



Dissertation

Master degree in International Business

***A Guide to Enhance Successful
International Negotiations in the Mexican
Market***

Liliana Marlene Dias Oliveira

Leiria, September 2022

This page was intentionally left blank



Dissertation

Master degree in International Business

***A Guide to Enhance Successful
International Negotiations in the Mexican
Market***

Liliana Marlene Dias Oliveira

Dissertation developed under the supervision of Professor Susana Cristina Serrano Fernandes Rodrigues, Ph.D., professor at the School of Technology and Management of the Polytechnic Institute of Leiria.

Leiria, September 2022

This page was intentionally left blank

Originality and Copyright

This dissertation is original, developed only for this purpose, and all authors whose studies and publications were used to complete it are duly acknowledged.

Partial reproduction of this document is authorized, provided that the Author is explicitly mentioned, as well as the study cycle, i.e., Master degree in International Business, 2021/2022 academic year, of the School of Technology and Management of the Polytechnic Institute of Leiria, and the date of the public presentation of this work.

Acknowledgments

I would like to express my gratitude to those who have been in my life and stayed through all the good and difficult moments of this path. To the greatest supporters of my life, my parents, my partner, my family and my closest friends, for their constant encouragement and for believing in this accomplishment.

I am deeply indebted to all the people who participated in this study, who dispensed their valuable time to help me, and entrusted me with their testimonies of experience. I would like to stress that this endeavour would not have been possible without their valuable participation, and I truly wish them all the best.

My deepest gratitude to Professor Susana Rodrigues for her experienced and wise guidance that carried me to the finish line.

I would like to extend my gratitude to Professor João Santos, the course coordinator, for his promptness to help in any situation.

I wish to thank Paulo Sobreira, at NERLEI, and Carlos Novo, at Maxioplás, for providing and facilitating some precious contacts. Thanks to all who contributed to access contacts and to those who kindly welcomed me in their workplace.

Special thanks to Professor Irene Ciccarino for her advice on the data collection software.

Lastly, to my cat for accompanying me throughout long hours into the night.

I am sincerely grateful to all.

Abstract

The increasing globalisation of markets accentuated a myriad of opportunities and challenges inherent to the internationalisation process of companies. The prevalent role of international business negotiations accentuated the role of culture, which has been perceived as a fundamental part of the negotiation process, influencing its every step.

As the second largest economy in Latin America, Mexico offers great potential for foreign investment, mainly due to the crescent manufacturing industry and its wide range of trade agreements. In the last decades, Portuguese companies have sought out international markets in search of opportunities to increase their competitiveness. One of the most relevant manufacturing sectors in Portugal is the mould industry. With its export vocation, it has been seizing the opportunities the Mexican automotive industry presents to these companies. This reality incited the motivation to evaluate how to succeed in business negotiations in Mexico.

Although there is increasingly information about negotiating in Mexico, the literature is scant from a non-US American perspective, and it rarely embraces cultural and negotiation aspects with the deal-making process. To fill this gap, this investigation examines the stages of the negotiation process, respectively connecting effective common business practices and cultural aspects to each stage. By applying a semi-structured interview to 10 managers in Portuguese mould companies, the study ascertains practical knowledge of cultural and negotiation aspects through the Portuguese business experience in Mexico. The results obtained allowed the development of a practical guide to enhance successful negotiations in the Mexican market.

Keywords: Culture, Business Culture, International Negotiations, Success, Mexican Market, Portuguese Mould Industry

List of Figures

Figure 1 - Structure of the dissertation.....	5
Figure 2 - Geographic location	7
Figure 3 - Hofstede 6-Dimensions of national culture: comparison of Mexico and Portugal	28
Figure 4 - Conceptual model.....	52

List of Graphs

Graph 1 - Main trading partners of Mexico	10
Graph 2 - Mexican cities Portuguese companies have business with	67

List of Tables

Table 1 - Trade balance of goods and services of Portugal with Mexico	18
Table 2 - Share of Mexico in the Portuguese international trade of goods.....	18
Table 3 - Negotiation dimensions of Mexico	29
Table 4 – Characterisation of the respondents.....	65
Table 5- Information research by topic frequency.....	67
Table 6 – National level information research	68
Table 7 - Cultural information research.....	70
Table 8 - Cultural information research – Similarities and communication.....	72
Table 9 - Business information research	73
Table 10 - Individual information research	75
Table 11 - Meeting date planning	77
Table 12 - Meeting time planning	78
Table 13 - Meeting scheduling antecedence.....	80
Table 14 - Agenda structure planning	81
Table 15 - Planning factors when going to Mexico.....	82
Table 16 - Meeting location planning.....	83
Table 17 - Meeting ambient requirements.....	84
Table 18 -Support materials preparation	85
Table 19 - Participants planning.....	87
Table 20 - Role of preparation on negotiations	88
Table 21 - Preparation factors	90
Table 22 - Greetings	91
Table 23 - Forms of address	92
Table 24 - Business cards	94
Table 25 - Engaging in small talk.....	94
Table 26 - Small talk topics.....	96
Table 27 - Personal life topics	97

Table 28 - Level of comfort answering questions	98
Table 29 - Small talk duration.....	98
Table 30 - Role of small talk in relationship building.....	99
Table 31 - Personal appearance.....	101
Table 32 - Punctuality and delays	102
Table 33 - Mexican time and pace perception	103
Table 34 - Meal environment.....	105
Table 35 - Gift giving.....	106
Table 36 - Language	108
Table 37 - Verbal communication.....	109
Table 38 - Speaking aspects.....	110
Table 39 - Refusing.....	110
Table 40 - Non-verbal behaviour interpretation.....	111
Table 41 - Voice tone.....	112
Table 42 - Body language	114
Table 43 - Silence	115
Table 44 - Human space & physical approaches	116
Table 45 - Physical distancing & comfort.....	117
Table 46 - Meeting organisation	118
Table 47 - Agreement building approach.....	119
Table 48 - Negotiation subject approach.....	119
Table 49 - Argument type	120
Table 50 - Decision-making power.....	121
Table 51 - Negotiation resolution.....	122
Table 52 - Reaching an agreement.....	122
Table 53 - Final agreements.....	123
Table 54 - Establishing relationships	124
Table 55 - Local intermediary.....	125
Table 56 - Post-negotiation	126
Table 57 - Follow-up meetings	127

Table 58 - Relationship improvement	128
Table 59 - Successful negotiation.....	129
Table 60 - Business satisfaction	130
Table 61 - Cultural differences.....	130
Table 62 - Negotiation blunders	131

List of Abbreviations and Acronyms

AICEP	Portuguese Trade and Investment Agency
BRICS	Brazil, Russia, India, China, and South Africa
CAQDAS	Computer-Assisted Qualitative Data Analysis Software
CCILM	Luso-Mexican Chamber of Commerce and Industry
CEFAMOL	Portuguese Association for the Mould Industry
EMEs	Emerging Market Economies
EU	European Union
FDI	Foreign Direct Investment
FTA	Free Trade Agreement
GDP	Gross Domestic Product
IB	International Business
INE	National Statistics Institute (Portugal)
INEGI	National Institute of Statistics, Geography and Informatics (Mexico)
MAXQDA	Max Qualitative Data Analysis Software
MNEs	Multinational Enterprises
NAFTA	North American Free Trade Agreement
NERLEI	Business Association of the Leiria Region
PALOP	African Countries of Portuguese Official Language
Pos.	Position of the retrieved segment in the document
SMEs	Small and Medium-sized Enterprises
UNCTAD	United Nations Conference on Trade and Development
USA	United States of America

Table of Contents

Originality and Copyright	iii
Acknowledgments.....	iv
Abstract	v
List of Figures	vi
List of Graphs	vi
List of Tables.....	vii
List of Abbreviations and Acronyms	x
1. Introduction	1
1.0. Introduction	1
1.1. Background and motivation	1
1.2. Aim and relevance	2
1.3. Objectives of the investigation.....	3
1.4. Methodology.....	3
1.5. Structure of the dissertation	4
2. Contextualisation of the Mexican Market.....	6
2.0. Introduction	6
2.1. Country Profile	6
2.2. Political System.....	8
2.3. Economic Analysis.....	8
2.4. Foreign Trade	9
2.5. Culture.....	12
3. Portuguese Internationalisation in Mexico	14
3.0. Introduction	14
3.1. Global Framework	14
3.2. Portugal and Mexico: Bilateral Relationship.....	15

3.3.	Internationalisation of Portuguese Companies in Mexico.....	17
3.4.	The Portuguese Mould Industry	19
4.	Literature Review	21
4.0.	Introduction	21
4.1.	Negotiation	21
4.2.	International Negotiations.....	21
4.3.	Culture.....	23
4.3.1.	Cultural manifestations	24
4.3.2.	Theoretical frameworks of national culture	24
4.3.2.1.	Monochronic and polychronic time - Hall (1959)	25
4.3.2.2.	High and low context cultures – Hall (1976)	25
4.3.2.3.	Cultural dimensions – Hofstede (1980)	25
4.3.2.4.	Mexico’s cultural theories	27
4.3.3.	Cultural influence on negotiations	28
4.4.	Managing Successful Negotiations in Mexico	30
4.4.1.	The Negotiation Process.....	31
4.4.1.1.	Preparation	31
4.4.1.2.	Pre-negotiations.....	37
4.4.1.3.	Profound negotiations	42
4.4.1.4.	Post-negotiations	50
5.	Conceptual Model	51
5.0.	Introduction	51
5.1.	Conceptual Framework	51
5.1.1.	Research questions	52
6.	Research Methodology	57
6.0.	Introduction	57
6.1.	Research Purpose and Strategy	57
6.2.	Data Collection	58
6.2.1.	Secondary data	59
6.2.2.	Primary data	60
6.2.2.1.	The interviews	60
6.2.2.2.	Characterisation of the conducted interviews	61
6.2.2.3.	Sample dimension	61
6.2.2.4.	Gaining access and the interview data collection procedure.....	62

6.2.2.5. Processing information and content analysis	63
7. Results and Analysis.....	65
7.0. Introduction	65
7.1. Sample Characterisation.....	65
7.2. Characterisation of the Negotiation Preparation	67
7.3. Characterisation of Pre-negotiations	90
7.4. Characterisation of Profound Negotiations	107
7.5. Characterisation of the Post-negotiations	126
7.6. Characterisation of Successful and Unsuccessful Negotiations.....	128
8. Conclusion	133
8.0. Introduction	133
8.1. Main Remarks	133
8.2. Theoretical Implications	136
8.3. Practical Implications	136
8.4. Limitations of the Study.....	142
8.5. Lines for Future Research	143
Bibliography.....	145
Appendices	159
Appendix A- Interview Guide	159
Appendix B- Results of the Interviews	170
Appendix C- Practical Guide – Dos and Don’ts of Doing Business in Mexico	171

1. Introduction

1.0. Introduction

The present introductory chapter intends to present a general overview of the purpose and main topics contemplated in this investigation. This chapter is comprised of five sections. The first section identifies the background and motivation for the research theme. The second section justifies the aim and relevance of the study. The third section enunciates the general and specific objectives of the investigation. Subsequently, the fourth section describes the methodology employed to reach the study's objectives. Lastly, section five illustrates the structure of the dissertation, providing an overview of its organisation.

1.1. Background and motivation

Over the last decades, the growing international trade characterised by trade liberalisation, globalisation, digitalisation, and intense competition, radically changed the world. It has been connecting companies across borders, boosting international business, and thus making successful negotiations increasingly crucial in the international context (Helmold, 2020b; Moran, Harris & Moran, 2007; Poza, Mateo & Solana, 2012). These dynamics of the global economy have provided the opportunity to Portuguese companies to grow their presence in foreign markets, which continue to have an increasing weight in national companies' exports, currently representing 47% of the national GDP (Esperança, Reto & Machado, 2017; AICEP, 2022a).

Mexico is the second largest economy in Latin America and the fifteenth at the global level (AICEP, 2022b). As an emerging nation, several factors make Mexico attractive to foreign investment, such as the privileged geostrategic position to access the USA and Canada markets or its multiple trade agreements with fifty countries (AICEP, 2017; International Trade Administration [ITA], 2021c). Furthermore, the longstanding relationship between Portugal and Mexico, marked by the FTA between the EU and Mexico signed in 2000, observed the growth in the volume of exports of Portuguese products, reaching 570 million euros in 2018, supported by 811 Portuguese companies (Zarató, 2014; Bravo, 2019).

Being Portugal's second trading partner in Latin America, the Mexican market presents significant potential to several industry sectors (Bravo, 2019). One of the most predominant sectors in Mexico is the Portuguese mould industry, representing 3% of the Portuguese mould exports. In particular, in injection moulds for plastics, the automotive industry is the most relevant, as the world's largest car producers are present in Mexico, occupying the seventh position in the ranking of light car manufacturers in the world (CEFAMOL, 2021b). The Portuguese mould industry has constantly been expanding and consolidating in the international market, exporting 492 million EUR to 87 countries in 2021. It is one of the world's leading manufacturers of injection moulds for plastics, ranking the eighth position globally and third in Europe, exporting 85% of its total production (CEFAMOL, 2022).

Although there has been increasingly new research in the last decade about the Mexican business culture, negotiating styles and other culture-specific aspects, little attention has been paid to the negotiation process and business practices leading to successful negotiation outcomes from a non-US American point of view (Weingart & Olekalns, 2004; Lügger, Geiger, Neun, & Backhaus, 2015). Evidencing the international dimension of the Portuguese industry and its growing presence in the Mexican market generated interest in investigating how both cultures interact and achieve successful negotiation outcomes. Therefore, the motivation for the current investigation lies in the significant role of internationalisation to Portuguese companies in an emerging market that offers immense potential and opportunities to the mould sector.

1.2. Aim and relevance

The growing presence of Portuguese mould companies in Mexico emerging from statistical evidence and entrepreneurs' testimonies proves the opportunities that the market may provide. Therefore, it is pertinent to develop practical knowledge to support the successful internationalisation of companies wanting to diversify their foreign presence in the Mexican market.

The purpose of this investigation is to identify business behaviours, practices and cultural aspects leading to successful interactions and negotiation outcomes in Mexico. It aims to deconstruct cross-cultural negotiation aspects and gather relevant updated information concerning the effectiveness of the negotiation process and its resolution.

This research expects to build the bridge between the literature and practitioners by developing a negotiation framework encompassing critical stages, experiences, perspectives and dos and don'ts from skilled negotiators. Hence, it intends to contribute to the theoretical and practical knowledge by providing a practical guide to enhance successful international negotiations in Mexico from the perspective of Portuguese companies.

1.3. Objectives of the investigation

The main objective of this investigation is to ascertain cultural aspects and successful business practices in Mexico by developing a practical guide considering the Portuguese experience. On a more detailed note, the study's specific objectives are:

- 1) Highlight key negotiation stages and respective business practices, cultural and negotiation aspects for successful negotiations in Mexico;
- 2) Construct a practical guide of dos and don'ts to negotiate in Mexico;
- 3) Contribute to the International Business literature on exercising effective negotiation practices and avoiding negotiation mistakes in the Mexican market;
- 4) Provide practical knowledge to minimise negotiation blunders and enhance Portuguese enterprises' success in the negotiation process;
- 5) Contribute to the investigation of the internationalisation of the Portuguese mould manufacturing industry.

1.4. Methodology

To meet the research aims and objectives, this study has had an exploratory purpose of gathering qualitative data on key topics and effective business practices during the negotiation process in the Mexican market. Therefore, a survey strategy administered through semi-structure interviews with Portuguese managers was used to collect a significant amount of qualitative data.

The study collected secondary and primary data to gather information on business practices in negotiations in the Mexican market from the Portuguese perspective. First, secondary data were collected to contextualise the markets, understand culture-related theories and develop a systematic negotiation process composed of key success negotiation aspects. Subsequently, primary data were gathered in the form of semi-

structured interviews with ten managers in Portuguese companies to answer the study's research questions, ascertain cultural business practices and habits, and reveal experiences of negotiating in the Mexican market.

The interviews were recorded, transcribed, translated, and codified to the MAXQDA 2022 qualitative data analysis software. In addition, the results of the research questions were retrieved from the software and analysed accordingly.

1.5. Structure of the dissertation

The present dissertation is comprised of eight chapters, as illustrated in Figure 1. The first chapter is the introductory section presenting the investigation's main purpose, relevance, objectives, and methods to fulfil its aim. The second chapter develops the contextualisation of the Mexican market, drawing the country's framework, including the political system, economic analysis, foreign trade and cultural aspects and facts. Chapter three contextualises the Portuguese internationalisation to Mexico, approaching a brief overview of the global economic context of Portugal, evidencing the bilateral relationship between both countries and the internationalisation of Portuguese companies to Mexico, focusing on the Portuguese mould industry.

Chapter four presents the literature review on the study's central themes. Firstly, concepts of international negotiations are described, followed by theories of national culture and its influence on international negotiations. Then, it discusses the concept of successful international negotiations, and its different stages, comprising business practices and cultural aspects focused on the Mexican culture. Subsequently, the fifth chapter elucidates the purpose of the study, builds the conceptual model and the research questions. Chapter six exposes the methodology used to achieve the proposed objectives, justifying the choice of method and strategy, including the description of data collection methods and its characteristics.

The seventh chapter presents the results obtained from the semi-structured interviews, followed by the respective analysis and discussion. Lastly, the eighth chapter reveals the main conclusions provided by the findings obtained, as well as the theoretical and practical implications, limitations of the study and lines for future research.

Figure 1 - Structure of the dissertation



Source: Own elaboration

2. Contextualisation of the Mexican Market

2.0. Introduction

The aim of this chapter is to contextualise the Mexican market to understand its environmental context and its characteristics. The market research includes the country's profile regarding geographic characteristics, population, ethnicity, language, religion, currency, and infrastructures. Subsequently, it describes the country's political system, analyses its economic context, and presents the main aspects of Mexico's foreign trade. The last section briefly depicts the Mexican history and cultural traits.

2.1. Country Profile

Mexico is a country located in southern North America, bordered by the EUA to the north, Belize and Guatemala to the South and surrounded by the Pacific Ocean, the Caribbean Sea, and the Gulf of Mexico (Figure 2) (Meyer, Griffin, Bernstein et al., 2021). Situated in the "Ring of Fire", Mexico holds a continental territory of 1,959,248 km². The capital is Mexico City (9.2 mil.), and its major cities are Tijuana (1.81 mil.), Ecatepec (1.64 mil.), León (1.58 mil.) and Guadalajara (1.38 mil.) (Meyer et al., 2021; INEGI, 2021). Its vast size and topographic diversity concede Mexico with a wide range of climatic conditions. Divided by the Tropic of Cancer, in the southern areas, the climate is tropical with a rainy season and a dry season, whereas in the north, it is predominantly arid and semiarid (Meyer et al., 2021). Mexico's time zone is associated with three standard time zones, corresponding to 3 DST (Daylight Saving Time) time zones. For example, Cancún is UTC-5 (Coordinated Universal Time), Mexico City is UTC-6 and Tijuana is UTC-7 (CENAM, 2021).

Mexico is the second most populous country in Latin America, with about 126 million inhabitants, in its majority women with 51.2% and men with 48.8% (AICEP, 2022b; INEGI, 2021). The highest percentage of inhabitants lies between 10-59 years old, and the ageing index has been increasing, which consequently causes a decreasing demographic dependency ratio (INEGI, 2021).

Figure 2 - Geographic location



Source: <https://geology.com/world/mexico-satellite-image.shtml>

The main ethnic groups are mestizo (Spanish Indian), accounting for the largest population segment, which is descendent from the indigenous and European mixture resulting from the Spanish settlers in the 1500s, and Amerindian (American Indian), the indigenous peoples (Meyer et al., 2021). The most spoken language is Spanish, yet it is notably different from Spain's Spanish. Amerindians still speak many indigenous languages, emphasising Náhuatl, Maya, Mixteco and Tseltal. Moreover, English is spoken by many in business, especially American English (Acuff, 2008; Helmold, Becker, Gonzalez & Herrera, 2020; Meyer et al., 2021; AICEP, 2022b). Moreover, ethnical and regional diversity translates into strong socioeconomic contrasts amongst the Mexican population. Its society can be characterised by extremes of rural and urban areas, comprised of indigenous people's traditions and fast-developing metropolitan areas (Meyer et al., 2021).

Although there is no official religion due to the segregation between church and state, the primary religious affiliation is Roman Catholicism (82%), a small segment of the population is Protestant, and a significant number of indigenous peoples practice syncretic religions (Meyer et al., 2021; Romero, 2021). The monetary unit is the Mexican Peso (MXN) which 1 EUR corresponds to 23,1808 MXN (AICEP, 2022b).

Considering the transportation infrastructures, Mexico faces a challenge in developing an integrated transportation system due to its landscape diversity and emerging economy (Meyer et al., 2021). Regardless of being at the forefront of promoting railway development in Latin America, several areas of the country still lack decent road and rail connections despite the improvements at the time the government privatised the network in the mid-1990s (Meyer et al., 2021; ITA, 2021b). The most common transportation mode is by bus and *colectivos*, taxis in some areas are not safe, and it is advisable to ask

at the hotel or airport for a taxi (Expat, 2020). Likewise, there is a need to invest in and improve road connections, safety, and traffic control from ports to trade and production centres (Oxford Business Group [OBG], 2015). Investing in infrastructures connecting the north and the south will make Mexico prone to make its economy an important industrial centre and able to attract investors interested in Latin American and US markets (AICEP, 2017). Regarding air and maritime transportation, Mexico owns 64 airports providing national and international flights and 102 ports along the coastline (ITA, 2021b).

2.2. Political System

Mexico, or the Estados Unidos Mexicanos (United Mexican States), is a federal republic and, as its official name suggests, integrates 31 physically and socially diverse states and the Federal District (Mexico City) (Meyer et al., 2021; AICEP, 2017). The governmental powers are constitutionally divided among executive, legislative, and judicial divisions. The legislative branch is divided into the Senate (upper house) and the Chamber of Deputies (lower house). The president is the head of the government popularly elected for a non-renewable six-year term, selects the cabinet and issues *reglamentos* (executive decrees). The first Mexican president in 1917 was Venustiano Carranza, and in 2018 the centre-left populist of the Movimiento Regeneración Nacional (MORENA), Andrés Manuel López Obrador (AMLO), won the elections. The central Mexican parties are Partido Revolucionario (PRI), Partido Acción Nacional (PAN) and Partido de la Revolución Democrática (PRD). The position of vice president does not exist, thus in the event of incapacity or death of the president, it is designated a provisional successor (AICEP, 2017).

2.3. Economic Analysis

Despite being predominantly an agricultural country, Mexico experienced a profound economic transformation in the mid-1990s after the economic liberalisation partially fuelled by NAFTA (Coleman, 2021; Moran et al., 2007). Additionally, strongly impacted by the Great Recession of 2007-2009 by its synchronisation with the US economy, the economic growth resumed in 2010, undergoing fast industrialisation through its exports of metal, manufacturing, and tourism (Kehoe & Meza, 2013; Moran et al., 2007). Nowadays, Mexico is reviving with notable progress in building a modern and diversified

economy more integrated with the global economy (Coleman, 2021; Gupta, Govindarajan & Wang, 2008).

Mexico is the 2nd biggest economy in Latin America, the 5th biggest emerging economy after BRIC and ranking 15th in the world (AICEP, 2022b; Goncalves, Alves & Arcot, 2015). In 2020 the GDP registered 1.087 trillion US\$, and the GDP growth contracted to 8,2% due to the effects caused by the Covid-19 pandemic (The World Bank, 2021). However, it partial recovered economically by 4,8% in 2021, registering 1.293 trillion USD, in line with the international economic situation, especially in the USA (AICEP, 2022b). According to The Economist Intelligence Unit [EIU] (2021), the industry represents the most accountable source of Mexican GDP in 2021 with 2.9%, followed by services with 2.7% and agriculture with 2%. Mexico's industrial fabric consists primarily of small and medium-sized companies, integrating highly competitive sectors and exporters with prominence in the automotive, electrical and electronics, metal-mechanical sectors, hydrocarbons, furniture, food, and extractive industry (silver, zinc, copper, and fluorite) (AICEP, 2022b).

According to AICEP (2017), by benefiting from its dynamic exports, Mexico will continue to fuel its economy's most significant growth driver, which will likewise benefit from the monetary devaluation of the Mexican peso. Consequently, growth in exports and domestic consumption should enhance fixed investment, specifically in the manufacturing sector. Additionally, the increasing urbanisation and young population (30% are 0-17 years old) will thrust the domestic market growth despite income inequalities and different growth rates between the north and south and the urban and rural areas (AICEP, 2017; INEGI, 2021).

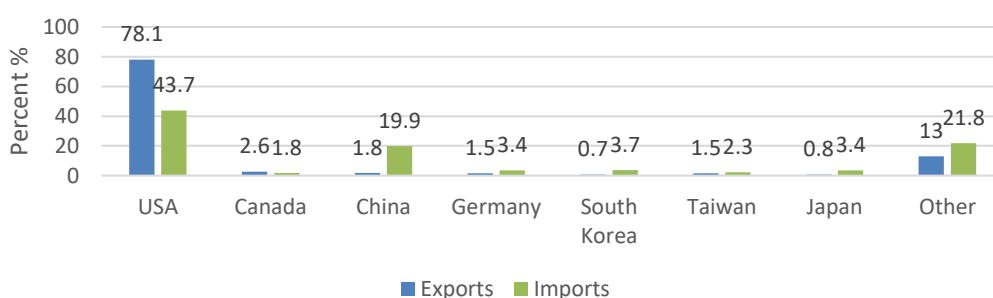
2.4. Foreign Trade

In 2020, Mexico reached the 11th position as the world's largest exporter (UNCTAD, 2021b). Heavily dependent on foreign trade, the country's exports of goods and services were worth 495 billion USD in 2021, against 417 billion USD in 2020, representing 40.43% of the GDP (AICEP, 2022b; The World Bank, 2022b). The main groups of exported products were machinery and equipment, vehicles and other transport material, agricultural products, optical and precision instruments, and common metals. Mexico's imports were worth 507 billion USD in 2021, compared to the 383 billion USD in 2020,

representing 41.93% of the GDP (AICEP, 2022b; The World Bank, 2022c). The main groups of imported goods were machinery and equipment, vehicles and other transport equipment, common metals, chemical products and plastics and rubber. Although the trade balance totalled 35 billion USD in 2020, it registered a 12 billion USD deficit in 2021, representing a decrease of 970 million USD compared to 2017 (AICEP, 2022b).

The primary trading partners of Mexico are the USA, Canada, China, Taiwan and Germany as clients and the USA, China, South Korea, Germany and Japan as suppliers. Accordingly, the USA is markedly the main partner of Mexico, absorbing 78.1% of its total exports and 43.7% of the total imports, followed by Canada with a significantly smaller share (2.6%) positioned as its second client and China as its second supplier (19.9%), see Graph 1 (AICEP, 2022b). As previously referred, foreign trade has played a fundamental role in Mexico’s development strategy representing the country’s main engine of economic growth (AICEP, 2017). Therefore, Mexico should seek to diversify its trading partners to reduce its dependence on the US market (AICEP, 2017).

Graph 1 - Main trading partners of Mexico



Source: Adapted from AICEP (2022b)

Considering Foreign Direct Investment, the implementation of NAFTA in 1994 provided an especially favourable evolution of FDI in the Mexican manufacturing industry. Since then, there has been an effort to create attractiveness for foreign investment (AICEP, 2017). While suffering a recession in 2019, Mexico’s FDI inflows in 2020 fell less sharply by 15% to 29 billion USD compared to the FDI in Latin America and the Caribbean's steep decline of 45%, corresponding to 88 billion USD. In 2021 Mexico maintained its 10th position in the top 20 host economies to FDI inflows, registering an increase of 13%, corresponding to 32 billion USD (UNCTAD, 2021a, 2022). In 2021, FDI flows to Mexico concentrated in automotive, mining, and extractive industries (UNCTAD, 2022).

Mexico holds a notable and lasting presence in international and regional relationships with a network of 13 Free Trade Agreements (FTAs) with 50 countries (ITA, 2021c). It is a member of the Inter-American Development Bank - IDB, the Organisation for Economic Cooperation and Development (OECD), the United Nations (UN) and its specialised agencies with organisations, funds and others, and it integrates the World Trade Organisation (WTO). To promote the free circulation of goods, services and capital between other countries in the region, Mexico is part of the renegotiated North American Free Trade Agreement (NAFTA), now denominated by the United States, Mexico, Canada Agreement (USMCA), the Pacific Alliance (Alianza del Pacífico), the Asia-Pacific-Economic Cooperation (APECC), the Organisation of American States (OAS), the Asociación Latinoamericana de Integración (ALADI), the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), among others (AICEP, 2017). The trade relations between Mexico and the EU are governed by the EU-Mexico Economic Partnership, Political Coordination and Cooperation Agreement ('Global Agreement') in effect since October 1st of 2000, establishing reciprocal trade liberalisation through the progressive creation of a free trade zone, tripling the bilateral trade by 2020 (European Commission [EC], 2021).

Mexico offers foreign investors a wide range of investment incentives and programmes (AICEP, 2017). *ProMéxico (Inversión y Comercio)* is the federal body responsible for promoting trade and attracting foreign investment, strengthening Mexico's participation in the international economy, and supporting companies' export process and internationalisation.

Foreign investment in Mexico is ruled by the consecrated principles in the *Ley de Inversión Extranjera* (LIE) and in the *Reglamento de la Ley de Inversión Extranjera y del Registro Nacional de Inversiones Extranjeras* controlled by the *Comisión Nacional de Inversiones Extranjeras* (CNIE)/ *Secretaría de Economía* (SE), which aims to expose economic sectors to foreign investment establishing administrative simplification concerning property acquisition and investments. Concerning customs charges levied upon entry of products on the market, the Customs Tariff is based on the Harmonized Commodity Description and Coding System (HS). The customs taxation imposed on the products originating in the EU falls under the 'Global Agreement' between EU-Mexico, whereas most of them benefit from customs exemptions and reductions (AICEP, 2017).

Mexico holds several reasons for being one of the most attractive emerging countries for foreign investment, its geographic proximity grants privileged access to the US and Canadian markets; its export orientation, with the integration at the end of the value chains of some Mexican industries; it belongs to an extensive network of free trade agreements, which enhances its investment opportunities; and the size of its domestic market, with a growing, young middle class (AICEP, 2017). Considering the business environment, Mexico is positioned in the 40th/82 in the global ranking, 55th/64 in competitiveness, 67th/177 in facility, 124th/180 in transparency, and the general and economic risk is medium (BBB and BB, respectively) (AICEP, 2022b). Nevertheless, Mexico's weaknesses are its high dependence on the US, causing vulnerability; bureaucracy is slow and burdensome; widespread corruption at state levels and organised crime (Information Handling Services [IHS], 2021).

2.5. Culture

A site to the earliest civilisations as early as 21 000 b.C. and to the great empires of the Aztecs, Mayas and Mixtecs, Mexico holds the legacies of highly developed civilisations which are still preserved by the society (Coleman, 2021; Meyer et al., 2021). In the 1520s, the pursuit of tales of great wealth drew Hernán Cortés to conquest Mexico, rapidly possessing the Aztec empire and subjugating other indigenous tribes to Spanish rule. Mexico achieved independence in 1821, revolting against the Spanish regime, which marked a century of political unrest, while the twentieth century witnessed economic progress despite the collapse in the 1990s brought by corruption, drug trafficking, doubtful elections, and a fiscal crisis (Meyer et al., 2021).

Meyer et al. (2021) characterise the Mexican society by extremes of wealth and poverty, led by elite groups of landowners and investors on one side and masses of rural and urban poor on the other, leaving a limited middle-class in-between. The authors observe a sharp contrast between Mexico's developing urban areas and the traditional lifestyles in rural and remote areas, mainly in the south, such as Oaxaca or Chiapas whereas indigenous people live in communal villages like their ancestors. The remains of pre-Columbian civilisations such as the Mayan pyramids at Chichén Itzá or Tulum deeply clash with the colonial towns such as Taxco or Querétaro, thus creating a unique character with complex and varied culture and economic diversity.

Mexicans are relaxed, warm, hospitable, proud, patriotic, and emotional. National pride is directed in the cultural sense, Mexicans feel proud about their country's cultural depth and wealth and uniqueness. The Mexican society highly values its family both in private and in public life. Family ties deeply influence individuals' status throughout their lifetime, being maintained strong relations between members and many inhabiting the same household for three or more generations. Weddings and a girl's *quinceañera* are the most extravagant family-oriented Mexican events. (Meyer et al., 2021; Moran et al., 2007).

Mexican cuisine is characterised by the ancient use of corn (maize), beans, squash, avocados, tomatoes, vanilla, cacao beans and chilli pepper. Maize tortillas, enchiladas, tamales, tacos, quesadillas, and stuffed chilli peppers are the main Mexican dishes which ambulatory vendors often sell on the streets. Chocolates and dulce de leche are the preferred desserts. *Licuidos* are common soft drinks, and *tequila*, *aguardiente*, beer, and *margarita* are common alcoholic beverages. There are three main meals throughout the day, comprised of *desayuno* (breakfast), *comida* (lunch), the largest meal is held between 1 pm and 3 pm, and it is often followed by *siesta* (afternoon nap) in smaller cities, and *cena* (dinner) between 7pm and 9pm (Meyer et al., 2021).

Holidays in Mexico are associated with Christian holidays, including Easter, Christmas (*Las Posadas*) and other patron saint's festivals. The *Día de los Muertos* (Day of the Dead) is the most memorable Mexican celebration held on November 1st to celebrate family ancestors and death by making *ofrendas* and decorating tombs. The *Día de la Raza* (or Columbus Day) on October 12th celebrates the mix of indigenous and European heritage, specifically the mestizo population. Other holidays are international Labour Day (May 1st), Independence Day (September 16th) and *Cinco de Mayo* (May 5th).

The Mexican culture is filled with creative and original folk and classical tradition. The most influential writers comprehend the names Octavio Paz, Carlos Fuentes, and Mariano Azuela. Murals, paintings, and sculptures are the most artistic representation of Mexican folk heritage, mainly those created by Diego Rivera, Frida Kahlo, and José Clemente Orozco. Music and dances with the popular *mariachi* and *ranchero* songs unify generations. Other appreciated cultural activities are *lucha libre* (professional wrestling), football, *telenovelas* (soap operas) and action films (Meyer et al., 2021).

3. Portuguese Internationalisation in Mexico

3.0. Introduction

This chapter intends to contextualise the Portuguese internationalisation in the Mexican market. It begins with a brief overview of the Portuguese economic situation focusing on the motivation to thrust the economy by expanding to foreign markets. The following section presents the bilateral relationship between Portugal and Mexico, highlighting key players in strengthening their bond. The third section describes the internationalisation of Portuguese companies to Mexico, revealing trading characteristics and opportunities between both markets. The last section introduces the Portuguese Mould Industry, centring on its contribution to the Portuguese economy and its potential to internationalise to Mexico.

3.1. Global Framework

The Portuguese economy has experienced a growing degree of openness and internationalisation after joining the EU in 1986 (Manzoni, Figueiredo & Ribeiro, 2017). Severely affected by the 2008 European economic and financial crisis, which culminated in 2011, Portugal emerged from the trade balance deficit in the following years (Manzoni et al., 2017; Bravo, 2017). After patiently complying with a severe austerity program, the Portuguese economy grows mainly on account of foreign trade, which occupies an essential role in the economic recovery (Bravo, 2017). Since 2013, exports have been the most significant contributor to the Portuguese economy, making it dependent on greater exposure to foreign markets (Esperança et al., 2017; Costa & Antonio, 2015). The Portuguese GDP growth contracted by 8.4% in volume in 2020, reflecting the profound impact of the COVID-19 pandemic on economic activity (INE, 2022). Similarly, in 2020, the Portuguese economy lost the trade surplus it had won in the previous eight years in the Troika period, concluding the year recording a trade deficit of 3,583 million euros in the balance of goods and services (Peixoto, 2021). Nonetheless, having experienced an acceleration in the volume of exports of goods and services in 2021 reflected a growth of 4.9% in the GDP (INE, 2022).

In light of the current global context, internationalisation is essential to business competitiveness which is mainly contributing to the progress of the economy (Leal, 2017;

Costa & António, 2015). Hence, motivations for internationalisation may lie in searching for new opportunities, transaction growth and creating a global position in less developed markets, making grander profit margins (Simões & Crespo, 2017).

According to the Bank of Portugal, in 2021, the Portuguese outward FDI mainly focused on Spain (29.4%), the Netherlands (27.7%), Brazil (4.6%) and Angola (4.6%). This corroborates with the literature as it demonstrates that cultural and geographic proximity substantially influence Portuguese activities' destinations, sustaining the growing internationalisation to Brazil and PALOP (Costa, 2006; Duarte, 2019; Esperança et al., 2017). Nonetheless, although cultural proximity, such as sharing a common language, can increase the trade volume between countries (Ghemawat, 2001), it is not a synonym for success since differences in the working methods were the source of the failure of Portuguese companies expanding into the Brazilian market (Tomás, 2017b; Duarte, 2019). Besides, the connection with these countries can be considered based on language facilitation or tradition. The disregard for their complexities has resulted in the great expenditure of companies' economic resources, preventing sustainable growth (Silva & Teixeira, 2017).

The Portuguese entrepreneurial spirit and its ability to innovate highlight the willingness to seize foreign business opportunities which have fostered an economic recovery by growing and entering new markets (Simões e Crespo, 2017; Bravo, 2017). Therefore, Portuguese executives and managers developing knowledge to successfully internationalise in culturally diverse countries is essential to companies' competitiveness and Portugal's economic growth. The next sections will consider the relations between Portugal and Mexico and prospects that Portuguese firms may benefit from investing in Mexico.

3.2. Portugal and Mexico: Bilateral Relationship

Political relations between Portugal and Mexico already hold a long record, celebrating 158 years in 2022 of diplomatic activity. Only after 1986, when Spain and Portugal were admitted as members of the EU, the trade relations between Mexico and the European Union began in earnest. Particularly following the year 2000, when both signed a Free Trade Agreement (FTA EU-MEX/TLCUEM) that promoted the exchange of goods and services, there was an amplification in Mexico's trade with the EU (Zaraté, 2014). In order

to foster and strengthen the development of investment relations between Portugal and Mexico, from 2000 to 2001 it was signed the Agreement for the reciprocal Protection and Promotion of Investments and the Convention to Avoid International Double Taxation and Prevent Income Tax Evasion (AICEP, 2017).

In 2004, the bilateral relationship expanded with an initiative from several Mexican and Portuguese economic agents, the Luso-Mexican Chamber of Commerce and Industry (CCILM) was created with the support from the Mexican Embassy in Portugal and from Portuguese companies in the public and private sectors of industry, banking, insurance, commerce, and services (Zaraté, 2014; Business Association of Santarém Region [NERSANT], 2017). The CCILM is a non-profit association whose main mission is strengthening socio-economic, commercial, and cultural relations between entrepreneurs in Mexico and Portugal (NERSANT, 2017). In 2019, it launched the project “Portugal Connect” to reinforce the process of internationalisation and competitiveness of Portuguese companies in the Mexican market, such as the presence in international fairs, workshops, and missions, mainly in the moulds, machines, tools, and industry sectors (CCILM, 2019; 2021b). The relationship between both countries has been particularly active and positive at the institutional, public and private level in the last eight years. Strengthening the mutual commitment between Portugal and Mexico was the modernisation of the EU-Mexico Global Agreement in 2016 and the Portugal-Mexico Chair Meeting on Issues of Mutual Interest in 2019. Furthermore, the participation of the Trade and Investment Agency (AICEP) and the CCILM was utterly substantial to the mutual economic growth (Bravo, 2019).

In Portugal, NERLEI (Business Association of the Leiria Region) accompanies companies in intrapreneurial missions to Mexico and created, for instance, the project Choose Portugal in 2008 with incentives for the internationalisation of Portuguese SMEs (NERLEI, 2011). Likewise, AICEP, IAPMEI, AEP (Portuguese Business Association) and CEFAMOL (Portuguese Association for the Mould Industry) continue to develop programs, fairs, missions, and webinars to present business opportunities and the potential of the Mexican market to Portuguese companies, providing valuable and practical information about the current context of the country (NERLEI, 2012; Zaraté, 2014; Bravo, 2019; AICEP, 2022b). It has been a priority of the Mexican Embassy in Portugal and the Portuguese Embassy in Mexico to promote and facilitate contact information and opportunities between both countries at a business, cultural and academic level (Costa,

2018; Bravo, 2019). Due to these incentives, the commercial exchange between both countries increased substantially to 853.3 million USD in 2018 against 480 million USD in 2015 (Bravo, 2019).

3.3. Internationalisation of Portuguese Companies in Mexico

Although being an old partner of Portugal, Mexico can still be regarded as an “illustrious unknown”, an exotic and touristic country in which tequila, chilli peppers, criminality and Cancun beaches remain the principal references for the Portuguese (Zaraté, 2014; Fernandes, 2019). This imagined view about Mexico overshadows the country’s image, demonstrating the necessity to contest generalisations that often limit the capacity to identify business opportunities or reduce the activity sphere of Portuguese companies (Cruz, 2015). Nevertheless, Mexico’s potential has been translating into the overall positive evolution of economic and trade relations between both countries and has been increasingly creating business opportunities for Portuguese companies, challenging these preconceived ideas (Bravo, 2017).

Alfredo Pérez Bravo, the former Ambassador of Mexico in Portugal, stated that since 2015 Mexico has become the second most important market for Portugal in Latin America, after Brazil, experiencing the presence of Portuguese companies multiplying. He adds that there are many similarities between Mexicans and Portuguese: growing up living with the sea, nourishing traditions, and being proud of the multi-ethnic identity, heritage, and gastronomy (Bravo, 2017). Although having distinct languages, 17,18% of the total trade of the Portuguese language community is with Spanish-speaking countries, thus supporting that the easiness of intercomprehension promotes commercial trade (Esperança et al., 2017). As well as sharing the Latin culture, their similarities represent great potential connections (Zaraté, 2014).

In 2021, the trade balance of goods and services between Portugal and Mexico recovered from the plunge suffered in 2020 due to Covid-19, presenting a surplus of 226,6 million euros, see Table 1 (The Office for Strategy and Studies [GEE], 2022). Exports increased 31,2%, accounting for 354,2 million euros, and imports increased 19,6%, totalling 127,7 million euros. The highest value in trade of goods and services was in 2018, reaching about 570 million euros. According to INE, between 2014 and 2019, 606 Portuguese

companies were exporting to Mexico in 2014, which turned to 861 in 2019 (AICEP, 2019b).

Table 1 - Trade balance of goods and services of Portugal with Mexico

	2016	2017	2018	2019	2020	2021	Var % 21/16	Var % 21/20
Exports	277,9	326,8	376,8	376,0	270,0	354,2	27,5	31,2
Imports	195,4	196,8	206,7	154,3	106,7	127,7	-34,8	19,6
Balance	82,5	130,0	170,1	221,7	163,3	226,6	--	--
Cov. Coef. %	142,2	166,1	182,3	243,6	253,1	277,5	--	--

Unit: Million EUR

Source: GEE (2022)

The Mexican market continues to present business opportunities for Portuguese companies in various sectors, mainly machinery and industry equipment, automotive (moulds and components), aeronautics, medical devices, technologies, circular economy and environmental protection solutions, food and beverages, home, and fashion clusters (AICEP, 2022b). In 2021, Mexico occupied the 29th position as a client of Portuguese exports of goods with a 0,50% share and ranked 58th in imports with 0,09% (Table 2).

Table 2 - Share of Mexico in the Portuguese international trade of goods

	Unit	2016	2017	2018	2019	2020	2021
Mexico as Portuguese Supplier	% Imports	0,26	0,21	0,21	0,11	0,09	0,08
Mexico as Portuguese Client	% Exports	0,45	0,52	0,55	0,54	0,47	0,51

Source: GEE (2022)

In the structure of exports, the main sectors were machines and devices (21,5%), plastics and rubber (16%), chemical products (12,6%), wood and cork (11,7%), and cellulose pulp and paper (11,5%). Moreover, the main groups of imported products were agricultural products (20,6%), machines and devices (17,3%), plastics and rubber (15,9%), common metals (12,3%) and minerals and ores (7,7%) (AICEP, 2022b). The Portuguese presence in Mexico grew significantly in information technologies, moulds for the automotive industry and infrastructure for construction (Zarató, 2014; Cunha, 2019).

There are several Portuguese companies with significant investments in the Mexican market, contributing to the growth of the Portuguese presence. Mota-Engil, Logoplaste, and Grupo Rar stand out, as SMEs in different sectors, from software to industrial tools, textiles and footwear (Tuottava, 2014). Mota-Engil Group, with the most Portuguese

investment in Mexico, is building motorways and a series of infrastructure works of prime importance (Costa, 2018). Vista Alegre is accelerating its expansion in Latin America by constituting a subsidiary in Mexico, assuming that the Mexican market is a priority in which the company can grow substantially (Marcela, 2018). EDP Renewables invested 278 million dollars in an agreement with Peñoles Industries and built the largest wind farm in Latin America (Costa, 2018). Finally, GLN (Gestmin Group) invested 2,5 million dollars in constructing a mould factory for the automotive sector in Querétaro (Sanlez, 2018).

Vitor Pinto da Cruz, general manager of Tuottava Consulting, clarifies the potential of Latin America for the internationalisation of Portuguese companies. He explains that Mexico, located in North America, assumes a strategic role as a link connecting Central and South America and as a gateway to the USA and Canada. Mexico is 20 times bigger than Portugal, with ten times more population and Cruz believes that Portugal has sufficient qualities for greater internationalisation of its products and services (Silva & Teixeira, 2017). Moreover, Portugal has potential because it has cultural, idiomatic, geographical and economic characteristics that complement Mexico (Cruz, 2015). There is a positive perception of Portugal being integrated with the EU as it is viewed as a knowledgeable and innovative reference (Cunha, 2019).

In a CCILM (2021b) webinar, Mariana Oom, director of AICEP in Mexico, presented several recommendations that Portuguese companies should consider when wanting to invest in Mexico. First, to study the Mexican market, have a presence by networking, participating in international events and fairs, and adapting to the business culture. To create a strategy, organise the necessary resources, and present concrete and personalised proposals that respond to the client's specific needs.

3.4. The Portuguese Mould Industry

Intimately bonded with the glass industry, the Portuguese mould industry developed in Marinha Grande, where most mould manufacturing companies are established. It is recognized as an industrial city and the main mould centre in the country, followed by Oliveira de Azeméis (Directorate-General for Economic Activities [DGAE], 2018; AICEP, 2019a). The district of Leiria is responsible for 48,6% of the turnover of the Portuguese mould exports and contributes to 63% of the industry's trade balance (Garcia,

2020). Currently, the sector is comprised of 498 companies, mainly SMEs, employing around 10.400 people (CEFAMOL, 2022).

Characterised by innovation, technology and highly specialised labour, it grants its products the quality to be recognised globally (AICEP, 2019a). Constantly expanding and consolidating its presence in the international market, the Portuguese mould industry exported 492 million EUR to 87 different countries in 2021. It is one of the world's leading manufacturers of injection moulds for plastics, ranking 8th globally and 3rd in Europe, exporting 85% of its total production (CEFAMOL, 2022). Despite Europe remaining the main destiny of its exports, representing 78%, the Portuguese companies seek to diversify their export markets, focusing on North America (8%), namely the USA (5%) and Mexico (3%) (AICEP, 2019a; CEFAMOL, 2022). The main client of the national mould industry is the automotive sector (78%), followed by packaging (8%), medical devices (3%) and electronics (3%), among others (5%) (CEFAMOL, 2022).

In 2021, the Portuguese mould industry exported a volume of about 11 million EUR to the Mexican market, with a mould and tooling industry representing 12 billion dollars (CEFAMOL, 2021a). A large number of Portuguese companies are supplying moulds to Mexico's automotive industry, as the world's largest car producers are present in Mexico, occupying the 7th position in the ranking of light car manufacturers in the world (CEFAMOL, 2021b). In a webinar organised by CCILM in 2021, Mariana Oom, director of AICEP in Mexico, stated that Mexico mainly invests in the automotive sector, which includes moulds, plastics and the machines and tools that allow their construction and also in the aeronautical and home appliance sectors (Graciano, 2021b). The opportunities in this industry are astounding as Portugal has excellent technique, quality, and commitment in the mould sector. However, a workforce shortage poses a challenge in meeting the Mexican demand. Therefore, the main strategy for the mould business sector is to invest in local technical training to increase manufacturing power (Graciano, 2021a). Furthermore, the webinar participants were unanimous in concluding that there are still business opportunities in Mexico. However, they are not yet being adequately seized by Portuguese companies, advising companies to take advantage of all existing aid to internationalize the business and invest in the Mexican market (Graciano, 2021b).

4. Literature Review

4.0. Introduction

This chapter aims to review fundamental cultural and practical elements when performing business across borders, namely in the Mexican market. It begins by providing an understanding of the concept of negotiation and the importance and challenges of international negotiations to the internationalisation of firms. The subsequent section describes the influence of culture on international negotiations by turning to renowned theoretical frameworks in the International Business field. Then, the last section presents the influence of culture on negotiation aspects focusing on the impact of the Mexican culture on negotiation.

4.1. Negotiation

Negotiation is the process of verbal or non-verbal communication interaction between two or more parties on a debatable aspect with mutual interest to reach an agreement (O'Brien, 2016; Helmold, 2020b; Weingart & Olekalns, 2004; Adair & Brett, 2004; Fisher & Ury, 1991; Carnevale & Pruitt, 1992; Moran et al., 2007). Acknowledging negotiation as a process, it comprises a long-term sequence of activities in which several phases are systematically arranged toward the desired outcome (Weingart & Olekalns, 2004; Helmold, 2020c; Salacuse, 2003). Therefore, a deep understanding of the negotiation process and its substance (what to negotiate) are requirements to succeed in any negotiation (Salacuse, 2003).

4.2. International Negotiations

The current global reality has witnessed transformative structural dynamics in the world economy instigated by globalisation, technology, and the reduction of trade protectionism and transportation costs (Crespo & Tomás, 2017). This phenomenon increased firms' competitiveness and forced companies to adopt new methods to do business abroad by developing awareness and recognising different cultural practices (Nataatmandia & Dyson, 2005).

The link between international business negotiation and the economy is undeniably persistent (Lügger, et al., 2015). Moreover, negotiation is backing the global economy,

hitting a peak of 5.8 trillion USD with global deal in 2021 (Saigol, 2021). Today's unparalleled global economic activity can be characterised by global manufacturing and distribution and by the increasing intercultural negotiations resulting in cooperative arrangements, such as buyer-seller negotiations, international joint ventures (JV), mergers and acquisitions (M&A), and strategic alliances (Gelfand & Dyer, 2000; Adler & Gundersen, 2008; Kumar, 2004).

International negotiations are distinguished from domestic ones by differences in environment, culture, legal systems, economic factors, ideologies, and amplified uncertainty (Luo & Shenkar, 2002; Salacuse, 2003). These numerous macro environment factors and elements present in a country and its members ultimately influence negotiations between culturally distinct parties (Acuff, 2008). Moreover, insufficient preparation to evaluate these aspects may heighten the risk of failure and lengthen the time to reach a deal (Salacuse, 2003). Therefore, although luring organisations with greater opportunities, foreign markets present plentiful challenges (Lytle, Brett, Barsness, Tinsley & Janssens, 1995).

Over the last decades, there has been substantial research on cross-cultural business negotiations (Carnevale & Pruitt, 1992), including the impact of culture (Brett & Okumura, 1998), communication (Adair & Brett, 2005), behaviours (Brett, 2000; Adler & Graham, 1989), outcomes (Natlandsmyr & Rognes, 1995) and negotiation styles (Gelfand & Dyer, 2000). Perceived as one of the most significant challenges associated to international operations, cultural differences generated great theoretical interest in understanding cultural aspects and its influence on negotiations and, consequently, on the performance of successful international negotiations (Simões & Crespo, 2017; Helmold, 2020d; Requejo & Graham, 2008; Adair & Brett, 2005). The literature acknowledges that multiple cultural constraints influence cross-cultural negotiations that go beyond the spoken language, such as values, beliefs, behaviours, codes of protocol and etiquette and eating habits (Tomás, 2017b). Hence, there is a need to expand practical knowledge regarding the connections between culture and negotiation, which is increasingly valuable for many companies to succeed internationally (Natlandsmyr & Rognes, 1995).

4.3. Culture

International business does not simply cross national boundaries but also cultures (Salacuse, 2003). The incessant attempt to comprehend the impact of culture on cross-cultural business practices, decisions and outcomes lead culture to be one of the most studied and used environmental dimension in IB studies (Ferreira, Li, Guisinger & Serra, 2009; Reis, Ferreira, Santos & Serra, 2013).

Despite its multiple definitions, culture can be defined as a distinct character of a particular social group, society, or nation (Lytle et al., 1995; Brett, 2001). Deriving from one's social environment, it is a complex set of learned and shared behaviours which are manifested through language, traditions, norms, values, and beliefs (Opatow, 2004; Lytle et al., 1995; Brett, 2017; Hofstede, 1991). In addition, it consists of the group's economic, social, political, and religious institutional structures that direct its members and confers authority by maintaining and promoting norms and values (Lytle et al., 1995; Brett, 2017; Brett, 2001).

The process of exchanging information is cultural since there are socially different ways to communicate through symbols, signs, and behaviours (Adair & Brett, 2004). Therefore, culture alters the process of negotiating across borders since each nation is shaped by culture, history, geography, political system, tacit cognitive knowledge structures, native languages, and social interaction systems (Dowd, 2015; Weiss, 1994; Herbig & Kramer, 1991). During the negotiation process, all negotiators carry their patterns of communicating, processing information, reasoning, negotiating styles, assumptions, problem-solving, political realities, etiquette, and costumes in ceremony and formality (Moran et al., 2007; Brett, 2000; Gelfand & Dyer, 2000). Cross-cultural negotiations, then, reveal negotiators' behaviours, strategies, goals, interests, beliefs, and norms that are utterly influenced by culture, which may indirectly affect negotiation outcomes (Adair & Brett, 2004; Natlandsmyr & Rognes, 1995; Brett, 2000, 2001, 2017; Adair, Okumura & Brett, 2001; Weiss, 1994; Gelfand & Dyer, 2000).

Expanding a company's presence across borders exposes it to a confrontation with diversity, and although luring organisations with greater opportunities, foreign markets present plentiful challenges (Lytle et al., 1995; Gupta et al., 2008). Therefore, to perceive the influence of culture on international business negotiations, it is necessary to describe cultural differences (Reis et al., 2013).

4.3.1. Cultural manifestations

Hofstede (1991) associates the manifestation of cultural differences with an onion diagram, in which the superficial layer represents symbols, the middle heroes, rituals, and values at the core. Symbols can be gestures, words, objects, clothes, or hairstyles shared by a determined culture with a particular meaning. Heroes are real or fictional persons, figures highly valued in a society possessing traits inspiring behaviour. Rituals are communal events that serve a social purpose through greetings or religious ceremonies. These former three manifestations are visible practices to an outsider, except for their meaning. Finally, values are the deepest and the invisible manifestations of culture, which correspond to the general tendency towards assumptions to perceive and favour certain reality traits over others, for example, to value good over evil, ugly over beautiful or rational over irrational (Hofstede, 1991; Pitta, Fung & Isberg, 1999). Cultural norms distinguish the appropriate or inappropriate behaviours, which, together with cultural values attributing what is more or less important, form the foundation to interpret everyday situations and behaviours (Brett, 2001).

As culture manifests in various ways and at distinct depth levels, this study intends to analyse how these manifestations affect interactions in the deal-making process with Portuguese companies in Mexico. In this way, the following sections will contribute knowledge to understand and interpret cultural differences.

4.3.2. Theoretical frameworks of national culture

Despite the difficulty in measuring the complex cultural phenomenon, these last decades confirm IB researchers' focus on understanding and deciphering cultural differences and their impact on IB operations (Natlandsmyr & Rognes, 1995; Reis et al., 2013). It is argued that cultural differences in negotiations can be interpreted and measured through constructs known as cultural dimensions (Brett, Gunia & Teucher, 2017). Considering that the present study aims to investigate how cultural differences affect the negotiation process between Mexican and Portuguese negotiators, the next sections will highlight three cultural taxonomies most renowned in the IB literature and most relevant to the development of a cultural analysis of Mexico: Hall's (1959) monochronic and polychronic time, Hall's (1976) high and low context cultures and Hofstede's (1980) cultural dimensions.

4.3.2.1. Monochronic and polychronic time - Hall (1959)

Edward T. Hall (1959, 1966) describes two contrasting ways of handling time, monochronic and polychronic time. Monochronic time describes low-involvement cultures that compartmentalise time by scheduling one issue at a time. Orderliness, precision, fast pace, a sense of appropriate time and space for activities and the lack of interruptions are valued in monochronic cultures. Contrastingly, polychronic time depicts cultures with higher involvement with each other that tend to carry out various operations simultaneously and have a more relative approach to time.

4.3.2.2. High and low context cultures – Hall (1976)

Pioneer of the high and low context cultures model, Hall (1976) developed these terms referring to the weight that context implies in interpreting communication, thus dividing cultures into high or low context communication (Reis et al., 2013; Dathe & Helmold, 2020; Hofstede, 2001). In low-context cultures (LC), information is communicated directly, the meaning of the message is covered in the words, and it is explicit, unambiguous, and context-free (Brett, 2000, 2001; Johnson & Cullen, 2002; Adair & Brett, 2005). In high-context cultures (HC), information is communicated indirectly, implying awareness of the message's context to decipher its meaning. A great deal of communication is nonverbal, and its subtle meaning is implicitly around spoken words and deciphered through the context of the situation. In these cultures, languages hold words with multiple meanings, prompting the receiver with pre-existing knowledge and familiarity with the meaning (Johnson & Cullen, 2002; Brett, 2000; Adair & Brett, 2004).

4.3.2.3. Cultural dimensions – Hofstede (1980)

Establishing the widely validated cultural dimensions, Geert Hofstede (1980) introduced an empirical model quantifying cultural values of multiple countries (Reis et al., 2013; Natlandsmyr & Rognes, 1995). The cultural dimensions' framework measures the complexity of culture's similarities, differences, and effects on behaviour, enabling comparisons between nations through an index of scores (Reis et al., 2013; Hofstede, 2001; Natlandsmyr & Rognes, 1995). The Value Survey Module (VSM) currently consists of six dimensions (6-D) to characterise a country or region: power distance, individualism vs collectivism, masculinity vs femininity, uncertainty avoidance, long-term orientation (Confucian dynamism) and indulgence vs restraint (Hofstede, 1991, 2001; Hofstede, Hofstede & Minkov, 2010).

Power distance refers to the extent society's members accept and expect a disproportional distribution of power (Hofstede, 1984, 1991; Reis et al., 2013). The Power Distance Index (PDI) measures the degree of influence between subordinates and superiors in a hierarchy (Hofstede 1980, 2001). Members in low power distance cultures endeavour for power equality and the minimisation of inequalities. On the other hand, members in high power distance accept the societal hierarchical order and superiors' greater and coercive influence (Hofstede, 1984, 2001).

Individualism-Collectivism refers to the "relationship between the individual and the collectivity which prevails in a given society" (Hofstede, 1980, p.148). Individualist cultures tend to be more self-oriented, valuing private life, openness, and directness (Hofstede, 1980, 1984). Conversely, collectivist societies are characterised by their members' identification with the social framework and by prioritising the group over oneself (Hofstede, 1984; Dathe & Helmold, 2020). Collectivist cultures expect protection and loyalty from their groups or family, value harmony and build trustful relationships with business partners where confrontation is preferably avoided (Hofstede, 1980; Dathe & Helmold, 2020).

Uncertainty avoidance refers to the extent that members tolerate ambiguity and uncertainty in life's situations (Hofstede, 1980). This dimension measures a culture's reaction to time and unknown future and whether individuals recognise a greater need to overcome this feeling than others (Hofstede, 1980, 1984). In weak uncertainty avoidance societies, ambiguity is more tolerated, and people are more pragmatic, innovative, and risk-taking and are comfortable living situations without rules, even when negotiation outcomes are unclear. On the other hand, strong UAI cultures value structured environments and hold strict behaviour codes that translate into interpretable and predictable events where deviant ideas and persons are reprehensible. Moreover, these tend to be more expressive in communicating, for example, by using hand gestures while talking, raising the voice, or showing emotions as an outlet to the anxiety feeling of ambiguity (Hofstede, 1984; Hofstede et al., 2010).

Masculinity-Femininity indicates the degree to which a society favours masculine values such as performance, achievement, competition, and material success or, its opposite, feminine values such as solidarity, cooperation, relationships, and quality of life (Hofstede, 1984).

Long-term orientation (or Confucian dynamism) refers to adopting virtues oriented toward future rewards or the past. Cultures with long-term orientation focus on the future and value perseverance, thrift and persistence. Whereas its opposite, short-term orientation cultures value tradition, preservation of “face”, and fulfilling social obligations (Hofstede et al., 2010).

Indulgence-Restraint describes the level to allow free gratification related to enjoying life and amusement (Hofstede et al., 2010). Indulgent societies appreciate natural human desires resulting in happiness, are more extroverted and optimistic and perceive a higher personal control of life (Dathe & Helmold, 2020). On the opposite pole, restraint cultures are less tolerant toward satisfying natural human desires, and are regulated by strict social norms and professional obligations.

4.3.2.4. Mexico’s cultural theories

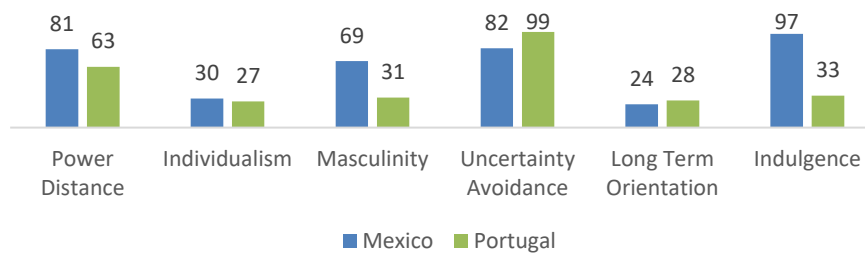
Hall's (1959, 1966, 1976) cultural theories determine various aspects of Mexican culture and communication. Mexico has a polychronic time orientation that perceives time in a relaxed and flexible way and emphasizes involvement with people rather than schedules. Moreover, Mexico is considered a high-context culture, using communication indirectly, focusing on the underlying context and tone of the message (Moran et al., 2007). The widely shared experiences among Mexicans allow the customisation of the Spanish language to speak metaphorically, using anecdotes, jokes and sayings (Hall, 1976; Moran et al., 2007). The Mexican society deeply values family, personal relations, respect, and beliefs in the divine (Moran et al., 2007). Therefore, it is essential that negotiators establish a warm and solid relationship with their Mexican counterparts to facilitate the process and enhance its success (Moran et al., 2007; Helmold et al., 2020).

According to Hofstede et al. (2010) Value Survey Module (VSM), an overview of Mexico's cultural values and negotiation behaviour can be analysed. The 6-D Model attributes Mexico a PDI score of 81, meaning it is a hierarchical society in which its members accept unequal power distribution. In IDV, it scores a low 30 by being considered a collectivist society, manifesting close long-term relationships, specifically with family. In the MAS dimension, Mexico scores 69, thus portraying a masculine society that is driven by competition, performance, and achievement. The consolidated competitiveness and assertiveness may lead negotiators to perceive negotiation outcomes in win-lose terms (Natlandsmyr & Rognes, 1995). Regarding UAI, it scores 82

demonstrating a high preference for avoiding uncertain behaviours and ideas that disrupt rules and security. Not susceptible to risky decisions, Mexicans avoid sharing opinions with out-group people and follow social procedures to direct action. In the LTO dimension, a low score of 24 characterises the Mexican culture as normative, maintaining ancient traditions and giving little attention to the future. Lastly, in the IVR dimension, Mexico scores a high 97 translating into a cultural predisposition to optimism, fulfilling impulses and desires with enjoying life which is present in their time devotion to social occasions, invitations, and relationships.

Figure 3 represents the six dimensions of national culture and their respective scores from both Mexico and Portugal to demonstrate a comparison between both cultures. Power distance and uncertainty avoidance are the dimensions that most affect nations' institutions and organisations and, as observed, score similar results, along with IDV (Hofstede, 1984). The main differences are between indulgence and masculinity dimensions.

Figure 3 - Hofstede 6-Dimensions of national culture: comparison of Mexico and Portugal



Source: Hofstede Insights (2022)

4.3.3. Cultural influence on negotiations

Culture can influence international negotiations in several different ways. Cultural differences can hinder and prolong the business deal by creating misunderstandings and misinterpretations, for example, or by influencing individuals' negotiation styles and how deals are made. Identifying substantial areas in the negotiation process where cultural differences may occur enables understanding for the other party and anticipates potential friction (Salacuse, 2003). Salacuse (1998) identifies ten main areas in the deal-making process that appear to be directly influenced by culture. The negotiation factors have a cultural response ranging between two polar extremes, see Table 3.

The table below presents Salacuse (1998) framework of the ten specific negotiation factors affected by culture and the respective cultural responses, as well as the research

findings on Mexico gathered by Metcalf et al. (2006) comparative analysis along with behavioural implications, which provide more recent data.

In Metcalf et al. (2006) research, the conventional wisdom on certain dimensions is contradictory to the results, mainly owing to a more globalised international experience, specifically in the communication and time sensitivity dimensions. Therefore, it is possible to conclude that Mexican communication is generally indirect, but negotiation specifics can be directly discussed, and time sensitivity is usually low and slow-paced, though in the context of negotiations it is high as punctuality is expected.

In the current study context, identifying these ten negotiation factors subject to culture appears to hold great influence on the negotiation process, hence the relevance of understanding and to test them with the perception of Portuguese companies in Mexico.

Table 3 - Negotiation dimensions of Mexico

Negotiation Factors	Cultural responses	Mexico	Behavioural implications
Goal	Contract or relationship	Relationship	It should not be assumed that Mexicans are not focused on concluding a contract
Attitude	Win/lose or win/win	Win-win	Mexicans strongly prefer win-win results
Personal style	Informal/formal	Formal	Mexicans adhere to rules that govern professional conduct, negotiating procedures, and hospitality
Communication	Direct or indirect	Direct	Underlying issues can be directly discussed
Time sensitivity	High or low	High	Negotiation issues should be addressed in a time-bound approach
Emotionalism	High or low	High	Negotiating with use of emotional arguments
Agreement form	Specific or general	Specific	Negotiating specific contract terms with vague language
Agreement Building	Bottom up or top down	Top down	General topics can be laid out during social interactions
Team organisation	One leader or consensus	One leader	Mid-level negotiators can influence the decisions made at the top
Risk-taking	High or low	Low	Mexican negotiators tend to avoid risk

Source: Adapted from Salacuse (1998) and Metcalf et al. (2006)

This framework will be developed in the section below with the respective associations between negotiation factors and the Mexican cultural response.

4.4. Managing Successful Negotiations in Mexico

International deal-making aims to achieve a beneficial outcome over an issue or concern between two or more parties (Helmold, 2020b). However, negotiated outcomes are often found challenging to measure and compare since success does not hold an equal global connotation (Adler, Graham & Gehrke, 1987; Rosenbaum, 2003).

Success might mean reaching an agreement, a win-win situation for both parties, being perceived in win-lose terms, or instead being recognised by achieving previously defined objectives and goals (Koh, 1990; Moran et al., 2007; Helmold, 2020b; Salacuse, 2003; PILPG & Baker Mackenzie, 2007).

The literature developed several approaches to measure negotiation outcomes categorised in financial and non-financial metrics. Often used measures are sale versus no sale, individual and joint profits, Pareto efficiency, negotiator satisfaction or impasse rates (Adler et al., 1987; Tripp & Sondak, 1992; Neale & Bazerman, 1985). Classifying a successful negotiation is a subjective process that can be measured by whether a party's goals and objectives sought to achieve in the negotiations were fulfilled (Koh, 1990; PILPG et al., 2007). In international business negotiations, the ultimate goal is to achieve a deal (Salacuse, 2003). This discussion ultimately sets the question of how to succeed in international negotiations.

Various authors defend the absence of an exact method to achieve effective international negotiations since there are several specific success and failing strategies for individual countries (Helmold, 2020f). Lists of rules, prohibitions and allowed practices are often helpful but too simple to guide cross-cultural ethical interaction (Pitta et al., 1999).

As defining a successful international negotiation and describing a method to achieve successful outcomes appears to be complex, this present research will test how Portuguese companies measure achieving a successful negotiation and what methods are required to reach such outcomes. Focusing on the cultural landscape of negotiating in Mexico, the following sections will discuss the numerous steps, processes and methods previously supported by the literature leading to successful outcomes and those leading to unsuccessful ones. Moreover, building on cultural constructs influencing international

negotiations, it follows the process from the first through the final stages of negotiations, from preparations and introductions to closing the deal and follow-up.

4.4.1. The Negotiation Process

The negotiation process is a complex structure of decision-making activity, frequently lasting long periods, involving each party's cognitions and interactive dynamics (Neale & Bazerman, 1992; Hafner, 1993). A large body of researchers describes various stages in the negotiation process with different designations (Moran et al., 2007). Drawing from Khan & Baldini (2019) and Hafner (1993), it can be highlighted four different phases of negotiations: preparation, pre-negotiation, negotiation, and post-negotiation phase, which will provide the background for the identification of variables and cultural concepts throughout the negotiation process.

The preparation phase focuses on preparing and planning the first meeting, which comprises collecting information, contextual research, training and making decisions on various issues. In the pre-negotiation stage, parties cooperatively plan the upcoming negotiation by sharing information regarding vital factors of the negotiation. This involves introductory meetings, allowing parties to get acquainted, build confidence, learn about individual backgrounds, and share information about negotiable issues. Next, the negotiation phase refers to profound meetings involving interactions between parties by identifying issues, framing interests and objectives, exchanging arguments, bargaining, and reaching a common ground leading to the negotiation resolution and contract signing. Finally, the post-negotiation aims at the follow-up, implementation of the agreement, support, and subsequent pragmatic meeting sessions. In this context, the current study endeavours to investigate cultural concepts and negotiation aspects that influence each stage of the negotiation process in Mexico.

4.4.1.1. Preparation

The negotiation process begins much earlier than the first approach with the other party (Opresnik, 2014). Researchers defend that preparation is crucial to a successful negotiation since it grants the power to make informed decisions (Helmold, 2020e; Opresnik, 2014; Herbig & Kramer, 1993; PILPG et al., 2007; Acuff, 2008; Salacuse, 2003; Adler & Gundersen, 2008). Besides, the difficulty in preparation rises sharply when negotiations become international, adding cross-cultural aspects and time required to plan properly. Inadequate preparation can cause adverse cultural consequences and harm

relationships and future negotiations, resulting in obstacles to effectively achieving an agreement (Herbig & Kramer, 1993). Moreover, experience in international negotiations goes a long way, nonetheless, it should not be assumed that past experiences and previous effective approaches can be replicated in different cultures (Ricks, 2006).

Preparation can involve discussing ideas, determining clear and precise goals, objectives and alternatives, collecting information, conducting contextual research, party analysis, past negotiations, relationship history, meeting planning, and practising (Helmold, 2020c; Opresnik, 2014; PILPG et al., 2007; Acuff, 2008; Khan & Baldini, 2019). Considering this stage in the deal-making process, this study intends to analyse the role of preparation in international business negotiations and what aspects are the most relevant to consider when doing business in Mexico.

Negotiation substance

Despite the complexity of details in business negotiations, Helmold (2020a) describes that preparation consists of a situation analysis of the negotiation scope, motives, objectives, roles, and intercultural characteristics. The negotiation scope refers to what to negotiate about, in business transactions can be distributed into quality, cost, delivery, technology (QCDT), plus alpha elements that can consist of ethical or people-related aspects. Assessing motives consists in understanding the reason that motivates actions and behaviours of negotiators, subsequently enabling recognition of the objectives. Then it is required the establishment of negotiation objectives (a minimum and a maximum target), followed by the assessment of the roles and responsibilities of the participants and intercultural aspects of the counterpart (Helmold, 2020a; Brett, 2000). Furthermore, it is crucial to outline proper strategies and tactics since these can be deeply influenced by numerous factors such as the environment, time, roles, relationships, culture, motives, objectives, or bargaining power (Helmold, 2020a). This stage has considerable importance since unsuccessful negotiations may lie in tangible and intangible aspects, such as not agreeing on the price, quality standards, components of an item or inadequate strategies and tactics (Helmold, 2020c). These conclusions will be tested in the current investigation to analyse the most pertinent aspects when preparing the negotiation substance.

Information Research of the Other Party

Reaching effective negotiation planning requires one of the most important steps: considering the other party (Fisher & Ury, 1991). Planning is a critical step in developing technical and cultural preparation, which includes recognising differences of the foreign counterpart and acquiring sufficient knowledge about the partner's country and culture (Herbig & Kramer, 1993). Thus, obtaining accurate information about the counterpart, including perceptions, objectives, motives, interests, personalities, icebergs (pitfalls), and icebreakers (openers), is part of an adequate preparation which anticipates reactions and solutions, thus influencing to achieve improved outcomes (Helmold, 2020e; Opresnik, 2014; Lee, Adair & Seo, 2011).

At the national level, considering the business environment is crucial to prepare strategies and tactics that meet opportunities and barriers that may arise, especially in emerging markets with volatility and shifts in the economy (Shonk, 2022). Researching the local institutional environment on economic and political system, legislation, regulation, and investment support (Brett, 2007, 2017; AICEP, 2017) is essential. It involves researching the economic situation, infrastructures, diplomatic relationships, political risks, foreign exchange risks, commercial agreements, trade policies, incentives and investment support programs, among others (Simões & Crespo, 2017; Tomás, 2017b). Mexico has a dynamic business environment which is susceptible to environmental changes, causing firms to become vulnerable to the unpredictability in the host country (Assouad, Parboteeah, & Guidice, 2020; Anderson & Gatignon, 1986). Moreover, cultural elements, such as corruption or religion, can have such an ingrained role in society that they reduce the power of formal institutions (Assouad et al., 2020).

At the cultural level, it is effective to be aware of, understand, and respect the partner's culture, customs, values, norms, religion, special meanings, inhibitions, forms of relationships, and taboos to smooth the negotiation process (Herbig & Kramer, 1993; Moran et al., 2007). Engaging in cultural backgrounds, history, language (few basic words), folklore, traditions, and hierarchies is an asset when meeting new business partners (Helmold, 2020d; Peleckis, 2013). Predicting and adjusting to culture-specific aspects and incompatibilities between different cultures involves focusing on cultural theories, such as Hofstede et al. (2010) and Hall's (1976) taxonomies (Adair & Brett, 2005; Peleckis, 2013). Early identification of intercultural differences allows the party to understand various actions and behaviours, such as appropriate and inappropriate topics to discuss during small talk or during meals, which is crucial to avoid pitfalls (Helmold,

2020a; Peleckis, 2013). Being aware of a culture's belief systems and superstitions is crucial when doing business interculturally, for example, positive and negative connotations with numbers, words and colours that influence reality. When realizing the relative significance of adhering to certain formalities, the other side will appreciate and respect the negotiator (PILPG et al., 2007; Herbig & Kramer, 1993).

Mexico should be approached with thoughtfulness, time, and dedication (Cunha, 2019). Hence, managers have the responsibility to plunge into the roots of diversity and the local communities (Das, 1993; Gupta et al., 2008). Jorge Roza de Oliveira, former Ambassador of Portugal in Mexico, states that it is necessary to get to know the market, establish contacts and feel the environment (Oliveira, 2019). The business culture is unique, and it is not easy to learn. Only direct contact without prejudgments allows for each entrepreneur to take their conclusion about the possibility of doing business (Cunha, 2019).

At the business level, gathering data from the negotiation partners includes background information such as researching the organisation, its products or services, financial status, members, leisure or recreational activities, reputation, history of the relationship, easiness of doing business, work habits, recent news and facts can similarly provide valuable information (PILPG et al., 2007; Acuff, 2008; Moran et al., 2007). Furthermore, determining the organisations and countries involved and identifying the authority holders and decision-makers is also deemed necessary, especially with high PDI cultures (PILPG et al., 2007; Dathe & Helmold, 2020). Additionally, the company's business, market position and analysis of strengths and weaknesses are likewise essential aspects to consider (Helmold, 2020e).

At the individual level, it is critical to study the members from the other side, especially since the Mexican market is sensitive to aspects related to ranked social structures and relationships (Brett, 2007). For example, the partners' position, decision-making power, qualifications, and time in the current organisation can be considered, as well as cultural experience, interests, motives, background, culture, and marital and family status (PILPG et al., 2007; Helmold, 2020e; Acuff, 2008).

This study will investigate these concepts to analyse the most relevant information aspects at the national, cultural, business and individual level to gather when preparing.

Meeting Planning

The meeting planning encompasses the information and elements that fuel the pre-negotiation process, thus being considered as important as the negotiation itself. Therefore, the teams' early decisions include deliberating meeting factors such as selecting the meeting date, time, duration, location, materials to bring, agenda, participants and travel-related issues (expenses, time to stay, where to stay), which will be considered further. Establishing these decisions sets the stage and scope of the negotiation and provides power and control over situations (Salacuse, 2003; PILPG et al., 2007). Along these lines, the following planning factors will be tested to ascertain their relevance to meeting planning.

Appointment and duration

Setting the meeting date and time requires awareness of local national and religious holidays, vacation periods, business hours and mealtimes (Moran et al., 2007; Salacuse, 2003). Selecting a date can also coincide with participating in events, fairs, missions, or national exhibitions in the country (CCILM, 2021a). Being European, Portuguese companies are likely to experience easiness in scheduling a first meeting with a Mexican partner (Marques, 2017). It should be offered two or three dates, convenient for both sides, to choose from. The meeting invitation should specify the start and end time or propose an agenda of the meeting, including time for breaks, group breakfast or lunch (Opresnik, 2014). Although, in Mexico, the length of the workday varies regionally, in Mexico City, business hours typically begin at 9 a.m., with a lunch break between 1 p.m. and 3 p.m. and close around 6 to 7 p.m. (Moran et al., 2007; ITA, 2021a).

Although providing key topics and the discussion focus on the negotiation, planning an agenda is usually a formality and not strictly followed since Mexican executives may perceive it as restrictive and overly formal (Acuff, 2008; Katz, 2006). A meeting should be scheduled at least two weeks in advance by e-mail or phone and reconfirmed a week before to avoid postponing or cancelling with little prior notice (Morrison & Conaway, 2006; Katz, 2006). It should also be mentioned who will attend the meeting, including details on titles, positions, and responsibilities (Katz, 2006). It is recommended to foster a flexible negotiation style since agendas can be changed or modified (Helmold et al., 2020). These conclusions will be analysed to determine the criteria for scheduling a date, and time and structuring an agenda for the meeting.

Travel, Location & Ambient

The meeting setting is commonly recognised as of considerable importance. Choosing a strategic location to favour the negotiation requires the analysis of several aspects (PILPG et al., 2007). Selecting the location involves considering accessibility, safety, resources, travel requirements (costs, time and where to stay), means of communication for both parties and support materials (PILPG et al., 2007; Opresnik, 2014; Adler & Gundersen, 2008; Katz, 2006; Salacuse, 2003). Meetings can be held at the home office, at the other party's office, at a neutral site (such as a hotel conference room) or remotely via e-mail or videoconference (Opresnik, 2014; Shonk, 2022).

Meeting on the counterpart's turf can communicate seriousness about the deal and allows negotiators to observe the other party in their environment (Shonk, 2022). In this way, the partner can enjoy a psychological "home advantage", which allows controlling several negotiation factors from the start (Salacuse, 2003; PILPG et al., 2007; Adler & Gundersen, 2008). Moreover, it implies preparing for a long stay as it may be required several trips and face-to-face meetings to strengthen connections (Katz, 2006; Osorio, 2011).

When meeting at the home office, where the counterpart is invited into a foreign environment, negotiators are advised to reduce potentially uncomfortable feelings and foster a pleasant meeting atmosphere to positively influence the negotiation (Helmold, 2020g; Opresnik, 2014). To ensure this, it involves attention to certain conditions such as the venue, surroundings, length of the meeting, participants, spoken language, climatic conditions, refreshments, limiting interruptions (phone calls), sitting around a table with identical seats, thus conveying equality and choosing a spacious, bright room (Morris & Gelfand, 2004; Opresnik, 2014; Helmold, 2020a). Furthermore, establishing a negotiation atmosphere and setting is centred around employing a feeling of comfort to openly address business concerns (Opresnik, 2014; Helmold, 2020a). Considering these theories, this study will test travelling, location, and ambient factors when meeting planning.

Materials

Preparing materials to support presentations include catalogues, photographs, diagrams, samples of products, promotional literature, and copies of documents (Katz, 2006). The presentation of such materials in Mexico should be detailed, attractive and impeccably designed and presented since initial appearances are prominent (Katz, 2006; Moran et al.,

2007). Both aesthetically and orally, presentations should be incredibly detailed (charts, graphics, models) (Acuff, 2008). However, when preparing support materials, negotiators must be cautious with cultural connotations of colours, words, and subjects that might be taboo or distasteful to the counterpart (Herbig & Kramer, 1991). For example, Mexicans associate the colour purple with death, some flowers, such as yellow marigolds and camellias, are used in funeral arrangements, and red flowers to casting spells (Axtell, 2007; Ricks, 2006). Translating materials to Spanish is not mandatory, but it is appreciated and helps to transmit the message (Katz, 2006). In this context, this investigation will test the aspects of preparing materials when planning the meeting.

Participants

Determining which individuals will be participating in the negotiation planning and the actual negotiation is a crucial decision since it can affect the negotiation's outcome. The delegation must decide which individuals will contribute to achieving success and promote a pleasant negotiation atmosphere (PILPG et al., 2007; Opresnik, 2014). When selecting the participants to attend the meeting, decision-makers should be invited first, followed by experienced negotiators and individuals with knowledge about the issues, parties and interests involved (Opresnik, 2014; PILPG et al., 2007). Following determining the participating individuals, it is necessary to define roles and responsibilities for each person in order to create a structure that will facilitate reaching the common goal by effectively working together (PILPG et al., 2007). Along these lines, this study will analyse the criteria to determine the participants in the negotiation.

4.4.1.2. Pre-negotiations

After the negotiation preparation, the pre-negotiation stage is characterised by initial encounters generally emphasising interpersonal relationship building, beginning with introductions, greetings, and informal discussions (Adler & Gundersen, 2008; Khan & Baldini, 2019).

Approaching the negotiation partner during a first impression means that 93% is influenced by visible appearance, manners, personality, and several communication forms such as language, tone of voice, facial expressions, gestures, and posture (Opresnik, 2014). Therefore, it is advantageous to know instruments to break the ice, such as greeting forms, engaging in basic words (*buenos días, gracias, por favor*), and being aware of protocols and cultural facts (Helmold, 2020f; Acuff, 2008). Considering this stage in the

deal-making process, this study intends to analyse the pre-negotiations role and its most relevant aspects when doing business in Mexico.

Greetings

Greeting the negotiation partner is a key point of the first meeting since it is the first contact to introduce participants and present the company. The Mexican society is dominated by courtesy, respect, dignity, and status consciousness, emphasising the concern for protocol (Moran et al., 2007). In Mexico, business acquaintances greet shaking hands with all participants upon arrival and departure (Moran et al., 2007; Katz, 2006). A firm handshake is usually accompanied by a slight head bow, a greeting saying *buenos días/buenas tardes* or *¿cómo está?*, and then an introduction of the person's name and title (Acuff, 2008; Axtell, 2007; Osorio, 2011). Closer acquaintances and friends usually embrace (*abrazo*), complemented with a slight pat on the back, and women greet each other with a light kiss on the cheek (Axtell, 2007; Acuff, 2008). Greetings among Latin Americans are lengthy practices involving inquiries about family, health, acquaintances, and other personal topics (Evason, 2018).

Status occupies a prominent place in Mexican values, hence, forms of address, such as honorifics and titles, are fundamental and should be respected (De Leon, 2013). The Mexican business environment is more formal than the Portuguese, and participants must be referred to as *usted* (2nd person plural) and not by *tú* (2nd person singular) (Cunha, 2019). Mexican names usually have two family names, the first from the father and the second from the mother. The honorifics *señor*, *señora* (married women), *señorita* (unmarried women), *don* or *dueña* (term of great respect used before the first name) should be used before the father's family name (Katz, 2006; Acuff, 2008). Similarly with Portugal, titles should be used when addressing people, these can include *Doctor* or *Professor* for academic titles, *Ingeniero*, *Licenciado* or *Arquiteto* for professional titles. Titles are used instead of honorifics, followed by the person's first family name (Katz, 2006; Axtell, 2007; Osorio, 2011). Using first names is inappropriate until the Mexican partner invites to do so (Katz, 2006). Knowing the participants' names, pronouncing them, and respecting their hierarchies and formalities (Opresnik, 2014; Adler & Gundersen, 2008).

Exchanging business cards at the beginning of the meeting to introduce negotiators is essential, especially in highly hierarchical cultures (Rosenbaum, 2003; Helmold, 2020a).

Professional or academic titles must be revealed on the business card, and it is recommended to bring an ample supply and to use one side in English and the other in Spanish. When presenting the card, the Spanish side should face the recipient. Reversely, when accepting the partner's card, it is advisable to smile and keep eye contact, then, after careful examination, it should be placed on the table in front of the recipient (Katz, 2006). These conclusions will be analysed to determine the greeting protocol in Mexico.

Small Talk

An essential element in any negotiation, small talk occurs when negotiators show interest in the conversation and establish a personal rapport allowing participants to become acquainted instead of going straight to the issue (Opresnik, 2014). A way to make negotiation members comfortable as the discussion begins is to find mutually agreeable areas (PILPG et al., 2007). Relationship-oriented cultures use this kind of conversation to establish knowledge about the trust degree of the other team. In Mexico, generating a favourable business climate involves mixing cordiality with informality to earn trust and respect (Osorio, 2011).

Engaging in small talk involves knowing appropriate and inappropriate topics to discuss, ice breakers, and barriers to avoid pitfalls. Remaining patient and letting the partner set the pace is important (Helmold et al., 2020; Katz, 2006; Acuff, 2008). In Mexico, ice breakers take the form of building personal relationships, exchanging gifts, having a relaxed attitude towards time and learning about the Mexican way and food (Helmold et al., 2020). Steering the conversation towards personally enjoyable topics such as family, hobbies, sports (*fútbol*), and personal or professional success is often an effective approach (Opresnik, 2014; Morrison & Conaway, 2006). This also includes answering personal questions about one's background, family, job, and interests (Katz, 2006). Complimenting the country's culture, history, achievements, art, national museums, and beautiful scenery is appreciated (Acuff, 2008). Praising economic accomplishments and progress segregated from the US influence (Acuff, 2008). On the other hand, barriers while negotiating in Mexico result when negotiators are being overly formal and inflexible when bringing up discussions about wars and defeats with the USA, issues related to immigration into the USA, or conflicts between Mexico and native people (Helmold et al., 2020; Acuff, 2008). Additionally, discussing politics, religion, or race is

typically inappropriate and should be avoided (Acuff, 2008). Along these lines, this study will analyse the role and criteria of small talk with the Mexican partner.

Personal Appearance

Personal appearance can be described as a negotiator's physical characteristics, comprising clothing, hairstyle, shoes, and other visible accessories (Helmold, 2020a). Dressing appropriately depends on the context of the negotiation and the counterpart's culture, thus, it requires an understanding of formal and informal practices of personal appearance (Helmold, 2020a; Opresnik, 2014). Teams should mind what clothing, jewellery and other accessories are appropriate or offensive for the other party (Opresnik, 2014). In Mexico, it is recommended to wear conservative dress styles, such as formal business attire in darker colours (Helmold et al., 2020; Axtell, 2007). Men should wear dark suits with neckties, and women should wear suits, pantsuits, or dresses (Morrison & Conaway, 2006; Katz, 2006). In this context, this investigation will test the aspects of personal appearance when meeting with the Mexican partner.

Time (Chronemics)

Elements of time or chronemics define the human tempo related to human communication, identifying how a person perceives, values and structures time (Helmold, 2020a). Hence, cultures sense and manage time differently, varying from precision to abstraction or from hours and minutes to seasons (Moran et al., 2007). Perceptions of time include punctuality, duration and interactions, which affect lifestyles, agendas, workday length, willingness to listen and wait, movements or speed of speech. Understanding a culture's different perceptions of time is essential since it influences communication (Helmold, 2020a; Moran et al., 2007).

Pace and Punctuality

Polychronic cultures, such as Latin America, tend to have a more abstract approach towards time. Negotiators typically take additional time to develop relationships and reduce ambiguity (Hall, 1959). The Mexican society has a leisurely sense of time, with an orientation to enjoy the present, respect the past and await the future to be determined "*se Dios quiere*", by God's will (Helmold et al., 2020; Moran et al., 2007). Although generally homogeneous, the Mexican business culture differs between the North and the South. Northerners tend to be more business-focused and frenetic, while Southerners have

a stereotypical *mañana* attitude with a sense of leisured business (Katz, 2006; Hough, 2021b; Hernández-Pozas, Chamoun-Nicolas & Hazlett, 2019). With a traditionally slow pace and a tendency to delays, appointments beginning 15-30 minutes after the scheduled time is frequent, along with project delays and postponed or cancelled meetings (Acuff, 2008; De Leon, 2013). However, time sensitivity in business is higher, where punctuality is expected and scheduled time is respected, and although being expected to wait, being delayed is considered impolite and disrespectful (Moran et al., 2007; Rodrigues, 2019; Metcalf et al., 2006). A polychronic work style is typically preferred amongst Mexicans, which involves engaging in multiple actions and goals in parallel, which translates into jumping between topics rather than following a sequential order to address them (Katz, 2006). Additionally, meetings might be lengthened, and negotiations can be slow, rushing the process can be counterproductive and be viewed as offensive. Thus, it is advisable to prepare for several trips since relationship building, bargaining, and decision-making can take considerable time (Katz, 2006). These conclusions will be analysed to determine the perception of time and punctuality when doing business in Mexico.

Meals

Business lunches and dinners are an essential element in business relations. Effective negotiators perceive having meals together, receptions, ceremonies, rituals, and invitations as opportunities to build interpersonal relationships and to gather additional information (Adler & Gundersen, 2008; Acuff, 2008). Some countries accept giving attention to business during the meal, while other countries emphasise building the relationship (Fisher & Ury, 1991). As relationship building is an ongoing and lengthy process, in Mexico, business partners are often invited for breakfast, lunch, or dinner to fraternise over food and festivities. Typically, business lunches are rarely extensive on business topics and are approached as a continuation of what has already been discussed in the meeting. Instead personal issues appear to be the most important to discuss in order to develop a relationship. In addition, having meals provides the necessary confidence to the Mexican counterpart to close the deal, which can take hours to achieve (Osorio, 2011; Hernández-Pozas et al, 2019).

The food selection, preparation, presentation, and consumption differ across cultures. Having meals with the business partner involves table manners, such as seating arrangements, serving food and drinks, and eating habits (using cutlery, slurping while

eating or burping) can be perceived positively or negatively depending on the country (Rodrigues, 2019; Moran et al., 2007; Tomás, 2017b). In Mexico, keeping both hands above the table and saying *buen provecho* before eating demonstrate polite manners (Fisher & Ury, 1991; Axtell, 2007). Eating certain foods with hands instead of utensils is common with tortillas, for example to scoop food. Using opportunities to compliment Mexican food is appreciated. Meals tend to last a few hours, and guests are expected to stay for a while after a meal to converse and not leave directly (Evason, 2018). Moreover, haggling to pay the bill is viewed as good manners (Morrison & Conaway, 2006). Along these lines, this study will analyse the role of having meals with the Mexican partner and determine eating habits.

Gift Giving

Exchanging gifts with the business partner is often a valuable factor in developing an amicable relationship, however, in some cultures, the mere offer can be considered offensive (Pitta et al., 1999; Ricks, 2006). Presenting a small and carefully chosen gift shows respect and a valued business relationship (Pitta et al., 1999). In Mexico, offering gifts at an initial meeting is not required, but it is often welcome. Offering small gifts such as items (pens and notebooks) with the company logo is more appropriate in initial meetings to not raise suspicions about one's motives (Katz, 2006). On subsequent trips or significant occasions (closing the deal), bottles of wine or Scotch, desk clocks, finely made pens, and gold cigarette lighters are appreciated gifts (Morrison & Conaway, 2006). Gifts made of silver can be associated with trinkets sold to tourists and should be avoided, as well as yellow marigolds and red and purple flowers (Morrison & Conaway, 2006; Axtell, 2007; Evason, 2018). In Latin America, offering handkerchiefs implies the possibility of an unfortunate event and cutlery can symbolise severing the relationship (Ricks, 2006). Furthermore, across cultures, this gesture might involve certain rituals that are more important than the actual value of the gift (Morrison & Conaway, 2006; Ricks, 2006). In Mexico, gifts are usually opened upon receiving them and are warmly praised in front of the offeror (Evason, 2018). In this context, this study will test the role of offering gifts and respective protocol aspects.

4.4.1.3. Profound negotiations

Following becoming acquainted, the negotiation process progresses into profound meetings, which include exchanging task-related information and making concessions

that accentuate the different communication behaviours (Adler & Gundersen, 2008). Considering this stage in the deal-making process, this study intends to analyse the role of profound negotiations and the most relevant aspects to consider when doing business in Mexico.

Communication

Negotiating is conveyed through communication, which can be expressed through spoken and body language, including posture, facial expression, tone of voice or silence. Hence, it is essential to learn to interpret the counterparts' patterns of communication as well as to acknowledge one's own to control reactions and behaviours and avoid cultural misunderstandings (Opresnik, 2014; Adler & Gundersen, 2008). Communication patterns can be seized considering Hall's (1976) terms of high and low context cultures, discussed in chapter 3.

Language

Knowing the counterpart's language is advantageous since when both sides work to share a common language, their communication is enhanced (Acuff, 2008; Herbig & Kramer, 1991). In Mexico, Spanish is imposed in negotiations, and the use of English should be avoided since it creates a distance with the counterpart (Cunha, 2019). Mexican Spanish is notably different from Spain, but speaking Spanish is a clear advantage, even if it is a few words, is viewed as courteous and demonstrates a sign of respect for the Mexican party (Hough, 2021b; ITA, 2021a; Katz, 2006).

Portuguese and Spanish have a facilitated intercomprehension that promotes business (Esperança et al., 2017). Nonetheless, Vítor Pinto da Cruz, Senior Managing Director of Tuottava, pointed out the biggest threats and obstacles for Portuguese companies that aim to enter the Mexican market, such as cultural overconfidence and language. He considers that overconfidence at a cultural level can sometimes demonstrate a lack of care, meaning that the common "Portunhol" is not enough to do business regarding particular products and technical elements (Graciano, 2021b). In this context, this investigation will test the aspects of language when negotiating in Mexico.

Verbal communication

The complexity in communicating between individuals raised in a cultural and linguistically different community is due to the cognitive processes and language itself

being a result of direct experience (Dowd, 2015). Therefore, communication should focus on using clear and slow speech, short and direct terms, avoiding slang and colloquial expressions to prevent misunderstandings, applying repetition, and checking for understanding (Adler & Gundersen, 2008; Rodrigues, 2019; Acuff, 2008; Herbig & Kramer, 1991). Mexican behaviour is often subject to regional or language-group generalisations, and despite certain customs and language resembling its neighbours (Latin America or Spain), Mexican idiosyncrasy has roots other than Spanish. Therefore, awareness of idioms, phrases and practices is endorsed to avoid misunderstandings (Graham, Lawrence & Requejo, 2014; Oficina Económica y Comercial de España en Mexico [OECEM], 2022).

During the dialogue, conversational overlaps occur when more than one person speaks simultaneously. Overlapping conversations and interrupting can be considered impolite and disrespectful behaviour, but to Latins, it is a frequent occurrence to tackle as many issues as possible (Adler & Gundersen, 2008). However, when interrupting a conversation with a Mexican partner, it is polite to say *con permiso* (excuse me) before speaking up (Evason, 2018).

Refusing

As high context cultures are reluctant to say “no” directly, the Mexican social etiquette prevents from saying “no” outright, even when disagreeing, finding proposals unattractive, or when not enjoying a product (Brett, 2007; Osorio, 2011). Even after a long exchange of arguments, Mexicans will use diplomatic statements to convey their message sensitively and avoid conflict or confrontation. They may take some time conversing inconclusively, communicating through nuanced expressions such as “we are going to study it”, “we are going to think about it”, or “we will see” instead (Osorio, 2011; Evason, 2018). Moreover, “yes” may only indicate that what is being said is understood and not that it is agreed with or a sign of willingness to start negotiating (Katz, 2006; Cunha, 2019). Limited receptibility to answer may also be related to the Mexican culture’s high UAI, indicating a tendency to avoid sharing opinions with out-group people (Hofstede et al., 2010). Considering these conclusions on verbal communication, this study will test verbal communication aspects when negotiating in Mexico.

Non-verbal communication

The majority of communication is transmitted non-verbally, which varies significantly across cultures. Nonverbal communication is expressed through non-conventionalised rules of a certain language, and it involves the use of visual cues such as face or body language, eye contact and blinking, paralanguage, personal appearance, personal space elements (proxemics), touch (haptics), time (chronemics) and the physical environment (Helmold, 2020a). It refers to what negotiators do and how they say it rather than what is being said, which is ultimately perceived by the counterpart (Natlandsmyr & Rognes, 1995; Adler & Gundersen, 2008; Opresnik, 2014). Negotiations involve conscious and unconscious processes of encoding and decoding, in which negotiators generate nonverbal information and interpret the received information using acquired knowledge respectively (Helmold, 2020a). The IB literature defends that the role of nonverbal communication is especially significant in high-context and collectivistic cultures, where indirect communication implies awareness of the context around the words and body language (Adair & Brett, 2004; Hall, 1976; Hofstede, 1984).

Body Language

Body and facial language convey information through nonverbal communication, which is expressed using physical behaviours instead of words and speech. Physical behaviours include body posture, gestures, facial expressions, eye movement, blinking, raising eyebrows, blushing, sweating, touching, or adjusting clothes. Paralanguage comprises nonverbal elements such as voice quality, pitch, volume, speaking style, speech rhythm or intonation (Helmold, 2020a).

High-context communicators, Mexicans are expressive and tactile and communicate with hand movements, physical contact, and emotional expressions (Moran et al., 2007). Therefore, understanding non-verbal communication, the context transmitted by who, to whom and how in business relationships, is crucial to recognize its nuances (De Leon, 2013). Mexican discussions can get lively, however, there is a dislike for loud and boisterous behaviours (Helmold et al., 2020; Katz, 2006). Laughing and smiling at appropriate times, such as during the initial stages of the negotiation, expresses joy and generates a positive response from both parties resulting in smoother, longer and better outcomes and improving relationships (Pease & Pease, 2004). Mexicans might display a smile to mask anger (Katz, 2006).

In negotiations, movements of the head, arms or hands give strong signals that might provide information about feelings, doubts, or resistance (Helmold, 2020a). Shaking or nodding the head means no and yes in Western culture, but Mexicans may nod out of respect for what is being said and might not indicate agreement (Morrison & Conaway, 2006; Evason, 2018). In Mexico, it is advised that negotiators avoid putting their hands inside their pockets which is considered rude and standing with hands on their hips indicates to provoke a challenge (Morrison & Conaway, 2006; Axtell, 2007).

Eye movements are culturally dependent. Maintaining eye contact with the counterpart can demonstrate paying attention and listening (PILPG et al., 2007). In most Western European cultures, avoiding eye contact reveals a lack of confidence and honesty. The same applies to Mexico, where direct contact is expected and appreciated, however in South American cultures, direct and sustained eye contact often means to be aggressive and challenging the individual or might imply romantic interest in the person, thus, intermittent direct eye contact is preferred (Katz, 2006; Helmold, 2020g; Moran et al., 2007; Morrison & Conaway, 2006).

Likewise, gestures are also culture-specific and usually punctuate the conversation (Moran et al., 2007). For example, pointing the index finger in some cultures is perceived as acceptable, while in Western or Asian cultures, pointing at someone might be regarded as aggressive and offensive (Pease & Pease, 2004). In Mexico, the OK sign using the thumb and index finger to form a circle can be read as an obscene gesture (Katz, 2006).

Silence

When experiencing silence from the counterpart, negotiators should not jump in to fill it since this behaviour is often used to think, process, and translate the discussion (Adler & Gundersen, 2008). In Mexico, pauses are used frequently, however, being silent is rare and usually suggests a serious issue (De Leon, 2013; Katz, 2006). Respecting the partner's silence is important to avoid misinterpretations, such as rejection or disapproval about the deal, and to prevent irritations (Rodrigues, 2019).

Human Space (Proxemics)

In intercultural negotiation, it is important to understand proxemics, the human use of space and its effects on behaviour, communication, and social interaction (Hall, 1966; Helmold, 2020a). The Mexican space is characterised by proximity, often conversing

standing 60 cm or less apart. In business contexts, this proximity is less pronounced and is often used in both personal and social spaces (Helmold et al., 2020). In Latin America, touching and being expressive with hand and arm gestures is customary (Acuff, 2008). In Mexico, a hug (*abrazo*) conveys the development of a trusting relationship (Adler & Gundersen, 2008). Embracing closeness in Mexico translates into prolonged handshakes, standing and sitting close to each other and touching the shoulders, elbows, arms, or a pat on the back (Moran et al., 2007; Axtell, 2007). To withdraw from such gestures can be insulting, unfriendly, or standoffish, signalling discomfort around the local partners (Morrison & Conaway, 2006; Katz, 2006; Evason, 2018). These conclusions regarding non-verbal communication will be analysed to ascertain culture-specific aspects of body language, silence and proxemics.

Dialogue and Negotiating

After opening the meeting with an informal conversation, it is advisable to let the Mexican partner set the tempo and introduce negotiation topics (De Leon, 2013). Meetings do not usually follow the proposed agenda systematically, instead, it is used as a rough guideline to address topics and issues (Evason, 2018). The business conversation can be fairly informal, and it is often to discuss negotiation points mixed with comments of an outside nature (Osorio, 2011; De Leon, 2013). The negotiation atmosphere is normally easygoing, sense of humour is appreciated in a light and friendly manner (Katz, 2006; Hernández-Pozas et al., 2019). Displays of overconfidence, arrogance, aggressivity or lack of flexibility limit the ability to adapt to new circumstances and provoke reactions that counteract any agreement (Helmold, 2020c; Opresnik, 2014).

The approach toward agreement building usually has general negotiation themes laid out during social interactions preceding formal negotiations and afterwards proceeds to specific items of the deal (Metcalf et al., 2006). Mexicans use indirect strategy by making multi-issue offers and have the habit of haggling, thus, initial offers must have ample room for manoeuvre (De Leon, 2013; Brett, 2007). Emotional/personal arguments, such as the benefits of their company getting involved with one's own, are usually more effective than empirical data since the perception of truth is often based on feelings (Acuff, 2008; De Leon, 2013; Osorio, 2011; Metcalf et al., 2006).

Initial meetings will unlikely lead straight to decisions since the decision-making process is slow and hierarchical, being brought at the highest organisation level (De Leon, 2013;

Katz, 2006). Hence, the following stages of the process can be characterised by successive periods of proposals that are refined over time (Marques, 2017). Regarding the attitude towards outcomes, although high masculinity and uncertainty avoidance may lead Mexican negotiators to employ distributive bargaining and perceive negotiation in win-lose terms (Natlandsmyr & Rognes, 1995), the Mexican culture promotes a win-win approach which is bestowed by its collectivism and relationship orientation, preferring harmony, and avoiding confrontation (Salacuse, 1998; Katz, 2006; Lewicki, Barry & Saunders, 2016; Hernández-Pozas et al., 2019; Metcalf et al., 2006). In the context of this study, these conclusions will be applied to analyse the influence of culture on negotiation factors.

Closing

After reaching a satisfactory and sustainable solution for both sides, the next step would be to seal the contract or agreement (Opresnik, 2014; Fisher & Ury, 1991). In Mexico, the deal's conclusion is usually made in person and not settled over the phone or e-mail (Moran et al., 2007). In Mexico, agreements are confirmed with a written document, usually considered more as a declaration of principles than a sequence of legal obligations (Moran et al., 2007; De Leon, 2013). Though, contracts can be signed to comply with legalities, which can be lengthy and detailed. Often Mexicans rely on partners' commitment as the prevalent strength of an agreement rather than written documentation (Katz, 2006). A negotiation's resolution is often more than the culmination of concessions, it marks the beginning of a new and long-term relationship between the parties, especially in relationship-oriented cultures (PILPG et al., 2007; Pitta et al., 1999; Herbig & Kramer, 1991). These conclusions will be analysed to ascertain negotiation aspects when reaching an agreement and closing the deal in Mexico.

Personal Relationships and Trust

Described as a collectivist and high-context culture, Mexico is relationship-oriented, emphasising building strong relationships prior to substantive negotiation (Brett, 2007; Acuff, 2008). Therefore, developing a personal relationship with the Mexican party provides the foundation for the negotiation's content portion (Acuff, 2008).

There is a tendency for Mexicans to distrust people who appear unwilling to invest time in relationship building (Katz, 2006). This "condition sine qua non" for doing business is a process that requires patience, time, dedication, collaboration, personal involvement,

and several trips to strengthen the bond (De Leon, 2013; Katz, 2006; Cunha, 2019). In the first contacts, Mexicans value building a climate of trust typically developed through small talk, conversing about personal aspects, country of origin and current events, family, tastes, and sports help to find coincidences and bonds (Osorio, 2011). Engaging in informal discussions, cultural background, personal rapport, preliminary meetings, phone conversations, and social activities bestows an image of being thoughtful, builds solid relationships and nurtures confidence (Acuff, 2008; Herbig & Kramer, 1991). Only after the Mexican partner becomes comfortable one should proceed with business discussions (Katz, 2006).

Cultures vary in their willingness to trust other people, and trust is at the core of each relationship and each negotiation. In relationship-oriented cultures, distrust and suspicion characterise meetings with strangers, where trust is earned and not granted (Herbig & Kramer, 1991; Osorio, 2011; Moran et al., 2007). As a risk-avoidant culture, Mexicans tend to be pessimistic in risky situations, promoting the “We are Latins, we don’t trust anyone” motto (Metcalf et al., 2006; Moran et al., 2007). There must be a mutual consciousness of trust during the negotiation process between the parties since the absence of trust predestines negotiations to fail (PILPG et al., 2007). In Mexico, the establishment of trust is therefore indispensable for the business and being viewed as trustworthy by the counterpart is an aspect that negotiators must protect and treasure (AICEP, 2019; Acuff, 2008).

Mexicans do business with whom they personally empathise, and closing a deal is often based on the person involved in the negotiation more than the firm they represent (Helmold et al., 2020). Even when earning the partner’s friendship and trust, it does not necessarily apply to other people from one’s own company. Hence, it is highly favourable to maintain key company contacts unchanged since alterations may require the relationship-building process to start over (Katz, 2006). Employing a local intermediary or a *persona bien colocada*, with relationships and connections, can leverage the initial contact by bridging the gap between cultures, smoothing the business operation (Morrison & Conaway, 2006; Katz, 2006; Helmold et al., 2020). In this context, this investigation will test the role of relationship building and its relevant aspects when negotiating in Mexico.

4.4.1.4. Post-negotiations

After signing the deal and implementing the conditions, post-negotiation is a crucial phase to consider (Khan & Baldini, 2019). It is necessary to allow time for follow-up negotiations to solidify and preserve the relationship between parties (Opresnik, 2014; Acuff, 2008). Agreeing on future sessions, projects or communications will require constant diligence by all parties and assuring progress towards successful outcomes. Keeping in contact is important to analyse the partner's satisfaction, inquire if issues have arisen, provide assistance (technical support) and after-sales service and remind them that they made an effective decision in agreeing to the deal (Opresnik, 2014; Acuff, 2008). In Mexico, the after-sales service is an essential factor in business success, as the commitment to provide reliable assistance, maintenance, and support determines the selection of a supplier (Hough, 2021a).

When planning the following sessions, a realistic time frame for regular follow-up meetings and the method of future meetings (in person, video conferencing, etc.) should be determined. Elapsing a long period of time in between meetings weakens the dialogue and the relationship. In Latin America, a single visit is insufficient, and contact must be made by at least two or three visits per year, along with regular communication (Osorio, 2011). Therefore, building cordial and strong relationships is critical to long-term success since the most successful relationships are developed through years of working together (Acuff, 2008; Graham et al., 2014). Considering this stage in the deal-making process, this study intends to analyse the role of post-negotiation and the most relevant aspects to consider when doing business in Mexico.

Considering the conclusions from this literature review, the following chapter aims to develop a theoretical, conceptual framework to outline negotiation practices and cultural aspects leading to successful or unsuccessful outcomes.

5. Conceptual Model

5.0. Introduction

Based on the conducted literature review, this chapter aims to develop a theoretical conceptual framework upon the information of successful negotiation practices in the Mexican market. The purpose of this model is to outline effective and ineffective negotiation habits and cultural aspects that may potentially lead either to the negotiation success or failure. Providing a clearer understanding of these procedures, the conceptual framework aids to frame the goal of the study and formulate research questions. It is expected that this model enacts as a practical guide to support Portuguese companies' managers to achieve enhanced outcomes when negotiating with Mexican partners.

5.1. Conceptual Framework

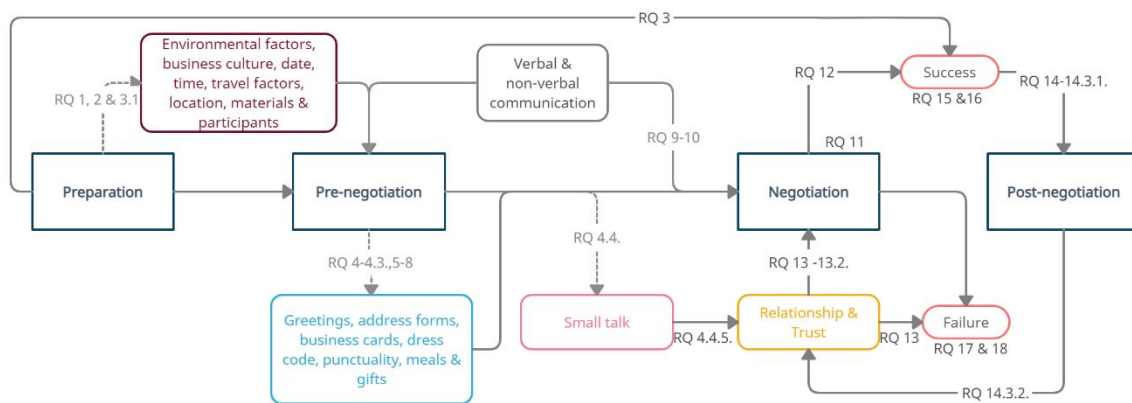
Although there are several guides and practical literature on international business operations, there is scant research on the Portuguese perception of the process of negotiating cross-borders specially to emerging market economies such as Mexico. In response to the increasing attention in the Mexican market among Portuguese companies, the purpose of this study is to outline the stages of the negotiation process, highlighting common business practices within cultural constructs. With the development of this framework, it is expected that it may guide Portuguese negotiators through negotiations by being informed about the Mexican business culture and possibly achieve positive and enhanced outcomes.

Negotiating in Mexico can be perceived as a complex and long process of several steps which should be considered systematically to achieve positive outcomes. It has been developed a four-stage negotiation process comprising cultural and negotiation aspects:

1. The **preparation** stage is comprised by preparing the negotiation and structuring the meeting planning. The preparation includes the assessment of negotiation scope, analysis of motives, objectives, roles, and intercultural aspects. The analysis of the counterpart's environmental and organisational factors, background, and business culture. The meeting planning involves appointment and duration, location and ambient, travel factors, materials, and participants.

2. The **pre-negotiation** stage refers to the first contact between parties and becoming acquainted with the partner. During this stage cultural behaviours will emerge through social interactions and approaches involving presentations, greetings, addressing people and exchanging business cards. Subsequently, engaging in small talk can develop bases for a trusting personal relationship. Then, it involves dress code, punctuality, having meals and exchanging gifts.
3. The **negotiation** phase implies the main interaction between parties and profound meetings discussing substantial negotiation topics concerning the spoken language, verbal and non-verbal communication, negotiation constructs, closing the deal and the need to develop a trusting relationship.
4. The **post-negotiation** phase refers to the steps following the negotiation agreement, namely, follow-up procedures (meetings and visits) and after sales service.

Figure 4 - Conceptual model



Source: Based on Neto (2021) and own interview guide

5.1.1. Research questions

The purpose to comprehend business practices and cultural aspects leading to successful negotiation interactions and outcomes in Mexico lead to the elaboration of research questions. The premise that cultural and negotiation behaviour affects the negotiation process and ultimately define its outcome is laid out throughout the following research questions, enumerated from RQ 1. to 18, and three open-ended, non-compulsory questions.

RQ 1.: What kind of information do you research to prepare for the meeting?

- RQ 1.1.: At the national level?
- RQ 1.2.: At the cultural level?
- RQ 1.3.: At the business level?
- RQ 1.4.: At the individual level?

RQ 2.: How do you plan meeting negotiations?

- RQ 2.1.: What requirements are needed to choose a date?
- RQ 2.2.: What do you consider when planning the meeting time?
- RQ 2.3.: What time in advance is necessary to schedule meetings?
- RQ 2.4.: Do you structure a restrict agenda for the meeting?
- RQ 2.5.: What factors do you consider when meeting in Mexico?
- RQ 2.6.: How do you plan the meeting location? Where do you prefer to hold the meeting? And why? What are the ambient requirements when meeting at the home office?
- RQ 2.7.: How do you prepare support materials? When preparing them do you consider cultural connotations of words, numbers, or colours? Do you translate them to Spanish?
- RQ 2.8.: How many people do you bring to be present throughout the negotiation process? Who?

RQ 3.: Do you believe negotiation preparation is critical to success? Why? What factors do you consider to be the most important?

RQ 4.: When meeting the partner for the first time, how do you present yourself and your company?

- RQ 4.1.: How do you greet your Mexican partner? Do you greet every participant individually upon arrival and departure? What words do you say upon greeting? How do you introduce yourself?
- RQ 4.2.: What forms of address do you use?
- RQ 4.3.: How important is to exchange business cards? When does it happen? What information is provided in your business cards? Do you translate them into Spanish?
- RQ 4.4.: Do you and your Mexican client engage in small talk after greeting? What kind of topics do you discuss and believe are appropriate and inappropriate to bring up during conversations? What topics do you discuss about personal life? How comfortable were you with the questions? How long did it take? Do you feel that small talk is important to develop personal relationships and establish trust in Mexico?

RQ 5.: How is the dress code in Mexico? Is there a specific type or colour of clothes or accessories considered less appropriate?

RQ 6.: How do you classify the punctuality to start a meeting? Do you expect delays and rescheduling? What is your perception towards Mexican time and pacing?

RQ 7.: How is it perceived having meals with a Mexican counterpart? What table manners and eating habits are appropriate and less appropriate? Who usually pays the bill?

RQ 8.: Do you offer gifts to your partner? What types of gifts would you offer? When is the suitable time to offer them? Did your Mexican partner open the gift in public?

RQ 9.: How do you perceive verbal communication aspects during business negotiations?

RQ 9.1.: What language is used in the meeting?

RQ 9.2.: When communicating verbally do you use short and direct terms or colloquialisms and slang? Do you repeat what has been said to ensure understanding?

RQ 9.3.: When speaking does your counterpart take turns when speaking? Or more than one person speaks simultaneously? Are there interruptions?

RQ 9.4.: How does your partner refuse/disagrees certain issues? Directly or Indirectly?

RQ 10.: How do you perceive non-verbal communication in Mexico?

RQ 10.1.: How do you classify interpreting Mexican non-verbal behaviour in a scale from 1 – very easy, to 5- extremely challenging?

RQ 10.1.1.: How do you classify the Mexican tone of voice in a scale from 1 – very low, to 5- very loud?

RQ 10.1.2.: How do you classify the Mexican body expressiveness in a scale from 1 – not expressive at all, to 5- very expressive?

RQ 10.1.3.: Can you describe body language aspects to consider in the Mexican market? Did you ever put your hands inside your pockets, stand with both hands on your hips, cross both arms or pointed the finger at someone? Do you maintain eye contact?

RQ 10.2.: Were there silent moments with the counterpart during conversations? During how long? How did it make you feel?

RQ 10.3.: How close do you stand with your counterpart? Did your Mexican partner touch you in arms and shoulders? What about embracing? Did you ever withdraw from being close? How did you feel with these actions in a scale from 1 – totally uncomfortable, to 5- totally comfortable?

RQ 11.: How do you perceive negotiation factors during negotiations?

RQ 11.1: How is the meeting organised? Does it follow a plan and address only foreseen subjects? Or not?

RQ 11.2.: How is the approach to agreement building? Bottom-up or top-down?

RQ 11.3.: What about their approach to the negotiation subject? Direct or

indirect?

RQ 11.4.: What type of arguments are most used? Emotional or logical?

RQ 11.5.: How do you perceive the Mexican team organisation on decision-making? At the top or by consensus?

RQ 11.6.: How do you perceive the Mexican approach towards outcomes? Integrative or distributive?

RQ 12.: How many meetings are required to reach an agreement and close the deal?

RQ 12.1.: During how long?

RQ 12.2.: When reaching a satisfactory agreement, how are final agreements concluded?

RQ 13.: How do you classify the need to develop a trusting relationship with the Mexican counterpart to do business in a scale from 1 - not important, to 5- extremely important?

RQ 13.1.: Approaches towards building a relationship and trust precede any substantive negotiations?

RQ 13.2.: How do you classify the importance to work with a local intermediary to initiate the contact in a scale from 1 - not important, to 5- extremely important?

RQ 14.: Do you allow time for follow-up negotiations?

RQ 14.1.: Do you keep in touch regularly? What time frame do you use to contact you counterpart?

RQ 14.2.: Do you inquire if issues have arisen, or if support is needed?

RQ 14.3.: How do you plan the following sessions? How often do you visit your Mexican partner? When visiting your partner, do you feel an improvement in the relationship and in the business?

RQ 15.: How do you classify success in international business? How do you measure a successful performance?

RQ 16.: Overall, how would you describe the success of the negotiation?

RQ 17.: Do you believe cultural differences can be the cause an unsuccessful negotiation?

RQ 18.: What factors do you consider to be most responsible to negotiation blunders in Mexico?

Open-ended, non-compulsory questions:

A: What do you consider to be the biggest mistake made during the negotiation process in the Mexican market? (Misunderstandings, blunders) Did it lead to failure or harmed the negotiation?

B: What do you consider to be the most anecdotal situation when negotiating with Mexican partners?

C: What strategies do you consider important to managers develop in order to avoid negotiation blunders in the Mexican market?

6. Research Methodology

6.0. Introduction

Methodology corresponds to a set of procedures that contribute to knowledge, aiming to determine the rules of investigation and the proof of scientific truths (Vilelas, 2009). It focuses on describing how knowledge about an issue can be produced (Eriksson & Kovalainen, 2016). The aim of this chapter is to present and justify the methodology used in the elaboration of this project. It describes the explanation of the research method and the tools used to collect and analyse the data.

Initially, in order to explain the methods employed to achieve the research objectives, the research purpose and strategy is briefly defined and justified. Subsequently, it is described the data collection methods and techniques which include secondary data and primary data. The secondary data method was used to gather information on country characteristics, theories of national culture and concepts of business habits and practices. This knowledge was converted into research questions that consequently required the process of obtaining information from reality through primary data to answer the questions. The primary data collection made use of qualitative information in the form of semi-structured interviews. Finally, the selected sample is described as well as the process of gaining access to organisations and information collection methods and analysis.

6.1. Research Purpose and Strategy

A research project can be classified in terms of its purpose according to the aim of the study. Saunders, Lewis & Thornhill (2009) identify three classifications of research purposes, namely exploratory, descriptive and explanatory. As previously referred, although there has been increasingly new research in the last decade about the Mexican business culture, negotiating styles and other culture specifics, it has been looked at mainly through US-American lens. The Portuguese perspective on performing business in Mexico has been emerging through entrepreneurs' testimonies and reports from entities such as AICEP for example. In light of this attention towards the Mexican market, to investigate common business practices of Portuguese firms in that market, the research has had an exploratory purpose.

Exploratory studies are valuable approaches to investigate scarcely explored phenomena and can be characterised by their flexible nature which are often associated with qualitative data collecting (Saunders et al., 2009; Sekaran & Bougie, 2016). According to Saunders et al. (2009), exploratory research contains three ways of being conducted: searching the literature; interviewing experts in the subject; and conducting focus group interviews. Ascertain key themes in effective business practices during the negotiation process relied on managers' experience with the Mexican market. Hence, the exploratory research utilised qualitative data through semi-structured interviews with managers in Portuguese firms.

In order to achieve the objective of the study and to answer the present research questions it is necessary to select a research strategy that will aid to meet these goals (Sekaran & Bougie, 2016). Saunders et al. (2009) suggest seven research strategies: experiment, survey, case study, action research, grounded theory, ethnography and archival research. A commonly used strategy in business research and in exploratory studies is the survey strategy to collect a significant amount of quantitative and qualitative data about people or events in a standardised way. In surveys the questions are often administered using questionnaires and interviews that allow easy data comparison. The present study made use of a survey strategy through semi-structured interviews, applying a standardised set of questions to all respondents. The time horizon of the study is cross-sectional, meaning that the data were collected once at a particular point in time over one month (Sekaran & Bougie, 2016; Saunders et al., 2009).

6.2. Data Collection

Subsequent to devising theoretical elements and identifying the type of study, it is necessary to select the collection techniques required to develop the tools that allow to obtain the data from reality (Vilelas, 2009). The present study defined a method of data collection and technics according to the research objective. In order to collect data on the business practices in negotiations in the Mexican market through the Portuguese perspective, the study proceeded with the collection of both secondary data and primary data. The collection of secondary data provided the necessary knowledge to develop research questions whereas primary data bestowed the answers making use of qualitative data of exploratory nature in the form of semi-structured interviews.

6.2.1. Secondary data

Secondary data pertains to records originating from already existent sources in the market collected by other investigators for other purposes (Sekaran & Bougie, 2016; Vilelas, 2009). It includes both quantitative and qualitative data such as government statistics, surveys, reports, documents, articles or information from company websites (Saunders et al., 2009). The present study collected secondary data to contextualise the markets, understand culture related theories and to develop a systematic negotiation process composed by key success negotiation aspects. The collection of secondary data made use of written documentary data, such as books, theses, published articles in journals (obtained from Google Scholar, and online platforms such as JStor, Elsevier, B-on), magazine articles (AICEP “Portugal Global”), interview transcripts, organisations’ websites, governments’ and entities’ websites (AICEP, CCILM, CEFAMOL), online news services (The Economist, Dinheiro Vivo), government publications, European Union publications and country reports and statistics (AICEP). From survey-based data, information was gathered from governments surveys and census (INEGI, INE, GEE, OECD, EC).

Initially, the secondary data were gathered with the aim of understanding and characterising the Mexican market. The contextualisation of the market made use of the most recent information available in relation to the overall country profile (geographical location, population, and infrastructures), political system, economic analysis, foreign trade, and culture. Subsequently, in order to contextualise the Portuguese internationalisation to the Mexican market, secondary data were collected in both qualitative and quantitative form. It provided a brief global economic framework of Portugal, allowed to comprehend the bilateral relations between both countries, and to describe the internationalisation of Portuguese companies, particularly mould making firms, to Mexico. Moreover, the quantitative data refers to the numeric data which enabled an analysis of the trade relations between both countries.

Then, the literature review also encompassed the collection of secondary data which provided understanding of the concepts and theories of international negotiations and culture. Likewise, the following chapter on successful international negotiations relied on secondary data to recognise negotiation phases, their weight in the process of negotiating and to describe effective business practices and habits in the Mexican market. Ultimately,

secondary data endorsed to build the foundation of the study's conceptual model and to shape the method of collecting primary data as an interview guide.

6.2.2. Primary data

Primary data refers to information directly obtained from reality by the investigator, using their own collection methods to interact with the investigated facts (Vilelas, 2009). Described as a social phenomenon, business involves information and decisions deriving from people (such as managers and employees), hence data are usually collected through the method of observation, semi-structured, in-depth or group interviews and questionnaires (Sekaran & Bougie, 2016; Saunders et al., 2009). To answer to the research questions, the present study adopted semi-structured interviews as the source of primary qualitative data collection. The study has a qualitative approach method which seeks to holistically explore and explain a non-measurable phenomenon, the experience of Portuguese companies through the negotiation process in the Mexican market (Major & Vieira, 2017). Focusing on this human experience, it endeavours to deeply comprehend Portuguese businesspeople's reality in the social context of negotiating by assessing their social practices, habits and opinions through semi-structured interviews (Vilelas, 2009). The qualitative approach also confers an evolutionary design to the investigation, enabling the discovery of relations between phenomena and new suppositions (Vilelas, 2009).

6.2.2.1. The interviews

One of the most adopted methods in qualitative investigation is the interview (Major & Vieira, 2017). The interview can be a valuable method to provide rich and detailed sets of data as well as to confer validity and reliability to the collected information (Saunders et al., 2009). Aiming to deeply understand a social phenomenon, the interview allows the investigator to initiate a process of generating information based on the lived experiences of the interviewees (Major & Vieira, 2017). These social actors furnish the interview with an essential advantage by providing their conduct and opinion related data (Vilelas, 2009).

Qualitative interviews resemble a regular conversation between the interviewer and the interviewee with the objective of gathering data for an investigation (Major & Vieira, 2017; Eriksson & Kovalainen, 2016; Vilelas, 2009). The dialogue is guided by a set of

themes and questions prepared by the investigator with relevance to the objective of the study (Major & Vieira, 2017; Saunders et al., 2009). The human interaction involved in an interview confers its complexity, with an unpredictability trait making each contact a unique experience (Magalhães & Paul, 2021). The interviews can be conducted face-to-face, by telephone or online, during a short period of time, such as one month, or throughout a long period of time, such as several years (Eriksson & Kovalainen, 2016; Major & Vieira, 2016). Nonetheless, administering interviews has a research method carries some constraints, such as the low adherence of participants, being time-consuming, challenging in the process of data analysis and comparison, and not being representative of the population (Magalhães & Paul, 2021).

6.2.2.2. Characterisation of the conducted interviews

In this study, the interview method was adopted with the objective to understand the process of negotiation in the Mexican market through the perspective of Portuguese companies. In order to meet this objective, it was considered the use of semi-structured interviews as the most suitable method to generate the required data. Semi-structured interviews involve a “pre-designed outline of topics” and questions (Eriksson & Kovalainen, 2016, p. 94), that allow variation from interview to interview, whether to omit, reorganize or complement questions (Saunders et al., 2009; Major & Vieira, 2017). Although following a systematic structure to some extent, this format presents the challenge to analyse and compare data since the respondents are allowed more liberty to elaborate their answers and introduce new topics (Eriksson & Kovalainen, 2016). This method allowed to collect rich and distinct experiences, perceptions and opinions about effective practices and interactions, from preparing the negotiation to follow-up actions.

6.2.2.3. Sample dimension

Sampling is the process of selecting a set of the appropriate individuals to collect data to represent the population (Sekaran & Bougie, 2016). As people are the often the source of information in qualitative research, it is necessary to identify the organisations and individuals eligible to participate (Eriksson & Kovalainen, 2016). In this study, the selected sample was comprised by managers of Portuguese mould companies with direct, face-to-face negotiation experience in the Mexican market. The sample is based on the premise that managers with experience in negotiating in Mexican businesspeople hold rich and valuable information about effective and ineffective business practices.

The secondary data collection revealed that 861 Portuguese companies hold trading relationships with Mexico (INE) of which 82 hold subsidiaries in Mexico, according to the SABI database. The Portuguese mould companies were cross referenced with a range of published articles, interviews, news, CEFAMOL's website, and organisations' websites about their relationship with Mexico. As only those companies with direct contact with the Mexican market were suitable to sample, several contacts were made by email and telephone to verify their business relationship. Following this stage, it was selected 33 companies mainly located in the district of Leiria with consolidated presence in the market to assemble a database.

According to Fontanella (2021), in qualitative studies the number of participants is rather of secondary relevance compared to "who" and "how" questions, as it should relate to the study's objectives and to the quality of the reported data. Additionally, the nature of face-to-face interviews requires to be administered to a smaller number of participants compared to online methods for example, since the sample size needs to be adjusted to the availability of both the individuals and the investigator (Magalhães & Paul, 2021). The present research was developed based on a nonprobability sampling technique in the form of convenience sampling to identify the participants (Saunders et al., 2009). Despite of the efforts to enlarge the sample size, a total of 10 managers from different Portuguese companies located in the district of Leiria were interviewed based on their relevance to the study and their availability.

6.2.2.4. Gaining access and the interview data collection procedure

In March 2022, the first approach to the companies in the database were made by email introducing the investigator, the purpose of the research and the participation details. The following weeks were dedicated to making several phone calls and taking trips to the most geographically close companies in Leiria region to gain access to relevant participants. Accessing potential respondents in a company was obtained through the professional network LinkedIn. Although the interviews over the phone and online have the advantage to interview people in geographically dispersed locations, it is argued that it does not have the levels of interactivity and spontaneity that confer a richer communication experience in face-to-face interviews (Saunders et al., 2009). Therefore, these attempts towards ensuing richer interactions and findings resulted in a total of 10 interviews with managers, specifically 7 face-to-face interviews and 3 by telephone.

When accessing organisations, most interviews were arranged through an appointment with the manager with the most relevant knowledge. In-person interviews took place in the respective manager's firm. In the beginning of each individual interview the investigator presented herself, explained the study's theoretical framework and objectives, and assured anonymity and confidentiality of the information. Subsequently, in an informal environment it was asked about the firm's sector, the Mexican cities with which the firm has commercial ties with, and the interviewee's brief background with the market. Consent was requested to voice-record the interviews in order to generate the most reliable data (Major & Vieira, 2017). To implement the interviews and to collect the empirical data, an interview guide was prepared. Designed to cover the main objectives outlined for the study, the guide incorporated questions that aimed to collect information about the process of negotiating, from preparation to follow-up, and their respective social practices in the Mexican market. Some questions were based on the questionnaires from Jacinto (2020) and Neto (2021). Along these lines, the interviews followed the format of questions laid down in the interview guide initially constructed in Portuguese and afterwards translated into English, which can be found in Appendix A.

Nonetheless, the interviews entail data quality issues, namely the limited time participants had and when asking more sensitive questions about blunders or about anecdotal situations the participants felt reticent when answering (Saunders et al., 2009). The interviewees may also have been retracted with the audio recording method and although being the last questions asked, few managers answered to these sensitive topics (Major & Vieira, 2017). The interviews lasted between 30 to 60 minutes depending on the availability of the respondents and their insights' depth. Subsequent to the data collection, the interviews were analysed as described in the next section.

6.2.2.5. Processing information and content analysis

Following implementing the interviews, the collected information was analysed, translated, transcribed and codified to a qualitative data analysis software. According to Saunders et al. (2009), qualitative data requires to be analysed and its meanings interpreted in order to develop theory. To handle and analyse the qualitative data it was used a computer aided qualitative data analysis software (CAQDAS), which allows to easily organise, manage, and retrieve coded information (Eriksson & Kovalainen, 2016). The software MAXQDA 2022 was utilised to transcribe the data to word processed text,

to code and analyse the data. The audio recording method allowed to reanalyse the data when necessary and to find common themes which bestowed a rich source of information to the study (Major & Vieira, 2017). To preserve anonymity, each participant has an identifiable code composed by two letters, the second corresponding to gender, being “M” male and “F” female.

7. Results and Analysis

7.0. Introduction

The purpose of this chapter is to present the results obtained through the qualitative instrument based on the proposed conceptual model and on the formulated research questions. This chapter consists of six sections. First, it presents a descriptive analysis of the collected data by characterising the profile of the sample. The subsequent sections present the results obtained from the semi-structured interviews and its respective analysis. The data will be presented and organised by making use of statistics and tables with segments retrieved from the qualitative data analysis software MAXQDA.

7.1. Sample Characterisation

The sample of the current study is comprised by 10 managers of Portuguese companies, 3 of the female gender and 7 of the male gender, with different functions in the companies they represent. As 30% of managers have operated in other companies, it has been considered the total time of their experience in the Mexican market instead of the companies' experience. Two respondents, HM and IM, are Mexican managers in Portuguese firms and subsidiaries, respectively. These testimonies provided valuable perceptions of the Mexican market and culture.

The code of each respondent, their job title, and their time of experience in the Mexican market is distributed in Table 4. Through the table below, it has been calculated an average time of experience in the market of the respondents of 18.6 years, revealing a high level of seniority in the Mexican market in the sample. Therefore, indicating a solid knowledge and experience of conducting business negotiations in Mexico. The seniority of experience in the market is an important asset to the current study insofar as it intends to assess these cultural aspects and business practices leading to negotiations' success.

Table 4 – Characterisation of the respondents

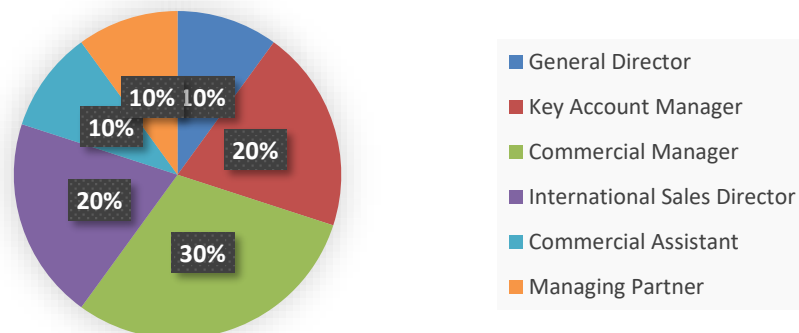
Respondents	Job Title	Time of Experience
AF	Commercial Assistant	22 Years
BM	International Sales Director	20 Years
CM	Commercial Manager	20 Years
DF	Commercial Manager	20 Years
EM	General Director	25 Years

FM	International Sales Director	4 Years
GF	Key Account Manager	7 Years
HM	Key Account Manager (Mexican)	40 Years
IM	Commercial Manager (Mexican)	10 Years
JM	Managing Partner	18 Years

Source: Own construction from the results obtained

Regarding the functional area that the interviewees occupy in companies, in Graph 1 it can be observed the different functions performed by the interviewees grouped in percentage rates, which indicates a preponderance of the commercial manager (30%) and international sales director (30%) positions. Although having different job functions, all the respondents are mainly responsible for the international business section in their firms, and 30% are solely dedicated to the Latin American region. Half of the interviewees (50%) referred the importance of maintaining the same people responsible for a specific market, especially when dealing with Latin American countries.

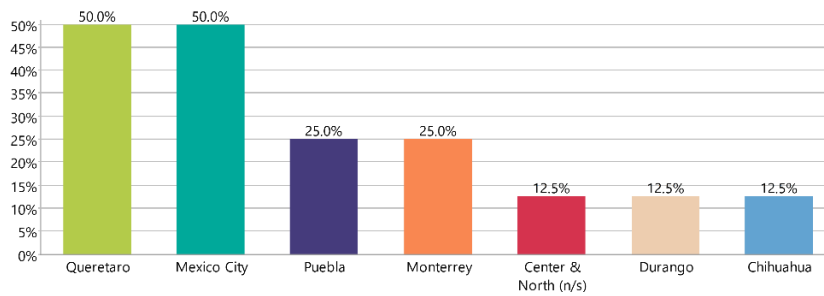
Graph 1 - Distribution by positions of the respondents



Source: Own construction, based on interviews

The business sector of the respondents' companies is inserted in the mould manufacturing industry, specifically in plastic injection. Consistent with the literature, the automotive sector yet appears to be the most relevant to Portuguese firms to integrate in the Mexican market (Graciano, 2021b) since "Mexico is a country that, at a global level, has a very intense activity in the automotive sector" (Respondent EM, Pos. 2). When asking the companies which Mexican cities they hold business with, it was found that the most predominant cities were Queretaro, Mexico City, Puebla, Monterrey, Chihuahua, and Durango (Graph 2). Two companies have a subsidiary in Mexico and others have local intermediaries facilitating getting new contacts across the country, thus extending their presence to more areas.

Graph 2 - Mexican cities Portuguese companies have business with



Source: MAXQDA Code Frequencies based on results obtained from interviews

The relevance of the Mexican northern and central areas to the mould industry is justified by the existence of multinational companies, mainly in the automotive sector, concentrated in areas with several car parts suppliers since automobile manufacturers acquire most of the components from specialised providers.

7.2. Characterisation of the Negotiation Preparation

This section presents the results obtained through the interviews with the respondents on their experience regarding the practices when preparing to negotiate in the Mexican market and the respective analysis.

When asked – RQ 1. what kind of information is gathered to prepare for the negotiations, at the national level - RQ 1.1., the most prominent factors of information research among the interviewees were the economic system first, followed by the political system and legal support (Table 5).

Table 5- Information research by topic frequency

Code System	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	
PREPARATION	0																																												
Information research	0																																												
National level	1	1	3	2	2	1	1	1	2	2																				16															
Other																				1	1																				2				
Legal support																				1	1	1																				5			
Regulation																				1																				2					
Legislation																				1																				3					
Economic system	1	1	1																				2	1	1																				9
Political system	1	1	1																				1	1																				7	
SUM	3			2		8			3			6			3			4			2			6			7			44															

Source: MAXQDA Code Matrix, based on results obtained

It was found that 80% of the interviewees consider researching the economic system an important part of the negotiation preparation. In this topic it is referred the current economic situation, market position, foreign investment, such as the developments of the automotive and mould industry (respondent IM, Pos. 3), trade agreements, specifically


the “EU-Mexico trade agreement” (respondent DF, Pos. 4), and socio-economic factors, namely “the minimum wage” (respondent AF, Pos. 20), as it can be verified in Table 6.

Regarding the political system, 60% of the respondents deem critical to assess factors related to the presidential system, since there is a non-renewable six-year term election which can cause some changes in policies and rules which may instigate uncertainty and indirectly influence the business (Table 6, respondents EM, HM and IM). Additionally, two respondents shared a concern with national corruption, present not only in political institutions but ingrained in the Mexican culture itself, as respondent BM mentions “[Mexico] is a ‘born corrupted country’, it is cultural (...) the police is corrupt even the guy with the small store is corrupt and we cannot resent that” (Pos. 136).

Moreover, 10% mentioned that the experience with the market provided the opportunity to “learn along the way” (respondent CM, Pos. 4). Despite of a high level of market experience of the respondents, findings point out that the country’s current conjecture is continuously assessed by all companies. This aspect is highlighted by respondent BM’s view on the 2012 crisis and respondents EM and HM’s position on the political system, attributing these occurrences as uncontrollable and volatile, hence justifying the necessity to gather recent data. The information is mainly obtained through online sources, news, updates, directly by keeping up with clients, or through CCILM guidelines and knowledge of the market (Table 6).

The legal support from organisations, associations and other entities appears to be relevant when companies participate in fairs or missions, or to provide information, rather than seeking actual investment support from these entities. Eight companies referred the role of CEFAMOL, IAPMEI, AICEP and CCILM in events, promoting business opportunities and providing practical market information to internationalisation (Table 6). Two respondents (BM and HM) shared their experience with organised fairs in Mexico, stating that these events mainly serve the purpose of presenting the company and gathering contacts.

Table 6 – National level information research

RQ	Resp.	Retrieved Segments
1.1.	AF	At the national level, we like to know the current political and socio-economic contexts. It is important to know the present situation in the country of the economy, laws, the minimum wage, etc., so we are always aware of these topics.  AF_Pos.20  Information research > National level (0)

BM	<p>Honestly, we do not really consider it much. We have a political approach that is concerned about how is the country doing, whether it is Mexico or Spain. For example, in the current state of Ukraine, it would never cross my mind to go there now and sell a mould. The same thing happens everywhere, we will be having news and updates, about the current market position of Mexico. For instance, I recall that in the year of 2008, Mexico was very positive, in particular the sales volume, there was a great amount of work, it was a country with a level of work that I simply had no idea. At that moment we were there, but then it came the 2012 crisis that dragged them down. And I did not go there to waste my time and money, because every trip is very expensive, ultimately they would be a loss of time and money. And the effort and devotion of the salesperson or the company itself cannot be channelled to countries that are not so well.</p> <p>BM_Pos.2 Information research > National level (0)</p> <p>there is very strong corruption. We are talking about Mexico, which is a 'born corrupted country', it is cultural. Although there is corruption here in Portugal it is hidden not cultural. In Mexico it is part of the culture, there is nothing you can do, the police is corrupt even the guy with the small store is corrupt and we cannot resent that. The police itself ask you for money, if you do anything wrong they go 'we can solve that' and you ask how much is it and you put it in the wallet.</p>
CM	<p>Well, we have been in the Mexican market for some years now, and we entered it in a time where it didn't exist so much information as now. So, we have just been learning along the way. Now we can check everything online about news and updates or ask directly to our clients.</p> <p>CM_Pos.4 National level > Other (0)</p>
EM	<p>The support from entities for us it is irrelevant, but it might be important to our client. We need to understand how the business is evolving with our client and of course the political and economic system, the cultural part are all inevitable elements. I would highlight more the political part, because there the mandates have a 6 year term, and if I'm not mistaken, each president can only have one mandate, thus, what happens is that there always major changes in politics every time there is an alteration. That aspect indirectly has an effect on our business, of course that we cannot do anything but it is important to pay attention.</p> <p>EM_Pos.10 Information research > National level (0)</p>
DF	<p>It is important to know the existing support and trade agreements between countries. Mexico and Portugal : trade agreement allowing easier and cheaper trades.</p> <p>DF_Pos.4 Information research > National level (0)</p>
FM	<p>R: We contacted some organizations, such as CCILM, they gave us some information about how the market was moving before going there, we didn't go empty-handed.</p> <p>FM_Pos.4 Information research > National level (0)</p>
HM	<p>That is fundamental. Mexico has a presidential system in which every 6 years the president changes, parties change as has happened in the last 4 periods but before it was very rare to change. So, policies change, rules change, fortunately the laws and international agreements have been safeguarded along with some import tax issues , which would be a catastrophe if they were not maintained, it is a matter of stability. It is important to be aware of legislation and changes.</p> <p>HM_Pos.4 Information research > National level (0)</p> <p>As for the political part, I think that is the bad part, there is no social or industrial support as it should be, there is a lot of corruption and it is not easy. The competition from the Portuguese in Mexico is good for Portugal because here there is really good work, and as the most well-known international brands are there, they refer themselves through other buyers here, we knock on doors and we keep having work.</p>
IM	<p>I believe that the economic system is more important to research. We have been living in this phase where there was an important change in the Mexican government. At the beginning there was a lot of uncertainty and ideas that expressed concern about the government alteration, it has been complicated. But at the economic level it has been developing investments with other countries, specially automotive industry and the mould manufacturing industry it has grown exponentially. Despite of political concerns what really matters is the growing investment, the coming of foreign companies is important to Mexico.</p> <p>IM_Pos.3 National level > Economic system (0)</p>

Source: MAXQDA retrieved segments from the results obtained



The findings reveal that the respondents' approach towards information research on economic and political topics corroborate Shonk's (2022) concern of understanding the host country's business environment, especially since Mexico is considered an emerging market economy as it exposes firms to uncertainty (Assouad et al., 2020; Anderson & Gatignon, 1986). These economic and political aspects are consistent with the literature referring to the importance to investigate the current political situation, such as political parties, risks, and elections, about the economy, the market, trade agreements and socio-economic factors (Brett, 2007; AICEP, 2017; Simões & Crespo, 2017; Tomás, 2017b). Moreover, 70% of the companies began expanding to the Mexican market more than 20 years ago, corresponding to the year the EU-Mexico trade agreement came into effect in

the year 2000 (EC, 2021). Thus, as an important aspect of the bilateral trade relations it corroborates with the literature since it facilitates and propels business between both countries (AICEP, 2017; Zaraté, 2014).

Moreover, the results associate the corruption phenomenon as an ingrained role of culture in society, thus verifying the literature in the sense that culture influences the individuals that develop institutions which may consequently undermine the strength of formal institutions (Hofstede, 1984; Assouad et al., 2020). Furthermore, while the role of experience in the market can certainly help to avoid blunders and conduct effective business negotiations (Ricks, 2006), the results show that, despite negotiators' experience, it remains crucial to incessantly search for updates and alterations. Therefore, validating Helmold (2020b) endorsement on preparing negotiations beforehand despite international business experience. Lastly, the results on legal support research attest that the companies' association with the legal entities such as CEFAMOL and CCILM, has translated into accessing the market through networking and provided valuable information about the market (CCILM, 2021b; NERLEI, 2011, 2012; Bravo, 2019).

When asked about - RQ 1.2. - what information is gathered to prepare at the cultural level, there were polarising answers about the cultural differences between Portugal and Mexico. The Mexican culture was positioned in two extremes in comparison with Portugal, one group of managers (20%) focused on both country's cultural resemblances in many aspects, and the other (50%) indicated that the Mexican culture is "very distinct" and "peculiar" from everything else (respondents BM, Pos. 6 and GF, Pos. 33), as shown in Table 7. Nonetheless, the latter group also recognised similarities in the "way of being" (respondent EM, Pos. 61), especially mentioning the Latin roots of both cultures and traits, such as, friendly, humane, and easy-going. The other 30% remained neutral. Respondent HM mentions that there is a major contrast in the countries' population, as well as some insecurities in certain areas, streets, and transportation, for example.

Table 7 - Cultural information research

RQ	Res p.	Retrieved Segments
1.2.	AF	<p>Yes we like to gather knowledge about the society in general. But we are not talking about people very different from us. If it were very different, we had situations of colleagues that went to countries in which, for example, where the role of women is regarded differently, not easily viewed, we are careful to send a male person. All the social and cultural environment is taken into account.</p> <p> AF_Pos. 24  Information research > Cultural level (0)</p>

BM	<p>Culturally it is very distinct from everything else, it is a very different country. At the level of humanity, the people there are impeccable, spectacular, too friendly even! However, do not betray them, the moment you betray them is quite different than here. We can grumble or mutter a few words and walk away but over there treason is something else. Thus, it is a completely different country than ours. They are very humane people, like us.</p> <p>BM_Pos.6 Information research > Cultural level (0)</p>
DF	<p>Mexico has a very different culture from ours. One has to know Mexico's geography very well, that is very important. And the only way to know Mexico is to experience it and learn from it.</p> <p>DF_Pos.6 Information research > Cultural level (0)</p> <hr/> <p>Here's the thing, who works with Mexico has to like Mexico, one has to know its culture which is immensely rich, has to know the country geographically which is very important.</p> <p>DF_Pos.83 Information research > Cultural level (0)</p> <hr/> <p>One has to know a great deal about their culture, their way of being, and that requires a lot of work and a long time.</p> <p>DF_Pos.243 Information research > Cultural level (0)</p>
EM	<p>In cultural terms, I would even say that the way of being of Mexicans is very similar to ours, very easily we enter a meeting and start talking about football, politics and now about the war and at the last minute of the meeting is when we are going to deal with the matter of the meeting, that is, if we don't take things structured this is what happens.</p> <p>EM_Pos.61 Information research > Cultural level (0)</p> <p>It is necessary to know that we are in Mexico. History and behaviours sure. Beliefs and taboos not so much, I mean there is an immense diversity there and as we are in a negotiation we have to take sides in whatever it is because we never know what side it's going to be. We have to be exempt from these things, we are to address a technical matter so we try to take refuge as much as possible in the matter we are dealing with which is the one we master.</p> <p>EM_Pos.12 Information research > Cultural level (0)</p> <hr/> <p>Depending on the market, there are people going to Mexico, others going to the East, to Asia to Europe, and these are the people that go and don't switch. Each person is responsible for a geographic area because it is a cultural issue. The person that I have dealing with Central Europe it is unthinkable to go deal with the East. I am not speaking in a technical matter, but rather the person's profile in view of the requirements and cultural conditions that exist in that region. All of that is very important. We have people with totally different sociocultural profiles, they have the technical skills that are expected, and if they don't, training is also provided but this is the standard, now the cultural issue is very important. We have people who are more likely to be able to deal with a certain person, others not so much.</p> <p>EM_Pos.40 Information research > Cultural level (0)</p>
GF	<p>These are always facilitating points of the approach, so yes we assess these aspects in a general way.</p> <p>GF_Pos.13 Information research > Cultural level (0)</p> <hr/> <p>In Mexico everything is a bit peculiar, in Mexico and in Latin America in general, what we usually have is a cultural context of that area, an organizational context and the character of the company, we have to open the meeting with those classic ice breakers about some of these things and then from there, depending on whether we are discussing projects or if it is a prospective visit or whatever, we try to understand if it makes sense to start with the presentation, sometimes it makes more sense to first visit the factory manager when we see that the customer is confused with the moulds they have, then it makes sense to visit the factory first.</p> <p>GF_Pos.33 Information research > Cultural level (0)</p>
HM	<p>Mexico and Portugal aren't very different regarding some cultural issues. But of course there are always differences when we go to another country. Mexico is a very hospitable country, you make friends easily, there is also some insecurity on the streets that it is important to consider when going for work because we are going to walk along avenues and main streets and not by tourist sites. We have to be careful, I warn people not to carry gold jewellery, flashy things, or to show wallets or cell phones, it never happened to me or my colleagues. Sometimes the client of the company we are going to visit alerts us of places and areas around to avoid, here we are in a little corner of heaven! In terms of culture, we are very similar, there are no situations where I say you have to greet one way or another. It is a very Catholic country like Portugal too and at a family level it is also similar. Mexico, of course, has a much larger population, with more than 100 million inhabitants concentrated in large cities, which have nothing to do with the pace, traffic, pollution, confusion of everyday life we have here, that is a big difference.</p> <p>HM_Pos.8 Information research > Cultural level (0)</p>

Source: MAXQDA retrieved segments from the results obtained

The first group, respondents AF and HM in the table above, implies that the similarities between both countries allow for an attenuated concern when preparing at the cultural level. Hence supporting Zárte (2014) notion of great cultural similarities between both Latin countries, which represents one of the greatest potential connections. In fact, the Latin roots shared between both countries are highlighted by 80% of the respondents, which corroborate with the literature, namely the hospitality, amicability, and flexibility traits amongst the people (Bravo, 2017; Zárte, 2014), the collectivism with strong family

values (Hofstede, 2010; Moran et al., 2007) or the Catholic religion (Romero, 2021). As well as the indirect communication aspects such as the use of anecdotes and jokes (Moran et al., 2007), indicating that the message is conveyed implicitly through context which is consistent with Hall's (1976) theory of high and low context cultures, as indicated in the Table 8 below.

Table 8 - Cultural information research – Similarities and communication

RQ	Resp.	Retrieved Segments
1.2.	GF	R: Yes, when there are questions about the price they say right away, sometimes they even make a joke if the price is more expensive such as 'Is this in pesos or is it in euros, didn't you make a mistake?', it's a bit like us making jokes like that. GF_Pos. 169 Business content > Subject approach (0)
	EM	With a mexican it is easy to solve, as is with a Brazilian or a Portuguese, a pat on the back and another joke and that's it. EM_Pos. 249 Information research > Cultural level (0)
	DF	Yes, they are latino like us, they are very amiable and chatty. Because they take life easy and more relaxed they are very amusing. DF_Pos. 145 Information research > Cultural level (0)

Source: MAXQDA retrieved segments from the results obtained

The second group described the Mexican culture as a very distinct, rich, and unique environment that one must be aware of when engaging it. The respondents indicated that the cultural factors are learned and experienced over time, such as behaviours, values and norms, as the respondent DF stated, “the only way to know Mexico is to experience it and learn from it” (Pos. 6), in Table 7. Nevertheless, managers do consider the country’s cultural factors, especially regarding the language, in which the importance of speaking Spanish was highly stressed in RQ 9.1. - when asked what language was spoken in meetings. In addition, the people assigned for a determined market area, in this case, the Latin American countries or Spanish-speaking countries, do not alter due to the culture’s intricacies (Respondent EM, Pos. 40). Thus, even though experience plays an important role in engaging with the Mexican business culture, language-related factors are considered previously, such as the use of ice breakers to facilitate the approach (Table 11, respondent GF, Pos. 33) which require some level of cultural knowledge (Helmold, 2020d). As well as idiomatic expressions and phrases that can be a challenge to understand (OECEM, 2022).

The findings showed that although 80% of the respondents recognise some cultural similarities between Portugal and Mexico, it is necessary to collect information and be aware about the other party’s culture. Including language, norms, values, behaviour, history, religion, and traditions, which confirms the literature encouraging negotiators to

culturally prepare international business negotiations in order to achieve positive outcomes (Helmold, 2020b; Herbig & Kramer, 1993). Communication appears to be the most relevant aspect to be considered, such as speaking Spanish, knowing idiomatic expressions and ice breakers to facilitate the approach. This supports the literature given that previous preparation of a set of skills is required to effectively interpret and adapt to the other party (Helmold, 2020e; Lee et al., 2011; Acuff, 2008). Moreover, the results point out that it is through experiencing the market, by embracing and adapting to it, that negotiators ultimately get to know the culture and “learn from it” (Table 7, respondent DF, Pos. 6) which is consistent with Acuff (2008) proposition to assess the whole experience as a learning opportunity, whether good or bad. Furthermore, the findings indicate that despite of the high level of experience in 80% of the respondents, there are several intricacies in the Mexican business culture that supersede cultural experience, such as people-related situations, relationships, trust, or commercial conditions which will be further developed. These results support the theory that although experience with a culture allows negotiators to be more confident with their knowledge, at ease with forthcoming negotiations and more likely to have greater outcomes (Adair, Taylor & Tinsley, 2009; Liu, Ma, Chua, Zhang & Barzantny, 2013), it does not assure negotiation success in the future (Brett, 2007).

When asked – RQ 1.3. – what information is gathered to prepare at the business level, the results indicate that the most relevant factors when gathering information about potential clients are the organisations’ reputation, business sector, financial status, history and members, as represented in the Table 9 below. Respondent EM (Pos. 14) referred the constant process of learning about management shake-ups, since “the staff turnover in Mexico is very high”. Furthermore, 40% of the interviewees mentioned the assessment of the potential client’s company involvement with other countries and organisations. This aspect is deemed important considering that the Mexican mould industry is deeply connected with multinationals from the US or Europe, which may condition the decision-making power of the deal (respondent HM, Pos. 2). Additionally, twenty percent of the respondents indicated that accessing companies’ members is rather difficult, especially in larger companies, hence these are learned later on when working in a project, along with work habits and recreational activities.

Table 9 - Business information research

RQ	Resp.	Retrieved Segments
-----------	--------------	---------------------------

<p>1.3. AF</p>	<p>Yes. We must have knowledge of the company, what it does, who are the key people we are dealing with.</p> <p>AF_Pos. 10 Information research > Business level (0)</p> <hr/> <p>Yes, we always browse the company's website, we gather all that information, its members and general reputation.</p> <p>AF_Pos. 26 Information research > Business level (0)</p>
<p>BM</p>	<p>R: Yes, we do that before tackling any company anywhere, whether it is in Mexico, Spain or here in Portugal you have to at least investigate if the company is doing well. You phone them, take notes, we have a website page that detects how the company is doing financially, we do that before proceeding. And then we move forward if the firm is ok and do not if it is not doing so good, or we will assess the situation.</p> <p>BM_Pos. 12 Information research > Business level (0)</p> <p>I: Do you check the company's culture, work habits?</p> <p>R: Usually that is after the first project. We start to identify that then. Obviously, we try to understand from the beginning if they are going to be a difficult or an easier client, but most times we cannot know that. There are more people involved in a project, such as project leaders from both sides, and if something happens it falls on me, it follows an hierarchy. Thus, from the beginning you cannot identify if the company's culture is positive, negative or so so, only after the first work or in the middle of it you can assess that.</p> <p>BM_Pos. 13-14 Information research > Business level (0)</p>
<p>EM</p>	<p>R: Yes, that is very important, I would say that is the most important. To do that follow-up, which is almost daily, I am exaggerating, but to make contacts, to call, to understand if there were changes and why, a person who left that place to know where did they go. Because the staff turnover in Mexico is very high, contrary to Europe and the US, in Mexico this happens frequently, the person today day is here and tomorrow is over there. This is very important to pay attention to.</p> <p>EM_Pos. 14 Information research > Business level (0)</p> <p>We don't start selling from today to tomorrow to a new customer, this doesn't happen, that is, it is necessary to carry out audits, accreditations, certifications, visits, and this can take some time.</p> <p>EM_Pos. 215 Information research > Business level (0)</p>
<p>GF</p>	<p>R: Yes, reputation, their numbers, the type of target customer, the type workpiece, of all these details are evaluated.</p> <p>GF_Pos. 15 Information research > Business level (0)</p>
<p>HM</p>	<p>R: Yes, here we do a research at a financial level, we have credit insurers that work for us and when we have doubts about a company that is not internationally known we ask for a report. And if we have doubts we ask for credit insurance to do business with them and that's it. We have a ceiling in case something goes wrong.</p> <p>HM_Pos. 12 Information research > Business level (0)</p> <p>But also because the Mexican market does not make decisions locally, usually the companies that make the injection or manufacture the cars are foreigners, they are not Mexican, there are not many Mexican factories. So decisions are not made in Mexico, so my point of entry is not always through Mexico. I have many clients, where the moulds can end up there, but the decision is made in the US, or in France, or in Spain, depending on where the companies are based.</p> <p>HM_Pos. 2 Information research > Business level (0)</p>

Source: MAXQDA retrieved segments from the results obtained

The literature demonstrates the importance of planning the negotiation by gathering data about the counterpart's organisation (Acuff, 2008). In accordance with the body of research, most respondents stated that they would do extensive due diligence, gathering information about the company's information, especially their business sector, product portfolio and potential interests, history, decision-makers, members, organisational changes, financial status and reputation by undertaking auditing processes (Acuff, 2008; PILPG et al., 2007; Moran et al., 2007; Helmold, 2020e). Moreover, the results corroborate with the premise of researching the organisations and countries involved with the company that may influence or hold the decision-making power (PILPG et al., 2007). This aspect becomes rather important when dealing with a high-power distance culture such as Mexico since it is necessary to identify the ultimate decision makers (Dathe & Helmold, 2020).

When asked – RQ 1.4. – what information is gathered to prepare at the individual level, the most relevant information managers research is the decision-making power, position, background, and work experience of who they are going to deal with. This research aspect appears to be essential due to the complexity of certain organisation’s social structure it requires extra research to identify and reach the right people (Table 10). For this reason, 30% of the respondents describe the hurdle to properly find information about those individuals. In larger companies, managers will deal with many people from different sectors which is difficult to gather prior information (respondent GF, Pos. 17). Hence the results showed that 20% of the interviewees did not research or know the partners’ individual information. Moreover, other factors, such as interests, qualifications, or family aspects are revealed later on with additional engagements between both sides. It is with time and with several contacts that people will get to know each other along the project, as respondent BM and HM refer.

Table 10 - Individual information research

RQ	Resp.	Retrieved Segments
1.4.	AF	Yes, we always ask who is going to be present at the negotiations. Normally the person who we deal with is the person responsible for the mould manufacturing process, who is always present at the meetings. Then there is the person responsible for the purchasing. It is these two individuals who are always in active communication with us. AF_Pos. 28 Information research > Individual level (0)
	BM	R: Yes we assess that from the beginning. But only after one or two projects we get to actually know these people. I have clients that only after 10 years of work I get to see their 'backs', to see their real selves. BM_Pos. 16 Information research > Individual level (0) Well, the person's history, where did he come from, what company was he in before, why is he a buyer, those aspects yes. But we cannot always identify that. BM_Pos. 20 Individual level > Background (0)
	DF	R: Decision making power and their work experience. DF_Pos. 10 Information research > Individual level (0)
	EM	Yes, we must look into that. Sometimes the decision power is not there, so we to scale up it to another country, if the company is in the US for example, it depends. Sometimes the business is for Mexico but the headquarters, the decision-making center isn't in Mexico. Thus, we deal with the technical matter in Mexico and with the negotiation matter through another country. EM_Pos. 16 Individual level > Decision-making power (0)
	GF	R: That is more subjective and transversal. We can deal directly with a technician or with someone from the purchasing department side, or, depending on the structure, it could be with the decision maker above. GF_Pos. 17 Information research > Individual level (0)

HM

R: Yes, that is part of the approach, both at fairs and in the first contacts we look for the person who will actually make the decision. And that's where we have more work, is to reach the right person and after getting there we gain confidence, we start giving quotes and begin to gain trust so that we can communicate honestly and straightforwardly until we find the right time to take the first order.

[HM_Pos. 14](#)

[Information research > Individual level \(0\)](#)

I: Do you research their experience, history, marital status?

R: No, that happens later, with time, usually when we meet them we try to break the ice after the negotiation, after talking the technical part in depth, or at lunch where I also try not to talk about work. Lunch time is more for relaxing, to open up a little and to become more human, less cold, sometimes it's not easy, but with a little wine and a good steak or good fish, people become friends right away.

[HM_Pos. 15-16](#)

[Information research > Individual level \(0\)](#)

Source: MAXQDA retrieved segments from the results obtained

Researching the individuals that negotiators may deal with during the negotiation is an important step in negotiation preparation (Acuff, 2008). As a hierarchical culture, negotiating in Mexico implies knowing the people that will be at the negotiation table and assess their multiple characteristics (Brett, 2007). The results corroborate with the literature indicating that it is relevant for negotiators to obtain information about the other party's members', decision-making power, position, background, years on the current company and work experience (PILPG et al., 2007; Helmold, 2020e; Acuff, 2008). It was found that accessing the decision-making power in larger companies is more challenging since there are usually more organisations and countries involved. Therefore, the relevance to locate the right people that hold the power to decide on a deal increases. Moreover, personal information is mostly learned throughout the negotiation process since such data is harder to gather.

When answering RQ 2.1. - what requirements are needed to choose a meeting date, the interviewees mostly consider the holidays and festivities, participation in fairs and the client's availability. Verifying holidays and festivities is deemed as an important factor to consider when negotiating in Mexico by 80% of the managers. This appears to be due to the Mexican holiday policy in which every holiday falling on a weekday will take place in a Monday or a Friday, thus reducing the weekday length, as respondents AF and HM explain (Table 11). Moreover, 60% of the respondents referred to conciliate or have conciliated negotiation meetings with national fairs, usually dedicating one week to the fair and another week to meeting various clients. Some respondents (30%) avoid scheduling meetings on Mondays, which are the busiest days during the week and Fridays, since some companies only work in the morning period and "everyone is rushing to leave" to seize the weekend (respondent BM, Pos. 30). Furthermore, respondent GF mentions that there is a calculation of the time necessary to visit each client to be able to

plan the dates for the entirety of the trip (Pos. 13). Additionally, the respondents stressed that the decision to choose a meeting date ultimately falls on the client's preference.

Table 11 - Meeting date planning

RQ	Resp.	Retrieved Segments
2.1.	AF	<p>We are extremely careful about national holidays. More importantly because it is a country, just like all the Latin America, in which every national holiday that falls during the week is pushed to Monday of the following week. For example, if a holiday falls on a Thursday, it is pushed to the following Monday. They always join it with the weekend so that they can enjoy more time. Thus, we have to be careful in relation to national holidays.</p> <p>AF_Pos.32 Meeting Planning > Date (0) We avoid Mondays and Fridays. We are talking about people who have always meetings on Mondays, in the morning it is impossible to talk to anybody. And on Fridays they work in the morning and in the afternoon it is difficult to get a hold of them, if they are working they work little. Fridays are almost holy days.</p> <p>AF_Pos.36 Meeting Planning > Date (0)</p>
	BM	<p>R: Yes, I do all that here. For example, I establish that I have week 11 and 12 to go to Mexico, so I will be scheduling meetings during those weeks. First thing to do is to go online and check the holidays for that period. Or I can also call my clients to ask if there are holidays or days off on those weeks and even set a lunch with the ones I already have a level of trust with or with whom I feel comfortable and address as 'tu'.</p> <p>BM_Pos.22 Meeting Planning > Date (0) Mondays are very negative in Mexico, but here it is as well. Tuesday begins to look positive and Wednesday is very positive. Thursdays are positive and Fridays are negative because everyone is rushing to leave and to begin the weekend, but again here it also happens.</p> <p>BM_Pos.30 Date > Weekdays (0)</p>
	DF	<p>R: When I schedule the trip to Queretaro, for example, I will assess how many days are necessary to visit a client, whether if it is 1-2, 3 days or a month, and I will seize the trip to visit other companies. The first factor is the business which is in progress at that time.</p> <p>DF_Pos.13 Meeting Planning > Date (0) There are worse days to schedule a meeting. Mondays, for instance, are days in which I try to not schedule anything, and Friday afternoons are 'to forget'.</p> <p>DF_Pos.15 Date > Weekdays (0) If we are referring to a scheduled visit to make presentations to clients I will have to look into that. I cannot make an appointment in a week when there are holidays, it has to be on the following week.</p> <p>DF_Pos.19 Date > Holidays & festivities (0)</p>
	EM	<p>R: We try to schedule the meeting for the day the client wants. And we do not to go Mexico to only visit one client, when we go we visit various clients as much as we can. We conciliate with fairs, because when we go to a fair when never solely go to that fair, we can go before or after the fair to visit more clients.</p> <p>EM_Pos.18 Meeting Planning > Date (0) In Mexico there are holidays in May that we need to pay attention. There is a very interesting holiday in May, I do not recall which day is it, that it is Mother's day in which mothers spend time with their children, there is no school and mothers do not go to work and it can be confusing. We need to pay attention to all of those aspects so we do not go there thinking that we'll have a 5-day work and it turns into 1 day of work.</p> <p>EM_Pos.20 Date > Holidays & festivities (0)</p>
	HM	<p>Yes, we have to. Mexico now has a very strange holiday policy compared to the rest of the world. The holidays are all on a Monday or a Friday, so if there was a holiday that was a Tuesday, it becomes Monday. We have to check the calendar to know where the holidays are going to be, for example May 5th, which was a public holiday, is now not the case, even if it falls on Saturday or Sunday, it changes to Monday or Friday, so they have weeks in which they only work 3 days. This changed a few years ago and I also don't agree because I sometimes call and no one answers me because before it was not a holiday and now it is, so we have to be careful especially with visits so it doesn't happen on such a week.</p> <p>HM_Pos.18 Date > Holidays & festivities (0)</p>





Source: MAXQDA retrieved segments from the results obtained

When preparing the negotiation, the literature identifies that meeting planning is an important phase of developing elements and early decisions that fuel the negotiation process, such as considering the meeting date, location, travel related aspects, participants, agenda, and materials (PILPG et al., 2007). When planning a meeting date, the results appear to corroborate with the literature regarding the awareness managers have towards researching holidays and vacation periods (Moran et al., 2007; Hough,

2021b). National holidays should always be assessed due to Mexico’s holiday policy which reduces the week length and increases delays which negatively affecting the trip’s productivity. The conciliation of business meetings with the participation in fairs or missions seems to be common among the interviewees which also corroborates with the literature (CCILM, 2021b). It was found that managers assess the time needed for each client in order to plan for the whole trip. Furthermore, Portuguese managers tend to avoid scheduling meetings on Mondays and Fridays, similar to what happens in Portugal (respondent BM, Pos. 30). Lastly, the meeting date is set when it is convenient for both sides, as Opresnik (2014) suggests, but always focusing on the clients’ preference.

To answer RQ 2.2. - planning the meeting hour, the respondents mainly consider the Mexican local costumes, including mealtimes and local meeting times, the beginning and ending time for the meeting and the commuting time in-between visits (Table 12). There is a preference of some managers (20%) for meetings in the morning, as respondent BM stated that people “are better listeners and are rested” (Pos. 28). In online meetings, due to the time difference, in Portugal the meeting is scheduled in the afternoon which is the morning in Mexico (respondent CM, Pos. 20). A meeting hour is scheduled to begin but an ending time is not always scheduled since it depends on the purpose of the visit. When planning presentation meetings, 30% state that the start and end time are previously scheduled, otherwise, in an ongoing project meeting, managers can dedicate a whole morning or day to one client. Therefore, 30% mention that there is a calculation of more or less the time it is necessary with a client, and it is given some tolerance time in between meetings of about 1 hour, as respondent DF reveals (Pos. 181). Moreover, meeting periods are planned from 9h AM to 1h PM and in the afternoon from 2:30h PM to 5h PM (respondent DF, Pos. 21), usually attributing the morning period to one client and the afternoon to another (respondent EM, Pos. 22). Additionally, the meeting time is ultimately determined by the client’s availability.

Table 12 - Meeting time planning

RQ	Resp.	Retrieved Segments
2.2.	AF	<p>Usually, we always schedule the meeting before lunch.</p> <p> AF_Pos. 36  Hour > Local customs (0)</p> <p>We do not exactly define an ending date. We know more or less the order of topics to follow to approach in the meeting and we know more or less the time we take. So, we define one hour which we normally fulfil and sometimes we finish sooner. We do not define breaks because these meetings usually take up about 45 min to 1 hour at most.</p> <p> AF_Pos. 38  Meeting Planning > Hour (0)</p>

BM	<p>When I am dealing with new clients, that I have never met before, I always try to schedule the meeting in the morning. Because they are better listeners and are rested, I try to do it in the morning but that doesn't always happen. Nevertheless, I have had success with clients after lunch time.</p> <p>BM_Pos_28 Hour > Local customs (0)</p> <p>I usually schedule one hour and a half or two hours, and then I have to check the distance of where the next meeting is and have to add a tolerance time in between meetings.</p>
CM	<p>Yes. If it is a meeting in which we are here and they are in Mexico we do it before their lunch, we always schedule it in their morning which for us it is the afternoon. If we are there whether it is in the morning or in the afternoon it is the same thing we do not have that concern.</p> <p>CM_Pos_20 Hour > Local customs (0)</p>
DF	<p>I always try to schedule the meeting starting at 9 am until 1 PM, and from 2:30 PM until 5 PM. After that I will not schedule any more.</p> <p>DF_Pos_21 Hour > Local customs (0)</p> <p>It depends on the subject, because if the subject is about negotiating a mould or a project of various moulds I will schedule an entire morning and sometimes even the whole day. If it is to make a presentation I will schedule the start and ending times yes.</p> <p>DF_Pos_23 Hour > Start & ending time (0)</p> <p>R: I always give half an hour of tolerance. If I schedule a 2 hour meeting I will plan 2h30 to that client or it might go up to 3 hours depending on the client. As I have already talked to the client before going, when I am planning I consider each client individually, i know that with some I might talk with a bit more so I will add thirty minutes.</p> <p>DF_Pos_181 Meeting Planning > Hour (0)</p>
EM	<p>The client proposes a meeting date and time and we then try to reconcile with ours. And most of the time it works. What we do is, we book mornings and afternoons for each client. These are work meetings, they have to be calm and sometimes they last a whole day in just one client.</p> <p>EM_Pos_22 Hour > Local customs (0)</p>
HM	<p>When we go to presentation meetings, we schedule a start and end time because we have to schedule two, three, four meetings a day and we have to go to the next one. If it's a job where we already have the project going, we have to spend the whole day there, we get there at a specific hour and then we don't have an ending time.</p> <p>HM_Pos_30 Hour > Start & ending time (0)</p>

Source: MAXQDA retrieved segments from the results obtained

According to Moran et al. (2007), planning the meeting time in international negotiations requires considering the host country's business hours and mealtimes. The findings validate this theory since the interviewees plan the meetings according to their Mexican client's business and meal hours, which are similar to Portuguese times. It was found that the morning period is preferred among the interviewees to hold the meeting, except in online meetings due to the time difference. Moreover, the results show that planning the time necessary in each client plus calculating a tolerance time in between meetings due to commuting or possible delays is important, as suggested by Hough (2021b). Furthermore, scheduling meeting start, and end times eventually depends on the purpose of the visit. When planning presentation meetings, the meeting beginning and ending times are previously arranged, thus validating Opresnik's (2014) theory. However, in meetings with ongoing projects the ending time is not always defined since these may take longer to finish. Contrary to Opresnik (2014), meeting breaks are not planned. Lastly, the meeting time most convenient to the client is then conciliated with the managers agenda.

To answer RQ 2.3. - the antecedence necessary to schedule meetings, it depends on the purpose of the visit, as the respondent IM explains (Table 13, Pos. 13), but the majority

of the respondents (50%) schedule the meetings with two weeks in advance. Three companies (30%) mentioned that there would be an annual calendar with meetings and trips, hence meetings are programmed with a month or more in advance to be able to plan the trip. The other 20% share that one week in advance is sufficient. Moreover, it was found that first meetings take longer to schedule, for example, respondent EM referred that an annual plan is structured for market prospecting trips (Pos. 28), in addition respondent FM states the difficulty in getting in contact to arrange a first meeting, thus taking up to one month in advance (Pos. 24). As for follow-up meetings or engineering alteration meetings the anticipation is reduced to some days or one week before.

Table 13 - Meeting scheduling antecedence

RQ	Resp.	Retrieved Segments
2.3.	DF	Usually, a week in advance, but I will say two weeks to arrange everything calmly, without stress. We need to know the time we take on commuting, where we can and cannot go, etc. DF_Pos. 25 Time in advance > 2 wks (0)
	EM	R: When they are market prospecting meetings we will schedule them with some time in advance, with months in advance even. If they are more technical meetings or to monitor projects then it may be with one or two weeks in advance no more than that, and it depends on the duration of each project. For market prospecting trips we will always make an annual plan comprising where, when and how we will go, to which markets and industries we will engage with. This will also depend on our strategic plan in terms of market diversification and it is based on that that we define a travel calendar and start to work on it with all that time in advance. In typical times it is how it works, with all the situations happening right now, the pandemic and now the war, everything has changed substantially. EM_Pos. 28 Meeting Planning > Time in advance (0)
	FM	R: With a lot and it's not a simple scheduling. In a first approach we engage with the client, we insist because they become silent until we finally get some involvement and, in this case, take advantage of the fair to meet with us. It is very difficult at this distance to go to such specific markets to get a meeting like this. They are people if they don't know me and my whole family, they won't do business with me. FM_Pos. 24 Meeting Planning > Time in advance (0)
	GF	In Mexico no more than two to three weeks. Anything too early in the case of Mexico could go wrong. GF_Pos. 31 Time in advance > 2 wks (0)
	HM	We have to schedule it with some time in advance because we need to book the entire trip, so it has to be with one month in advance at least. HM_Pos. 32 Time in advance > >1 month (0)
	IM	As we dedicate to mould manufacturing and to mould engineering alterations, they are two different branches. To schedule mould manufacturing meetings it is necessary two-three weeks in advance. The engineering alteration meetings can be scheduled from one day to the next. IM_Pos. 13 Meeting Planning > Time in advance (0)
	JM	In advance, we prepare the travel schedule and meetings by region as it is a country where distances are significant. JM_Pos. 14 Meeting Planning > Time in advance (0)

Source: MAXQDA retrieved segments from the results obtained

Early decisions, such as scheduling meetings in advance, are important planning aspects as these promote control and power over the negotiation (PILPG et al., 2007). The findings indicate that two weeks in advance seems to be sufficient to schedule a meeting with their Mexican client, thus corroborating with Morison and Conaway (2006) and Katz (2017). To half of the managers, it allows time to arrange the trip, such as, commuting aspects or which

clients to visit. As for others, first in-person meetings are necessary to schedule with a month or months in advance to arrange the entire trip.

When structuring an agenda for the meeting, RQ 2.4. tries to understand if Portuguese managers construct a restrict agenda for Mexican meetings. The results indicate that 30% of the interviewees structure restrict agendas for meetings, composed by personalised presentations, topics, products to discuss and time. On the other hand, the majority of the respondents (70%), do not plan a constrain agenda and tend to follow a holistic approach, looking at the meeting environment as whole. Respondent GF explains that the peculiarity of the Mexican market proposes the assessment of each client and meeting context in a unique way, making sense on what to tackle as the encounter progresses (Table 14, Pos. 33). This approach does not necessarily disregard meeting key topics planning, since all participants reveal to follow a preformatted presentation model or the topics to discuss.

Table 14 - Agenda structure planning

RQ	Resp.	Retrieved Segments
2.4.	EM	R: Yes, that is mandatory. The topics of the meeting, including the duration of the meeting is very important so that we don't start talking about football and only have 5 minutes left to discuss more issues because we are in a hurry, that cannot happen. EM_Pos.30 Meeting Planning > Agenda (0)
	FM	R: Yes, we already have more or less preformatted how we present our company and what are the products we have to offer. We follow a standard model so we don't make a mess. FM_Pos.28 Meeting Planning > Agenda (0)
	GF	R: No. In Mexico everything is a bit peculiar, in Mexico and in Latin America in general, what we usually have is a cultural context of the area, an organizational context and the character of the company, we have to open the meeting with those classic ice breakers about some of these things and then from there, depending on whether we are discussing projects or if it is a prospective visit or whatever, we try to understand if it makes sense to start with the presentation, sometimes it makes more sense to first visit the factory manager when we see that the customer is confused with the moulds they have, then it makes sense to visit the factory first. GF_Pos.33 Meeting Planning > Agenda (0)
	HM	R: Yes, the presentation is specialised for each client. Not all companies are the same, some make grills, others headlights, others seats, so we have to focus and specialise the presentation and topic to the type of product the customer manufactures. HM_Pos.35-36 Meeting Planning > Agenda (0)

Source: MAXQDA retrieved segments from the results obtained

Planning an agenda provides key topics' organisation and focus on the upcoming discussions (Acuff, 2008). Some managers (30%) validate this theory, indicating that establishing an agenda prevents delays or failing predetermined appointments and schedules for upcoming meetings. However, in Mexico agendas may be perceived as restrictive and overly structured and thus, mostly not strictly followed (Acuff, 2008; Katz, 2006). Corroborating with the literature, the findings ultimately suggest that it is not necessary to establish a formal agenda for meetings in Mexico, as the market asks for a dynamic and unstructured negotiation approach (Helmold, 2020f; Katz, 2006). This validates the theory that polychronic cultures, such as Mexico, emphasize interpersonal

engagement rather than predefined programs (Moran et al., 2007). Its leisurely sense of time results in not too firm future arrangements and planning (Moran et al., 2007) which is also confirmed by the fact that planning “too early in the case of Mexico can go wrong” (Table 13, respondent GF, Pos. 31).


The RQ 2.5. refers to preparation factors when meeting at the other party’s office in Mexico. It was found that all respondents consider travel expenses, the duration of the trip, and the location where they will be staying at. Regarding travel expenses, companies perform a pre-calculation of the total costs of the travel or prepare annual travelling budgets, as observed in Table 15. The duration of the trip is between 1 to 2 weeks, since it is a long journey and also when there are national fairs, some companies have 1 week to participate in the fair and the second to meeting clients. The location to stay is planed according to the cities the meetings are held, most companies book hotels except for one that already has an apartment in Mexico. Considering materials to bring, 80% prepare support materials to the business trip, such as, catalogues, samples, business cards and digital presentations. Moreover, the hotel, airplane tickets, transportation (car rental or taxis) and health insurance are booked and arranged in advance, and likewise are the people assigned to go accounted for. Lastly, two respondents share a concern for safety measures, respondent DF mentions to always commute by the same prearranged taxis from the hotel (Pos. 35), and respondent HM warns about street insecurities and advises to get to know the partner’s company area in advance, to avoid walking in tourist areas and wearing eye-catching jewellery (Table 7, Pos. 8).

Table 15 - Planning factors when going to Mexico

RQ	Resp.	Retrieved Segments
2.5.	BM	Yes, we bring catalogues, business cards, everything that we have available to be able to demonstrate and prove our work. BM_Pos. 52 Factors of meeting in Mexico > Materials (0)
	DF	R: We must consider the costs, health insurance, taxis because most of the time it is quite complicated to drive there. DF_Pos. 33 Meeting Planning > Factors of meeting in Mexico (0) R: No, we must always take the taxis from the hotel. I never take them on the streets, the taxi that picks me up is the same that will take me back. DF_Pos. 35 Meeting Planning > Factors of meeting in Mexico (0)
	EM	We prepare a travelling budget one year in advance, its respective plan, including the people who are going to travel, because it isn't only one person travelling there various people that are going to travel. EM_Pos. 40 Factors of meeting in Mexico > Expenses (0)
	GF	R: No less than two weeks, because in the case of Mexico, given the duration of the trip itself, which is always a day and a half, it makes no sense to go for less time and since we have been through it, it is better to take more time there. GF_Pos. 41 Factors of meeting in Mexico > Travel duration (0) R: Yes, we always bring catalogues, samples, the digital presentation and everything in between. GF_Pos. 45 Factors of meeting in Mexico > Materials (0)

HM

R: Yes, we always make reservations in advance on everything, plane, hotel, car.

 [HM, Pos. 43-44](#)







 [Meeting Planning > Factors of meeting in Mexico \(0\)](#)

Source: MAXQDA retrieved segments from the results obtained

When meeting in another country the literature advises that there are several travel related factors to prepare in advance (Adler & Gundersen, 2008; PILPG et al., 2007). The findings indicate that there is an elevated concern with calculating travel expenses, the duration of the trip, the location of where to stay, transportation, safety and with preparing support materials, thus corroborating with the literature as demonstrated by PILPG et al. (2007), Opresnik (2014) Adler & Gundersen (2008) and Katz (2006). The duration of the visit being between 1 to 2 weeks confirms the evidence of meeting in Mexico implies preparing for a long stay as stated by Katz (2006). Moreover, booking hotels, means of transportation and insurances in advance, planning which people will travel, as suggested by Katz (2006) Acuff (2008), along with safety concerns (PILPG et al. 2007) appears to occupy a great portion of the negotiation preparation of Portuguese companies.

The group of questions elaborated in RQ 2.6. relate to several aspects regarding the meeting location planning. The RQ 2.6.1. assesses the location managers prefer to hold the meeting with their Mexican clients. The results indicate that all respondents show a preference to have the first meeting in the clients' company in Mexico. This predilection is justified by being "a unique opportunity to see" the client, the company, their products and to meet relevant people (Table 16, respondent EM, Pos. 34). Additionally, respondent FM reveals that it allows clients to "feel more comfortable" (Pos. 30).

Table 16 - Meeting location planning

RQ	Resp.	Retrieved Segments
2.6.1.	EM	R: In Mexico. Let's say it is a unique opportunity to see our client, their company, how they work and what type of product they have. In a 2 hour visit we can understand if the client fits with what we want or not.  EM, Pos. 34  Meeting Planning > Location (0)
	FM	R: We've received them here, now it's mostly digital. But we always prefer it at the client's home because we see more opportunities being there. And they feel more comfortable.  FM, Pos. 30  Meeting Planning > Location (0)
	HM	R: It is always at the customer's company or here. When we go to meet a customer, we have to know and see where they are, what they do and show us the company and we will visit. And when they come here we do the same, show them the facilities and relevant people for them to meet.  HM, Pos. 38  Meeting Planning > Location (0)

Source: MAXQDA retrieved segments from the results obtained

The literature suggests that the meeting setting can influence negotiations (PILPG et al., 2007). The findings reveal a preference to hold the meeting in the clients' office in Mexico, especially first meetings, thus corroborating with the literature. This preference

is a business strategy that favours the negotiation (PILPG et al., 2007; Opresnik, 2014) since it provides opportunities to observe the other party in their environment (Shonk, 2022), allows the partner to enjoy a psychological “home advantage” and cultivates a comfortable ambient (Opresnik, 2014; PILPG et al. 2007).

The RQ 2.6.2. considers the ambient requirements companies follow in order to host meetings. It was found that most of the interviewed companies (90%) take care in ensuring a pleasant atmosphere when receiving clients. The main factors referred are climatization, refreshments, such as water or coffee, a welcoming and bright space and reducing interruptions. One respondent mentions the importance of having a clean room with proper audio-visual material (Table 17, respondent EM, Pos. 36). Moreover, the company’s reception may vary depending on the client and their level of relationship, for example, respondent BM mentions to prepare the room better when receiving an important delegation (Pos. 44). On the other hand, one respondent states that the room setting is a daily care as unexpected clients may come (respondent GF, Pos. 31). Despite of these environmental factors, the managers stressed the need to make the clients feel welcome and comfortable, for example, to focus on making a good first impression and to sit closer to each other in order to “show openness” and to facilitate the communication (respondent BM, Pos. 44).

Table 17 - Meeting ambient requirements

RQ	Resp.	Retrieved Segments
2.5.	AF	<p>First we have to be welcoming with them and we have the space prepared to ensure that. Just like in this room we are in that is luminous, we also set a coffee area because they are people who drink a lot of coffee. Yes, we try to reduce interruptions during the meeting.</p> <p>AF_Pos.50 Meeting Planning > Ambient requirements (0)</p>
	BM	<p>Well, we do not consider it much. Only if a very important client or a delegation is coming and we prepare the room, try to have a meeting in which we do not sit too separately from each other, not like Putin! We try to sit closer to each the other, the closer the better and put water bottles on the table. When we host a regular client which we know already, we only put the water when he gets here and nothing else. The closer you get to the client and show openness the easier the communication gets, if you don't, it may block and create ice in the business relationship.</p> <p>BM_Pos.44 Meeting Planning > Ambient requirements (0)</p>
	DF	<p>R: Yes, we take that care on our daily basis, not only when we welcome clients, because most of the time they drop in, so for us that is a daily care.</p> <p>DF_Pos.31 Meeting Planning > Ambient requirements (0)</p>
	EM	<p>R: We take into consideration, what I would say is basic, the room condition which, as you see, is a tidy and clean room, it has the necessary audiovisual conditions. And just as I offered you in the beginning, we have water and coffee.</p> <p>EM_Pos.36 Meeting Planning > Ambient requirements (0)</p>
	IM	<p>Yes, we have a protocol to welcome the client. If it is a new client, we need to make a good first impression so we take care in that, but when it is a regular client coming often then the formalities fade away.</p> <p>IM_Pos.15 Meeting Planning > Ambient requirements (0)</p>

Source: MAXQDA retrieved segments from the results obtained

Receiving clients from abroad involves considering the negotiation atmosphere and setting in order to reduce uncomfortable feelings from the other party and ensuring a pleasant ambient (Opresnik, 2014; Helmold, 2020a). The results reveal that managers do prepare the negotiation setting, thus confirming the evidenced in the literature, that arranging refreshments, climatic conditions, interruptions reduction and bright rooms, as stated by Opresnik (2014) and Helmold (2020a). Although managers would not mention it specifically, in most of the in-person interviews the ambient included spacious and luminous rooms and equal seats, hence there is also attention to these aspects as Opresnik (2014) suggests. It was found that having a clean space with audio-visual materials is also valued. Moreover, it appears that making the client feel welcoming and comfortable is a generalised concern among the interviewees. Along with sitting closer to each other in order to display openness and facilitate communication.

When considering support materials to prepare to the negotiation in RQ 2.7., the results indicate that all the respondents prepare support materials whether in physical or digital format, such as, catalogues, samples, business cards and digital presentations. Regarding cultural connotations awareness when preparing these materials in RQ 2.7.1., it was found that the majority of the companies (80%) do not consider cultural connotations in material planning. The respondents reveal that in professional materials there is not a concern about cultural matters, and as respondent BM refers, today the Mexican society has advanced to a level that transcends previous cultural connotations (Table 18, Pos. 58). Hence, the colours of the companies are used in every material and information related to it. Nonetheless, the other 20% shared to consider cultural connotations related to the use of cultural Mexican expressions to “help to create a bridge” (respondent GF, Pos. 47) and to avoid the use of the colour red in presentations (respondent DF, Pos. 41). Considering the translation of support materials, in RQ 2.7.2. the results indicate that all respondents adapt their materials to Spanish, with the exception of one interviewee that states that using the English language in support materials is sufficient since it is commonly used in business (respondent HM, Pos. 48).

Table 18 -Support materials preparation

RQ	Resp.	Retrieved Segments
----	-------	--------------------

2.7. AF	Formerly yes we brought catalogues. But catalogues are something that people dispense, less and less people want papers, so what we do is, we normally have our tablet and show our company's website where we have everything. We show the types of pieces that we make, etc. AF_Pos.60 Meeting Planning > Materials (0)
BM	I: Do you believe that in Mexico there is cultural connotations associated with words, colours? R: No, not nowadays. That was in the past, or people in small villages, indigenous people. Not business people, buyers and companies in large cities that are much more advanced than we are. BM_Pos.57-58 Meeting Planning > Materials (0)
DF	R: There are colours that I do not use when I write, for example red. The presentations must have soft colours and cannot be very showy in a sense that hurts the eyes but also not too pale, so they must have a mix of colours that catches the eye. DF_Pos.41 Meeting Planning > Materials (0)
EM	R: No, our company has the logo which our material has colours associated with it, so the bases to that will always get from the colours of our logos. Thus, it is very easy to identify us anywhere. The catalogues have more to do with us than with the customer. EM_Pos.46 Meeting Planning > Materials (0) R: Yes, that is mandatory. In Germany we can only speak German and in Mexico we can only speak Spanish. EM_Pos.48 Materials > Translation (0)
GF	I: Do you consider any cultural connotations? R: Yes. I wouldn't say colours, but words are exactly the opposite, as we know that there are expressions they use that are not classically native Spanish but are very Mexican, we always try to use those words that are identity factors and that always help to create a bridge. GF_Pos.46-47 Meeting Planning > Materials (0)
HM	R: No, they are all in English. Gone are the days when it was necessary to translate, now English is practically spoken everywhere and we are excused from making versions for all countries. HM_Pos.48 Materials > Translation (0)
JM	The materials in this case the presentations are occasionally customized according to the type of product that the company we are visiting works with. JM_Pos.26 Meeting Planning > Materials (0)

Source: MAXQDA retrieved segments from the results obtained

The literature proposes the preparation of meeting support materials to help the meeting presentation and to improve the credibility of the situation (Katz, 2006). The findings of RQ 2.7. indicate that companies prepare various support materials to display during the meeting, such as, catalogues, samples, business cards, emphasising the preparation of a formal and detailed presentation customised to each client, which confirms the theory supported by Katz (2006). The findings on cultural connotations in RQ 2.7.1., overall contradict Herbig & Kramer (2006) premise of considering colours, or subjects in support materials, since most negotiators use their companies' colours in these materials. Hence, with the exception of one manager, colours such as red and yellow which are commonly used in companies' logos, are applied to print and digital information materials in an intuitive way to easily identify their presence. Considering the increasing business focus in Mexican companies, these contradicting results were expected to materialize. Words, however, are communication symbols that play an important role in high-context cultures (Hall, 1976; Hofstede, 1991) and Mexican expressions can help in a presentation if prepared in consideration with its context and applied correctly. Furthermore, as for RQ 2.7.2., Katz (2006) suggests that although not being compulsory, translating materials to Mexican Spanish is appreciated and helps to transmit the message The findings

corroborate with the literature, in fact it seems that translating these materials has a great significance when meeting with Mexican clients, since some managers emphasised this aspect as mandatory.

The RQ 2.8. relates to the determination of which and how many people will be present throughout the negotiation process. It was found that the people assigned for the Mexican, Latin American, or Spanish-speaking markets are continuously responsible, since the first contact to the follow-up, for these markets. Respondent EM explains that determining people to international markets involves assessing that each person has different “sociocultural profiles” that may correspond better to a certain market than others, and highlights that once responsible for one market they do not switch (Table 19, Pos. 40). Considering how many people and who will be present during the negotiation, the findings indicate that 80% of the companies bring two people to business negotiation meetings in Mexico, corresponding to commercial and technical skills (Table 19). Moreover, some respondents (30%) mentioned that having technical skills is very important when going to a negotiation in order to solve technical questions.

Table 19 - Participants planning

RQ	Resp.	Retrieved Segments
2.8.1.	AF	Two people, normally it is the commercial manager and the commercial assistant which is me. AF_Pos.66 Meeting Planning > Participants (0) The commercial manager speaks Spanish and knows the technical part so he is a technical-commercial manager let's say it like that. AF_Pos.68 Participants > Who? (0)
2.8.	EM	Depending on the market, there are people going to Mexico, others going to the East, to Asia to Europe, and these are the people that go and don't switch. Each person is responsible for a geographic area because it is a cultural issue. The person that I have dealing with Central Europe it is unthinkable to go deal with the East. I am not speaking in a technical matter, but rather the person's profile in view of the requirements and cultural conditions that exist in that region. All of that is very important. We have people with totally different sociocultural profiles, they have the technical skills that are expected, and if they don't, training is also provided but this is the standard, now the cultural issue is very important. We have people who are more likely to be able to deal with a certain person, others not so much. EM_Pos.40 Meeting Planning > Participants (0)
2.8.1	HM	R: Yes, commercial or technical skills are indispensable, a commercial without technical knowledge in this business does not work. HM_Pos.52 Participants > Who? (0)
2.8.1.	IM	Here in Mexico sometimes there are too many people coming to meeting that are not necessary, but of course we will receive them with pleasure. Usually it is me and other colleague with technical skills which is very important. IM_Pos.17 Meeting Planning > Participants (0)





Source: MAXQDA retrieved segments from the results obtained

Determining the composition of participants at the negotiation is an important decision to take when planning the negotiation since it can affect its outcome (Opresnik, 2014; PILPG et al., 2007). The findings indicate that managers plan which individuals will participate and their roles in the negotiation process, therefore corroborating with PILPG

et al. (2007) and Opresnik (2014). Companies will mostly bring two people, one with commercial skills and the other with technical skills, or with both. Moreover, it appears that companies assess which profiles will correspond better with a certain market, which confirms the evidenced by Lewicki et al. (2016), and always attribute the same people to the same geographical area. The preservation of the same negotiators to the Mexican market implies the importance of maintaining a long-lasting trusting relationship with the Mexican clients. This validates Moran et al. (2007) and Hernández-Pozas et al. (2019) observation that as a high context culture, Mexicans value personal relationships and significantly distinguish in-group from out-group people.

When evaluating the role of preparation in Mexican business negotiations in RQ 3., all respondents agree that preparation is fundamental to obtain negotiation successful outcomes (Table 20). It was found that preparing the negotiation allows the negotiators to research crucial information about the market, the client’s company, credibility, market position thus providing the ability to plan according to each client situation. Moreover, it enables to adapt the company’s negotiation model to the Mexican market and to react to unexpected situations, considering that Mexico is a very subjective market, as respondent EM states (Pos. 61). On the other hand, one respondent reveals to plan not too strictly since overly structured planning does not allow to be spontaneous in order to overcome the market’s subjectivity and unexpected situations (respondent FM, Pos. 52). Furthermore, preparation is important to avoid potential problems which compromise the negotiation success (respondent DF, Pos. 49).

Table 20 - Role of preparation on negotiations

RQ	Resp.	Retrieved Segments
3.	AF	<p>Planning the negotiation is very important. When we are going to negotiate, we already have everything planned before in relation to deadlines, time to produce the mould, among others in order to be everything well defined and structured. In the mould industry where everything needs to be done by 'yesterday', specially in the automotive sector, is very exigent and requires a well structured planning.</p> <p> AF_Pos. 4  PREPARATION > Fundamental to success (0)</p>
	DF	<p>R: Yes it is. It avoids many problems, and if there aren't problems there is success.</p> <p> DF_Pos. 49  PREPARATION > Fundamental to success (0)</p>

EM	<p>R: Because we have to know what we're going into. The unexpected is there waiting for us. If we don't take things minimally prepared, that is, to effectively define the goals we want to achieve, we very easily have a meeting there and come back with nothing. In Mexico, we cannot forget that it is Mexico, it has everything that is good and everything that is bad, and it is a country very prone to subjectivity. We're not dealing with a German market where the wall is white and the monitor is black, no, that's not the case there. There, the wall can be any colour and the monitor can even be transparent, whatever it is. If we don't take very concrete goals of what we want, we easily leave there with nothing. In cultural terms, I would even say that the way of being of Mexicans is very similar to ours, very easily we enter a meeting and start talking about football, politics and now about the war and at the last minute of the meeting is when we are going to deal with the matter of the meeting, that is, if we don't take things structured this is what happens. On the contrary, in Germany nobody talks about football, nothing, if we have the meeting, we go to the meeting and when it is over we leave. And this is impossible to do in Mexico, that's why we're going to try to replicate this model that is in the hands of those who will receive us, in the Mexican hands, that's why preparation is fundamental.</p> <p>EM, Pos. 60-61 PREPARATION > Fundamental to success (0)</p>
FM	<p>R: We prepare but not too much. Because the more we prepare and have a surprise when we get there, we then don't know what to do. If we take everything very standardized, we get there, we don't know the client and he is totally what we weren't expecting and then we don't know how to deal with them. If we are formatted to say this and that in a specific way it doesn't work. We have to know more or less what we want to talk about, and not think about it too much.</p> <p>FM, Pos. 52 PREPARATION > Fundamental to success (0)</p>
GF	<p>R: Because Latinos in general are very cautious decision makers, despite being culturally sociable and forthcoming at the moment, it is not easy to make a decision and it is necessary to properly calculate the arguments to be able to close the deal.</p> <p>GF, Pos. 57 PREPARATION > Fundamental to success (0)</p>

Source: MAXQDA retrieved segments from the results obtained

Preparation is commonly perceived by a large body of research as a crucial phase in the negotiation process since it grants the ability to make informed decisions and obtain successful outcomes (Helmold, 2020c, 2020e; Opresnik, 2014; PILPG et al., 2007; Acuff, 2008; Herbig & Kramer, 1993; Adler & Gundersen, 2008). The findings indicate that gathering information about the other team to confers the ability to plan the negotiation according to each client. Thus, validating Fisher and Ury (1991) and Herbig and Kramer (1993) focus on considering the other party to reach effective planning, along with Acuff (2008) view of preparation conceding the power to make educated business decisions. Moreover, negotiation preparation allows to adapt to unexpected situations which supports Opresnik (2014) findings of preparation allowing to anticipate the partners' reactions. Furthermore, it was found that preparation avoids negotiation problems and that overly restrictive planning does not allow the spontaneity to overcome unexpected situations.

When assessing the most important factors to consider when preparing the negotiation in RQ 3.1., the respondents mostly value planning the counterpart's information, negotiation scope, determining objectives and strategies, as observed in Table 21. Researching the clients' information helps to focus on a certain product and to formulate a personalised solution (respondent FM, Pos. 54). Additionally, the negotiation scope, or what to negotiate, is prepared in relation to the client as respondent HM stated, "each client is different, and we have to know what we are going to exhibit" (Pos. 56), to be able to "properly calculate the arguments" (Respondent GF, Pos. 57) and deal with the "unexpected" (respondent EM, Pos. 60). Lastly, determining objectives and their

respective strategies are prearranged in relation to the business context, whether if it regards a new client or a pre-existing one and the type of project in question (respondent DF, Pos. 51).

Table 21 - Preparation factors

Code System																				
Counterpart's info	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	9
Participants			1			1														2
Travel factors						2														3
Agenda				1																2
Strategies						1														3
Objectives						1	1													3
Negotiation scope	1	1	1	1	1			1	1	1	1	1	1	1	1	1	1	1	1	9
SUM																				31

Source: MAXQDA Code Matrix from the results obtained

Preparation requires the assessment of several information and decision-making to effectively approach the following negotiation stages (Acuff, 2008; Helmold, 2020e). The findings support the literature evidencing preparing information from the other party, such as, sector, products, potential needs and interests, reputation, market position and financial status is an effective planning (Helmold, 2020e; Herbig & Kramer; PILPG et al., 2007). It was found that preparing the negotiation scope includes planning the product, price, deadlines, and product manufacturing times, as supported by Helmold (2020a), which are always adapted to the client. Moreover, the results point out that objectives and strategies should be set to the context of each negotiation, confirming the evidenced by Opresnik (2014) and PILPG et al. (2007).















7.3. Characterisation of Pre-negotiations

The pre-negotiation phase involves meeting the client for the first time, building interpersonal relationships, and sharing information on negotiable matters which begins with introductions, greetings, and informal discussions (Adler & Gundersen, 2008; Khan & Ebner, 2019).

The group of questions in RQ 4.1. relates to greeting formalities when meeting the client for the first time. When assessing RQ 4.1. and RQ 4.1.1., it was found that all managers greet with a handshake to every person present in the room. Some respondents referred that when there is a longstanding relationship with the client, they can greet with an embrace or with two kisses on the cheek when greeting women (Table 22). As all of the respondents speak some level of Spanish, in RQ 4.1.2. when greeting the other party, the managers usually say ‘hola’, ‘buenos días/buenas tardes’, ‘mucho gusto’, ‘encantado/a’

and show appreciation for being received (Table 22). Regarding RQ 4.1.3. it was found that all managers introduce themselves by solely stating their first and last name. Since the majority of the contacts are made previously by email or phone, titles or positions are assumed to be known by the partner at the time of the meeting, and thus not revealed upon greeting, as respondent AF explains (Pos. 80).

Table 22 - Greetings

RQ	Resp.	Retrieved Segments
4.1	BM	R: Well, during the pandemic there are no physical greetings, but it is with a normal handshake. With women, for example, not in the beginning but when there is already a connection, we greet with a kiss, I have Spanish female clients that greet me with a kiss.  BM_Pos. 66  PRE-NEGOTIATION > Greetings (0)
4.1	HM	R: Yes, after some time. It is very important in Mexico to greet someone with an embrace. Someone we know already for some time, some years I will never greet them with a handshake it is always with a hug upon arriving and departing.  HM_Pos. 162  PRE-NEGOTIATION > Greetings (0)
4.1	JM	If there is already a relationship and trust, we greet with a handshake and a hug at the same time, if it is a 1st meeting, it will be with a handshake.  JM_Pos. 36  PRE-NEGOTIATION > Greetings (0)
4.1.2.	AF	We say hello, good afternoon, pleased to meet you in Spanish.  AF_Pos. 74  PRE-NEGOTIATION > Greetings (0)
4.1.3.		First and last name. Usually when we have a scheduled meeting in the contact that I made previously, whether it is by email or phone, I say who are the participants and our positions so there is no need to say it when we are there because they already know.  AF_Pos. 80  PRE-NEGOTIATION > Self presentation (0)
4.1.2.	GF	R: 'Encantada', 'es un gusto'. Depending on the context, if we've talked for some time, it is 'pronto nos conocemos'.  GF_Pos. 67  PRE-NEGOTIATION > Greetings (0)
4.1.2.	IM	R: if it is our first time meeting each other I will say 'hola', 'mucho gusto', and say my name.  IM_Pos. 23  PRE-NEGOTIATION > Greetings (0)

Source: MAXQDA retrieved segments from the results obtained

The findings in RQ 4.1. and 4.1.1. indicate that all managers greet their partners with a handshake to all the participants present, thus confirming the evidenced by Acuff (2008) to shake hands upon meeting and validating Moran et al. (2007) and Katz (2006) premise to greet shaking every participant individually. In addition, managers recognise the importance of greeting long-standing clients with an embrace, thus corroborating with Acuff (2008) and Axtell (2007) that closer acquaintances and friends usually embrace upon meeting. Regarding the RQ 4.1.2. it was found that all managers engage with cultural greeting forms in Spanish, which is an advantageous instrument to break the ice, as stated by Helmold (2020f) and Acuff (2008), showing respect and promoting comfortable feelings on the other party (De Leon, 2013). These findings corroborate with the evidenced by PILPG et al. (2007) and by Pease and Pease (2004) that considering the partner's greeting manner shows goodwill and a welcoming intention to cultivate positive

personal relationships. Lastly, considering RQ 4.1.3. it appears that the use of academic or professional titles while introducing oneself, as Osorio (2011) refers, is not supported by the results. All managers mention to solely state their first and last names as these details have been previously disclosed and are also indicated in business cards.

When assessing the forms of address in RQ 4.2., all interviewees stated that when first engaging the other party they would always try to level the address form coming from the counterpart, since every company has a different environment. On first contacts, 60% state that the *usted* form and titles, such as *Ingeniero*, are used and often afterwards, as the relationships grows, these address forms are taken into other level, formality diminishes and the use of *tú* becomes the norm (Table 23). The use of *don/dueña* is usually used for older people in form of respect. Nevertheless, 20% highlight the role of addressing people by *tú* has it shortens the social distance as well as not using titles, as respondent GF refers. In fact, two managers stated that the Portuguese stress much more the use of titles and the 2nd person singular, since in Mexico these are dropped right after getting acquainted and sometimes even promoted in the first contact.

Table 23 - Forms of address

RQ	Resp.	Retrieved Segments
4.2.	BM	<p>R: It depends on the trust level at that point. In Mexico, the 'señor' lags behind and everyone goes by 'tú', it does not exist 'usted'. If I do not use 'tú' they do not use it as well with me. With a new client, if I go there they say straight away 'how are you? is everything going ok?', immediately, without even knowing each other.</p> <p>BM, Pos. 76 PRE-NEGOTIATION > Addressing people (0)</p> <p>R: Not in Mexico, but in Spain it is 'usted'. As I lived there and I can speak 'Mexican', and automatically it is like I am Mexican to them. In Mexico the 'tú' factor inhibits the distance right away. I do not mean to say that it is rude to address by 'usted', no. I am saying that it separates the 'land area' between you and the buyer, whereas as I address them by 'tú' it shortens that area. Here in Portugal, in the beginning we address people as you [2nd person plural, 'você'] because some may take umbrage if we don't, but if we use it constantly we are creating a great distance. If we shorten that distance over time and address someone as you [2nd person singular, 'tu'] it becomes much easier to sell, to make business, however, it is also easier to exist quarrels and arguments, to become louder.</p> <p>BM, Pos. 78 PRE-NEGOTIATION > Addressing people (0)</p>
	CM	<p>R: It depends on their age, if it is an older person then it is 'Don Fernando' for example.</p> <p>CM, Pos. 60 PRE-NEGOTIATION > Addressing people (0)</p> <p>R: Yes, we address them by engineer or 'licenciado' in the beginning, but when we become acquainted then we drop it.</p> <p>CM, Pos. 62 PRE-NEGOTIATION > Addressing people (0)</p>
	DF	<p>R: The last time I was there, for example, I said 'Hola Mário' but only because I did my homework before going, which was breaking the ice by telephone. So, when I arrived they do not want me addressing them by their titles. In the beginning it is always by 'Ingeniero', but then it is by the first name.</p> <p>DF, Pos. 61 PRE-NEGOTIATION > Addressing people (0)</p> <p>I: So you only use the titles in that initial conversation?</p> <p>R: Yes, because they are the ones who ask for it. When they accept us to visit them, that barrier which I always put up in the beginning by treating them by their titles, I know that at some point when they want to make business the first thing they say is 'take the engineer out of my name'.</p> <p>DF, Pos. 62-63 PRE-NEGOTIATION > Addressing people (0)</p>

EM	<p>R: It depends. Usually, it is by 'tú', because it is the way they address us. Depending on how they treat us, we have to treat them the same. If they address us by 'señor' we will address them the same way. Sometimes we begin addressing them by 'señor' and end up addressing them by 'tú'.</p> <p>EM_Pos. 71 PRE-NEGOTIATION > Addressing people (0)</p>
GF	<p>R: Usually, it's by the first name, unless it's actually someone with a culturally high status. We Portuguese are the ones who have this Drs and whatsoever craze, it's true. They [Mexicans] don't care about it and address by the first name basis too. I also refer more to this last trip we took that I already spoke with the client before and it was always by 'tú' and they also address us by 'tú' too. They are very americanised in these things, Americans use 'you' a lot like 'tu', even the last names which Americans seem to have lost. Emails start with a 'hello' and my first name and they are very much like that. In fact, I've already received a series of emails following the trip and they all address me by my first name.</p> <p>GF_Pos. 71 PRE-NEGOTIATION > Addressing people (0)</p>
JM	<p>Communication is very easy and somewhat informal. The treatment by 'tú' on the first meeting is very frequent and highly promoted.</p> <p>JM_Pos. 14 PRE-NEGOTIATION > Addressing people (0)</p>

Source: MAXQDA retrieved segments from the results obtained

Recognising the appropriate forms of address helps to smooth the process of getting acquainted (PILPG et al., 2007). The findings show that all managers adapt to the address form used by the counterpart and that using titles and honorifics is respected, as De Leon (2013) and Katz (2006) suggest. The use of these formal forms of address eventually drops as the relationship grows and informal forms become the norm, as evidenced by Osorio (2011). However, it was found that not all managers follow this norm at first since it is the other party who encourages to use informal address forms. Hence, it can be analysed that nowadays the Mexican culture may be influenced by other cultures in this sense, especially by the USA as Howell et al. (2007) suggest, which explains the decreasing concern to use formal address forms, such as *usted*, titles and last names, as respondent DF reveals (Pos. 71).

The group of questions elaborated in RQ 4.3. tries to evaluate several aspects related to business cards. Considering the relevance of exchanging business cards when negotiating in Mexico, through RQ 4.3. it was found that 90% of the interviewees deems important to exchange business cards with their Mexican partner. Regarding the time when negotiators exchange business cards in RQ 4.3.1., it appears that the exchange mainly occurs upon greeting or at the beginning of the negotiations. As for the information contained in business cards in RQ 4.3.2., it seems that it essentially has the managers' name, position, contact and their company's information, such as, phone number, email, and address. Two respondents referred that their business cards are in digital format containing the same information and shared through WhatsApp for example. Lastly, when considering the business cards translation in RQ 4.3.3., it was found that these are designed in a general format, in English to “cover more areas besides” the Spanish market (Table 24, respondent DF, Pos. 75).

Table 24 - Business cards

RQ	Resp.	Retrieved Segments
4.3.2.- 4.3.3.	AF	It has the name, email, the company's website, phone number. It does not need translation.  AF, Pos. 88  Business cards > Information (0)
4.3.- 4.3.3.	DF	R: Yes, after greeting each other we hand our business cards, or when we are already seating we put them in the table and distribute them to each person.  DF, Pos. 71  PRE-NEGOTIATION > Business cards (0) R: Name, last name, phone number, company number, position, email and the company's website.  DF, Pos. 73  Business cards > Information (0) R: No, they are in English because it covers more areas besides Spanish. Only the flyers and other documents we have with information are translated to Spanish.  DF, Pos. 75  Business cards > Information (0)

Source: MAXQDA retrieved segments from the results obtained

Exchanging business cards is crucial step when meeting the other party for the first time (Katz, 2006). The findings in RQ 4.3. and 4.3.1. reveal that exchanging business cards is an important action when meeting the Mexican partner for the first time while greeting and introducing oneself, thus corroborating with the evidenced in the literature by Rosenbaum (2003) and Helmold (2020a). As for RQ 4.3.2. and 4.3.3. the findings do not support Katz (2006) evidence regarding stating the person’s titles on business cards and translating them to Spanish. It was found that only the person’s position is revealed on the card, and that they all follow a general English format.

The group of questions in RQ 4.4. relates to the engagement in small talk in Mexican business negotiation. Through RQ 4.4. it was found that 50% of the managers engage in small talk while greeting or in the beginning of negotiations with their partner. This action allows to create a lighter atmosphere “essential for the meeting to run smoothly and more successfully” (Table 25, respondent GF, Pos. 97). Moreover, all the interviewees follow the other party’s lead when engaging in this conversation and in certain topics. Thus, as it mostly depends on the client’s approach and on the purpose of the visit, the remnant 50% state that small talk does not necessarily happen in the beginning of the encounter, it may happen after the meeting, at lunch or in other circumstances. The interviewees point out that their priority is the purpose of their visit, to show their professionalism, work, and conduct the business negotiation. If there is space to briefly discuss some informal topic it is other party decision to engage or not (Table 25).

Table 25 - Engaging in small talk

RQ	Resp.	Retrieved Segments
----	-------	--------------------

4.4. BM	It is important not to solely speak about moulds or in a commercial approach, so you can pull the client to you and to not convey the message of 'I just came here to sell this to you'. You have to convey the idea that you can become a friend, there has be communication, warmth and connection, that is very important even more than presenting your product.
	BM_Pos.36 PRE-NEGOTIATION > Small talk (0) R: That approach only exists if the client wants to do it as well, or when it is allowed to do it. It does not happen with everyone, it does not have an hour to start, nor a place. It might happen in the car when they invite us to have lunch even.
	BM_Pos.90 PRE-NEGOTIATION > Small talk (0)
GF	R: Yes, they are very similar to us in that aspect, even when we are hyper professionals we never like to arrive at a meeting completely stiff because, there it is, as we are also Latinos we think that these initial few minutes of relaxing the meeting are essential for the meeting to run smoothly and more successfully. Because we're all going to be there very stiff and inert, listening to each other carefully, it's good to break the ice.
	GF_Pos.97 Small talk > Comfort (0)
AF	R: Normally, they always intend to engage in that type of conversation, and we do as well, to break the ice. Because later we will be talking about more serious topics so there is mutual interest.
	AF_Pos.118 Small talk > Negotiations begin without (0)
HM	R: No, I seek to be more serious in the beginning. I try to build trust seriously. Breaking the ice is more at the end of the meeting.
	HM_Pos.80 PRE-NEGOTIATION > Small talk (0)

Source: MAXQDA retrieved segments from the results obtained

The RQ 4.4.1. tries to assess the topics engaged in this type of informal conversations. In a first contact with a client, the topics most talked about overall are the Mexican culture (food and drinks), the weather, the trip, the economy, the industry (concerns, competitors), Portugal (culture, economy) and global events (news, Eurovision song contest and world championships) (Table 26). Topics such as sports, politics, religion and USA relations have polarised opinions. Three respondents state that sports, namely football is a theme that is often brought up, namely about Cristiano Ronaldo, as it helps to break the ice (respondent AF, Pos.108). On the other hand, a few managers referred the possibility of bringing up unwanted divided opinions about football teams that might tense up the environment (respondent EM and IM). On the same note, politics can be a complex theme since there are divided opinions about parties and implies a great amount of knowledge to comfortably approach certain issues, such as election seasons (respondent EM, Pos. 89 and AF, Pos. 98). Religion can be a sensitive topic to approach, nonetheless 20% of the respondents engage with religious themes if the other party shows interest. Managers referred that there can also be an interest from the client to know some facts about Portugal, especially about Fátima, as it is closely located to these companies and sparks a religious interest. In fact, one respondent referred it to be something to break the ice, namely by mentioning a religious symbol or a place like the Basilica of Our Lady of Guadalupe or Fátima, since most Mexicans are catholic (respondent CM, Pos. 86 and GF, Pos. 83-85). Conversing about the relations between Mexico and the USA can be also an intricate topic to approach. Nevertheless, managers reveal that due to the proximity between both countries and their business relationship, the topic is discussed many times especially with companies located in the north of Mexico. Personal life topics

are usually discussed further along, though respondent EM refers to approach more personal topics, such as hobbies or interests instead of themes that might create tension (Pos. 83).

Table 26 - Small talk topics

RQ	Resp.	Retrieved Segments
4.4.1.	AF	<p>They ask us if the trip went well, how is the weather in Portugal and how it is over there. If we already know some places. Culture yes, especially about food, they like to ask about their food.</p> <p>AF_Pos.92 Small talk > Topics (0)</p> <p>Politics yes, for example, if there is an election season, we always try to be aware and careful about that.</p> <p>AF_Pos.98 Topics > Politics (0)</p> <p>Normally, to break the ice it is always talked about Cristiano Ronaldo, it is always that thing you know, football. We try to find things in common that everybody knows.</p> <p>AF_Pos.108 Small talk > Topics (0)</p>
	CM	<p>Yes, well it depends on the area. In the north they work a lot with the US directly. In Mexico City as well but not as much due to the proximity matter. As the northern area works so much with the US we do not notice any problem when talking about it.</p> <p>CM_Pos.82 Topics > USA relations (0)</p>
	DF	<p>R: I do not talk about personal life. Not about sports, nor politics. We talk about cultural elements, their culture, our culture. They like to know about Portugal because many of them do not know. Fátima is very important for them..</p> <p>DF_Pos.79 Small talk > Topics (0)</p> <p>Yes, also. When we are passed the barrier of strangers then we talk about what frustrates us for example, I can say that I am angry with government because of the high fuel prices and they answer with a similar complaint about their their country. We talk about these little things that do not interfere with anything.</p> <p>DF_Pos.83 Topics > World events (0)</p>
	EM	<p>Yes. The world championship, for example, we use that event to pick on each other. If Mexico wins we will congratulate all the Mexicans we know and they are happy about that. This may seem insignificant, but when we won the Eurovision song festival we had loads of customers congratulating us. Hence, we have to seize these little events to sow the seeds.</p> <p>EM_Pos.91 Topics > World events (0)</p> <p>R: Usually, we try to approach the personal side. When we talk about sports we might be creating a problem in the sense that each person is a fan of different football teams. We try to talk about more personal topics, what we have been doing or hobbies.</p> <p>EM_Pos.83 Small talk > Topics (0)</p> <p>R: No, we try not to, despite the information we might have it is always weaker compared to the information that they have, they are the ones living there. We have to avoid what we do not master and concentrate in the purpose of our visit.</p> <p>EM_Pos.89 Topics > Politics (0)</p>
	GF	<p>R: If the trip went well, the weather, if we are enjoying it, what we have already seen, they are very happy to talk about the places and the culture. I say that I am delighted with what we have seen and they are very happy. It is very important for them for us to say these things because there is a stereotype particularly in security matters and if we say that everything is going well and that we are well received, they feel very proud and grateful.</p> <p>GF_Pos.81 Small talk > Topics (0)</p> <p>I: Do you talk about religion or politics?</p> <p>R: No, we avoid those topics. Religion, if we look at the case of Mexico, which is traditional, they are very Catholic, if in fact we think that there is this space we can make some kind of comment like 'before leaving we have to go to the basilica of the our Lady of Guadalupe' or other things that they love.</p> <p>GF_Pos.82-83 Small talk > Topics (0)</p> <p>I: And they are interested in Fatima right?</p> <p>R: Yes. And it's just one thing for us to understand if they are Catholics or not. That can be a point of contact, which is to indicate that we are located half an hour from Fátima and depending on whether Fátima shines in their eyes or not, we immediately understand if it can be a bridge.</p> <p>GF_Pos.84-85 Small talk > Topics (0)</p>
	IM	<p>R: Yes we try to break the ice with conversations about the weather 'it is very hot' or 'how have you been?', 'how is work going?', it is a base for a conversation. Topics about the economy an cultural are very good but others like politics, sports it depends on the trust you have with the client. And sometimes it also depends on the position or level that the other person has, it is complicated to approach certain topics so it is best to stick to economic and cultural topics.</p> <p>IM_Pos.29 Small talk > Topics (0)</p> <p>R: Yes, has our main partner, what happens to them affects us as well. In these last months we have been talking a lot about the dollar price, raw materials, and has we react to them there will be always some topic to talk about.</p> <p>IM_Pos.31 Topics > USA relations (0)</p>

Source: MAXQDA retrieved segments from the results obtained

The RQ 4.4.2. relates to personal life topics when speaking with a Mexican partner. All the respondents revealed it to be a subject that evolves with contacts and time. When the relationship reaches a greater level of trust managers engage in more personal questions, as conversations become natural. Themes about family, interests, job, hobbies, and sports are the most mentioned (Table 27). Respondent EM actually mentions that he tries to make a more personal approach in informal conversations, bringing up interests and hobbies the other partner might have (Table 26, Pos. 83). Contrastingly, respondent FM reveals that such personal contact is needed in Mexico, but it has to be the partner's initiative to avoid being intrusive (Pos. 82). In addition, it seems that the Mexican approach towards women when asking about the marital status, for example, is more sensible and cautious (see Table 27, respondent AF, Pos. 108 and DF, Pos. 85).

Table 27 - Personal life topics

RQ	Resp.	Retrieved Segments
4. 4. 2.	AF	In general terms yes. When we already have trust with the client then it is asked how is the family and more personal questions. AF_Pos_94 Small talk > Personal life (0) R: If I have children, about family but not the marital status no. Yes, about work experience they ask 'so how long have you been here?'. Not about the religion no. AF_Pos_108 Small talk > Personal life (0)
	DF	R: Not marital status no. I ask 'how are you and your family', we do not talk about our sons. If they want to talk about them its fine, and of they do not we move on, I do not focus on that. DF_Pos_85 Small talk > Personal life (0)
	EM	R: Yes. They ask if I am married, if I have children, how many, what do we do with them during free time. About work not so much, usually it is more at a personal level. We usually show pictures of each others children, and that is a very good sign. EM_Pos_93 Small talk > Personal life (0)
	FM	But usually in the first contact with a Mexican that conversation does not kick off, very rarely, it has to be the customer to strike up that conversation. Not in every business is good to have a personal closeness because it also affects and can ruin the business. Mexicans are like that, they need that contact but they have to want it, not us striking it up, otherwise they feel invaded. FM_Pos_82 Small talk > Personal life (0)
	HM	R: In the initial meetings no. Only later, when we have an extra socializing with them do we talk about the family, unless it is very evident that the client has a photo with their children on their cell phone, it is because they like it, so yes, if it is not so evident, we do not go there so soon. HM_Pos_92 Small talk > Personal life (0)
	IM	Some hobby they might have and then we may talk about some interest in sport or politics. If the client opens up about their personal life then we begin to have a union that will develop further and further, and even though we might not really want to know something if they want to speak about it we will ask and talk about it obviously. IM_Pos_35 Personal life > Interests (0)

Source: MAXQDA retrieved segments from the results obtained

The RQ 4.4.3. tries to classify how comfortable the interviewees felt with personal questions asked by their clients. Using a 5-point Likert scale, from not important at all (1) to extremely important (5), it was found that 80% of the managers have felt totally comfortable (5) and 20% fairly comfortable (4). As personal life subjects are usually

brought up in an advanced stage of the relationship, managers state that it becomes natural in an informal environment, and it does not feel invasive or uncomfortable. Additionally, managers recurrently mention the affability of Mexican people and the ease to communicate with. In women's perspective, respondent DF states that in previous years people had a different attitude towards women in the industry that might feel uncomfortable at times, but nowadays it is not the case, there is mutual respect and professionalism (Table 28, Pos. 91).

Table 28 - Level of comfort answering questions

RQ	Resp.	Retrieved Segments
4.4.3.	AF	R: Very comfortable yes. We are talking about very affable people, even people in higher positions like to break the ice rapidly. Although the disparity there is even higher than ours, these people in higher positions are very affable and friendly. AF_Pos. 112 Small talk > Comfort (0)
	DF	R: Yes, I am comfortable because since the beginning, the first contacts with them, I create this invisible barrier where they have to be there professionally and so do I. So, we might talk about some situations but without interfering in our positions, there are two people, regardless their sex, talking, what really counts is these two professionals talking about their business. I do not allow more conversations. DF_Pos. 89 Small talk > Comfort (0) I: So you have never felt uncomfortable? R: No, because I do not allow those actions. And if ever there was a less pleasant comment, which are very few and less and less often, a few years back it was a bit different because they would say 'you are very beautiful' during presentations or on LinkedIn, to which I would never respond to. These actions make me feel uncomfortable so I don't follow the conversation, I stop it. Nevertheless, I have been working for twenty years, and their culture has been changing a lot, those actions were not normal and now and then there would be someone that came out of nowhere and said some comment and I ignore this type of conversation. DF_Pos. 90-91 Small talk > Comfort (0)

Source: MAXQDA retrieved segments from the results obtained

When answering how much time the small talk usually takes in RQ 4.4.4., the respondents state that depends on the client and on the circumstance. Having an informal conversation before the negotiations is a short event, lasting about 10 minutes. However, when the conversation occurs after the meeting it may stretch for some time over lunch or dinner (Table 29).

Table 29 - Small talk duration

RQ	Resp.	Retrieved Segments
4.4.4.	DF	R: It depends. If it is during a dinner it is different. If it is inside the company it is about 10 minutes, usually after the meeting when we can do some comment or say something funny. Before the meeting we only greet each other, ask 'how are you' and start the meeting. DF_Pos. 93 Small talk > Time (0)
	EM	R: Oh that can last a while! We can go to dinner with them, which is very common for them to invite us. So, it can last 1 hour or all night. But before the meeting it is about 5 minutes, it is short because we cannot let that happen, one thing is to go to dinner after the meeting and all the topics are dealt with, another thing is to lose meeting time to talk about those things. EM_Pos. 97 Small talk > Time (0)

Source: MAXQDA retrieved segments from the results obtained

When answering if small talk is an important mean to develop personal trusting relationship with the Mexican partner in RQ 4.4.5., all respondents agreed that it is “the most important of all conversations” (Table 30, respondent BM, Pos. 100). Creating a strong bond with the client is a very important job for the managers, being constantly cultivated by listening and engaging in their conversations about subjects that interests them. Asking about their family and knowing important moments, as their birthday for example, are acts of involvement that show concern and therefore allow for a deeper family-like connection.

Table 30 - Role of small talk in relationship building

RQ	Resp.	Retrieved Segments
4.4.5.	BM	R: It is the most important of all conversations. We just do not know when or how it is going to happen, but yes it is the most important. It is the one that can act as a connecting link with the client BM_Pos.100 Small talk > Relevance on relationships (0)
	DF	R: Yes it is. Because we will allow it and we will make friends out of it. We later become friends with their families specially their wives and we will hang out together. They are very sweet people, but only through respecting our positions and boundaries I can become friends with them. They have changed and now they respect that. DF_Pos.97 Small talk > Relevance on relationships (0)
	EM	R: It is fundamental. It is necessary to know when their birthday is, when their children's birthday is, to ask how they are. EM_Pos.99 Small talk > Relevance on relationships (0)
	IM	Yes, totally. To strengthen the bond between us and the client but always with boundaries. It is important to know what interests and concerns them, to know that is very good. IM_Pos.45 Small talk > Relevance on relationships (0)
	JM	Yes. It is part of trying to gain trust, to open up in order to bond with them, because if we don't we are going to build tension instead. JM_Pos.64 Small talk > Relevance on relationships (0)

Source: MAXQDA retrieved segments from the results obtained

Engaging in small talk allows participants to become acquainted and therefore it is crucial to establish a trusting relationship with the other party which can have a favourable impact on the negotiation’s outcome (Opresnik, 2014; PILPG et al., 2007). The findings in RQ 4.4. reveal that small talk usually occurs while greeting before the negotiation in order to create a lighter atmosphere and to build personal rapport, as Katz (2006) suggests. However, it was found that it does not necessarily happen every time or with everyone before commencing a negotiation. It appears that managers mostly dealing with the Northern Mexico stress that it depends on the company and on the participants present at the negotiation, which corroborates with Katz (2006) view that Northern Mexicans tend to be more business focused. Letting the partner set the pace of the conversation is the most important, thus corroborating with the evidenced by Katz (2006).

Considering RQ 4.4.1., small talk topics such as Mexican culture, economy, weather, and current global events validate the view of Acuff (2008) and Moran et al. (2007). It was found that there is interest from the Mexican side to know about the company's environment, such as the Portuguese culture, economy, and current situation overall, as Osorio (2011) suggests. The topics of politics, religion, sports, and USA relations are complex subjects that should only be approached in line with what the client brings up. Although the literature states that talk about sports with Mexicans is a good topic in conversations (Morrison & Conaway, 2006; Moran et al., 2007; Osorio, 2011), the results show that engaging in this theme depends on the client's interest and willingness to engage in it. Furthermore, talking about USA related affairs is deemed inappropriate by Acuff (2008), nonetheless it appears that it has become more common to discuss economic subjects about the relation between the US and Mexico, due to their strong relation. Furthermore, it seems that the respondents try to search for common interests that can be further developed and to actively listen to their client to understand their needs and interests. All in all, the interviewees stress that the most important is to stick to subjects they master about the work and the purpose of their visit.











Through RQ 4.4.2. it was found that when the relationship between both parties has developed to a higher level of trust it is natural to ask personal questions, contrary to Opresnik (2014) proposal of bringing up the subject. Talking about family, marital status, hobbies, interests, sports and career validates Katz (2006), Morrison & Conaway (2006) and Osorio (2011). Corroborating with Moran et al. (2007), as a high-context culture, valuing family and personal relationships as Mexicans are interested in knowing about the visitor's personal life. Moreover, it was found that the Mexican approach towards women is more thoughtful and sensitive regarding personal questions. In RQ 4.4.3. the findings show that the negotiators are at ease and comfortable with personal subjects. It appears that there is a moment in the relationship to discuss such topics, hence personal life questions do not feel invasive or uncomfortable, they become natural. The results indicate that finding mutual areas of interest fosters relationship building and feelings of comfort, thus corroborating with the evidenced by Adler and Gundersen (2008) and Osorio (2011). Moreover, the respondents stress that above all there is always professionalism and barriers that exist from the beginning.

Through RQ 4.4.4. it was found that engaging in small talk is usually a quick event before the meeting, taking about 5 to 10 minutes, and after the meeting it may stretch for hours,

over lunch for example. As for RQ 4.4.5., informal conversation and trust are the core to negotiate with Latin American countries (Katz, 2006; Hernández-Pozas et al., 2019; Acuff, 2008; Moran et al., 2007). To develop a trusting relationship with the Mexican counterpart involves engaging in small talk and tackling subjects of common interest (Adler & Gundersen, 2008; Osorio, 2011). The results corroborate with the literature, as some respondents state that it is “the most important of all conversations” (respondent BM, Pos. 100). All respondents shared that small talk improves building a relationship and therefore smoothing the negotiation process, thus corroborating with the literature.

The RQ 5. relates to the dress code used in Mexico in business meetings. It was found that 35,7% always dress formal with a complete suit including tie, while 35,7% also wear a complete suit but without tie. Moreover, 28,6% of managers refer to wear somewhat informal clothes, including trousers with a shirt or a company’s polo shirt. Respondent BM justifies this choice of clothing by stating that a formal attire might “push people away” (Table 31, Pos. 108). Some respondents refer that the choice of clothing depends on the client they are meeting with and on the business industry. To answer RQ 5.1., the mostly used colours in suits are darker shades, such as black, dark blue and grey. Sober and neutral colours are predominant, especially white shirts due to the hot weather, and other soft colours such as light pink, blue and beige in women’s blouses/shirts. Floral patterns or flashy colours are not recommended to wear.

Table 31 - Personal appearance

RQ	Resp.	Retrieved Segments
5.	BM	<p>R: Before I would wear a suit with tie, but now I no longer wear it. I confess that as the suit with the tie is very formal, it tends to push people away. I can wear the suit without the tie, or I can wear some nice quality jeans with the company's polo shirt.</p> <p> BM_Pos.108  PRE-NEGOTIATION > Dress code (0)</p> <p>R: I wear a lot of black and whites. I do not wear colours, only dark blue. Usually, for meetings it is black and dark blue colours that it are most used. In Mexico I wear a lot of white clothes due to the sun, there is always good weather.</p> <p> BM_Pos.110  PRE-NEGOTIATION > Dress code (0)</p>
	CM	<p>R: It depends on the client, because we work with large companies and also with smaller ones. In big companies we wear a formal suit, but without the tie, whereas with smaller companies we wear more informal clothes.</p> <p> CM_Pos.106  PRE-NEGOTIATION > Dress code (0)</p>
	DF	<p>R: If it is not a suit I will wear classic trousers and a blouse, it has to be formal and no colourful shirts or blouses. I have to convey a neutral language and not to draw attention. No jeans. We wear the jacket but as soon as we seat we take it off because of the heat.</p> <p> DF_Pos.107  PRE-NEGOTIATION > Dress code (0)</p>
	HM	<p>R: In Mexico, specially in Mexico City suit and tie is used a lot, but it has been losing relevance. If we go to a director, a company owner and we don't know him, it's better to wear a tie. If you're a person we've seen at a fair or on other occasions, you no longer need that, you just need clean shoes, an ironed shirt and combed hair, the tie is secondary.</p> <p> HM_Pos.108  PRE-NEGOTIATION > Dress code (0)</p>

IM

In this industry is not that formal, it is more semi-formal. A shirt or a polo shirt, pants and shoes that usually characteristic of the industry. It is not necessary a full suit with a tie.

IM, Pos. 49

PRE-NEGOTIATION > Dress code (0)

Source: MAXQDA retrieved segments from the results obtained

Attending international business meetings requires a to consider the appropriate dress code (Helmold, 2020a; Opresnik, 2014). In Mexico the literature advocates wearing formal attire in darker colours to business negotiations (Helmold et al., 2020; Axtell, 2007). The results corroborate with the literature, although the use of the tie appears to be losing relevance, which can be attributed to the influence of the casual western attire in more industrialised areas (Hough, 2021a; Hernández-Pozas et al., 2019). Therefore, it appears that the area and the client’s company influence the dress code of managers, namely the mould industry seems to be a more informal environment.

The group of questions in RQ 6. analyses how Portuguese managers perceive time, pace, and punctuality in Mexico. Regarding the punctuality to begin a business meeting in RQ 6., all respondents agree that being punctual and even arriving some minutes before the meeting is a requirement. As representing Portuguese companies and being European, it is important to cause a good impression through this manner (Table 32, respondent DF, Pos. 111). Except for two respondents, 80% refer that it is common to wait for the other party to begin the meeting, which usually takes about 5 to 15 minutes. Respondent GF actually reveals that it is “rare to be less than half an hour late”, and BM and JM share that it could be 1 hour later. The RQ 6.1. assesses if managers expect delays and appointments reschedules in the Mexican market. The majority of the respondents (90%) agreed to expect delays in meetings and on project development, such as responding to emails, or when saying that something is “*ahorita*” which in reality “can take hours or days” (respondent JM, Pos. 68). Rescheduling may ensue, but certain managers referred that there is always flexibility to rearrange meetings.

Table 32 - Punctuality and delays

RQ	Resp.	Retrieved Segments
6. 6.1.	BM	<p>R: Well, about punctuality, if it was in Germany and you arrive five minutes late the meeting is over. In Mexico you can arrive one hour late, there is no punctuality. Usually, it is 5 minutes later. I always try to be punctual, if I have scheduled it at 9h it is at 9h. But I want to tell you is that Mexico is a country so different from others. For example, I can say to my client that 'I am running late, I am in the middle of traffic' and he goes 'don't worry! In half an hour you can come and I'll be here', and then I'll be there.</p> <p>BM, Pos. 112 PRE-NEGOTIATION > Punctuality (0)</p> <p>R: Normally they accept everything. They are not like a German client that will say 'no, you failed, it is over and you can leave'. Mexicans are very flexible and they are the ones who are delayed, if we schedule a meeting to 9h they can show up 1 hour later, and you are seating there in the meeting room waiting.</p> <p>BM, Pos. 114 Punctuality > Delays & rescheduling (0)</p>

6.- 6.1.	DF	R: It is possible to start later, due to traffic or if the client has been in other meeting before. We can be delayed by traffic which in that case we have to call the client and let them know that we are running late. There are always contingencies. Of course that we have to calculate all the distances and if that happens it is due to an unexpected problem, because arriving late looks very bad. We, as Europeans, arriving late looks bad! DF_Pos. 111 PRE-NEGOTIATION > Punctuality (0) R: Sometimes they may call me and ask to reschedule, but that is not a problem because I am in constant contact with them on the previous weeks. DF_Pos. 117 Punctuality > Delays & rescheduling (0)
6.	GF	R: If it was in Germany it was on time. In Mexico, it can be 40 minutes later, it's not 5 or 10 minutes, it's very rare to be less than half an hour late. There was one that we really had to leave. But that's how it is, they are Latinos. GF_Pos. 111 PRE-NEGOTIATION > Punctuality (0)
6.	IM	We have to be there on time! We can wait a bit but we cannot be late because it causes a bad impression. We should arrive 10 minutes earlier. We can wait 10 or 15 minutes. IM_Pos. 53 PRE-NEGOTIATION > Punctuality (0)
6.	JM	They are not very punctual. Making an appointment and being late is a common occurrence, whether for business or pleasure. There is a concern to change this habit that is sometimes almost scandalous, more than an hour late! When they tell us that they are dealing with something "ahorita", it can take hours or days. JM_Pos. 68 PRE-NEGOTIATION > Punctuality (0)

Source: MAXQDA retrieved segments from the results obtained

The RQ 6.2. intends to understand the perception of Portuguese companies towards the Mexican time and pace. Most respondents (50%) perceive it as slow pace in comparison to Portuguese time and rhythm. On the other hand, 20% actually perceive it as a faster pace, indicating the country's industry progresses. Respondent EM believes it to be different in a way that it is not comparable with any other culture, mentioning high work productivity and flexibility, and more relaxed in other non-work-related matters, which also corresponds with the view of respondents JM and HM (Table 33).


Table 33 - Mexican time and pace perception

RQ	Resp.	Retrieved Segments
6.2.	AF	R: I believe that they are evolving in the sense of working faster. Previously they were very slow and have been evolving in that sense. I even think that they are getting ahead of us. AF_Pos. 136 Punctuality > Time & pace perception (0)
	BM	Always fast paced, much more than here BM_Pos. 116 Time & pace perception > Fast paced (0)
	DF	R: Slower. To them a day can last 72 hours, because when they tell me that they will send that email that afternoon and only arrives on Friday. But it may also depend on their hurry to do have things done, generally they are slow but if they are in a hurry they will work quickly. If they say 'give me 5 minutes and I will send it', those 5 minutes can last 12 hours. It is normal and we expect that. DF_Pos. 119 Punctuality > Time & pace perception (0)
	EM	R: It is different, I don't like to make that comparison because they are different from us just like we are different from Germans or French. One fact is that one of the biggest industries, which in this case is the automotive, is there, it is because they are good. They treat things differently. A german is very upright. They are more flexible and do everything the same, it's just that sometimes we don't understand, but they do everything. They are more prone to disorganisation, they are similar to us, we are the same, they live in their own disorganisation, just like us. And when some companies go there for the purpose of organization, these are the companies that do badly and fail because there is a huge cultural shock. In the companies that we know, which are top companies, I would say that in terms of productivity they will certainly be comparable to a European one, almost certainly. Of course, some companies are there because the labour is cheaper, it's true. EM_Pos. 117 Punctuality > Time & pace perception (0)
	GF	The first impression I had in the first 48 hours is that they are very similar to Alentejo's people, both in terms of time and geographical distance, everything is for sometime later, and they go for kilometres and kilometres and then never arrive. They are good people, good gastronomy but with a bit strange geographical temporal concepts. GF_Pos. 113 Time & pace perception > Slow paced (0)


HM

It is the same, in their free time they are more relaxed but at work they are very focused.

 [HM_Pos_116](#)

 [Time & pace perception > Other \(0\)](#)

R: In some things they are so much more advanced than here. For example, if we want to go to a company we cannot enter just like that, if we go to factory we need to wear vests, safety shoes, ear plugs. With covid we also have to do those things of disinfection, measure temperature, etc. There, this type of control in factories is much more demanding.

 [HM_Pos_118](#)

 [Punctuality > Time & pace perception \(0\)](#)

Source: MAXQDA retrieved segments from the results obtained

The literature indicates that Latin American countries tend to perceive punctuality as an abstract concept (Hall, 1959, 1966; Moran et al., 2007). The findings in RQ 6. indicate that meeting sessions beginning 5 to 15 minutes after the scheduled is normal and expected, and beginning half-hour later is frequent, thus corroborating with Acuff (2008). It was found that being punctual is extremely important, even if waiting some time is expected, as Moran et al. (2007) indicate. Moreover, the results contradict Metcalf et al. (2006) and sustains the evidenced in Salacuse (1998) research that Mexico has a low sensitivity towards time indicating greater flexibility and less punctuality.

In RQ 6.1. it was found that meeting and project delays and postponing are perceived as normal in the Mexican environment, thus corroborating with Acuff (2008) and De Leon (2013), that delays and rescheduling occurs with more frequency in polychronic cultures. Nonetheless, managers reveal that being flexible and in constant contact allows to manage such delays and rescheduling.

In RQ 6.2. the findings show that most Portuguese managers perceive the Mexican time and pace and slower than the Portuguese. Even though both cultures are polychronic, the managers reveal that Mexicans are more relaxed in certain aspects, such responding to emails and making project developments but especially in non-work related issues, thus corroborating with the literature (Acuff, 2008; Moran et al., 2007). However, many respondents mentioned that Mexico has a highly developed industry, completely distinguished from the Portuguese, which is increasing its focus on business achievement. Therefore, it was found that the pace varies according to the region, northern areas such as Monterrey or Queretaro are much more business focused than central or southern areas such as Mexico City or Puebla, corroborating with Hough (2021b), Katz (2006) and Hernández-Pozas et al. (2019).

The group of questions in RQ 7. relate to having meals with Mexican clients. In RQ 7. the respondents referred that there is more of an informal environment when having meals with clients (Table 34). Business might continue to be discussed but an informal conversation follows in a more relax environment. Managers will follow the topics

brought up by the other party, whether it is about family, sports or about the industry. Regarding the table etiquette in RQ 7.1. the respondents indicated that they use the same etiquette as in Portugal and revealed that there are not any social formalities to be conscious of. Eating with hands is appropriate when handling certain foods and eating loudly with the mouth open is not appropriate and viewed negatively. Managers suggest being attentive to the other party's behaviours and manners and try to follow the same, especially with people in higher positions. Lastly, the RQ 7.2. assesses which party pays the bill and if there is haggling over who is going to pay. Paying the bill usually falls on the supplier's responsibility, although there might be some haggling demonstrating a level of politeness, there is no doubt that the supplier is going to pay the bill.

Table 34 - Meal environment

RQ	Resp.	Retrieved Segments
7.	AF	<p>R: It is a relaxed environment. It is half business discussion and half trying to build a relationship, we always take care with the commercial side but yes, it is more tranquil.</p> <p>AF_Pos_140 PRE-NEGOTIATION > Meal environment (0)</p>
	BM	<p>R: It is a mix, but 80% it is more about life, politics, sports and so on and the rest might go towards moulds yes.</p> <p>BM_Pos_120 PRE-NEGOTIATION > Meal environment (0)</p> <p>R: No, we eat normally. Eating with the hands it depends, I have clients that eat with their hands, for example that Spanish client that came here, we ate with our hands because it is roasted chicken. In Mexico some foods are also eaten with the hands, in Spain as well but it really depends on the food that we will eat. Keeping both hands above the table will depend on the level of involvement we have with the client. If there is a 'Mr. Dr.' or company owner that does not make you at ease it is obvious that you will be behaving in the same way.</p> <p>BM_Pos_122 Meal environment > Etiquette (0)</p>
	DF	<p>R: After a business meeting what we really want is to eat! So, that is when we talk about cultural themes and other topics that are appropriate. A meeting causes some level of stress and after it is finished all we want to do is to relax. But it is very difficult to have lunch with a client we do not usually do that because we have the day already planned out with upcoming meetings in the afternoon to which we do not want to arrive late.</p> <p>DF_Pos_125 PRE-NEGOTIATION > Meal environment (0)</p> <p>R: If we have lunch in that case, it is a quick meal to satisfy our hunger. We will leave behind the business discussion because most of time we will spend the entire morning talking about that project, so when we go to have lunch it is to refresh, to take deep breaths and to enjoy the food. We will discuss informal topics, such as family, the weather and it also depends a lot on the person we are speaking with.</p> <p>DF_Pos_127 PRE-NEGOTIATION > Meal environment (0)</p> <p>R: No, and to eat with the mouth open is viewed very negatively, Mexicans do not tolerate to watch people chewing with their mouths open, or making noises while eating. Yes we must follow the same etiquette we have here, but after 5 minutes of seating at the table we all get comfortable because we all need to lean back, relax and it alleviates the tension even for them.</p> <p>DF_Pos_129 Meal environment > Etiquette (0)</p>
	GF	<p>R: When we get to lunch or dinner time, the atmosphere is a little more informal. What usually happens is that we take advantage of where there is space to say some commentary about the business or the industry.</p> <p>GF_Pos_117 PRE-NEGOTIATION > Meal environment (0)</p> <p>R: They are more comfortable. We also try to make a difference there because, normally it's always dinner, so first we change the dress code, which is immediately a visual sign that there is a change in register and that we are also serious in this aspect, work is work, cognac is cognac. We are trusted by that, we are very professional in what we do and we become friends with them.</p> <p>GF_Pos_119 Meal environment > Etiquette (0)</p>
	HM	<p>usually when we meet them we try to break the ice after the negotiation, after talking the technical part in depth, or at lunch where I also try not to talk about work. Lunch time is more for relaxing, to open up a little and to become more human, less cold, sometimes it's not easy, but with a little wine and a good steak or good fish, people become friends right away.</p> <p>HM_Pos_16 PRE-NEGOTIATION > Meal environment (0)</p>

Source: MAXQDA retrieved segments from the results obtained

Having meals with business partners is viewed as a great opportunity to gather additional information about the other party, to build relationships and improve business relations (Adler & Gundersen, 2008; Acuff, 2008). Through RQ 7. it was found that having meals with the Mexican business partner is mostly perceived as an informal environment. Business topics can continue to be discussed but the focus is on personal topics and interests of the participants, thus validating Osorio (2011). The managers perceive mealtimes as a period to relax and to build a relationship with the client which corroborates with Adler and Gundersen (2008) and Acuff (2008). Regarding the table etiquette in RQ 7.1., the results validate the literature (Fisher & Ury, 1991; Axtell, 2007; Evason, 2018) that suggests keeping the elbows out of the table and that it is common to use hands to eat certain foods. Moreover, it was found that eating loudly is perceived negatively, corroborating with Graham et al. (2014). Lastly, considering who pays the bill in RQ 7.2., the respondents shared that it is their responsibility to pay the bill to the client, although there might be some haggling, as Morrison and Conaway (2006) suggested, there is no doubt who is going to pay.

The group of questions elaborated in RQ 8. relates to several aspects of offering gifts to business partners. When asked if there was a practice of offering gifts to their clients in RQ 8., the interviewed companies stated that it is a “sporadic occurrence” directed towards determined clients, especially longstanding clients (Table 35, respondent AF, Pos. 122). The objects most frequently mentioned to be offered in RQ 8.1. are small symbolic gifts, namely Portuguese regional products, such as wine, especially Port wine, spirit drinks and liqueurs, such as “*amêndoa amarga*” or “*ginja*”, cheese, olive oil or saints’ statues from Fátima. Regarding the moment to offer these gifts in RQ 8.2., it can be during festive holidays, on Christmas or Easter events, or upon visiting a longstanding client. Lastly, when answering if the partner opened the gift in public, through RQ 8.3. it was found that there are no formalities attached to the act, as some clients opened the gift and thanked the partner, and others did not open and expressed gratitude in the same way.

Table 35 - Gift giving

RQ	Resp.	Retrieved Segments
----	-------	--------------------

8.- 8.3.	AF	R: No. We only offer if they are longstanding client, yet it is a sporadic occurrence. R: If we offer is going to be something typical of Portugal, like a bottle of Port wine, something that we know that they will like.
		AF_Pos. 122 PRE-NEGOTIATION > Gifts (0) AF_Pos. 124 Gifts > Items (0)
	BM	R: Yes at the end of the year, at Christmas. Wine bottles, cheese, olive oil, usually we offer things from our region. If they come here we may also offer a bottle of wine if it is a special occasion or a special client.
		BM_Pos. 104 PRE-NEGOTIATION > Gifts (0)
	EM	R: Yes, we usually offer statues of Fatima's saints, Port wine, 'vinho verde' or 'ginja' liqueur. R: Usually is at Christmas time or when we are going to visit them. If I am going to Mexico to visit a client it's normal for me to bring them a gift.
		CM_Pos. 98 PRE-NEGOTIATION > Gifts (0) EM_Pos. 105 Gifts > When (0)
	IM	At the end of the year, at Christmas, we offer to regular clients. Wine no, but chocolates for example, it has to be more than a gift it has to be a detail.
		IM_Pos. 47 PRE-NEGOTIATION > Gifts (0)
	JM	They appreciate small tokens of appreciation that can be a symbolic gift.
		JM_Pos. 18 PRE-NEGOTIATION > Gifts (0)

Source: MAXQDA retrieved segments from the results obtained

Offering gifts is a symbolic gesture that can be greatly appreciated by the other party, or even considered offensive. Certain objects may be associated with negative connotations and cause a hindrance on the new business relationship (Pitta et al., 1999; Ricks, 2006). The results indicate that offering small and thoughtful gifts is appreciated by the Mexican partner, thus corroborating with Pitta et al. (1999), especially on subsequent visits or on festive holidays as Morrison and Conaway (2006) suggest. It appears that items with negative cultural connotations, such as, silver, cutlery, or yellow flowers (Morrison & Conaway, 2006; Axtell, 2007; Evason, 2018), are not offered nor acknowledged as so by the respondents. Portuguese items are referred as great products to offer as they are appreciated by the Mexican partner. Moreover, although some cultures have social formalities in receiving and opening gifts (Ricks, 2006), it was not found any formality to open the gift, only that the partner would express gratitude for the gesture.









7.4. Characterisation of Profound Negotiations

This section relates to several aspects associated with the phase of substantial negotiations when parties start the actual business negotiation. From RQ 9. to RQ 13. it comprises verbal and non-verbal communication, negotiation organisation, and agreement closing features.

The group of questions established in RQ 9. relate to verbal communication aspects. The RQ 9.1. tries to assess what language is spoken at business negotiations as well as the

necessity to know fluent Spanish or if some knowledge of the language is sufficient to effectively negotiate. It was found that speaking Spanish is a prerequisite to negotiate in Mexico. The respondents referred that Spanish is always spoken even though 30% acknowledged to actually speak “Portunhol”. Speaking “Portunhol” actually demonstrates the effort to speak the client’s language, as the partners “appreciate” the negotiators endeavour and even “help” in situations, hence it does not pose a problem with their Mexican partners (Table 36, Respondent AF, Pos. 138). Moreover, Mexican Spanish appears to be more perceptible and similar to Portuguese than the Spanish from Spain (respondent JM, Pos. 41). Speaking English may apply when the meeting involves more foreign parties, from the USA for example.

Table 36 - Language

RQ	Resp.	Retrieved Segments
9.1.	AF	<p>Yes, in fact it is a prerequisite, lets put it that way, when we go there is to speak Spanish.</p> <p> AF, Pos. 76  PRE-NEGOTIATION > Language (0)</p> <p>R: My superior actually speaks Portunhol but they understand it perfectly and even appreciate when the person assumes from the beginning that he/she speaks Portunhol. They even help, for example, Mexico as much as the Latin America they help and recognise the effort. They try to speak slower to be understood. Conversely, with our neighbours of Spain there is no such help. I believe that they think that we need to know how to speak Spanish.</p> <p> AF, Pos. 138  PRE-NEGOTIATION > Language (0)</p>
	EM	<p>R: We try to speak Spanish, sometimes may come out some Portunhol. Communication is the basis for a negotiation, as it is a very technical business it is simple to understand, we can make a drawing if it is needed. It is easy to understand each other.</p> <p> EM, Pos. 119  PRE-NEGOTIATION > Language (0)</p>
	JM	<p>As curious as the language issue may seem, despite speaking Spanish, they have much more similarities with Portuguese than the Spanish spoken in Spain. In addition to the accent being much more noticeable too. Some meetings are held in English as there are many American companies due to the proximity of the countries and the high volume of business between the USA and MX. Likewise, they speak much better English than our Spanish neighbours.</p> <p> JM, Pos. 41  PRE-NEGOTIATION > Language (0)</p>









Source: MAXQDA retrieved segments from the results obtained

Negotiating abroad may implicate speaking a different language and in some countries is extremely important to know the language as it shows appreciation and effort for the other party (Acuff, 2008). The results indicate that speaking Spanish is a prerequisite to do business with Mexicans, thus corroborating with the evidenced by Cunha (2019). Managers understand that it improves the business negotiation as the communication is enhanced (Herbig & Kramer, 1991; Acuff, 2008). Moreover, although “Portunhol” is used by some managers, it appears that it does not affect the negotiation, as the Mexican partner appreciates the effort of the Portuguese partner. This contradicts Graciano (2021) view of it not being enough to do business but supports Hough (2021b) and ITA (2021a) interpretation of even a display of rudimentary command of Spanish demonstrates a

courteous and a respectful attitude. The results also corroborate with Katz (2006) premise of the Spanish spoken in Mexico being different from the Spanish spoken in Spain.

The RQ 9.2. assesses managers' use of verbal communication during meetings. The results indicate that 60% do not use slang during meetings, preferring direct and short terms and repetition to avoid misunderstandings (Table 37). Some managers (40%) with more time of experience in the market and with a good level of Spanish state to use slang and colloquialisms with longstanding clients. The client's reaction is usually positive towards this approach, appreciating the managers' effort to know the language and culture.

Table 37 - Verbal communication

RQ	Resp.	Retrieved Segments
9.2.	CM	<p>R: It depends on how comfortable we are with the client, but yes we do. And they most of the time laugh about it because we use their slang and not ours, and has foreigners it is funny to them. They appreciate our effort.</p> <p> CM, Pos. 132  Communication > Verbal (0)</p>
	EM	<p>I: Do you repeat to ensure comprehension? R: Yes, we make a summary at the end. And make another summary of the points that we wanted to reach, if everything is covered or not and what each person is going to do, it is very important.</p> <p> EM, Pos. 140-141  Communication > Verbal (0)</p>
	GF	<p>R: There is usually one or another situation where we have to play a little, namely with their idiomatic expressions I think it's part of the dynamics, not at an early stage but later when we realize that they are wanting to touch on some point and if we even know of some expression that fits there well, we use it and they laugh. They even think it's more funny if it comes from me because I'm still learning and they sometimes teach us their expressions and slang. They have an expression which is 'está chido', it almost seems Japanese, which means that something is very cool/good.</p> <p> GF, Pos. 128-129  Communication > Verbal (0)</p>
	HM	<p>R: No, we are always more formal and direct has possible. In my case, I can distinguish work from other things. There are a lot of Portuguese people that go there, begin to learn and they may not realize that they are using slang, you have to use formal language so there are no unpleasant surprises.</p> <p> HM, Pos. 139-140  Communication > Verbal (0)</p>









Source: MAXQDA retrieved segments from the results obtained

In business negotiations, verbal communication using slang or colloquialisms can ignite misunderstandings and be perceived negatively (Adler & Gundersen, 2008). The findings reveal that the use of short and direct verbal terms and repetition is preferred in order to avoid misinterpretations. Thus, corroborating with the literature suggesting that as a high context culture, negotiating in Mexico should focus on short and direct terms and avoiding colloquial expressions to prevent misunderstandings (Adler & Gundersen, 2008; Herbig & Kramer, 1991; Acuff, 2008). Nonetheless, it was found that some managers contradict the evidence since they perceive their partner's reaction to slang and colloquialisms as positive and appreciative.

The RQ 9.3. tries to assess the partners' behaviour when negotiators are speaking throughout the business meeting. The respondents shared that their partner would wait

for their turn to speak in most situations. However, 40% of the interviewees mentioned that sometimes conversations may overlap, and 60% stated that if they interrupt it is with respect and apologise or ask for permission. No manager mentioned having a problem with that, in fact one respondent mentioned the partners' trait of chattiness which allows for dynamic conversations (Table 38).

Table 38 - Speaking aspects

RQ	Resp.	Retrieved Segments
9.3.	AF	<p>I: Do they ask permission to interrupt? R: Yes, they might say 'perdón puedo decir una cosa', always polite yes.</p> <p> AF_Pos. 220-221  NEGOTIATION > Speaking (0)</p>
	BM	<p>R: That depends, there are moments when we speak at the same time but usually there is respect for the situation.</p> <p> BM_Pos. 180  NEGOTIATION > Speaking (0)</p>
	CM	<p>R: There are times in which, depending on the discussion we are having, they speak over us but sometimes we also do that, so there is no problem with that.</p> <p> CM_Pos. 172  NEGOTIATION > Speaking (0)</p>
	GF	<p>R: No, usually it's an isolated thing, they listen and if asked to interrupt they apologize for interrupting to say some idea, or question but in terms of politeness nothing strange.</p> <p> GF_Pos. 161  NEGOTIATION > Speaking (0)</p>

Source: MAXQDA retrieved segments from the results obtained

The findings suggest that the Mexican partners are respectful and polite towards their negotiation partner. There is a demonstration of mutual respect towards the business partner when interrupting someone, as Evason (2018) suggests. As part of the culture, conversations may overlap even though there is not a negative reaction towards these situations since it is rooted and deemed as normal behaviour in certain situations, as evidenced by Adler and Gundersen (2008).

The RQ 9.4. aims to evaluate the partner's response towards disagreeing or refusing with proposals or certain situations. All respondents shared the Mexican approach towards refusing is through an indirect communication method. The most common phrases to indicate such rejection position is "we are going to think about it", "we will keep in touch" or a more direct and polite way to say is to apologise and say they cannot accompany such offer, and the managers understand that the deal is not going to materialise (Table 39).

Table 39 - Refusing

RQ	Resp.	Retrieved Segments
-----------	--------------	---------------------------

9.4. BM	R: Most of the time it is implied when they say 'we really cannot work with this price' and we may also say 'and we cannot lower the price' for example, and it is all clarified that way. They do not say directly 'no' just like that, they say it in a more cordial manner, it is implied, and everyone understands if it is to move forward or not. AF, Pos. 227 NEGOTIATION > Refusing (0)
EM	R: I believe that they usually never just say no. But in my case, projects sometimes take years to be decided, especially when the decision is not on their side. When there is finally a decision that is not a positive one, you can see that they get uncomfortable. GF, Pos. 165 NEGOTIATION > Refusing (0)
HM	R: In Mexico it is more indirect. Even if they know the answer already they do not say immediately, they are not very frontal. It is a flaw, they always leave the door open even when having the awareness that they are not going to accept, we have to learn to read in between the lines. HM, Pos. 178 NEGOTIATION > Refusing (0)
GF	It not that direct, they do not say no at the meeting. They will say that they will call later or keep in touch and that is the commercial side of it, we have to follow up on these clients to understand their decision. And after some calls we understand if they are interested or not. If they answer and keep responding to our emails that is a good sign that they might be interested so we have to move fast. IM, Pos. 73 NEGOTIATION > Refusing (0)

Source: MAXQDA retrieved segments from the results obtained

The findings corroborate with the literature as high context communicators, such as Mexicans, will adopt indirect and subtle ways to refuse offers, instead of directly saying “no”, as a mechanism to avoid confrontation (Brett, 2007; Osorio, 2011). Communicating with nuanced phrases is a Mexican behaviour that the Portuguese negotiators, being also indirect communicators, are already familiar with (Katz, 2006) and are able to understand its meaning.

The group of questions developed in RQ 10. relate to non-verbal communication aspects. The RQ 10.1. tries to evaluate managers' interpretation of the Mexican partner's non-verbal behaviour. The interviewees acknowledge that the first contacts with the market communication may feel somewhat ambiguous to perceive, although it gets less challenging with experience over time. Therefore, using a 5-point Likert scale, from very easy (1) to extremely challenging (5) all managers classify interpreting the Mexican non-verbal behaviour as fairly easy (2). Moreover, respondent GF refers that the social similarities between both cultures allows for easier interpretation (Table 40, Pos. 131). Ultimately, as respondent HM remarks, it depends on the manager's experience in reading people's body language (Pos. 142).

Table 40 - Non-verbal behaviour interpretation

RQ	Resp.	Retrieved Segments
10.1.	AF	R: Yes, we understand, and over time we get familiarised with that type of communication. We then recognise when someone is receptive our proposals or not, with experience it becomes easier to understand. AF, Pos. 171 Communication > Non-verbal (0)

EM	<p>R: That is very important. Hence the preference for doing the face-to-face meeting, this Zoom and Teams thing we use so much now isn't good, because people are doing other things while they are talking. If I was on a Zoom call with you I would be looking at emails and talking.</p> <p>EM_Pos_143 Communication > Non-verbal (0)</p> <p>R: When we start having a relationship with people, it starts to be easier, the first times it's very ambiguous, we don't know how the person is thinking. Then with time we get there.</p> <p>EM_Pos_145 Communication > Non-verbal (0)</p>
GF	<p>R: Yes. They are very much like us on a social level in many ways, at least in terms of to see how the meeting is going. In my case, I have already done some NLP training and it also helps. But they are a lot like us in that aspect, probably the people I found closest to us until today were the Mexicans.</p> <p>GF_Pos_131 Communication > Non-verbal (0)</p>
HM	<p>R: That is a personal opinion, everyone has an experience in reading people, prepare and try to have a correct posture and try to see if other people are comfortable, etc. and we try to be careful.</p> <p>HM_Pos_142 Communication > Non-verbal (0)</p>

Source: MAXQDA retrieved segments from the results obtained

Communicating non-verbally implicates awareness for a determined culture, especially in high-context cultures, which involves gestures, posture, eye movements, facial expressions, and touch (Helmold, 2020a; Adair & Brett, 2004). The findings indicate that experienced Portuguese managers, as a high-context culture, find relatively easy to interpret the Mexican non-verbal behaviour. Nevertheless, as the majority of the communication is transmitted non-verbally (Natlandsmyr & Rognes, 1995), in the first contact with the Mexican market the negotiators found ambiguity and unclarity regarding the other party's reaction and reasoning, which validates Adair and Brett (2004) view that communication requires a level of familiarity with the cultural meaning.

The RQ 10.1.1. considers the classification of the Mexican tone of voice. Using a 5-point Likert scale, from very low (1) to very loud (5), it was found that 60% of the interviewees classified the Mexican voice tone as normal (3), 20% as lower (2) and 20% as louder (4). Most managers referred to be a normal and calm voice tone during meetings, and in informal settings or when there is trust in the relationship, laughing and talking can be louder (Table 41). As a Mexican, Respondent HM, reveals his experience when first coming to Portugal, believing Portuguese people were arguing just by their voice tone.

Table 41 - Voice tone

RQ	Resp.	Retrieved Segments
10.1.1	AF	<p>R: I would say that it is normal, like ours yes. When they see us, they almost "throw a party" but then it is normal. And we are talking about people who now, more in these last years, study in the US or in Europe so their behaviours are very similar as it starts to arise a generalised culture in that sense as well.</p> <p>AF_Pos_173 Communication > Voice tone (0)</p>
	GF	<p>R: Generally speaking, they talk as calmly as I am talking to you. When they laugh they laugh louder of course, and when they get more comfortable they also laugh out loud, it is that Latin thing. It's like I said, in terms of personality of being they are very similar with us. I went through several places in Mexico and I got this feeling in all of them.</p> <p>GF_Pos_135 Communication > Voice tone (0)</p>

Source: MAXQDA retrieved segments from the results obtained





















The tone of voice is a non-verbal communication aspect that varies according to different cultures (Ricks, 2006). The findings indicate that the Mexican voice tone is normal, even though in certain events can get lively, it is usually calm, thus corroborating with the evidenced by Helmold et al. (2020) and Katz (2006). Moreover, it is revealed that the contact Mexicans have with international affairs, such as studies or business, may have influenced and generalised certain behaviours, as ITA (2021a) suggests.

When classifying the Mexican body expressiveness level in RQ 10.1.2., 90% shared that Mexicans are more expressive with their body and gestures, and 10% mentioned that “they are more tranquil than us” (respondent CM, Pos. 138). The results corroborate with Moran et al. (2007) and Metcalf et al. (2006) evidence that Mexicans are expressive with hand movements, physical contact, and emotions.

The RQ 10.1.3. considers body language aspects that are important to pay attention or to avoid, understanding in what way it influences interactions. It was found that laughing, crossing both arms, reclining back on the chair and pointing the finger are postures and gestures considered by negotiators. It was found that in Mexico laughter can assume three different meanings, revealing genuine amusement, discomfort, or mockery (Table 42, respondents AF, Pos. 175 and BM, Pos. 148). Respondent AF revealed that inadvertently it might have happened to put both hands inside the pockets, regardless it is important to try to keep both hands visible (Pos. 179). Respondent EM mentions that crossing the arms is also a posture to avoid doing (Pos. 157). Leaning back on the chair is signal that respondent AF mentions to interpret as a negative reaction from the partner and tries to “get around” that situation. Regarding gestures, the interviewees mostly gave a negative answer to gestures, such as pointing the finger or making an OK sign with thumb and index finger, however, others (20%) when answering positively state that the client’s reaction is normal or that it is not taken on a serious note. Respondent BM refers that “these postures and gestures and learned and studied” and there is an effort to improve such non-verbal cues (Pos. 150). Moreover, the findings indicate that all managers maintain visual contact during meetings, in a way without exaggerating or “touching extremes” (respondent DF, Pos. 155). Keeping eye contact appears to be important to be

able to analyse the behaviour of the other party and the message it may imply (respondent GF, Pos. 139).

Table 42 - Body language

RQ	Resp.	Retrieved Segments
10.1.3.	AF	<p>R: Yes, we laugh if there is something like 'oh we're not liking this', but only if there is a higher level of trust.</p> <p> AF_Pos. 175  Communication > Smile & laugh (0)</p> <p>R: Hum, I think that we even do that inadvertently if we are not enjoying something isn't it? Those are things that we do not realise that we do. They probably do it as well. We could have done it inadvertently, as far as I can remember we didn't, but we could have. We always try to keep our hands visible, we consider that important. Even to create that idea or to show that we are confident in what we are presenting and in what we are saying. The important thing is to keep our hands showing.</p> <p> AF_Pos. 178-179  Communication > Body language (0)</p> <p>R: We understand them. Normally, the non-verbal communication in a meeting if the person for example leans back we understand that the person is not liking it we then try to get around.</p> <p> AF_Pos. 169  Communication > Non-verbal (0)</p>
	BM	<p>R: Almost always and they as well. When somebody walks in with a straight face that meeting is usually lost. However, there are different types of laughter, for instance, there is the mocking laughter in which the best thing to do is to end the meeting because they are mocking you. So, we must know how to identify these types of laughter, if it is mockery or if it is a genuine satisfaction.</p> <p> BM_Pos. 148  Communication > Smile & laugh (0)</p> <p>R: No. These postures and gestures are learned and studied and we try to improve them. I have done it, but not anymore because I learned not to.</p> <p> BM_Pos. 150  Communication > Body language (0)</p> <p>I: Have you ever been pointed at?</p> <p>R: Yes. They do not take it seriously like we do.</p> <p> BM_Pos. 157-158  Communication > Gestures (0)</p>
	EM	<p>R: No. We hardly ever cross our arms, it is another thing not to do.</p> <p> EM_Pos. 156-157  Communication > Body language (0)</p>
	HM	<p>I: Have your clients ever point the finger at you?</p> <p>R: No, that is just like in here, it is not pretty.</p> <p> HM_Pos. 153-154  Communication > Gestures (0)</p>
	DF	<p>I: Always, it is important. Nothing too long, without touching extremes.</p> <p> DF_Pos. 155  Body language > Eye contact (0)</p>
	GF	<p>R: Yes. It's also a matter of reading if we notice that the person is looking away and is not comfortable so we don't force it either, we also notice when someone is paying more attention to a certain element and we have to have that skill.</p> <p> GF_Pos. 139  Body language > Eye contact (0)</p>











Source: MAXQDA retrieved segments from the results obtained

The information generated through non-verbal cues must be interpreted using acquired knowledge and shared accordingly (Helmold, 2020a). The results indicate that Mexicans may display laughter to mask discomfort, as Ricks (2006) suggests, or to mock. Putting hands inside pockets may convey lack of interest or not telling the truth and putting both hands on the hips may be perceived as a challenging body position (Morrison & Conaway, 2006; Axtell, 2007). To both of these non-verbal communication aspects, most managers acknowledged these body language cues and referred not to practise such postures. Leaning back on the chair is acknowledged to transmit a lack of interest or dislike on what is being said (Acuff, 2008; PILPG et al., 2007). Moreover, results suggest that

gestures can convey inappropriate signals, such as pointing the finger may be offensive (Pease & Pease, 2004; Katz, 2006), however, in a developed stage of the relationship these gestures may not be perceived as seriously. Using open gestures, such as keeping hands visible and laying the palms up, was found to be important as it often shows openness and honesty agreeing with Pease and Pease (2004). Lastly, the results show that maintaining eye contact during a meeting in Mexico is important, thus corroborating with Katz (2006) that frequent eye contact helps to develop trust and conveys sincerity. Staring directly seems to be avoided by the respondents, as Helmold (2020g) and Morrison and Conaway (2006) suggest that sustained eye contact may convey aggressive and threatening behaviour, and intermittent contact is preferred.

The RQ 10.2. assesses if and in what situations there were moments of silence during the negotiation meetings and how did it make the managers feel. It was found that 70% of the interviewees that have experienced silence during negotiation meetings with their Mexican counterpart state to sometimes be more than three seconds as to may occur during a decision or reflection, or when some situation is not being agreed to (Table 43). Respondent DF observed that it is important to interpret the silence along with the partner’s body language to try to understand their perception. Additionally, DF mentions to break the silence by rephrasing the situation or lightening the ambient introducing an informal topic, such as the weather (Pos. 175-177).

Table 43 - Silence

RQ	Resp.	Retrieved Segments
10.2.	DF	<p>R: Yes, every now and then people need to take a deep breath we might say something out of the business context and then we resume.</p> <p> DF_Pos. 173  Communication > Silence (0)</p> <p>R: Maybe more than 3 seconds. But it isn't just when there is silence or when they speak, it is their body language that I always try to interpret. It is this whole range of actions which I cannot segregate because I'm used to it, when I see their body language and silence then I will say something. It can be about the weather, if it is hot or that I didn't expect to rain today, something like that might come up and we have to be very creative to not let the negotiation collapse.</p> <p> DF_Pos. 175  Communication > Silence (0)</p> <p>I: Is it uncomfortable?</p> <p>R: I do not let it get to that point, I will break the silence. When I notice that a silent moment might come up I always try to say something like 'what if we could think about it in a different way', 'what if we put the proposal like this' or 'what if we could alter that'. But sometimes they need to think about it and I let them.</p> <p> DF_Pos. 176-177  Communication > Silence (0)</p>
	EM	<p>R: It can last a long time, yes much more than 5 seconds, we've had situations with problems but we have to have the courage to face these problems.</p> <p> EM_Pos. 179  Communication > Silence (0)</p> <p>R: It is normal, it is part of the process. Sometimes it is a mutual silence, when we are reflecting for example.</p> <p> EM_Pos. 181  Communication > Silence (0)</p>

GF	R: In those situations we try to disguise the discomfort but try to read what happened, what is happening or what is left behind. But sometimes it's not a big deal, I'm even remembering when the man was sending an email and then apologized because it was urgent, this relaxation that exists now with being with cell phones is something that happens with some frequency and then we just stand there waiting and watching.
	GF_Pos. 153 Communication > Silence (0)
HM	R: It is not good! We have to speak. And when we finish the presentation we don't have to be standing there all in silence, when it is over we thank them and begin our farewell.
	HM_Pos. 166 Communication > Silence (0)
IM	R: Yes, the silence is very upsetting. It doesn't always happen, it is likely to occur when there are some technicalities or price to revise or if they are thinking about a decision.
	IM_Pos. 65 Communication > Silence (0)

Source: MAXQDA retrieved segments from the results obtained

The findings reveal that silent moments occasionally occur during business negotiations in Mexico. Most respondents refer that silence from the other party is not a good sign to the negotiation environment and others share that sometimes the other time is having a reflecting moment. These findings corroborate with the literature as pauses in Mexico are frequently used to think and prolonged silent moments may be associated with something more serious about the deal (De Leon, 2013; Katz, 2006). The managers attempt to fill the silence contradict Adler and Gundersen (2008), since breaking the uncomfortable moment of silence becomes a priority to the negotiators. Regardless, it was observed that the respondents try to interpret the whole context to properly read the situation, which corroborates with Rodrigues (2019).

The group of questions elaborated in RQ 10.3. relate to human space or proxemics. The RQ 10.3. evaluates the proximity managers and Mexican clients have. The managers stated that they are close about 40cm to 60 cm and even more if there is trustful relationship to hug or touch, such as a pat on the back (Table 44, respondent EM, Pos. 169). The RQ 10.3.1. considers whether the Mexican party has ever touch shoulders or arms and RQ 10.3.2. refers to whether both parties have embraced. Most interviewees (90%) responded positively to both research questions supporting their answer with the partner's necessity to feel close and respected through the physical actions of patting on the back, hugging and touching (Table 44). Managers denote that this type of approach only occurs when the relationship between both parties is more developed and at that point greeting with a hug or a kiss is natural.

Table 44 - Human space & physical approaches

RQ	Resp.	Retrieved Segments
10.3.	EM	R: Very close, we are closer when we hug each other, pat ourselves on the back. It is not everywhere you can do to that, to a Mexican you have to.
		EM_Pos. 169 Communication > Proximity (0)

IM	Yes, there are clients that need that proximity. It represents respect and before the pandemic many clients wanted to hug as well. IM_Pos. 63 Communication > Touch (0)
HM	R: Yes, after some time. It is very important in Mexico to greet someone with an embrace. Someone we know already for some time, some years I will never greet them with a handshake it is always with a hug upon arriving and departing. HM_Pos. 162 Touch > Embrace (0)

Source: MAXQDA retrieved segments from the results obtained

The RQ 10.3.3. intents to assess managers’ reaction to their clients becoming close and the RQ 10.3.4. tries to perceive the level of comfort managers experience when engaging in these physical actions. All the interviewees mentioned to have never withdrawn from their partner’s physical approaches since those contacts occur when there is already a “great level of trust” in the relationship (Table 45, respondent AF, Pos. 193). Therefore, the majority of the interviewees (80%) stated that they have felt totally comfortable with touching or embracing behaviours. Moreover, it is acknowledged that Mexicans interact using more physical space which it is accepted and perceived positively by the interviewees, as it also comes from warm and affable people. Nonetheless, two respondents mentioned that, although not appreciating such approaches and having never withdrawn from an uncomfortable situation, they engage in them since it is part of the Mexican culture (respondents AF, Pos. 201 and FM, Pos. 152).

Table 45 - Physical distancing & comfort

RQ	Resp.	Retrieved Segments
10.3.3. & 10.3.4.	AF	R: If I ever felt like they were in personal space no. With clients that we have a greater level of trust with well they really like hugs! I think that we Portuguese are warm people but not as much, so we have to adapt to that reality and that’s basically it, and to accept it because they are affable to that point. AF_Pos. 193 Communication > Proximity (0) R: Personally, I do not appreciate it much but it is almost like a proforma that we have to do, because it is part of them and we have to adapt. AF_Pos. 201 Touch > Comfort (0)
	DF	R: No, their culture isn’t like that anymore. They know their place. And from the beginning I will steer the conversation away from topics that are unprofessional. They already know who are they meeting with so all the limits are respected. DF_Pos. 165 Communication > Proximity (0) R: The newer generations are educated in that sense, they know information about what not to do or say and are inclusive to identify whether it is a man or a woman as a professional person. I do not have any problem regarding that issue because I do not allow it. I consider them as friendly people and not abusive or offensive. DF_Pos. 166-167 Communication > Proximity (0)
	FM	R: There are those who like to be closer, but no, I haven't had any uncomfortable situations yet. But if it happens, I move away because I don't really like proximity and sometimes they can't measure proximity. FM_Pos. 151-152 Communication > Proximity (0)
	GF	R: No. I have clients who, from the moment they realize that they are comfortable, and that as I am a woman and that they have to treat me on an equal basis, they say goodbye to me with a hug, a hug of companionship, as if to say have a nice trip, take care of yourself. When they gain trust with us, you can see that it is genuine, they show a concern that goes beyond the working relationship, which is also always very rewarding. GF_Pos. 144-145 Communication > Proximity (0)

Source: MAXQDA retrieved segments from the results obtained

The findings in RQ 10.3. indicate that in Mexico participants stand relatively close to each other and become even closer when engaging in physical actions, thus corroborating the evidenced in Helmold et al. (2020) that the Mexican space is characterised by close proximity. Touching constitutes an important role in communication in Latin American cultures (Acuff, 2008). Through RQ 10.3.1. and 10.3.2. it was found that the managers acknowledge this cultural aspect evidenced by Acuff (2008), as touching, pats on the back and embraces are common in longstanding relationships with Mexican business partners. These results corroborate with Adler and Gundersen (2008), Moran et al. (2007) and Axtell (2007) view that these physical approaches are signs of trust and respect in the Mexican culture which are appreciated in relationships. In RQ 10.3.3. and 10.3.4. it was found that although physical proximity may not be of interest of all managers, physical distancing is acknowledged to create tension and be insulting to the other party, thus validating Morrison and Conaway (2006) and Katz (2006). Therefore, embracing closeness appears to be important specially to develop trust and relationships.

The following group of questions in RQ 11. assesses several cultural negotiation aspects. When evaluating how negotiation meetings are organised in Mexico in RQ 11.1., it was found that to 60% there is an absence of a restrict plan and guidelines are used, whereas 40% stated that an agenda is thoroughly prepared and followed through in the meeting. Furthermore, 40% mentioned to solely address expected subjects (Table 46). While 60% of the interviewees referred that the conversation often disperses into different subjects during the meetings, to which respondent EM refers to “try to resume to the business” (Pos. 183). Additionally, managers state that it ultimately “depends on the client”, whether to approach a past subject or topics of outside nature (respondent IM, Pos. 69).

Table 46 - Meeting organisation

Code System	1	2	3	4	5	6	7	8	9	10	11			
NEGOTIATION												0		
Meeting organisation					1	1	1	1	1	2	1	1	2	11
Holistic discussions	1	1			1			1			1	1		6
Absence of a restrict plan	1	1			1	1					1	1		6
Address only expected subjects			1			1			1				1	4
Follow a plan/agenda			1				1	1				1		4
SUM	2	3	3	3	3	3	4	3	3	4	3	4	3	31

Source: MAXQDA Code Matrix from the results obtained

The findings corroborate with the evidenced by Evason (2018) that meetings do not usually follow the proposed agenda systematically, rather a guideline is used to address

topics. Moreover, the discussion of informal, outside the business topics may occasionally happen during negotiations, thus validating Osorio (2011) and De Leon (2013).

The RQ 11.2. relates to the approach towards the content of the business. The respondents mention to approach a general framework before the meeting, specifically during the contacts previous to the encounter, and at the business meeting the objective is to tackle the specificities of the deal (Table 47). Technical specifics and details about the product, doubts and clarifications are approached in the first place. The price and delivery times are discussed last.

Table 47 - Agreement building approach

Code System																				
NEGOTIATION																				0
Agreement building	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	10
Other																				0
Top-down	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	10
Bottom-up																				0
SUM	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	20

Source: MAXQDA Code Matrix from the results obtained

The findings corroborate with Metcalf et al. (2006) negotiation theory of subject approach since general themes are discussed before the substantial negotiations and proceeds to specific items of the deal, such as price and deadlines, afterwards.

The RQ 11.3. considers the form of approach towards the subject of the negotiation. With the exception of 10% of the respondents, the majority of the interviewees stated that their Mexican partner would directly question negotiation aspects, such as price and delivery times, without any implicit meaning (Table 48).

Table 48 - Negotiation subject approach

Code System																				
NEGOTIATION																				0
Business content	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	9
Subject approach	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	9
Indirect										1										1
Direct	1	1	1	1						1	1	1	1	1	1	1	1	1	1	9
SUM	1	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	28

Source: MAXQDA Code Matrix from the results obtained

The findings are consistent with the literature revealed by Metcalf et al. (2006), that Mexican communication in negotiation specific issues is direct, rather than the indirect communication approach supported by the general literature, which can be justified by the global dissemination of western practices.

The RQ 11.4. attempts to evaluate the influence of personal and logical arguments when negotiating a deal. The preference to use emotional arguments was shared by 70% of the respondents, indicating the need of the market to connect emotionally between buyer and seller. This practice emphasises the necessity to develop a relationship with the Mexican partner, to cultivate trust and a familiar environment, and to be able to achieve enhanced outcomes (Table 49, respondent IM, Pos. 9). Whereas 30% shared that the use of rational arguments in the first contact with the client and only later there is a preference to use emotional arguments when there is a developed business relationship. In Table 49, the respondent AF justifies this practice stating that having a consolidated relationship with the client allows for the use of the emotional factor, as the relationship history “carries some weight” in future businesses (Pos. 233). Overall, there is a focus on assuring the product and service quality and follow-up during the negotiation and fulfilling that commitment.

Table 49 - Argument type

RQ	Resp.	Retrieved Segments
11.4.	AF	R: In longstanding business relationships that carries some weight since they already know our work, our follow-up so there is an emotional factor in that relationship. In the absence of such business relationship then no. AF_Pos.233 Business content > Arguments (0)
	BM	R: Yes more personal. I always try to offer more than a mould, so I really emphasise our after sales service which works best than other arguments BM_Pos.190 Business content > Arguments (0)
	IM	To know how to listen to them, to have that relationship, closeness with them because it is difficult for a business to happen at a first try you know? If you are regular and close with your client it gets familiar, you can ask about the family and so on, that closeness and follow up will facilitate the negotiation a lot, it will open a lot of doors to future business. IM_Pos.9 Arguments > Emotional/personal (0)





Source: MAXQDA retrieved segments from the results obtained

The findings suggest that emotional arguments ultimately carry weight when negotiating in Mexico, whether if it is approached right from the beginning or later on the relationship. These results are consistent with the literature (Acuff, 2008; De Leon, 2013; Osorio, 2011; Metcalf et al., 2006) that emotional arguments are usually more effective than empirical data.

The RQ 11.5. evaluates the decision-making power of the Mexican team. The power to decide on a deal seems to diverge among the respondents. Three interviewees identified the Mexican decision at the top and three identified it as a group consensus. The last four respondents described it as mixed since it depends on the size and type of company they are dealing with. This group of respondents shared that in smaller sized companies the decision-making power would be at the top, with the administration or the owner, whereas

in larger companies the decision lies in a group consensus, or scaled up to the headquarters, in the case of some MNEs (Table 50).

Table 50 - Decision-making power

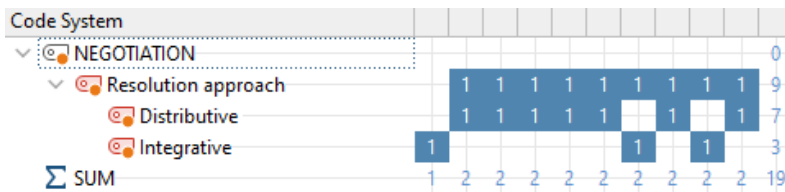
RQ	Resp.	Retrieved Segments
11.5.	BM	It depends on the company. In some firms, the owner takes that responsibility, in others, 20 people are necessary to take that buying responsibility or those in which it falls on the project leader. It depends on what the company buys, and their sector.  BM_Pos. 192  NEGOTIATION > Decision power (0)
	GF	R: It is usually by consensus, extended teams, often multidisciplinary. When they are multinationals, they are still very dependent on their countries of origin.  GF_Pos. 173  NEGOTIATION > Decision power (0)

Source: MAXQDA retrieved segments from the results obtained

The findings indicate that the decision-making power is moving towards group consensus rather than a hierarchical, one-leader decision, which contradicts the common literature (Metcalf et al., 2006; De Leon, 2013; Katz, 2006). The analysis of the results indicates that the respondents' Mexican partners represent large companies, namely multinational firms, which are inserted in highly industrialised areas. This implies that the growing presence of MNEs in emerging markets ultimately transfers technology, know-how or organisational and managerial practices to local subsidiaries (Rugraff & Hansen, 2011). In addition, today's global interdependence has shaped international business negotiators to exercise a more collaborative approach, contrary to the traditional high PDI and paternalistic Mexican leadership style (Howell et al., 2007). Hence, following participative leadership behaviours emerging in industrialised regions (Howell et al., 2007), the decision-making power is increasingly lying on group consensus.

The RQ 11.6. considers the perception of the negotiation resolution of the Mexican partner. Regarding the partners approach towards the business outcomes, 30% of the respondents shared that it is an integrative approach and 70% classified it as a distributive approach (Table 51).

Table 51 - Negotiation resolution



Source: MAXQDA Code Matrix from the results obtained

Culture influences the perception of negotiators towards the outcome of the negotiation (Lewicki et al., 2016). The results corroborate with the evidenced by Natlandsmyr and Rognes (1995) that Mexicans achieve more distributive outcomes due to high masculinity, high uncertainty avoidance and high power distance scores, therefore contradicting Salacuse (1998) and Metcalf et al. (2006). Additionally, it validates Katz (2006) view on the Mexican competitive style and employment of distributive bargaining, and Howell et al. (2007) premise of the culture’s individualist behaviour when found in subjects outside of their family.

The RQ 12. and 12.1. relate to the number of meetings and time necessary to reach an agreement and close the deal, respectively. The results captured two distinct approaches that influence the number of meetings necessary. Meeting the client for the first time face-to-face may result from a prospecting trip, where managers present the company and its solutions, or may be a result of the culmination of several contacts and proposals exchanged previously (Table 52). Therefore, on the first occasion, the respondents reveal that it may take several meetings and contacts, ranging from 3 to 6 meetings on average throughout various months, which may take about 1 to 5 months. Whereas, with previous communications closing the deal may take only 1 to 3 meetings in the period of 2 weeks on average. Most managers (80%) refer that when going to Mexico it is with the intention to close the deal.

Table 52 - Reaching an agreement

RQ	Resp.	Retrieved Segments
12.	DF	R: It can be 2 or 3 meetings. If I go to Mexico to close a deal of a project it will be concluded on that day. If it is a presentation meeting which is to follow through it may take various meetings. DF, Pos. 209 NEGOTIATION > Closing the deal (0)
	HM	R: Usually, one meeting. Before that meeting happens there was already many contacts, proposals, emails and if we are meeting it is because it is more guaranteed. HM, Pos. 192 NEGOTIATION > Closing the deal (0)

Source: MAXQDA retrieved segments from the results obtained

The results indicate that on first negotiations with a Mexican partner can take some months to actually reach an agreement and close the deal. This validates the evidenced by Katz (2006), Brett (2007), Moran et al. (2007), De Leon (2013) that in a traditionally slow paced, collectivist and high context culture, negotiations and decision-making tend to be slow and prolonged, involving relationship building prior substantial negotiations. Moreover, when there is already a relationship with a business partner, the following negotiations will elapse much faster. Moreover, closing the deal is made in person, as Moran et al. (2007) demonstrate.

The RQ 12.2. considers the form of how final agreements are concluded. All the interviewees stated that there is always a purchase order to conclude the agreement. The purchase order usually comprises the product specificities, price, and delivery time. Moreover, 70% of the respondents revealed that it depends on the partner's company, there may be required a detailed contract, or a confidentiality agreement and some companies may not have any document prepared, as respondent AF explains (Table 53, Pos. 251). Some companies (40%) use a detailed contract with the agreement specifics. Additionally, 70% of the interviewees emphasized the importance of having an email summarising the agreement conditions.

Table 53 - Final agreements

RQ	Resp.	Retrieved Segments
12.2.	AF	R: It depends on the client. There are clients that start off with a confidentiality agreement as soon as we receive the budget request, and there are others who don't even have that. There are some that make a contract with the stipulated deadlines, prices, and everything else, for example, in the event of existing a problem some clients would name somebody to deal with it all according to the laws of Mexico and so on. That is to say that there are firms that already have all of that prepared and there are others that do not have absolutely anything. AF_Pos. 251 Closing the deal > Agreement conclusion (0)
	EM	R: We have a purchase order that specifies price, delivery time and then we have a specification that accompanies the purchase order with everything we have to fulfill. EM_Pos. 221 Closing the deal > Agreement conclusion (0)

Source: MAXQDA retrieved segments from the results obtained

The findings indicate that verbal agreements are not sufficient to conclude the deal. Agreements are always concluded and confirmed with a written document, usually a purchase order or a contract, depending on the company, thus confirming Moran et al. (2007) and De Leon (2013) evidence. Moreover, capturing, summarising, and exchanging written results and agreements at the end and after the negotiation appear to be highly relevant, which corroborates with Katz (2006) and Helmold (2020a).

The group of questions elaborated in RQ 13. relate to the role of building a trusting relationship in the Mexican market. The RQ 13. attempts to evaluate the need to develop a trusting relationship with the Mexican partner in order to achieve successful negotiations. Using a 5-point Likert scale, from not important at all (1) to extremely important (5), all the interviewees classified as extremely important (5). It was found that to be present, close, and flexible are highly valued traits when negotiating in the Mexican market. Managers referred that without trust it is not possible to move further with the deal, the feeling of confidence in these companies work and their representatives has to be constant otherwise it can fade out very quickly (Table 54).

When answering if approaches towards developing a trusting relationship precede substantial negotiations in RQ 13.1., it was found that most of the respondents (90%) agree with this premise. As referred in RQ 4.4., engaging in certain informal topics when meeting for the first time only occurs when the other party allows space for it by bringing up some comment or observation. Hence, as it depends on the client the possibility to engage in informal conversation allowing to break the ice and begin to develop a relationship, not all approaches towards relationship building will necessarily precede substantial negotiations. However, the results show that it precedes decision-making, as “late decision makers” it appears to be important to stay close and build trust along the entire negotiation process (Table 54, respondent GF, Pos. 125). Therefore, even though managers’ exhibition of professionalism and work proficiency ultimately pave the way towards negotiations progresses, it is by demonstrating openness towards the Mexican culture and being in constant presence that propel the relationship and consequently effectiveness in the business negotiation. Managers highlight the need to foster such relationship with the Mexican client “without losing the business purpose” (respondent BM, Pos. 130).

Table 54 - Establishing relationships

RQ	Resp.	Retrieved Segments
13.	AF	<p>R: Oh yes it is very important. They are very friendly and affable, but they also like to feel that from us. They like to feel that openness from us and not that we are rigid or inflexible people.</p> <p>AF_Pos. 152 PRE-NEGOTIATION > Trusting relationship (0) I: What actions result in relationship building? R: Well, all of those questions and ice breakers in the beginning really help.</p> <p>AF_Pos. 155 PRE-NEGOTIATION > Trusting relationship (0)</p>

BM	<p>R: A 100 percent! If you do not have that trust you cannot sell there.</p> <p>BM_Pos. 128 PRE-NEGOTIATION > Trusting relationship (0)</p> <p>I: What actions result in that?</p> <p>R: To talk about life, common interests, without losing the business purpose</p> <p>BM_Pos. 129-130 PRE-NEGOTIATION > Trusting relationship (0)</p>
DF	<p>R: It is very important. Without trust we cannot make the deal, nor even go a step further with anything. If they look at us with diffidence there is no moving forward.</p> <p>DF_Pos. 133 PRE-NEGOTIATION > Trusting relationship (0)</p>
EM	<p>R: Extremely important, but that's in Mexico and everywhere. I would say that our company doesn't sell moulds, it sells trust. Let me explain, if you go to a car dealership and you want to buy a car and you have it in front of you, if it is not that one it is a similar one, but you know that will be that one, its colour and everything, you can even try it. When it arrives there is no disappointment because it is that one, and cars usually come out the same. In our business this is not the case, when the customer buys, he does not know what he will receive because what he buys from us is that piece of engineering. He has a certain challenge and he wants to produce, let's say, a mobile phone and we tell him 'to make the phone, we'll make twenty moulds and take them into all of those machines and after we will start to ship the pieces and you start to make them'. What did they hear until now? Nothing. What guarantee do they have that this will happen? None. But they will buy it. So either do they have confidence and buy or they don't. What we sell isn't moulds, it's trust, because that's what the customer pays us to be rest assured. If they decide to spend less money, to take the risk and buy the product for example from an Asian supplier, that client has ceased giving privilege to trust and started giving privilege to money. They are compromising their tranquility, because they are the ones who will have to go after the problem, when the customer buys from us, the customer is rested from the start, because he knows that on that day there will be those pieces, on that day and at that time.</p> <p>EM_Pos. 133 PRE-NEGOTIATION > Trusting relationship (0)</p>
GF	<p>R: I believe it is very important. With them, a person has to be close. They are late decision makers, so sometimes they come very warm but then they cool down very quickly. You have to be very close to them.</p> <p>GF_Pos. 125 PRE-NEGOTIATION > Trusting relationship (0)</p>

Source: MAXQDA retrieved segments from the results obtained

The RQ 13.2. considers the importance that Portuguese firms classify to having a local intermediary in Mexico. It was found that 40% have, or had, an intermediary in Mexico, which is in charge of prospecting clients, presenting the company, and facilitating the first contact (Table 55). Managers agree that working with a local intermediary in Mexico is important to establish new contacts and getting to know the market quicker.

Table 55 - Local intermediary

RQ	Resp.	Retrieved Segments
13.2.	AF	<p>R: At the moment we have a local intermediary that works at our subsidiary. Usually he visits the companies there, presents the company and deals with the rest. A local person there sometimes is good to break the ice quicker.</p> <p>AF_Pos. 157 PRE-NEGOTIATION > Intermediary (0)</p>
	CM	<p>R: In Mexico currently no. But in the past we had an agent, and he 'opened the doors for us' to get clients.</p> <p>CM_Pos. 126 PRE-NEGOTIATION > Intermediary (0)</p> <p>R: Yes, sure. In the beginning he was important because that was how we go to know the country.</p> <p>CM_Pos. 128 PRE-NEGOTIATION > Intermediary (0)</p>
	EM	<p>R: We already had once but we don't have one anymore. Even the companies we had in Mexico were in partnership with local people, to make cultural integration easier. It is easier for a Mexican to negotiate with a Mexican than a Portuguese with a Mexican.</p> <p>EM_Pos. 135 PRE-NEGOTIATION > Intermediary (0)</p>

Source: MAXQDA retrieved segments from the results obtained

The results in RQ 13. indicate that developing a trusting relationship with the counterpart is crucial to do business in Mexico. The absence of trust in the business relationship puts the business negotiation in a vulnerable situation, hampering achieving successful outcomes. These findings corroborate with the literature since Mexico is a relationship-



oriented and risk-avoidant culture, it emphasizes relationship building engaging in slow trust prior to substantive negotiations (Brett, 2007; Acuff, 2008; Moran et al., 2007). Moreover, engaging in informal discussions, cultural background, personal topics, having an active communication and dedication provides the foundation to develop relationships, as supported by Acuff (2007) and Herbig and Kramer (1991). Additionally, local intermediaries in the target country can ease the process of negotiating with new clients. Initiating the contact and being present may positively influence company's opportunities in the Mexican market. The findings validate Morrison and Conaway (2006), Katz (2006) and Helmold et al. (2020) view that a person assigned to the market can bridge the gap between both cultures by leveraging the initial contact.

7.5. Characterisation of the Post-negotiations

This section analyses the results of the post-negotiation phase and the follow-up strategy about negotiating in Mexico.

The group of questions elaborated in RQ 14. focuses on the follow up sessions after closing the deal. In RQ 14.1. it is questioned if managers keep in regular contact with their clients. All respondents answered positively to the research question. The RQ 14.1.1. considers the time period that negotiators have to be in contact with their Mexican client. It was found that during the manufacturing process, 80% of managers maintain contact with their client on a weekly basis to report progresses and exchange technical information. After the delivery of the product, the time period to remain in contact is every month. The respondents highlighted the importance of following up on the subsequent stages of business, such as the piece manufacturing process, the shipping and the after sales service. The ability to be present after closing the deal was highly emphasised by the respondents on Table 56.

Table 56 - Post-negotiation

RQ	Resp.	Retrieved Segments
14.1.	DF	<p>R: After the business is done we have to be present all the time, a sales person has to be always present. When a deal is closed we have to go through all the details and all the information, obviously we are very happy that day when an order comes in but after that we have a lot of work to do.</p> <p> DF_Pos. 215  POST-NEGOTIATION > Follow-up (0)</p>

EM

R: It is always, all the time. From the moment the deal is done, we never stop talking to our client, they always talk to us about what they need and what they don't need. The client becomes ours, which is why it is very important to know when their birthday is, when their wives and children have their birthday, because then we become friends. They will always do future businesses with us. I wouldn't say every day, but two to three days a week. Monitoring is carried out by the person responsible for that customer, always, from the first deal to the last. If there is a problem, it's with the commercial they talk about, they are responsible for the customer from A-Z. It's not just selling, the act of that sale doesn't end there, it ends when we start another one, so this is continuous.

EM_Pos_231

Follow-up > Regular contact time (0)

Source: MAXQDA retrieved segments from the results obtained

The RQ 14.2. evaluates whether the Portuguese companies provide an after sales services by asking their Mexican client if support is needed. It was perceived that all respondents guarantee an after sales service and highlight that commitment during the negotiations. Nonetheless, only one respondent tends to avoid asking if some problem as arisen, or if support is needed, and provide assistance “only if there is a problem, a question that the client may have, or when there is abrasion of some pieces which is normal” (respondent AF, Pos. 8).

The group of questions in RQ 14.3. relates to the planning of following sessions. In RQ 14.3. all the respondents stated to plan visits throughout the year and online meetings as well, according to the projects' development. The RQ 14.3.1. considers future meeting planning trips frequency to Mexico. All the interviewees stated that they would plan follow-up meeting trips. Most of the managers (60%) have the frequency to go on follow-up trips two times a year, 20% go three times a year and respondent IM, as working in a subsidiary in Mexico, visits clients every month (Table 57).

Table 57 - Follow-up meetings





The image shows a MAXQDA Code Matrix for the category 'Follow-up meetings'. The matrix displays the frequency of responses for different meeting frequencies across 11 segments. The rows represent the meeting frequencies: 'Future meetings', 'Biannually', 'Rarely', 'Anually', 'Triannually', and 'Monthly'. The columns represent the segments, with a 'SUM' row at the bottom. The counts are as follows:

Meeting Frequency	Segment 1	Segment 2	Segment 3	Segment 4	Segment 5	Segment 6	Segment 7	Segment 8	Segment 9	Segment 10	Segment 11	SUM
Future meetings	1	1	1	1	1	1	1	1	1	3		11
Biannually	1	1	2	2	2	1	1	2	2	3		17
Rarely				1	1	1	1			1	1	6
Anually					1							1
Triannually		1								1		2
Monthly			1									1
SUM	2	3	4	4	4	3	3	4	4	7		38

Source: MAXQDA Code Matrix from the results obtained

The RQ 14.3.2. attempts to realise if there is an improvement in the relationship with the Mexican business partner upon visits. All except for one respondent stated to that the act of visiting their partners does improve their relationship (Table 58). Respondent BM reveals that it is necessary to be in constant presence to do business with Mexicans, and he does not feel an improvement otherwise.

Table 58 - Relationship improvement

RQ	Resp.	Retrieved Segments
14.3.2.	AF	R: Yes. One who does not show up is forgotten and I believe that in person it generates more empathy and trust.  AF, Pos. 273  Future meetings > Relationship improvement (0)
	BM	R: No, that is why we do not work much with Mexico. Because in order to work with Mexico it is necessary to be there, to live there. That is why I haven't been there for two years.  BM, Pos. 218  Future meetings > Relationship improvement (0)

Source: MAXQDA retrieved segments from the results obtained

The results in RQ 14. indicate that the negotiation does not terminate when parties close the deal. The interviewees stressed the crucial role the following phases have, to be present at all times and situations, whether business or non-business related, such as giving birthday congratulations. Regular communication in the form of online meetings, personal visits to the client and providing after sales service is especially important in the Mexican market. Being present fosters trust, endures the relationship and therefore thrusts future businesses. These findings corroborate with the evidenced by Opresnik (2014) and Acuff (2008) that time to follow-up helps to solidify and preserve the relationship and assures the partner of their decision. Moreover, support was found to Hough (2021) premise that the supplier’s ability to grant after sales service is a determining factor to business success. Additionally, it validates Osorio (2011) and Katz (2006) view that only one annual visit is not sufficient and that several trips and regular communication is a necessity to strengthen bonds.

7.6.Characterisation of Successful and Unsuccessful Negotiations

This final section comprises the concepts of succeeding in the Mexican market, and the results to the most relevant aspects to succeed and also to avoid.

The RQ 15. tries to classify success in a business negotiation in Mexico. The most prominent factors to determine a successful negotiation were conquering the client (45%), establishing a strong relationship (45%), and achieving predetermined objectives (10%). Some respondents revealed that they might lower the price to win the client, especially since the Mexican market “frequently asks for discounts” (Table 59, respondent AF, Pos. 16). Additionally, by lowering the price with a new client allows the company to replace the clients’ former supplier, as respondent HM mentions (Pos. 6).

Table 59 - Successful negotiation

RQ	Resp.	Retrieved Segments
15.	AF	<p>Initially, our objective is to win the client. Not always the sales volume comes first. Initially, we like to make a good impression and empathy and then it is necessary that they are also satisfied with our service. And only after that we can focus on other objectives.</p> <p>AF_Pos_14 SUCCESS & FAILURE > Measuring success (0) For example, we are talking about the Mexican market which frequently asks for discounts and initially we can yield in order to do that work and win the client. Later then when the client knows our work we can assert our valences, our competences.</p> <p>AF_Pos_16 SUCCESS & FAILURE > Measuring success (0) R: That is our main concern. As of the initial contact and the first project our objective is to win the client and to build a lasting business relationship, that is always the objective.</p> <p>AF_Pos_276-277 SUCCESS & FAILURE > Measuring success (0)</p>
	GF	<p>R: To reach the objectives and establish a relationship with the client. Depending on the stage we are in with the client, it can be reaching the goals on which we are building the bridge and then conquering the client is vital to reach the final stage of the negotiation.</p> <p>GF_Pos_195 SUCCESS & FAILURE > Measuring success (0)</p>
	EM	<p>R: It is establishing a trusting relationship. We could be the best company in the world, or have the best commercial people, if the client doesn't feel trust in us they won't order us a single screw, this is true, that is why this relationship of trust established with the customer is very important. It's them feeling that we're always here for whatever they need. Sometimes we can do it, sometimes not so much, but it's like everything in life, our goal is really to reach this paradox.</p> <p>EM_Pos_239 SUCCESS & FAILURE > Measuring success (0)</p>
	HM	<p>When we want to approach a new customer, what often happens is that they already have their suppliers and we have to lower prices a lot to get that client.</p> <p>HM_Pos_6 SUCCESS & FAILURE > Measuring success (0)</p>

Source: MAXQDA retrieved segments from the results obtained

The findings suggest that these three factors are ultimately linked, since some managers stated that their objectives in the Mexican market actually includes achieving a relationship with the client, since in the absence of such relationship is rather difficult to conquer the client. These results corroborate with the literature stating that reaching an agreement, achieving predetermined objectives, and building strong relationships is recognised as a successful negotiation (Acuff, 2008; Koh, 1990; Moran et al., 2007; PILPG et al., 2007; Salacuse, 2003).

The RQ 16. relates to the perception of the managers towards the overall success in the Mexican market. The majority of the interviewees (60%) describe that their businesses in the market has been satisfactory, 30% share a very satisfactory experience and the other 10% revealed it be a “very difficult, very exhausting” market (respondent EM, Pos. 241). It was found that the level of satisfaction highly depends on the negotiated price, as respondent BM reveals in Table 60, at times in order to obtain a project it is negotiated a lower price and the necessity to “bring down the price too much then I will only be satisfied or even unsatisfied it depends” (Pos. 222). Moreover, higher levels of satisfaction lay on the fact that the businesses usually have great potential to move forward when reaching the negotiation meeting stage, and also when there are integrative results, respondents HM (Pos. 208) and BM (Pos. 222), respectively.

Table 60 - Business satisfaction

RQ	Resp.	Retrieved Segments
16.	BM	Satisfied in some, more satisfied in others. If I have to bring down the price too much then I will only be satisfied or even unsatisfied it depends. There are negotiations in which we have to give a very low price because we need the project, others that are fair to both sides and others that are very good businesses. So, according to that we can classify it as such. BM_Pos.222 Overall perception > Satisfactory (0)
	HM	R: Very satisfied, when we have negotiation meetings is because success is almost guaranteed. HM_Pos.208 Overall perception > Very Satisfied (0)

Source: MAXQDA retrieved segments from the results obtained

The findings suggest that Portuguese companies are overall satisfied with their business in the Latin American country. Moreover, it appears that higher rates of success in Mexico might be possible if the interests from both sides were met efficiently, as Fisher & Ury (1991) and Opresnik (2014) suggest.

The RQ 17. and 18. contemplate the causes to unsuccessful negotiations in Mexico. In the RQ 17. it is considered if the cultural differences between both cultures might cause unsuccessful negotiations. It was found that 70% of the respondents believe that cultural differences between Portugal and Mexico are not the cause of failed negotiations, against the 30% that consider it does influence businesses outcomes. Some managers deem that nowadays the cultural differences are not the motive to cause negotiations to fail, respondent IM refers that “Here [in Mexico] it is known that Portuguese quality is important, and I don't think that our differences are the cause” (Table 61, Pos. 91). On the other hand, one respondent states that cultural dissimilarities may influence negotiations in the sense that a “Portuguese may not understand what the client wants, but this is rare” (HM, Pos. 210).

Table 61 - Cultural differences

RQ	Resp.	Retrieved Segments
17.	HM	R: Yes, that can be an influence. When there is no success in a negotiation, it can be due to a cultural difference, yes. The Portuguese may not understand what the client wants, but this is rare. HM_Pos.210 SUCCESS & FAILURE > Cultural differences (0)
	IM	No. Here it is known that Portuguese quality is important and I don't think that our differences are the cause. IM_Pos.91 SUCCESS & FAILURE > Cultural differences (0)

Source: MAXQDA retrieved segments from the results obtained

The RQ 18. considers the most responsible factors to negotiation blunders in Mexico. It appeared that the most relevant factors to negotiation mistakes were commercial conditions (29.4%), inflexibility (23.5%), absence of a relationship (11.8%), intercultural unawareness (11.8%) and other factors (23.5%), such as, overconfidence, breaking trust,

being overly aggressive and lack of openness from the other party. The commercial conditions relate to the price and delivery times agreements. The respondents state that the Mexican market “seeks the lowest prices” (Table 62, respondent IM, Pos. 95) and most of the time the negotiation offer does not meet the partner’s budget resulting in an unsuccessful negotiation. Furthermore, being inflexible does not allow room to negotiate as “negotiating is part of the [Mexican] culture”, thus, flexibility is important to establish a negotiation margin and to avoid blunders (respondent EM, Pos. 245). Additionally, when “we don't understand that they are Mexicans, with all their good and bad, like us” (respondent EM, Pos. 247) indicates that being unaware of the other party’s culture can be a cause for failed negotiations.

Table 62 - Negotiation blunders

RQ	Resp.	Retrieved Segments
18.	EM	<p>R: It's the cultural aspect, we don't understand that they are Mexicans, with all their good and bad, like us.</p> <p> EM, Pos. 247  SUCCESS & FAILURE > Blunders (0)</p> <p>In Mexico, you can't be inflexible, they like to negotiate. In Switzerland, we cannot go with the profile of a trader because they do not like to negotiate, nor do they tolerate negotiating. In Mexico, negotiating is part of the culture, we have to negotiate and we negotiate, and we have to have a margin to do that.</p> <p> EM, Pos. 245  Reasons to fail > Inflexibility (0)</p>
	IM	<p>The prices. Nowadays the mexican market seeks the lowest prices. They can go to China and have a mould for 1000\$ instead of Europe's 1300\$ and get a thousand problems, but it is the client who decide.</p> <p> IM, Pos. 95  Reasons to fail > Commercial conditions (0)</p>

Source: MAXQDA retrieved segments from the results obtained

The results of RQ 17. and 18. indicate that cultural differences are not the cause of unsuccessful negotiations in Mexico, thus corroborating with Helmold (2020c), Helmold et al. (2020) and Opresnik (2014) view that it is rather the price disagreement, inflexibility to adapt to new circumstances, absence of a relationship, intercultural unawareness, breaking trust, overconfidence, and arrogance that lead to failure. Moreover, the findings suggest that nowadays Mexican businesspeople are much more open and tolerant to other cultures. Greatly influenced by the USA, it is expected that the business culture alters, such as managerial practices, especially in highly industrialised areas, as suggested by Howell et al. (2007), and in younger generations of businesspeople.

The last three questions (A-C) are open-ended and of non-compulsory nature. Question A considers the biggest mistake made by Portuguese managers during the negotiation process in the Mexican market, and if it harmed the negotiation. From the 3 answers obtained, the main blunders related to Mexican idiomatic expressions and the other party’s negotiation behaviour, as observed in Appendix B1. The blunders in

understanding Mexican expressions did not result in any serious harm to the business negotiation, although it “disrupted the delivery times of the product” in one situation (respondent CM, Pos. 230). Moreover, one respondent mentioned that some words sound and look the same but may actually have the opposite meaning (homophones or homographs) which can cause some misunderstandings.

Question B explores anecdotal situations Portuguese managers have experienced in Mexico during the negotiation process. It was gathered 4 answers of anecdotal situations, all relating to communication aspects such as, miscommunications and misunderstandings, that managers perceive as humorous event from their experience with the market, as seen in Appendix B2. Respondent BM shares a singular presentation meeting experience with a Mexican client in which he purposely interrupted his presentation due to the client’s need to share some personal life issues. This occurrence revealed the importance to listen and analyse the other party in order to understand their needs at the moment, to be present and a friend when necessary.

The last question (C) assesses the strategies Portuguese managers deem important in order to avoid negotiation mistakes in the Mexican market. All respondents contributed with aspects that promote the effectiveness of the business and also what to avoid doing during the process. In Appendix B3 the results obtained are grouped in the following categories: relationship and trust, business, negotiating, culture, and follow-up.

Following presenting and analysing the results obtained, the next chapter will consider the main conclusions drawn from this research, including theoretical and practical contributions, limitations, and lines for future research.

8. Conclusion

8.0. Introduction

This last chapter presents the main conclusions of the investigation. Composed by five sections, the first section seeks to assess the general fulfilment of the proposed objectives by synthesizing the stages to reach the research findings. The following second and third sections refer to the main theoretical and practical implications drawn from the study's results. Then, the fourth section considers the limitations of the research and the fifth and last section suggests lines for future research.

8.1. Main Remarks

The increasing internationalization of the Portuguese economy after joining the EU translated into seizing the opportunities stemming from global interdependence, liberalisation of foreign markets, and diplomatic actions, allowing companies to diversify markets and increase sales (Martinho, 2017). A growing number of Portuguese firms have been venturing to geographically and culturally distant countries. In the last two decades, Mexico has presented great opportunities to Portuguese companies, especially in the mould industry which has been reflecting the Portuguese capacity to reach higher levels of competitiveness in the international context. This reality has ignited the need to expand the knowledge on succeeding in the Mexican market, thus the relevance of this study.

International negotiations involve the challenge to manage cross-cultural differences effectively, involving a remarkable effort from companies to understand distinct contexts, socio-cultural protocols, and etiquette (Khan & Baldini, 2019; Tomás, 2017a). In this context, this dissertation endeavoured to identify common business behaviours, practices and cultural aspects that enhance successful interactions and negotiation outcomes in Mexico. To fulfil these objectives, in a first stage of the study, chapters 2 and 3 contextualised the Mexican market and the internationalisation of Portuguese companies to Mexico, respectively. The market research gathered relevant information regarding country characteristics, the Portuguese global economic context, the bilateral relationship between both countries and the relevance of the Portuguese mould industry. Subsequently, chapter 4 reviewed the literature to gather cultural and negotiation aspects influencing the process of negotiating in Mexico. The analysis of these chapters provided

the knowledge to progress to the stage of the development of the conceptual model and research questions in chapter 5, followed by the research methodology in chapter 6. The qualitative analysis in the form of semi-structured interviews was applied to 10 managers of Portuguese mould companies in the region of Leiria with experience in the Mexican market. The results obtained in chapter 7 allowed to develop a practical guide to enhance successful international negotiations in Mexico as demonstrated in the following sections.

Based on the analysis of the results, it is possible to conclude that there are numerous business practices, planning factors and cultural aspects to consider when negotiating in the Mexican market. Regarding the preparation phase of the negotiation process, it can be determined that researching the political and economic system, legal support, language and information about the other party's company are the most prominent factors, especially when approaching new clients, therefore corroborating with the literature (Brett, 2007; AICEP, 2017; Simões & Crespo, 2017; Tomás, 2017b; Helmold, 2020d; Acuff, 2008; PILPG et al., 2007). Planning the meeting was found to be greatly influenced by the client's local environment and costumes, such as holidays, vacations, weekdays, mealtimes, location. Travelling arrangements are prepared with months in advance to carefully consider traveling costs, duration, location, materials, participants, transportation, and insurance, thus validating PILPG et al. (2007), Salacuse (2003), Opresnik (2014), Adler & Gundersen (2008) and Katz (2006). Additionally, preparation was deemed as a crucial stage in the negotiation process, with emphasis on assessing the counterpart's information, negotiation scope (product, price delivery times) and setting objectives and strategies, thus validating Helmold (2020a), Acuff (2008), Opresnik (2014) and Salacuse (2003).

Considering pre-negotiations, greeting and addressing formalities are followed according to the client's approach, as well as engaging in small talk, validating the literature to adapt and follow the partner's formalities when getting acquainted, shows respect and a welcoming intention to cultivate positive personal relationships (De Leon, 2013; PILPG et al, 2007; Pease & Pease, 2004; Katz, 2006). It is possible to conclude that longstanding trusting relationships with clients allow for an informal environment, where formalities in addressing people and greeting reduce and become more personal. *Usted* fades to *tú*, handshakes are accompanied by hugs, closeness, touching and personal conversational topics are naturally engaged with and offering gifts becomes greatly appreciated,

corroborating with Acuff (2008), Axtell (2007), Osorio (2011) and Morrison and Conaway (2006).

As global diffusion incites change in business practices, it is possible to conclude that the influence of western business practices, mainly from the US, is increasingly changing certain negotiation practices and business culture in Mexico, as suggested Howell et al. (2007), Cunha (2019) and Metcalf et al. (2006). The results indicated that this “westernisation” altered communication aspects, such as the increased informality in the use of titles, address forms and dress code, altered the approach to the negotiation subject to direct and diminished the engagement with small talk before the meeting. As well as it directed the decision making power towards a consensual team organisation and increased the Mexican time sensitivity towards a more business focused pace mainly due to the industrialisation concentrated in the northern areas closer to the USA as indicated by Hough (2021b), Metcalf et al. (2006) and Hernández-Pozas et al. (2019).

As evidenced through this research, the role of relationship building in collectivist and high-context culture is predominant when doing business in Mexico (Brett, 2007; Acuff, 2008). Therefore, engaging in informal discussions and social activities, building personal rapport and being present and flexible are approaches that cultivate a trusting relationship.

The post-negotiation is a phase often underestimated by practitioners (Acuff, 2008). Through the results obtained it is possible to conclude that it is indeed a crucial stage in the negotiation process and on the relationship between parties. Maintaining a regular presence in business and personal issues and providing a reliable after sales service solidifies and preserves the relationship, thus boosting future deals (Opresnik, 2014; Acuff, 2008).

Lastly, it can be determined that achieving a successful negotiation is based on conquering the client, establishing a trusting relationship, and achieving pre-set objectives (Salacuse, 2003; Acuff, 2008; Moran et al., 2007). Cultural differences appeared to not be deemed as the main cause for failed negotiations between Portuguese and Mexicans, but rather due to commercial conditions (price and time deadlines), inflexibility and absence of a relationship (Helmold, 2020c; Helmold et al., 2020; Opresnik, 2014). Moreover, the results indicated that the main blunders in negotiation are related to communication, especially Mexican idiomatic expressions, that can cause

misunderstandings (OECEM, 2022; Herbig & Kramer, 1991). Hence, it is possible to conclude that it is not the cultural clash of values and behaviours that lead to failure, but rather the inability to adapt goals and behaviours in response to the counterpart's cues (Tinsley, Taylor & Adair, 2012). Furthermore, today's Mexican businesspeople, especially younger, western educated generations, are more open and tolerant to deal with different cultures.

Having achieved the main objective of the study, the subsequent section suggests the theoretical implications of this investigation.

8.2. Theoretical Implications

This research is considered to contribute to the theoretical knowledge on IB literature and cross-cultural management in the context of doing business in the Mexican market. A large body of research has highlighted many challenges companies face when expanding internationally by developing numerous guides, check lists of dos and don'ts to negotiate in several countries around the globe. Although the Mexican business culture has received considerable attention, mainly through US-American view, this investigation focused on assembling the main stages of the negotiation process and synthesising cultural and negotiation aspects known to succeed and to avoid in the market. It created a link between literature and real business experience in the market from Portuguese mould manufacturing companies, which is expected to contribute to the knowledge and investigation of the internationalisation of Portuguese mould companies to Mexico.

The next section recommends the practical implications from this study directed towards practitioners in the field.

8.3. Practical Implications

The findings of this investigation expect to accomplish the last remaining objective of this investigation, to provide practical knowledge to Portuguese practitioners to achieve enhanced outcomes and minimise blunders during the negotiation process in Mexico. This section intends to present a structured and systematic negotiation process, from preparation to follow-up, comprising the results obtained of common business practices, experiences, and perspectives from 10 skilled negotiators of Portuguese firms with businesses in the Mexican market.

The research findings contributed to the development of a practical guide to do business in Mexico. It is considered a four-stage negotiation process to be followed systematically to achieve positive outcomes:

1. The **preparation** stage involves preparing the negotiation and structuring the meeting planning to have the ability to gather information of the client, adapt to unexpected situations and to make informed decisions. The preparation includes:
 - Assessment of the negotiation substance by preparing the negotiation scope (what to negotiate), consisting of planning the product, price, product manufacturing times, delivery deadlines, adapted to each client's necessities, and by determining objectives and strategies according to the context of each negotiation.
 - Analysis of the other party: national, cultural, business, and individual level. Gathering knowledge of the counterpart's local environment and background preceding the negotiation is essential to effectively prepare the negotiation scope, strategies, and tactics.
 - National level: research the current political situation (political parties, elections, risks, transparency); economic system (market position, foreign investment, developments of the mould and automotive industry, trade agreements, socio-economic factors); active legal support (CEFAMOL, IAPMEI, AICEP and CCILM) to provide information about the market and support in events (fairs and missions); legislation and regulation; see chapters 2 and 3;
 - Cultural level: study the language (Mexican Spanish), idiomatic expressions and ice breakers to facilitate the first approach; norms; values; behaviour; geography (relevant areas); history (monuments, historical places); religion (Catholic); traditions; and cuisine to generate positive interactions with the client and to more able to embrace and adapt to the Mexican cultural experience; see chapters 2 and 4;
 - Business level: thoroughly investigate the client's organisation on the business sector, product portfolio and potential interests, history, decision-making power (countries and companies

involved in the decision process), members, recent organisational changes, financial status and reputation by undertaking a business process audit;

- Individual level: research the individuals that may be present during negotiations; decision-making power (potentially scaling up to other countries or organisations involves when dealing with multinationals); position; background; years on the current company and work experience;
- Planning the meeting requires assessing and deciding on several aspects that fuel the future negotiation:
 - Appointment and duration: consider holidays (holiday policy), festivities, companies' vacation periods, participation in fairs, weekdays (avoid Mondays and Fridays), set a convenient date for both sides, adapt the time necessary to the client's needs (start and end times), consider local business hours (morning periods can be more productive), local mealtimes, plan tolerance time to commute and delays, schedule the meeting with 2 weeks antecedence at least (but first in-person meetings may require 1 month to schedule in advance to plan for the entire trip), structure an agenda with main negotiation topics and time estimations as guidelines; see chapter 2;
 - Travel factors: calculate travel expenses; plan who will travel, analyse the duration of the trip (1-2 weeks, depending on the purpose of the visit), where to stay (book the hotel, rent an apartment), transportation (book airplane tickets, taxis, rent a car), safety (get information with your client about safer areas and which to avoid, avoid carrying showy jewellery and other accessories in crowded or insecure areas, commute with prearranged taxis from the hotel), travel insurance and prepare support materials to bring;
 - Location and ambient: plan first meetings in the client's company in Mexico; when hosting the meeting prepare the negotiation setting, consider the climatization, refreshments (coffee, water), audio-visual materials, luminous and spacious room, equal seats,

ensure a welcoming and clean space, reduce interruptions (phone calls, other appointments), sit closer to each other to facilitate communication and display openness;

- Materials: prepare physical or digital format of catalogues, samples, pamphlets, and business cards; a formal, visually attractive, detailed presentation (customised to each client); use colours associated with your company to create an easy identification; use soft colours in presentations to facilitate the reading and comprehension, study Mexican expressions to use or avoid in presentations; translate the materials to Mexican Spanish;
- Participants: assess the individuals' profile, attribute their roles and responsibilities in the negotiation process; assign the people that will remain responsible for the market (to preserve key contacts); bring two people with commercial and technical skills;

2. The **pre-negotiation** stage refers to the first contact between parties and becoming acquainted with the partner. During this stage cultural behaviours will emerge through social interactions and approaches involving:

- Greetings: greet with a handshake and eye contact to all the individuals present; greeting with an embrace is common in longstanding relationships; verbally greet the participants (*hola, buenos días/buenas tardes, mucho gusto, encantado/a*) and express gratitude for being received; introduce yourself with first and last name; in a first contact engage with formal forms of addressing people (using *usted* and the person's respective title), recognise when it is possible to level the address forms (addressing by *tú* is increasingly encouraged in business settings but especially common when the relationship between parties is growing); exchange business cards;
- Small talk is an important mean to develop personal trusting relationships with clients, hence consider: follow the partner's lead and pace to know whether to engage in small talk or not (although commonly engaged with after greetings it does necessarily happen at that moment, especially in northern areas); topics about Mexican culture (cuisine, sightseeing, monuments, places), weather, trip, economy, industry (concerns, competitors), Portugal (culture, economy) and global events (news,

Eurovision song contest, world championships) are appropriate to talk about. Topics about sports, politics, religion and USA relations are sensitive and best to avoid in first encounters and should be approached with care when the other party brings it up. When approached, sports can both break the ice (by bringing up football and Cristiano Ronaldo) or create divided opinions about football teams and thus tensing up the environment, politics is a complex topic that requires a great amount of knowledge to approach (elections, parties), religion can also be both interest the other party (talking about Fátima, since it is closely located to the companies, or mentioning religious monuments/buildings) or be inappropriate, and USA relations are more appropriate to discuss in the northern areas of Mexico; personal topics are engaged further in the relationship, evolving with contacts and time and becoming natural, common themes are about family, interests, hobbies, sports and the job; the duration of the informal conversation depends on the client and on the circumstance, it is usually a brief event (about 10 min.) before negotiations and it extends afterwards, over lunch or dinner;

- Personal appearance: wear formal attire in darker clothes (complete suit with tie) in first meetings or when meeting with the company's owner; semi-formal clothes (shirt and pants) on subsequent meetings are common;
- Pace and punctuality: be punctual; it is frequent for business meetings to start 5-15 minutes later; northern and industrialised cities (Monterrey, Queretaro) are more fast-paced and business-focused than central and southern cities (Mexico City, Puebla);
- Meals: the environment when having meals is a combination of relationship building and a brief discussion of previously addressed negotiation subjects; informal conversations and personal topics are preferred, especially at dinner; general table etiquette, avoid eating loudly, handling certain foods with hands is appropriate; the supplier pays the bill;
- Gifts: small symbolic gifts are appreciated in a developed stage of the relationship with the client; consider offering Portuguese regional products such as wine (Port wine, *vinho verde*), spirit drinks and liqueurs (*amêndoa amarga*, *ginja*), cheese, olive oil, saints' statues from Fátima;

offer gifts in festive holidays (Christmas, Easter) or when visiting a longstanding client;

3. The **negotiation** phase implies the main interaction between parties and profound meetings discussing substantial negotiation topics involving:

- Verbal communication: speaking Spanish is required; although speaking “Portunhol” can limit the communication in some level it is perceived positively by the Mexican partner as an effort to speak their language; English can be spoken when negotiating with foreign parties; avoid using slang and colloquialisms (especially in first meetings); prefer direct and short terms; repeat what has been said to avoid misunderstandings; ask permission if you need to interrupt the person who is speaking; overlapping conversations are common to occur; it is rare to hear a direct “no” from the Mexican side, but rather the use of indirect phrases (“we are going to think about it”, “we will keep in touch”) or by politely saying that they cannot accompany the offer;
- Non-verbal communication: interpreting Mexican non-verbal behaviour at first can be slightly challenging due to ambiguous reactions and reasoning; normal voice tone; more expressive with body movements and hand gestures; carefully assess body language aspects, such as laughter (amusement, discomfort or mockery); avoid leaning back on the chair, crossing arms and pointing the finger at someone; keep both hands visible; maintain eye contact; assess silent moments, that can occur to decide or reflect on a subject, and prolonged silence that can indicate adversity; close physical proximity is frequent; touching arms and shoulders, pats on the back, hugging are common and encouraged in longstanding relationships; avoid withdrawing from physical actions;
- Dialogue and negotiation aspects involves considering: avoid aggressive, confrontational, overconfident attitudes and being inflexible; prepare and embrace haggling in an informal and easy-going atmosphere; absence of a restrict meeting plan to follow; holistic discussion of business and informal subjects; general framework approach towards specific topics (price, delivery times); directly approach negotiation subjects; use emotional arguments (especially with longstanding clients) over empirical data; decision-making power is usually highly centralized and placed on

the top leader, nonetheless it is moving towards group consensus (especially in larger companies in industrialised areas) hence mid-level negotiators must not be ignored; distributive approach towards negotiation resolution;

- Closing: closing the deal with new clients without previous communication (prospecting trips) may take 3-6 meetings over the period of 1-5 months, while with previous communications (emails, proposals) it may only take 1-3 meetings over the period of 2 weeks; close the deal in person; final agreements are concluded with a purchase order (specifying the product's characteristics, price, delivery time), and less often with detailed contracts; summarise all the agreement conditions in an email;
 - Relationship and trust: build a warm personal relationship based on trust and respect for the members of the other team; engage in informal discussions, cultural background, personal topics when appropriate; be present, close, and flexible throughout the entire negotiation process; local intermediaries facilitate meetings, leverage initial contacts, and mitigate cultural nuances;
4. The **post-negotiation** phase refers to the follow-up procedures after the negotiation agreement:
- Maintain regular contact on a weekly basis (progress reports, technical information exchange, shipping); implementation of agreed terms; after sales service (technical assistance), schedule follow-up meetings (technical meetings), schedule visits throughout the year (2-3 times);

To summarise the facts and constructs that characterise negotiating cross-culturally in Mexico, a practical guide of dos and don'ts has been developed highlighting negotiating practices cultural aspects of the negotiation process. In Appendix C it can be found the synthesised model of this guide, comprising the dos and don'ts of culture-specific items analysed.

8.4. Limitations of the Study

Although the current research has achieved its aims and objectives, it presents some limitations that are important to mention. Firstly, while sampling a specific population that confers reliability to the results, the study was limited by the sample size. Obtaining

a greater number of respondents would have provided more generalised results and bestowed a richer analysis. The process of searching for suitable companies to participate in the study was rather challenging, since organisations might have not been prepared to engage in voluntary activities due to the time required and it being a time-consuming process (Saunders et al., 2009), hence reducing the willingness to participate in the study. In addition, some companies were found to no longer operate in Mexico or the manager responsible for the market was no longer with the company. Secondly, even though the participation of two Mexican managers in the study has provided valuable insights, it reduced the homogeneity among the participants and consequently to some results, namely those related to non-verbal communication, biggest negotiation blunder and anecdotal situations which were evaluated through their perception and experience in relation to the Portuguese culture. Finally, the method used to collect data showed some limitations. Regarding the dimension of the interview questionnaire, while it provided an analysis of several aspects, its extensive length did not allow the deepening of some questions as it required some time to completely gather all answers. Moreover, there might be some resistance in answering questions about negotiation mistakes or about sharing less positive experiences that may have led to the business failure that explain their low response rate.

8.5. Lines for Future Research

Drawing from the limitations identified above, it can be considered some relevant lines for future research. The research findings indicated that there are several factors that could be analysed in future studies regarding the post-negotiation phase and the future of the business relationship. Closing a deal does not imply that the next steps will not encounter a form of resistance, such as in terms of payment, organisational changes, compliance with agreed terms or the relationship between both parties. As the results highlighted the importance of post-negotiation in the negotiation process, it could be interesting to investigate this phase with more depth, assessing potential hurdles that may damage the business and how to overcome and avoid them, and possibly providing a more accurate success metric.

Moreover, future research could further evaluate the influence of western practices and MNEs in the Mexican business culture and in the deal-making process. Lastly, this research could be applied to other sectors beyond the mould industry and assess if the

results obtained reveal differences in the negotiation practices or cultural approaches with the ones obtained in the current study.

Bibliography

- Acuff, F. L. (2008). *How to negotiate anything with anyone anywhere around the world* (3rd ed.). New York: American Management Association.
- Adair, W. L., & Brett, J. M. (2004). Culture and negotiation processes. In M. J. Gelfand & J. M. Brett (Eds.), *The handbook of negotiation and culture* (pp. 158-176). Stanford University.
- Adair, W. L., & Brett, J. M. (2005). The negotiation dance: Time, culture, and behavioral sequences in negotiation. *Organization Science*, *16*(1), 33-51. doi:10.1287/orsc.1040.0102
- Adair, W. L., Okumura, T., & Brett, J. M. (2001). Negotiation behavior when cultures collide: The United States and Japan. *The Journal of Applied Psychology*, *86*(3), 371-85. doi:10.1037//0021-9010.86.3.371
- Adair, W. L., Taylor, M. S., & Tinsley, C. H. (2009). Starting out on the right foot: Negotiation schemas when cultures collide. *Negotiation and Conflict Management Research*, *2*(2), 138–163. doi:10.1111/j.1750-4716.2009.00034.x
- Adler, N. J., & Graham, J. L. (1989). Cross-cultural interaction: The international comparison fallacy? *Journal of International Business Studies*, *20*, 515-537.
- Adler, N. J., Graham, J. L., & Gehrke, T. S. (1987). Business negotiations in Canada, Mexico, and the United States. *Journal of Business Research*, *15*(5), 411–429. [https://doi.org/10.1016/0148-2963\(87\)90010-5](https://doi.org/10.1016/0148-2963(87)90010-5)
- Adler, N. J., & Gundersen, A. (2008). *International dimensions of organizational behavior* (5th ed.). Ohio: Thomson/South-Western.
- AICEP. (2017). *México – Ficha de mercado*. AICEP Portugal Global. Retrieved from <http://www.revista.portugalglobal.pt/AICEP/Documentos/FMMexico/?Page=18&page=1>
- AICEP. (2019a). Moldes portuguesas: Uma indústria reconhecida mundialmente. *Portugalglobal*, *117*, 6-17. Retrieved from <https://portugalglobal.pt/PT/RevistaPortugalglobal/2019/Documents/revista-117-fevereiro.pdf>
- AICEP. (2019b). Relacionamento Portugal – México. *Portugalglobal*, *121*, 42. Retrieved from <http://www.revista.portugalglobal.pt/AICEP/PortugalGlobal/Revista121/>

- AICEP. (2022a). *Exportações portuguesas com forte impacto no PIB*. AICEP Portugal Exporta. Retrieved from <https://www.portugalexporta.pt/noticias/exportacoes-portuguesas-forte-impacto-pib>
- AICEP. (2022b). *Mercado: México*. AICEP Portugal Exporta. Retrieved from <https://myaicep.portugalexporta.com/mercados-internacionais/mx/mexico?setorProduto=-1>
- Anderson E., & Gatignon H. (1986). Modes of foreign entry: a transaction cost analysis and propositions. *Journal of International Business Studies*, 17(4): 1–26.
- Assouad, A. A., Parboteeah, K. P., Guidice, R. (2020). Who are these emerging markets anyway? A taxonomic approach integrating institutional and culturalist perspectives. *International Journal of Cross Cultural Management*, 20(3), 271-300.
- Axtell, R. E. (2007). *Essential do's and taboos: The complete guide to international business and leisure travel*. John Wiley & Sons, Inc.
- Bravo, A. P. (2017, July 15). *Portugal, novo sócio do México*. DN – Diário de Notícias. Retrieved from <https://www.dn.pt/opiniaio/opiniaio-dn/convidados/portugal-novo-socio-do-mexico-8638699.html>
- Bravo, A. P. (2019). A importância da relação institucional entre Portugal e o México. *Portugalglobal*, 121, 30-31. Retrieved from <http://www.revista.portugalglobal.pt/AICEP/PortugalGlobal/Revista121/>
- Brett, J. M. (2000). Culture and negotiation. *International Journal of Psychology*, 35(2), 97–104. <https://doi.org/10.1080/002075900399385>
- Brett, J. M. (2001). *Negotiating globally: How to negotiate deals, resolve disputes, and make decisions across cultural boundaries*. San Francisco, CA: John Wiley & Sons.
- Brett, J. M. (2007). *Negotiating globally: How to negotiate deals, resolve disputes, and make decisions across cultural boundaries* (2nd ed.) San Francisco, CA: John Wiley & Sons.
- Brett, J. M. (2017). Culture and negotiation strategy. *Journal of Business & Industrial Marketing*, 32(4), 587–590. doi:10.1108/jbim-11-2015-0230
- Brett, J.M., Gunia, B. C., & Teucher, B. M. (2017). Culture and negotiation strategy: A framework for future research. *Academy of Management Perspectives*, 31(4), 288-308.
- Brett, J. M., & Okumura, T. (1998). Inter- and intracultural negotiation: U.S. and Japanese negotiators. *The Academy of Management Journal*, 41(5), 495-510.

- Carnevale, P., & Pruitt, D.G. (1992). Negotiation and mediation. *Annual Review of Psychology*, 43, 531-582.
- CCILM. (2019). *Portugal Connect*. Câmara de Comércio e Indústria Luso-Mexicana. Retrieved from <https://camaralusoamericana.org/portugal-connect/>
- CCILM. (2021a). *Acordo entre México e EUA muito benéfico para empresários portugueses*. Câmara de Comércio Indústria Luso-Mexicana. Retrieved from <https://camaralusoamericana.org/acordo-entre-mexico-e-eua-muito-benefico-para-empresarios-portugueses/>
- CCILM. (2021b). *Webinar – Oportunidades de internacionalização no México*. CCILM - Câmara de Comércio Indústria Luso-Mexicana. Retrieved from <https://camaralusoamericana.org/segundo-webinar-oportunidades-de-internacionalizacao-no-mexico/>
- CEFAMOL. (2021a). México visitou Portugal e apresentou oportunidades de negócio. *Market Report*, 36, 8-10. Retrieved from <https://www.cefamol.pt/index.php?id=25&idn=506>
- CEFAMOL. (2021b). Webinar revela potencialidades do mercado do México. *Market Report*, 33, 4-5. Retrieved from <https://www.cefamol.pt/index.php?id=25&idn=442>
- CEFAMOL. (2022). *Report 2022*. Retrieved from <https://www.cefamol.pt/index.php?id=75>
- CENAM. (2021). *Hora Oficial*. CENAM - Centro Nacional de Metrologia. Retrieved from https://www.cenam.mx/hora_oficial/
- Coleman, D. Y. (2021). *Mexico: Country review*. CountryWatch. Retrieved from <https://www.countrywatch.com/intelligence/countryreviews?countryid=114>.
- Costa, C. G. (2006). Proximidade cultural e dinamismo econômico: por que investem as empresas portuguesas no Brasil. *Revista de Administração de Empresas*, 46, 35-47.
- Costa, M. J. (2018, November 29). *"Estamos a abrir as portas do México aos portugueses"*. Rádio Renascença. Retrieved from <https://rr.sapo.pt/noticia/132158/estamos-a-abrir-as-portas-do-mexico-aos-portugueses>
- Costa, R. L. D., & António, N. (2015). As quatro dinâmicas de abrangência na resposta à crise portuguesa. *Revista de Gestão dos Países de Língua Portuguesa*, 14(2), 49-61.
- Crespo N., & Tomás, M. J. (2017). Introdução. In N. Crespo & M. J. Tomás. (Eds.), *A internacionalização da economia portuguesa: Casos de sucesso empresarial* (pp. 11-15). Lisboa: Temas e Debates.

- Cruz, V. (2015, January). *Ensaio de investigador sobre o México*. Tuottava. Retrieved from <https://www.tuottava.com/copia-bloco-hispano-americano>
- Cunha, A. (2019). Um mercado ao alcance das empresas portuguesas. *Portugalglobal*, 121, 32-36. Retrieved from <http://www.revista.portugalglobal.pt/AICEP/PortugalGlobal/Revista121/>
- Das, G. (1993). Local memoirs of a global manager. *Harvard Business Review*, Mar.-Apr., 38–47. doi: 10.2307/j.ctt2005tk7.31
- Dathe, T., & Helmold, M. (2020). Negotiations in different cultures and internationalization. In M. Helmold, T. Dathe, F. Hummel, B. Terry & J. Pieper (Eds.), *Successful international negotiations: A practical guide for managing transactions and deals* (pp. 83-96). Cham: Springer.
- De Leon, J. M. (2003). Perfil cultural y comportamiento en los negocios en México. Retrieved from <http://www.iberomex.com/articulos/comportamientoennegocios.htm>
- DGAE. (2018). Indústria de moldes: Sinopse. Retrieved from https://www.dgae.gov.pt/gestao-de-ficheiros-externos-dgae-ano-2019/sinopse-industria-moldes_vf_2018-3-pdf.aspx
- Dowd, E. T. (2015). Tacit knowledge awareness and its role in improving the decision-making process in international negotiations. In M. Galluccio (Ed.), *Handbook of international negotiation* (pp. 15-25). Cham: Springer.
- Duarte, F. E.S. (2019). *Os desafios da internacionalização para o crescimento das empresas portuguesas* (Master thesis, ISCTE Business School, Lisbon). Retrieved from <https://www.iscte-iul.pt/tese/9047>
- EC. (2021). *Mexico*. European Commission. Retrieved from <https://ec.europa.eu/trade/policy/countries-and-regions/countries/mexico/>.
- EIU. (2021). *Mexico: Political structure*. The Economist Intelligence Unit. Retrieved from <http://country.eiu.com/article.aspx?articleid=1771472760&Country=Mexico&topic=Summary&subtopic=Political%2Bstructure>.
- Eriksson, P., & Kovalainen, A. (2016). *Qualitative methods in business research*. SAGE Publications Ltd.
- Esperança, J.P., Reto, L.A., & Machado, F.L. (2017). Países de destino das multinacionais portuguesas: A importância da lusofonia. In N. Crespo & M. J. Tomás. (Eds.), *A internacionalização da economia portuguesa: Casos de sucesso empresarial* (pp. 71-87). Lisboa: Temas e Debates.

- Evason, N. (2018). *Mexican culture*. Cultural Atlas. Retrieved from <https://culturalatlas.sbs.com.au/mexican-culture/mexican-culture-communication>
- Expat. (2020). *Travelling around Mexico*. Expat. Retrieved from <https://www.expat.com/en/guide/north-america/mexico/10730-transport-in-mexico.html>
- Fernandes, M. C. (2019). Saraiva + Associados: México, um “ilustre desconhecido”. *Portugalglobal*, 121, 40-41. Retrieved from <http://www.revista.portugalglobal.pt/AICEP/PortugalGlobal/Revista121/>
- Ferreira, M. P., Li, D., Guisinger, S., & Serra, F. A. R. (2009). Is the international business environment the actual context for international business research? *Revista de Administração de Empresas*, 49(3), 282-294. doi: 10.1590/S0034-75902009000300004
- Fisher, R., Ury, W., & Patton, B. (1991). *Getting to yes: Negotiating agreement without giving in* (2nd ed.). New York: Random House Business Books.
- Fontanella, B. J. B. (2021). Participantes em investigação qualitativa. In S. P. Gonçalves, J. P. Gonçalves & C. G. Marques (Eds.), *Manual de investigação qualitativa: conceção, análise e aplicações* (pp. 25-40). Lisboa: Factor.
- Garcia, C. (2020, October). Exportações de moldes caem 14% e deprimem pelo segundo ano consecutivo. *Revista Moldes e Plásticos*, 4–9.
- Gelfand, M., & Dyer, N. (2000). A cultural perspective on negotiation: Progress, pitfalls, and prospects. *Applied Psychology*, 49(1), 62–99. doi:10.1111/1464-0597.00006
- GEE. (2022). *Comércio Internacional Portugal-México*. GEE - Gabinete de Estratégia e Estudos. Retrieved from <https://www.gee.gov.pt/pt/docs/doc-o-gee-2/estatisticas-de-comercio-bilateral/mexico/1654-comercio-internacional-de-portugal-com-mexico/file>
- Goncalves, M., Alves, J., & Arcot, R. V. (2015). *Doing business in emerging markets: Roadmap for success*. Business Expert Press.
- Graciano, S. (2021a). *Formação técnica de profissionais é desafio para a indústria dos moldes*. CCILM - Câmara de Comércio e Indústria Luso-Mexicana. Retrieved from <https://camaralusoamericana.org/formacao-tecnica-de-profissionais-e-desafio-para-a-industria-dos-moldes/>
- Graciano, S. (2021b). *Empresas portuguesas devem aproveitar ajudas para internacionalizar e investir no mercado mexicano*. Câmara de Comércio e Indústria Luso-Mexicana. Retrieved from <https://camaralusoamericana.org/webinar-ccilm-empresas-portuguesas-devem-aproveitar-ajudas-para-internacionalizar-e-investir-no-mercado-mexicano/>

- Graham, J., Lawrence, L., & Requejo, W. H. (2014). *Inventive negotiation: Getting beyond yes*. Palgrave Macmillan.
- Gupta, A. K., Govindarajan, V., & Wang, H. (2008). *The quest for global dominance: Transforming global presence into global competitive advantage* (2nd ed.). Jossey-Bass.
- Hafner, G. (1993). The use of analytical methods and tools in international negotiations: A practitioner's perspective. *Theory and Decision*, 34, 329–343.
doi:10.1007/BF01075196
- Hall, E. T. (1959). *The Silent Language*. New York: Doubleday & Company, Inc.
- Hall, E. T. (1966). *The Hidden Dimension*. New York: Anchor Books.
- Hall, E. T. (1976). *Beyond Culture*. New York: Anchor Books/Doubleday.
- Helmold, M. (2020a). A-6 concept for successful international negotiations. In M. Helmold, T. Dathe, F. Hummel, B. Terry & J. Pieper (Eds.), *Successful international negotiations: A practical guide for managing transactions and deals* (pp. 107-162). Cham: Springer.
- Helmold M. (2020b). Best-in-class negotiations in the international context. In M. Helmold, T. Dathe, F. Hummel, B. Terry & J. Pieper (Eds.), *Successful international negotiations: A practical guide for managing transactions and deals* (pp. 1-24). Cham: Springer.
- Helmold M. (2020c). Competencies and criteria for successful negotiations. In M. Helmold, T. Dathe, F. Hummel, B. Terry & J. Pieper (Eds.), *Successful international negotiations: A practical guide for managing transactions and deals* (pp. 31-44). Cham: Springer.
- Helmold, M. (2020d). Negotiation concepts. In M. Helmold, T. Dathe, F. Hummel, B. Terry & J. Pieper (Eds.), *Successful international negotiations: A practical guide for managing transactions and deals* (pp. 65-81). Cham: Springer.
- Helmold M. (2020e). Negotiation execution – Value add and the ZomA. In M. Helmold, T. Dathe, F. Hummel, B. Terry & J. Pieper (Eds.), *Successful international negotiations: A practical guide for managing transactions and deals* (pp. 59-64). Cham: Springer.
- Helmold, M. (2020f). Negotiations in different countries. In M. Helmold, T. Dathe, F. Hummel, B. Terry & J. Pieper (Eds.), *Successful international negotiations: A practical guide for managing transactions and deals* (pp. 237-241). Cham: Springer.

- Helmold, M. (2020g). Nonverbal communication. In M. Helmold, T. Dathe, F. Hummel, B. Terry & J. Pieper (Eds.), *Successful international negotiations: A practical guide for managing transactions and deals* (pp. 163-172). Cham: Springer.
- Helmold, M., Becker, N., Gonzalez, J., Herrera, M. P. (2020). Negotiations in the Americas. In M. Helmold, T. Dathe, F. Hummel, B. Terry & J. Pieper (Eds.), *Successful international negotiations: A practical guide for managing transactions and deals* (pp. 281-295). Cham: Springer.
- Herbig, P. A., & Kramer, H. E. (1991). Cross-cultural negotiations: Success through understanding. *Management Decision*, 29(8), 19-31.
doi:10.1108/eum00000000000083
- Hernández-Pozas, O., Chamoun-Nicolas, H., & Hazlett, R. D. (2019). Negotiating with managers from Mexico. In M. A. Khan & N. Ebner (Eds.), *The Palgrave handbook of cross-cultural business negotiation* (pp. 169-187). Cham: Palgrave Macmillan.
- Hofstede, G. (1980). *Culture's consequences: International differences in work-related values*. London: Sage Publications.
- Hofstede, G. (1984). Cultural dimensions in management and planning. *Asia Pacific Journal of Management*, 1, 81–99. <https://doi.org/10.1007/BF01733682>
- Hofstede, G. (1991). *Cultures and organizations: Software of the mind*. London: McGraw-Hill.
- Hofstede, G. (2001). *Culture's consequences: International differences in work-related values* (2nd ed.). Thousand Oaks: Sage Publications.
- Hofstede, G., Hofstede, G. J., & Minkov, M. (2010). *Cultures and organizations: Software for the mind* (3rd ed.). London: McGraw-Hill.
- Hofstede Insights. (2022). Country comparison tool. Retrieved from <https://www.hofstede-insights.com/product/compare-countries/>
- Hough, M. (2021a). *Tactics and strategies for success in Mexico – Part 1*. Global Business Culture. Retrieved from <https://www.globalbusinessculture.com/cultural-awareness/tactics-and-strategies-for-success-in-mexico-part-1/>
- Hough, M. (2021b). *Tactics and strategies for success in Mexico – Part 2*. Global Business Culture. Retrieved from <https://www.globalbusinessculture.com/cultural-awareness/tactics-and-strategies-for-success-in-mexico-part-2/>

- Howell, J. P., DelaCerde, J., Martínez, S. M., Prieto, L., Bautista, J. A., Ortiz, J., Dorfman, P., & Méndez, M. J. (2007). Leadership and culture in Mexico. *Journal of World Business*, 42(4), 449–462. <https://doi.org/10.1016/j.jwb.2007.06.006>
- IHS. (2021). *Country/Territory report - Mexico*. IHS Markit. Retrieved from <https://ihsmarkit.com/industry/economics-country-risk.html>.
- INE. (2022, January 31). *GDP increased by 5.8% on a year before and by 1.6% on the previous quarter. In 2021 GDP grew by 4.9%* [Press release]. Retrieved from https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaques&DESTAQUE_Sdest_boui=472472540&DESTAQUESmodo=2&xlang=en.
- INEGI. (2021). Censo de población y vivienda 2020: Presentación de resultados. Retrieved from https://www.inegi.org.mx/contenidos/programas/ccpv/2020/doc/Censo2020_Principales_resultados_EUM.pdf
- ITA. (2021a). *Mexico- business travel and etiquette*. International Trade Administration. Retrieved from <https://www.trade.gov/country-commercial-guides/mexico-business-travel-and-etiquette>
- ITA. (2021b). *Mexico - transportation infrastructure equipment and services*. International Trade Administration. Retrieved from <https://www.trade.gov/country-commercial-guides/mexico-transportation-infrastructure-equipment-and-services>.
- ITA. (2021c). *Mexico - Trade Agreements*. International Trade Administration. Retrieved from <https://www.trade.gov/country-commercial-guides/mexico-trade-agreements>
- Jacinto, D. S. (2020). *Internationalization to Colombian market: Enablers and constraints* (Master thesis, Polytechnic Institute of Leiria). Retrieved from <https://iconline.ipleiria.pt/handle/10400.8/5051>
- Johnson, J., & Cullen, John B. (2002). Trust in cross-cultural relationships. In M. J. Gannon & K. L. Newman. *The Blackwell handbook of cross-cultural management*. (p.342-371). Oxford, U.K.: Blackwell Publishers Ltd.
- Khan, M. A., Baldini, G. M. (2019). Understanding the scope and importance of negotiation. In M. A. Khan & N. Ebner (Eds.), *The Palgrave handbook of cross-cultural business negotiation* (pp. 19-51). Cham: Palgrave Macmillan. https://doi.org/10.1007/978-3-030-00277-0_2
- Katz, L. (2006). *Negotiating international business: The negotiator's reference guide to 50 countries around the world* (3rd ed.). Booksurge Publishing.
- Kehoe, T. J., & Meza, F. (2013). Crecimiento rápido seguido de estancamiento: México (1950-2010). *El Trimestre Económico*, 80(318), 237–280. <https://doi.org/10.20430/ete.v80i318.88>

- Koh, T. (1990). The Paris conference on Cambodia: A multilateral negotiation that "failed". *Negotiation Journal*, 6(1), 81-88. doi:10.1007/BF01000459
- Kumar, R. (2004). Culture and emotions in intercultural negotiations: An overview. In M. J. Gelfand & J. M. Brett (Eds.), *The handbook of negotiation and culture* (pp. 95–113). Stanford University Press.
- Leal, C. M. (2017). O papel da diplomacia económica. In N. Crespo & M. J. Tomás. (Eds.), *A internacionalização da economia portuguesa: Casos de sucesso empresarial* (pp. 258-290). Lisboa: Temas e Debates.
- Lee, S., Adair, W., & Seo, S. J. (2011). Cultural perspective taking in cross-cultural negotiation. *Group Decision and Negotiation*, 22, 389-45. doi: 1-17.0.1007/s10726-011-9272-4.
- Lewicki, R. J., Barry, B., & Saunders, D. M. (2016). *Essentials of negotiation* (6th ed.). New York: McGraw-Hill Education.
- Liu, L. A., Ma, L., Chua, C. H., Zhang, Z. X., & Barzantny, C. (2013). The confluence of cultural richness & global identity in intracultural & intercultural negotiations. *Academy of Management Proceedings*, 14123-14123. doi: 10.5465/AMBPP.2013.37.
- Lügger, K., Geiger, I., Neun, H., & Backhaus, K. (2015). When East meets West at the bargaining table: Adaptation, behavior and outcomes in intra- and intercultural German–Chinese business negotiations. *Journal of Business Economics*, 85, 15-43. doi:10.1007/s11573-013-0703-3
- Luo, Y., & Shenkar, O. (2002). An empirical inquiry of negotiation effects in cross-cultural joint ventures. *Journal of International Management*, 8(2), 141-162.
- Lytle, A., Brett, J.M., Barsness, Z., Tinsley, C., & Janssens, M. (1995). A paradigm for confirmatory cross-cultural research in organizational behavior. *Research in Organizational Behavior*, 17, 167- 214.
- Magalhães, J., & Paul, V. (2021). A Entrevista. In S. P. Gonçalves, J. P. Gonçalves & C. G. Marques (Eds.) *Manual de investigação qualitativa: conceção, análise e aplicações* (pp. 63-86). Lisboa: Pactor.
- Major, M. J., & Vieira, R. (2017). *Contabilidade e controlo de gestão: Teoria, metodologia e prática*. Escolar Editora.
- Manzoni, A., Figueiredo, C., & Ribeiro, J. F. (2017). Uma abordagem geoeconómica das exportações portuguesas. In N. Crespo & M. J. Tomás. (Eds.), *A internacionalização da economia portuguesa: Casos de sucesso empresarial* (pp. 47-70). Lisboa: Temas e Debates.

- Marcela, A. (2018, April 21). *Vista Alegre abre filial no México até junho*. Dinheiro Vivo. Retrieved from <https://www.dinheirovivo.pt/empresas/vista-alegre-abre-filial-no-mexico-ate-junho-12787951.html>
- Marques, A. (2017). WeDo Technologies: Identidade corporativa global. In N. Crespo & M. J. Tomás. (Eds.), *A internacionalização da economia portuguesa: Casos de sucesso empresarial* (pp. 361-376). Lisboa: Temas e Debates.
- Martinho, R. L. (2017). Prefácio. In N. Crespo & M. J. Tomás. (Eds.), *A internacionalização da economia portuguesa: Casos de sucesso empresarial* (pp. 9-10). Lisboa: Temas e Debates.
- Metcalf, L., Bird, A., Shankarmahesh, M., Aycan, Z., Larimo, J., & Dewar Valdelamar, D. (2006). Cultural Tendencies in Negotiation: A Comparison of Finland, India, Mexico, Turkey and the United States. *Journal of World Business*, 41(4), 382–394.
- Meyer, M. C., Griffin, E. C., Bernstein, M. D., Willey, G. R., Palerm, A., Cline, H. F., & Parkes, H. B. (2021). *Mexico*. Encyclopedia Britannica. <https://www.britannica.com/place/Mexico>
- Moran, R. T., Harris, P. R., & Moran, S. V. (2007). *Managing cultural differences: Global leadership strategies for the 21st century* (7th ed.). Oxford, UK: Elsevier.
- Morris, M. W., & Gelfand, M. J. (2004). Cultural differences and cognitive dynamics: Expanding the cognitive perspective on negotiation. In M. J. Gelfand & J. M. Brett (Eds.), *The handbook of negotiation and culture* (p. 45–70). Stanford University Press.
- Morrison, T., & Conaway, W. A. (2006). *Kiss, bow, or shake hands*. Adams Media.
- Nataatmadia, I., & Dyson, L.E. (2005). Managing the modern workforce: Cultural diversity and its implications. In M. Khosrow-Pour (Ed.), *Managing modern organizations through information technology: Proceedings of the 2005 Information Resources Management Association International Conference* (pp. 580–583). Idea Group Publishing.
- Natlandsmyr, J.H., & Rognes, J. (1995). Culture, behavior, and negotiation outcomes: A comparative and cross-cultural study of Mexican and Norwegian negotiators. *International Journal of Conflict Management*, 6(1), 5–29. doi:10.1108/eb022753
- Neale, M. A., & Bazerman, M. H. (1992). Negotiator cognition and rationality: A behavioral decision theory perspective. *Organizational Behavior and Human Decision Processes*, 51(2), 157–175. [https://doi.org/10.1016/0749-5978\(92\)90009-V](https://doi.org/10.1016/0749-5978(92)90009-V)
- NERLEI. (2011). *Nerlei acompanha empresas ao México*. NERLEI - Associação Empresarial da Região de Leiria. Retrieved from <https://www.nerlei.pt/pt/noticia/nerlei-acompanha-empresas-ao-mexico-608>

- NERLEI. (2012). *Oportunidades de Negócio no México*. NERLEI - Associação Empresarial da Região de Leiria. Retrieved from <https://www.nerlei.pt/pt/evento-nerlei/oportunidades-de-negocio-no-mexico-468>
- NERSANT. (2017). *México - Export intelligence: Promoção da internacionalização da região de forma inteligente*. NERSANT - Associação Empresarial da Região de Santarém. Retrieved from <http://www.exportribatejo.com/Content/uploads/ficheiro/24/Export-Intelligence-Mexico-Final.pdf>
- Neto, M. N. B. A. (2021). *The dos and don'ts of doing business in the Middle East: GCC/United Arab Emirates* (Master thesis, Polytechnic Institute of Leiria). Retrieved from <https://iconline.ipleiria.pt/handle/10400.8/6754>
- O'Brien, J. (2016). *Negotiations for procurement professionals* (2nd ed.). Croydon: Kogan Page.
- OBG. (2015). *Mexico transport infrastructure development continues*. Oxford Business Group. Retrieved from <https://oxfordbusinessgroup.com/overview/full-steam-ahead-investment-major-transport-infrastructure-upgrades-continues-despite-tighter-budget>
- OECEM. (2022). *Guia país: México 2022*. Oficina Económica y Comercial de España en Mexico. Retrieved from <https://www.icex.es/icex/es/navegacion-principal/todos-nuestros-servicios/informacion-de-mercados/estudios-de-mercados-y-otros-documentos-de-comercio-exterior/guia-pais-mexico-doc2022913758.html>
- Oliveira, J. R. (2019). México: Um mercado de oportunidades para as empresas portuguesas. *Portugalglobal*, 121, 29. Retrieved from <http://www.revista.portugalglobal.pt/AICEP/PortugalGlobal/Revista121/>
- Opatow, S. (2006). Aggression and conflict. In M. Deutsch, P. T. Coleman, & E. C. Marcus (Eds.), *The handbook of conflict resolution: Theory and practice* (2nd ed., pp. 509–532). San Francisco, Jossey-Bass.
- Opresnik, M. (2014). *The hidden rules of successful negotiation and communication: Management for professionals*. Switzerland: Springer International Publishing. doi: 10.1007/978-3-319-06194-8_1
- Osorio, M. (2011). *Guía de etiqueta para hacer negocios en México*. América Economía. Retrieved from <https://mba.americaeconomia.com/articulos/reportajes/guia-de-etiqueta-para-hacer-negocios-en-mexico>
- Pease, A., & Pease, B. (2004). *The definitive book of body language*. Pease International.

- Peixoto, M. (2021). *Portugal perde excedente comercial conquistado no tempo da Troika*. *Jornal de Negócios*. Retrieved from <https://www.jornaldenegocios.pt/economia/conjuntura/detalhe/portugal-perde-excedente-comercial-conquistado-no-tempo-da-troika>
- Peleckis, K. (2013). International business negotiations: Culture, dimensions, context. *International Journal of Business, Humanities and Technology*, 3(7), 91-99.
- PILPG & Baker McKenzie. (2007). *The international negotiations handbook: Success through preparation, strategy, and planning*. PILPG and Baker & McKenzie.
- Pitta, D. A., Fung, H., & Isberg, S. (1999). Ethical issues across cultures: managing the differing perspectives of China and the USA. *Journal of Consumer Marketing*, 16(3), 240–256. doi:10.1108/07363769910271487
- Poza, C., Mateo, P., & Solana, G. (2012). Gestión de las barreras de entrada de la empresa española en su proceso de implementación en mercados emergentes: los casos de China, Brasil y México. *Revista Escuela de Administración de Negocios*, 73, 184-195.
- Reis, N., Ferreira, M., Santos, J., & Serra, F. (2013). A bibliometric study of the cultural models in international business research. *BASE – Revista de Administração e Contabilidade da Unisinos*, 10(4), 340-354.
- Ricks, D. A. (2006). *Blunders in international business* (4th ed.). Blackwell Publishing.
- Requejo, W. H., & Graham, J. H. (2008). *Global negotiation: The new rules*. New York: Palgrave MacMillan.
- Rodrigues, S. C. S. F. (2019). Communication on cultural misunderstandings [PowerPoint slides of the class “Multinational Corporations Strategies and Multiculturalism”]. School of Technology and Management of the Polytechnic Institute of Leiria. Retrieved from <https://ead.ipleiria.pt/2022-23/login/index.php>
- Romero, T. (2021, October 11). *Main religion affiliations in Mexico*. Statista. Retrieved from <https://www.statista.com/statistics/275436/religious-affiliation-in-mexico/>.
- Rosenbaum, A. (2003). How to steer clear of pitfalls in cross-cultural negotiation. *Harvard Management Communication Letter*, (March), 3-4.
- Saigol, L. (2021, December 31). *Global deal making hits record high at \$5.8 trillion*. *Barron's*. Retrieved from <https://www.barrons.com/articles/global-deal-making-record-high-2021-51640960224>
- Salacuse, J. W. (1998). Ten ways that culture affects negotiating style: Some survey results. *Negotiation Journal*, 14(3): 221–235.
- Salacuse, J. W. (2003). *The global negotiator: Making, managing, and mending deals around the world in the twenty-first century*. Palgrave Macmillan.

- Sanlez, A. (2018, July 3). *Mais de 100 empresas portuguesas apostam no México*. Dinheiro Vivo. Retrieved from <https://www.dinheirovivo.pt/empresas/mais-de-100-empresas-portuguesas-apostam-no-mexico-12793342.html>
- Saunders, M., Lewis, P., & Thornhill, A. (2009). *Research methods for business students*. Pearson, New York.
- Sekaran, U., & Bougie, R. (2016). *Research methods for business: A skill-building approach* (7th ed). John Wiley & Sons Ltd.
- Shonk, K. (2022, January 6). *The process of business negotiation*. Program on Negotiation - Harvard Law School. Retrieved from <https://www.pon.harvard.edu/daily/business-negotiations/the-process-of-business-negotiation/>
- Silva, A. R., & Teixeira, E. (2017). Uma visão 360° sobre o seu negócio. *Pontos De Vista*, 1(66), 30. https://issuu.com/revistapontosdevista/docs/revista_pontos_de_vista_66
- Simões, N., & Crespo, N. (2017). A decisão de internacionalização: uma abordagem introdutória. In N. Crespo & M. J. Tomás. (Eds.), *A internacionalização da economia portuguesa: Casos de sucesso empresarial* (pp. 161-177). Lisboa: Temas e Debates.
- The World Bank. (2021). *GDP (current US\$) - Mexico*. The World Bank. Retrieved from <https://data.worldbank.org/indicator/NY.GDP.MKTP.CD?locations=MX>.
- The World Bank. (2022b). *Exports of goods and services (% of GDP) - Mexico*. The World Bank - Data. Retrieved from <https://data.worldbank.org/indicator/NE.EXP.GNFS.ZS?locations=MX>
- The World Bank. (2022c). *Imports of goods and services (% of GDP) - Mexico*. The World Bank - Data. Retrieved from <https://data.worldbank.org/indicator/NE.IMP.GNFS.ZS?locations=MX>
- Tinsley, C. H., Taylor, M. S., & Adair, W. L. (2012). Culture and international negotiation failure. In G. O. Faure (Ed.) *Unfinished business: Why international negotiations fail* (pp.185-200). Athens: University of Georgia Press.
- Tomás, M. J. (2017a). Os desafios culturais da internacionalização. In N. Crespo & M. J. Tomás. (Eds.), *A internacionalização da economia portuguesa: Casos de sucesso empresarial* (pp. 179-194). Lisboa: Temas e Debates.
- Tomás, M. J. (2017b). A escolha do mercado de destino. In N. Crespo & M. J. Tomás. (Eds.), *A internacionalização da economia portuguesa: Casos de sucesso empresarial* (pp. 217-226). Lisboa: Temas e Debates.
- Tripp, T. M., & Sondak, H. (1992). An evaluation of dependent variables in experimental negotiation studies: Impasse rates and pareto efficiency. *Organ. Behavior Human Decision Processes*, 51(2), 273-295.

- UNCTAD. (2021a). *World Investment Report 2021*. UNCTAD. Retrieved November 8, 2021, from https://unctad.org/system/files/official-document/wir2021_en.pdf.
- UNCTAD. (2021b). *Evolution of the world's 25 top trading nations*. United Nations Conference on Trade and Development - UNCTAD. Retrieved from <https://unctad.org/topic/trade-analysis/chart-10-may-2021>
- UNCTAD. (2022). *World investment report 2022 - UNCTAD*. United Nations Conference on Trade and Development. Retrieved from https://unctad.org/system/files/official-document/wir2022_overview_en.pdf ~
- Weingart, L. R., & Olekalns, M. (2004). Communication processes in negotiation: Frequencies, sequences, and phases. In M. J. Gelfand & J. M. Brett (Eds.), *The handbook of negotiation and culture* (p. 143–157). Stanford University Press.
- Vilelas, J. (2009). *Investigação: O processo de construção do conhecimento*. Edições Silabo.
- Weiss, S. E. (1994). Negotiating with "Romans" - Part 1. *Sloan Management Review*, 35(2), 51-61.
- Zárate, A. (2014). *A Evolução das Relações Entre o México e Portugal*. Casa da América Latina: Lisboa. Retrieved from <http://casamericalatina.pt/2014/11/10/a-evolucao-das-relacoes-entre-o-mexico-e-portugal/>

Appendices

Appendix A- Interview Guide

Semi-structured Interviews:

“A Guide to Successful International Negotiations in the Mexican Market”

My name is Liliana Oliveira and I'm a student in the 2nd year of the International Business Master's Degree at the Polytechnic Institute of Leiria, School of Technology and Management (ESTG).

I am currently writing a dissertation about successful negotiation practices in the Mexican market from the perspective of Portuguese companies. The objective is to collect data to ascertain knowledge of common business habits and cultural aspects leading to successful negotiation outcomes and interactions in Mexico.

As part of my research project, I kindly ask for your participation (or a company's employee most involved in doing business in the Mexican market) in a semi-structured interview.

All your responses will be anonymous and confidential and will fill the unique purpose of the research. The semi-structured interview will take approximately 10-15 minutes.

Thank you in advance for your time and attention.

1. Profile

1. Name of the company:
2. Business sector:
3. City in Mexico where the partners' located:
4. Name: 4.1. Gender: 4.2. Position in the company:
5. Time of experience in the market:

The Negotiation Process

2. Preparation

2.1. **RQ 1:** In order to prepare to the negotiation, what kind of information do you gather? What information do you pay attention to?

RQ 1.1.: At the national level?

- a) Political system
- b) Economic system
- c) Legislation
- d) Regulation

- e) Support (from legal entities to internationalisation or investment)
- f) Other(s): _____

RQ 1.2.: At the cultural level?

- a) History
- b) Values
- c) Norms
- d) Behaviours
- e) Language
- f) Traditions
- g) Religion
- h) Taboos
- i) Beliefs and superstitions
- j) Other(s): _____

RQ 1.3.: At the business level (potential partner/buyer)?

- a) History
- b) Members
- c) Reputation
- d) Recreational activities
- e) Work habits
- f) Organisation culture
- g) Other(s): _____

RQ 1.4.: At the individual level (who you are dealing with)?

- a) Decision-making power
- b) Qualifications
- c) Background
- d) Interests, motives
- e) Experience
- f) Marital/Family status
- g) Other(s): _____

2.2. **RQ 2.:** How do you plan the meeting?

RQ 2.1.: What requirements are needed to choose a meeting date?

- a) Holidays and festivities
- b) Seasons
- c) Participation in events (fairs, national exhibitions, among others)
- d) Weekdays, which?
- e) Other(s): _____

RQ 2.2.: What do you consider when planning the meeting time?

- a) Local customs (mealtimes, local meeting times, *siesta*, among others)
- b) Start and ending time
- c) Breaks
- d) Times of the day (morning or afternoon)
- e) Other(s): _____

RQ 2.3.: What time in advance is necessary to schedule meetings?

- a) 1 week

- b) Two weeks
- c) Three to four weeks
- d) >1 month

RQ 2.4.: Do you structure a restrict agenda for the meeting? Yes or no.

RQ 2.5.: What factors do you consider when meeting in Mexico?

- a) Travel expenses
- b) Travel duration – how long: _____
- c) Location
- d) Materials to bring
- e) Other(s): _____

RQ 2.6.: How do you plan the meeting location?

RQ 2.6.1.: Where do you prefer to hold the meeting? And why?

- a) Home office
- b) Counterpart’s office
- c) Neutral site (hotel, conference room)

RQ 2.6.2.: What are the ambient requirements when meeting at the home office?

- | | |
|------------------|----------------------------|
| a) Spacious room | e) Interruption reductions |
| b) Bright room | f) Refreshments |
| c) Equal seats | g) Climatization |
| d) Table format | h) Other(s): _____ |

RQ 2.7.: How do you prepare support materials (documents, catalogues, samples) to bring?

RQ 2.7.1.: Do you consider cultural connotations of words, numbers, or colours?

If yes, please give some examples: _____

RQ 2.7.2.: Do you translate presentation handouts and other materials to Spanish? Yes, or no.

RQ 2.8.: How many people do you bring to be present throughout the negotiation process? _____

Who?

- | | |
|----------------------|---------------------|
| a) Technical skills | e) Mediators |
| b) Commercial skills | f) Lawyers |
| c) Budgeting | g) Cultural experts |
| d) Translators | h) Other(s): _____ |

2.3. **RQ 3.:** Do you believe negotiation preparation is critical to success? Yes, or no?

If yes, why?

- a) Ability to make informed decisions
- b) To adapt and react to situations
- c) Other(s): _____

If not,

- a) Depends on the cultural context
- b) Years of experience
- c) Other(s): _____

RQ 3.1.: What factors do you consider to be the most important?

- a) Negotiation scope
(what to negotiate)
- b) Determining objectives
- c) Strategies
- d) Structuring an agenda
- e) Meeting location
- f) Travel factors
- g) Participants
- h) Counterpart's environment
- i) Other(s): _____

3. Pre-negotiations

3.1. **RQ 4.:** When meeting the partner for the first time, how do you present yourself and your company?

RQ 4.1.: How do you greet your Mexican partner?

- a) Handshake
- b) Slight head bow and handshake
- c) Embrace
- d) Kiss (between women)
- e) Other: _____

RQ 4.1.1.: Do you greet every participant individually upon arrival and departure? Yes or no.

RQ 4.1.2.: What words do you say upon greeting?

RQ 4.1.3.: How do you introduce yourself? In what order?

- a) First name
- b) Last name
- c) Title
- d) Position in the company

RQ 4.2.: What forms of address do you use (honorifics, titles)?

- a) *Señor/Señora/Señorita*
- b) *Don/Dueña*

- c) Academic or professional titles (*Doctor, Ingeniero*)
- d) *Usted*
- e) *Tú*
- f) Other(s): _____

RQ 4.3.: Do you consider exchanging business cards important? Yes or no.

RQ 4.3.1.: If yes, when does it happen?

- a) Greeting
- b) Beginning of negotiations
- c) End of the meeting
- d) Other(s):

RQ 4.3.2.: What information do you provide in business cards?

- a) Name
- b) Title
- c) Position
- d) Contact
- e) Company information
- f) Other(s): _____

RQ 4.3.3.: Do you bring translated business cards to Spanish? Yes or no.

RQ 4.4.: Do you and your Mexican counterpart engage in small talk after greeting? Yes, or no.

RQ 4.4.1.: If yes, what kind of topics do you talk about, and which ones do you believe are appropriate and inappropriate to bring up during conversations? Please classify:

Trip		Politics	
Sightseeing		USA relations	
Mexican culture		Economy	
Personal life		World events	
Sports		Portugal	
Religion		Other(s):	

RQ 4.4.2.: Does your partner ask about your personal life? If yes, what did your partner ask about?

Family		Interests	
Marital status		Religion	
Job		Other(s):	
Background			

RQ 4.4.3.: Describe how comfortable were you with the questions?

From 1- totally uncomfortable, to 5- totally comfortable: _____

RQ 4.4.4.: How long did it take?

- a) 10 minutes
- b) 15 minutes
- c) 30 – 60 minutes
- d) >1 hour

RQ 4.4.5.: Do you feel that small talk is important to develop personal relationships and to establish trust in Mexico? Yes or no.

3.2. **RQ 5.:** How is the dress code used in business meetings in Mexico?

- a) Complete suit (jacket, shirt, tie)
- b) Suit (jacket and shirt, no tie)
- c) Shirt and pants
- d) Informal (jeans and t-shirt)

RQ 5.1.: What colours of clothes or accessories are considered more appropriate?

Which ones: _____

3.3. **RQ 6.:** How do you classify the punctuality to start a meeting?

- a) At the schedule time
- b) 5 minutes later
- c) 10 minutes later
- d) 15 minutes later
- e) > 30 minutes later
- f) Other(s)

RQ 6.1.: Do you expect delays and rescheduling? Yes or no.

RQ 6.2.: What is your perception towards Mexican time and pace?

- a) Fast paced (business-focused)
- b) Slow paced (leisurely sense of time)
- c) Other(s): _____

3.5. **RQ 7.:** How is it perceived having meals with your Mexican counterpart?

- a) Entirely business
- b) Relationship building
- c) Further discussion of terms/topics
- d) Other(s)

RQ 7.1.: During meals, what table manners/eating habits are appropriate and less appropriate? Classify:

- a) Burp
- b) Slurp
- c) Sleep
- d) Hands above the table
- e) Eating using hands
- f) Other(s): _____

RQ 7.2.: Who usually pays the bill?

- a) The buyer
- b) The supplier
- c) Haggle over paying

3.6. **RQ 8.:** Do you offer gifts to your Mexican partner? Yes or no.

RQ 8.1.: If yes, what types of gifts would you offer?

Wine		Cigarette lighters	
Spirit drinks		Company's items w/ logo	
Cutlery		Portuguese regional products	
Flowers		Silver items	
Finely made pens		Other(s):	

RQ 8.2.: When do you offer the gifts?

- a) Festive celebrations (Christmas)
- b) When reuniting with clients
- c) Other(s):

RQ 8.3.: Did your partner opened the gift in public? Yes or no.

4. Negotiations

4.1. **RQ 9.:** Regarding verbal communication during business negotiations:

RQ 9.1.: What is the language used in the business meeting?

- a) Spanish (Mexico)
- b) Portuguese
- c) "Portunhol"
- d) English

RQ 9.2.: When communicating verbally during meetings do you use:

- a) Short and direct terms
- b) Colloquialisms
- c) Slang
- d) Repetition (ensuring understanding)

RQ 9.3.: When speaking, does your counterpart:

- a) Take turns (waits until their turn to speak)
- b) Speak simultaneously (overlapping conversations)
- c) Interrupt
- d) Other(s): _____

RQ 9.4.: What does your Mexican partner say when refusing/disagreeing with issues?

- a) "No"
- b) "We are going to study/think about it"

c) Other(s):

4.2. **RQ 10.:** When communicating non-verbally during meetings, how would you describe the following constructs:

RQ 10.1.: How do you classify the interpretation of Mexican non-verbal behaviour?

From 1- very easy, to 5- extremely challenging: _____

RQ 10.1.1.: How do you classify the Mexican tone of voice?

From 1- very low, to 5- very loud: _____

RQ 10.1.2.: How do you classify the Mexican body expressiveness?

From 1- not expressive at all, to 5 - very expressive: _____

RQ 10.1.3.: Please describe body language aspects that you perceive important to pay attention or to avoid (for example, stand with both hands on your hips, crossing arms, hands inside pockets, pointing fingers, eye contact):

RQ 10.2.: Were there silent moments with the counterpart during conversations? Yes or no.

RQ 10.2.1.: If yes, during how long? _____

RQ 10.2.2.: How did it make you feel? _____

RQ 10.3.: How close did you stand with your counterpart?

a) Very close, < 30 cm

c) 60 cm

b) Close, about 40 cm

d) 1 m

RQ 10.3.1.: Did your Mexican partner ever touch you in arms and shoulders? Yes or no.

RQ 10.3.2.: Did you ever embrace? Yes or no.

RQ 10.3.3.: Did you ever withdraw from being close?

RQ 10.3.4.: How did you feel with any of these actions?

From 1- totally uncomfortable, to 5- totally comfortable: _____

4.3. **RQ 11.:** During negotiations, how do you perceive the following constructs:

RQ 11.1.: How is the meeting organised?

- a) Follow a plan/agenda
- b) Address only expected subjects
- c) Absence of a restrict plan (agendas as guidelines)
- d) Conversation dispersing into different subjects

RQ 11.2.: How is the approach to agreement building?

- a) Bottom-up – Specifics (price, terms, product) to general themes
- b) Top-down – General principles to specific items
- c) Other(s):

RQ 11.3.: What about their approach to the negotiation subject?

- a) Direct approach towards issues
- b) Indirect approach around issues
- c) Other(s):

RQ 11.4.: What type of arguments are most used?

- a) Emotional/personal
- b) Empirical/logical
- c) Other(s):

RQ 11.5.: How do you perceive the Mexican team's decision-making power?

- a) Decisions at the top (one leader)
- b) Decisions by group consensus
- c) Other(s):

RQ 11.6.: How do you perceive the Mexican approach towards outcomes?

- a) Integrative (win-win; muti-issue offers)
- b) Distributive (win-lose; single-issue offer)
- c) Other(s):

4.4. **RQ 12:** How many meetings are required to reach an agreement and close the deal?

- a) 1 meeting
- b) 2 meetings
- c) 3 meetings
- d) 4 meetings
- e) 5 meetings, or more

RQ 12.1.: During how long?

- a) 1 day
- b) < 2 weeks
- c) 1 month
- d) 2-3 months
- e) 6 months
- f) > 1 year

RQ 12.2.: When reaching a satisfactory agreement, how are final agreements concluded?

- a) Written document
- b) Detailed contract
- c) Verbal agreement
- d) Other(s): _____

4.5. **RQ 13.:** How do you classify the need to develop a trusting relationship with the Mexican counterpart to do business?

From 1- not important, to 5- extremely important: _____

RQ 13.1.: Approaches towards building a relationship and trust precede any substantive negotiations? Yes or no.

RQ 13.2.: How do you classify the importance to work with a local intermediary (with relationships with the partner) to initiate the contact?

From 1- not important, to 5- extremely important: _____

5.Post-negotiations

5.1. **RQ 14.:** Do you allow time for follow-up negotiations? Yes or no.

RQ 14.1.: Do you keep in touch regularly? Yes or no.

RQ 14.1.1.: What time frame do you use to contact you counterpart?

- a) Weekly
- b) Once a fortnight
- c) Monthly
- d) Seasonally
- e) Yearly

RQ 14.2.: Do you inquire if issues have arisen, or if support is needed? Yes or no.

RQ 14.3.: How do you plan the following sessions?

- a) Plan visits throughout the year
- b) Plan online meetings
- c) Other(s): _____

RQ 14.3.1.: How often do you visit your Mexican partner?

- a) Monthly
- b) Quarterly
- c) Yearly
- d) Rarely

RQ 14.3.2.: When visiting your partner, do you feel an improvement in the relationship and in the business? Yes or no.

Successful and Unsuccessful Negotiations

6. Concepts & Considerations

6.1. **RQ 15.:** How do you classify success in international business?

How do you measure a successful performance?

- a) Achieving predetermined objectives and goals
- b) Reaching integrative outcomes (win-win)
- c) Reaching distributive outcomes (win-lose)
- d) Establishing a strong relationship
- e) Win the client

6.2. **RQ 16.:** Overall, how would you describe the success of your Mexican negotiations?

- a) Unsatisfactory
- b) Satisfactory
- c) Very pleased

6.3. **RQ 17.:** Do you believe cultural differences can be the cause of unsuccessful negotiations? Yes or no.

6.4. **RQ 18.:** What factors do you consider to be most responsible to negotiation blunders in Mexico?

- a) Inflexibility
- b) Intercultural unawareness
- c) Inadequate preparation
- d) Lack of relationship building
- e) Other(s):

6.5. A: What do you consider to be the biggest mistake made during the negotiation process in the Mexican market? (Misunderstandings, blunders) Did it harm the negotiation?

6.6. B: What do you consider to be the most anecdotal situation when negotiating with Mexican partners?

6.7. C: What strategies do you consider important to managers develop in order to avoid negotiation blunders in the Mexican market?

Appendix B- Results of the Interviews

Appendix B1 - Biggest blunder

RQ	Resp.	Retrieved Segments
A	CM	<p>R: In the beginning there were some expressions that they would use that weren't understood, as well as some of our expressions that were not understood by them.</p> <p>CM_Pos. 228 SUCCESS & FAILURE > Blunders (0)</p> <p>I: Did it harm the negotiation?</p> <p>R: No, it disrupted the delivery times of the products, not exactly the negotiation itself.</p>
	BM	<p>CM_Pos. 229-230 SUCCESS & FAILURE > Blunders (0)</p> <p>One time I had this situation with a client that until today has not bought me anything, nor ever looked for me. This is a type of client that tells you to speak, we present the company and what we do, and he does not say anything, we only see him writing down, and I run away from these clients. Because we do not know what is he thinking about us, about our product or project, he does not speak and we get to the end of the meeting not understanding what had happened. It is very complex.</p>
	GF	<p>BM_Pos. 102 SUCCESS & FAILURE > Blunders (0)</p> <p>R: Sometimes it is the use of popular expressions, which later translated do not make sense and might even look bad. I had a meeting where my boss said something like 'we are the blacks of Europe here' and what he meant by that was that we are not here working for free and doing everything that others do not want, and these are things that are rooted, but taking into account that they have a large population of mestizos that worried me at a certain point but as they started to laugh it passed. I am the one who has a sensitivity to these issues, for these things it is necessary to have some tact as sometimes things can go wrong.</p> <p>GF_Pos. 203 SUCCESS & FAILURE > Blunders (0)</p>

Source: MAXQDA retrieved segments from the results obtained in question A


Appendix B2 - Anecdotal situation

RQ	Resp	Retrieved Segments
B	AF	<p>R: I have a funny story of a client who once asked me to bring a t-shirt of Cristiano Ronaldo to his daughter and I understood that it was for him, and his daughter was very little. So I came up there with this enormous official t-shirt, because he was big, and it was to his little daughter.</p> <p>AF_Pos. 295 SUCCESS & FAILURE > Anecdotal situation (0)</p>
	BM	<p>I once had a meeting in which the man needed to get somethings off of his chest, I didn't know him yet and he started to tell me about his personal life and some issues. Do you know what I did to my laptop? I closed it and did not present the company, we talked, we just talked and now I sell him moulds. So that's why I say that it is very important to assess who is in front of you, sometimes we can have someone who is going to buy moulds but at that specific moment they do not need you to sell the mould nor do they need you to wear them out, but rather a friend's shoulder. We need to talk and to help them because they can return you the favour afterwards.</p> <p>BM_Pos. 36 SUCCESS & FAILURE > Anecdotal situation (0)</p> <p>And the funnier one was about me feeling that I needed to close my laptop and stop my presentation so that we could talk about this man's personal life! About his son, mother, mother-in-law and that he was divorcing and everything else really! For me that was the most different meeting I have ever had!</p>
	DF	<p>BM_Pos. 228 SUCCESS & FAILURE > Anecdotal situation (0)</p> <p>R: The most recent one that happened to me was when I was answering the phone and started having an uncontrollable coughing attack. Then when I was apologising we just burst out laughing because I couldn't stop coughing! He said to try to drink some water and I said 'not water, now the only way is to drink cognac!' and we kept laughing about it.</p> <p>DF_Pos. 239 SUCCESS & FAILURE > Anecdotal situation (0)</p>

HM

R: When I first came here, I met with the owner of a company to show him my technical drawings. He looked at them and said they were 'espartosos' and I was very upset and sorrowful! I realised later that 'espartoso' in Portuguese means 'amazing' but to me it meant 'horrible'!

 HM, Pos. 216

 SUCCESS & FAILURE > Anecdotal situation (0)

Source: MAXQDA retrieved segments from the results obtained in question B

Appendix B3 - Successful and unsuccessful practices

Source: Own construction from the results obtained

Relationship & Trust	Establish a trusting relationship; honesty; create a network of contacts, bonds with buyers and engineers; building affinity that will become a lasting friendship over time; keeping one's word and promises; breaking a promise, trust, or lying collapses the deal.
Business	Build customer loyalty with quality, honesty and meeting deadlines; adopt flexibility and promote a relaxed conversation; focusing on larger companies avoids the possibility of losing deals over corporate corruption; face the problems and solve them; avoid traveling alone to Mexican business meetings and bring at least 2 businesspeople, a man and a woman in particular, in order to keep a "cool head" and avoid "temptations that exist there"; to always have written registries, such as, emails confirming the agreed terms, in order to get mutual consent and clarification and also to avoid mistakes and miscommunications.
Negotiating	Give evidence that foster confidence to their decision of buying from a Portuguese company and help them to lose the fear to make the investment; explain why the prices cannot be lowered by selling the idea that buying cheaper is not going to be worth it in the long run; make them understand that the company is trying to sell a high quality product and service that will compensate long term; promote a future monitoring and after sales service that can be fulfilled.
Culture	Study the market and the Mexican culture; understand Mexicans way of being; mutual awareness of realities to understand the intentions from both sides;
Follow-up	Constant presence and communication; showing up, staying close and monitoring fosters confidence.

Appendix C- Practical Guide – Dos and Don'ts of Doing Business in Mexico

Aspects	Do	Do not
Preparation		
Negotiation Substance	Plan the product, price, time deadlines adapted to the client; determine negotiation objectives and strategies	Disregard the clients' sector and potential interests
National level	Research the current political situation (political parties, elections, risks, transparency); economic system (market position, foreign investment, developments of the mould and automotive industry, trade agreements, socio-economic factors); active	Presume the country's political and economic situation is unchanged; Ignore news about the market

	legal support (CEFAMOL, AICEP, CCILM); legislation and regulation	
Cultural level	Learn Mexican Spanish, idiomatic expressions, and ice breakers; norms; values; behaviour; geography; history (monuments, historical places); religion (Catholic); traditions and cuisine; Embrace and adapt to the Mexican cultural experience	Rely on previous experience abroad; Be overconfident with the current knowledge; Make generalisations about the Mexican behaviour; Criticise values, norms, and behaviours
Business level	Investigate the client's organisation on the business sector, product portfolio and potential interests, history, decision-making power (countries and companies), members, organisational changes, financial status and reputation	Approach a client without the proper preparation; Assume the decision-making power is in Mexico
Individual level	Research individuals' decision-making power; position; background; years on the current company and work experience;	Ignore mid-level negotiators
Appointment and duration	Consider the holiday policy, festivities, vacation periods, potential fairs, weekdays (avoid Mondays and Fridays); local business hours (prefer morning periods), mealtimes Set a convenient date for both sides; Adapt the time necessary to the client's needs; Plan tolerance time to commute and delays; Schedule the meeting with 2 weeks in advance; Structure an agenda with main negotiation topics and time estimations as guidelines	Be inflexible with scheduling meetings' date and hour; Disregard commuting and possible delays; Expect to strictly follow the planned agenda
Travel factors	Calculate travel expenses; Plan who will travel; Plan the duration of the trip (1-2 weeks), where to stay (hotel, apartment), transportation (airplane, taxis, rent a car), safety (get information about safer areas), travel insurance and support materials	Ignore travel distances; Get taxis from the street; Wear showy accessories in crowded areas

Location and ambient	Plan first meetings in the client's company; Prepare the negotiation setting: climatization, refreshments (coffee, water), audio-visual materials, luminous and spacious room, equal seats; Ensure a welcoming and clean space; Reduce interruptions (phone calls, other appointments); Sit closer to each other	Disregard room preparations; Create distance at the table
Materials	Prepare catalogues, samples, pamphlets, and business cards; a formal, detailed, and customised presentation (soft colours); Use colours associated with your company; Translate the materials to Mexican Spanish	Use a standard presentation to all clients; Show a presentation in English;
Participants	Assess the individuals' profile, attribute roles and responsibilities; Assign the people responsible for the market; Bring two people with commercial and technical skills	Change the key negotiators responsible for the market
Pre-negotiation		
Greetings	Shake hands to all the individuals; Verbally greet the participants (<i>hola, buenos días/buenas tardes, mucho gusto, encantado/a</i>) and express gratitude for the hospitality; Introduce yourself with first and last name; Address people formally (<i>usted</i> and respective title); Level the address forms when possible; Exchange business cards with all individuals	Ignore protocol; Address informally on first contacts;
Small talk	Follow the partner's lead and pace; Praise the Mexican culture (cuisine, sightseeing, monuments, places), Talk about the weather, trip, economy, industry (concerns, competitors), Portugal (culture, economy) and global events; Approach sports, politics, religion and USA relations topics only when the other party brings up; Engage in personal topics when other party shows interest; Share stories about family, interests, hobbies, sports, Portugal and the job;	Force the conversation; Bring up sports, politics, religion, or USA relations topics; Ask personal questions on first contacts; Criticise cultural aspects, acts of violence or crime; Refer the US as America
Personal appearance	Wear formal attire in darker clothes (complete suit)	Dress casually; Wear flashy colours

Pace and punctuality	Be punctual; Expect Northern and industrialised cities to be more fast-paced and business-focused than Central and Southern cities	Imply that Mexicans are idle; Assume that Mexicans are not focused on the negotiation
Meals	Seize the opportunity to have lunch/dinner; Engage in both relationship building and business subjects when appropriate; Follow the general table etiquette; Expect the supplier to pay the bill	Decline lunch/dinner invitations; Eat loudly
Gifts	Offer small symbolic gifts to longstanding clients; Offer Portuguese regional products: wine (Port wine, <i>vinho verde</i>), spirit drinks and liqueurs (<i>amêndoa amarga, ginja</i>), cheese, olive oil, saints' statues from Fátima; Offer gifts in festive holidays or when visiting a longstanding client;	Offer ostentatious gifts; Offer Mexican products
Negotiation		
Verbal communication	Speak Spanish; Use direct and simple terms; Repeat what has been said; Ask permission to interrupt; Be patient, respectful and courteous; Listen actively	Speak English when not necessary; Use slang, jargon, colloquialisms; Use pompous words; Interrupt without asking permission; Use confrontational attitudes; Force a direct answer
Non-verbal communication	Be attentive when reading the partners non-verbal behaviour; Carefully assess body language aspects, such as laughter; Keep both hands visible; Maintain eye contact; Assess silent moments; Engage in physical proximity: touching arms and shoulders, pats on the back, hugging in longstanding relationships;	Ignore non-verbal behaviours; Lean back on the chair; Cross both arms; Point the finger at someone; Hide hands; Show aggressive behaviour; Assume the meaning of a laugh, gesture or silence; Withdraw from physical actions

Dialogue and negotiation	<p>Prepare to haggle in an informal and easy-going atmosphere; Expect holistic discussions of business and informal subjects; Engage in a top down approach (general to specific topics); Directly approach negotiation subjects; Use emotional arguments; Assess decision-making power (top leader or group consensus);</p>	<p>Exhibit aggressive, confrontational, overconfident attitudes; Be inflexible; Assume meetings are unorganised; Ignore mid-level negotiators; Be competitive</p>
Closing	<p>Expect to close the deal after several proposals and contacts lasting from 1-5 months with new clients; Close the deal in person; Conclude final agreements with a purchase order or detailed contracts; Summarise all the agreement conditions in an email</p>	<p>Take long without contacting or sending new information/proposals ; Disregard having written information</p>
Relationship and trust	<p>Build a warm personal relationship based on trust and respect for the members of the other team; Engage in informal discussions, cultural background, personal topics when appropriate; Be present, close, and flexible; Be open to client's family and acquaintances Employ local intermediaries</p>	<p>Begin negotiations without trust; Break promises Neglect to preserve the relationship</p>
Post-negotiation		
Follow up	<p>Maintain regular contact on a weekly basis; Ensure after sales service (technical assistance); Schedule follow-up meetings; Schedule visits throughout the year (2-3 times); Seek opportunities to make future deals</p>	<p>Be distant; Fail the agreed deadlines; Neglect after sales service</p>

Source: Own construction based on interview