesday** | Arrive in Lisbon | Morning ~ Half day sightseeing tour of Lisbon  
Afternoon ~ Transfer to your hotel for check-in  
Evening ~ Welcome Dinner at a local restaurant with cultural show |
| **January 7 Thursday** | Lisbon            | Morning ~ Business Visit #1  
Afternoon ~ Business Visit #2                                                   |
| **January 8 Friday** | Lisbon            | Morning ~ Business Visit #3  
Afternoon ~ Business Visit #4                                                   |
| **January 9 Saturday** | Lisbon / Barcelona | Morning ~ Half day sightseeing tour of Parque das Nacoes  
Afternoon ~ Transfer to the airport  
One-way flight from Lisbon to Barcelona  
Transfer to your hotel for check-in |
| **January 10 Sunday** | Barcelona         | Full-Day ~ Sightseeing tour of Barcelona                                    |
| **January 11 Monday** | Barcelona         | Morning ~ Business Visit #5  
Afternoon ~ Business Visit #6                                                   |
| **January 12 Tuesday** | Barcelona         | Morning ~ Business Visit #7  
Afternoon ~ At leisure                                                          |
| **January 13 Wednesday** | Barcelona        | Morning ~ Sightseeing tour to Park Guell  
Afternoon ~ At leisure  
Evening ~ Farewell Dinner                                                       |
| **January 14 Thursday** | Depart From Barcelona | Morning ~ Transfer to the airport for flight back to U.S.  
Arrive in Newark in the evening                                                  |