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Planning in Brazil, India and Germany

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Abstract

Planning is a fundamental cognitive ability that helps in organizing and structuring events unfolding in a person's daily life. Two studies are presented that analyze planning behavior in different cultures: Brazil, India, and Germany. The first is a cross-cultural psychological study in which students develop plans for uncertain problem scenarios. The second study follows a cultural psychological tradition. Workers from different domains are interviewed about their life problems and plans. The strengths and the weaknesses of both approaches become obvious in the description and discussion of these two studies. The cross-cultural study sheds light on cross-cultural similarities and differences in planning in Brazil, India, and Germany. The cultural psychological approach yields data regarding a theoretical model on the specific cultural influences on planning.

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Introduction

Planning has been identified as a key issue in cognitive psychology as well as in theories of action regulation (e.g., Dörner, 1996). Planning is considered a fundamental cognitive ability that allows human beings to organize and structure their daily lives and their futures. We plan, for example, holidays, birthday parties, or possible solutions in problem situations. But how important is planning in daily life of people in different cultures? And how do people plan in different cultures?

In this article, we discuss cross-cultural differences in planning and cultural influences on planning. After a brief theoretical introduction on planning, two studies are presented which analyze planning behavior in Brazil, India, and Germany. The first is a cross-cultural psychological study in which students develop plans for uncertain problem scenarios. The second study follows a cultural psychological tradition: Workers from different domains living in the above mentioned countries are interviewed about their life problems and plans.

Planning

Planning is especially important in new situations characterized by uncertainty because in such situations new courses of actions often have to be developed. Imagine a student, called John, who starts college. John thinks about what to study -- perhaps psychology or business administration. He gets advice from friends who study psychology and business administration. He plans that he will need statistics and basic methodology knowledge for both subjects. So John decides to take those statistics and methodology courses in the first semester. In addition, he plans to take some courses in psychology and some courses in business administration. After the first semester he will choose either several courses in psychology or several courses in business administration...

What did John do? John set goals to either have a degree in psychology or business administration. His actions refer to the selection of several courses in the first semester, mainly statistics and methodology courses. Then he planned in two directions: Taking courses either for psychology or for business administration.

What is planning? Starting from a given situation, we have to use available knowledge to find a course of actions to reach a desired goal situation. Figure 1 shows an abstract schema of a plan, symbolizing the initial situation and two goals. From the initial situation, actions (drawn as arrows) lead to new situations (drawn as circles) and finally to one goal situation. The plan can also develop in different situations (e.g., when John decides after the first semester to take courses mainly for psychology or mainly for business administration. The question marks indicate different plan alternatives where a choice has to be made. Some actions may lead to barriers and not to the intended goal, such as the selection of a course that is neither a requirement for psychology nor business administration.

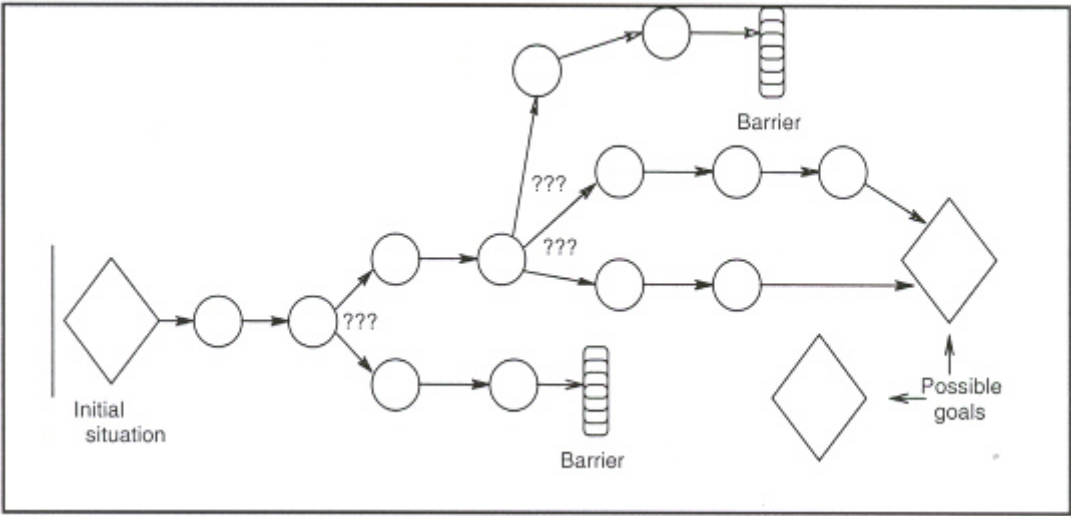


Figure 1. Abstract schema of a plan.

Table 1
Four Types of Plans

		Depth	
Width		short	deep
narrow			
wide			

Plans can differ in various aspects (Miller, Galanter, & Pribram, 1960). One dimension is time perspective (depth). Plans may be "short" in the sense that their range encompasses only the immediate future. Plans with a "deep" time perspective consist of a long sequence of actions that reaches far into the future. Another dimension is the number of "branches" (width). Plans may be narrow and consist of just one course of action or they can be wide and take different possibilities and events into account. From these two dimensions result four different types of plans (see Table 1): short and narrow plans, deep and narrow plans, short and wide plans, and deep and wide plans.

Culture

Certain requirements for planning suggest that there are cultural influences on planning. First, the problem situation must be reasonably clear. This requires a certain degree of stability of the environment to enable us to make reasonably accurate forecasts. Second, we need at least a general idea of the desired goals. Third, we need special cultural knowledge to develop ways and means of reaching the goals. Finally, the planner should experience a sense of control to feel confident in carrying through the plans. Through the process of enculturation, goals and knowledge are learned. They will be activated in the planning process. Plans are developed in a specific environment and mostly lead to actions in this environment (see Figure 2).

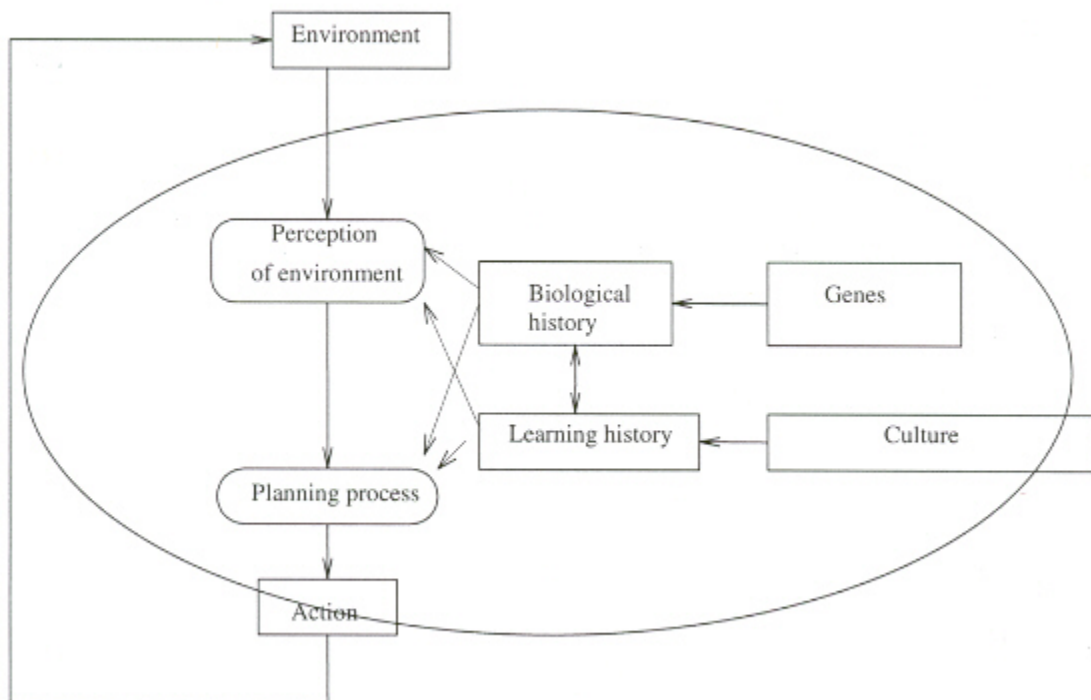


Figure 2. A first model of planning and culture.

In this model, culture is something "inside" the individual and something "outside" the individual. Inside the person, symbols within the ellipse are, for example, ideas, goals, plans or motivations; outside the individual is, for example, the physical and social environment. Therefore, culture is located inside and outside the ellipse.

***The best discoveries one makes are when
he sees the world with different eyes.***

Marcel Proust

Study 1: Are There Cross-Cultural Differences in Planning Behavior?

The following part presents results of a cross-cultural study conducted in Brazil, India, and Germany (see Güss, 1997; Strohschneider & Güss, 1998). Cross-cultural psychologists often use quantitative methods for their investigations of similarities and differences in individual psychological functioning in different cultural groups. Cross-cultural psychology follows an "etic" perspective. The basic assumption is that all human beings are in someway similar and share universals, but they are also different because of cultural influences.

In this study 120 students in Brazil, India, and Germany read several open-ended problem scenarios like the following one.

Please imagine that you live together with your spouse and your three children in a pretty flat for rent. The flat is located in a nice area and the rent is reasonable. Although you are not living there for long, you feel quite at home there. Coming home from work this evening, you find a letter from the landlord in which he gives notice of termination because he needs the flat for a member of his own family.

Table 2.

Comparison of the Plans' Formal Structure, Aggregated Data from Five Stories

	Brazilian students	German students	Indian students
Number of actions (Depth)	3.61	5.43	5.31
Number of ramifications (Width)	.59	.76	.81
Number of explorations	1.14	2.02	1.52

The students write down their feelings, and what they are going to do in such a situation. Take a moment and think about what you would do in such a situation. Table 2 shows some differences in the plans of the Brazilian, German, and Indian students. (For a detailed description of the instrument and data analysis see Güss, 1997). German students' plans showed most actions and most explorations (i.e., additional information that they would like to know). Brazilian students' plans had the least ramifications and were unidirectional. In the following part, one plan example of each country will be given and the

overall characteristics of the plans will be described. Note that I will talk about the overall differences between the groups in a very general way. I will not describe the variations that exist within the groups.

Brazil

Example:

"My God, this is sad. Probably the landlord only wants more money and this is the way he tells it to me. Stay calm! I will talk to him and offer him a higher monthly rent. We had a good talk and he accepted my offer. As a result of this we can stay in the apartment and are all very happy."

Brazilian students show fear, disappointment, and concern as most frequent emotional reactions. Disappointment and concern are emotions that are focused on other people. Brazilian students accept the situations as they are and don't ask questions. They develop short plans and they develop mostly one-track solutions. The content of the plan focuses often on internal thoughts and feelings and the goal of the plan is mostly to fulfill the duties. Most of the Brazilian students are optimistic in regard to the future development.

Germany

Example:

"One moment! This is not so easy according to the law. Where is my book of German Civil law? I will immediately have a look in the book and check my rights and if serious danger exists for me. Probably I will talk to a lawyer. Afterwards I will talk to the landlord and check if his demand is really so urgent. I want to be kind and objective. The result of my actions will be as follows. The landlord has explained his situation and he was right. Leaving the apartment was necessary."

German students react mostly with anger or fear in these situations, emotions that are directed to the individual. German students perceive the situation as uncertain, inquire more about the background of the situation, develop longer plans, and are therefore more active in planning. German students' plans focus more on the solution of the problem itself than on internal thoughts and feelings. The main goals in German students' plans are duty, control over the situation, stress avoidance, and social harmony. Compared to the Brazilian and Indian students, the German students evaluate the outcome of their plans and the future skeptically and pessimistically.

India

Example:

"Oh! This is bad luck, I feel terribly depressed. I will personally go and meet the landlord and ask him whether other arrangements could be done so that his family member can have another place to live. But I would not be too insistent since it is his house and I know that I must leave the house when he asks me to. So if he insists that his relative has to have the house I will probably thank him for letting me live in this house for so long. I do not want to cause trouble to the owner. In a few months I will have bought a nice little house for my family and myself with a small garden in the front. My family loves the house. The owner helped us to find the place and we are very thankful to him."

Indian students show heterogeneous emotional reactions, especially fear, anger, surprise, and sadness. Many Indian students also show no emotional reaction. They accept the problem situation and do not ask further questions. The main goals for Indian students are duty and social harmony. In contrary to the western stereotype that describes Indians as "fatalistic", Indian students are quite active planners and optimistic in regards to the plans' outcomes.

What do these results show? Several aspects of planning in uncertain situations are indeed subject to cultural variation. We find different emotional reactions, different plan content and structure, and a different prediction of the plan's outcome. According to an eco-cultural perspective (e.g., Berry, 1993) psychological skills, such as planning, are functional in a specific cultural environment. For instance, at the time of the experiment, Brazil was suffering from high inflation. People received their salaries at the beginning of the month and immediately bought food supplies for the current month. In this context, it makes no sense to develop long-term plans, because the near future was uncertain and unpredictable. People had to be very flexible and adjust quickly to different situations. Also India is described as a rapidly changing society and therefore short and flexible plans are more functional in those life domains. In Germany, however, with its more stable economic environment, it is possible and functional to develop long-term plans. Therefore, it makes no sense to say that, for example, German plans are "better" than Brazilian plans. German plans might work in Germany, but they might not be so effective in Brazil or in India.

Such a cross-cultural study shows interesting differences in planning behavior. Knowledge about cross-cultural similarities and differences is helpful to better understand different cultures. But it remains unclear which cultural determinants are responsible for the development of a specific plan and for the selection of a specific planning strategy. A cultural approach in a second study addresses this more theoretical question: What are the cultural influences on planning?

There is nothing so practical as a good theory.

Kurt Lewin

Study 2: How does Culture Influence Planning?

A cultural psychological study will be described in the following paragraph (see Güss, 2000). The goal of this study is to examine the cultural influences on planning behavior. Cultural psychology follows an "emic" perspective. The underlying philosophy assumes that people in different cultures are different and unique, and it is impossible for an outsider to understand a different culture. Therefore, it makes no sense to compare cultures. Cultural psychologists study the person in his or her context and often use qualitative methods and fieldwork in their studies.

For the purpose of developing a process-oriented theory of planning with its cultural dimensions, 33 in-depth interviews are conducted in Brazil, India, and Germany. Participants are workers from different domains (e.g., fishermen, agricultural workers, factory workers, taxi drivers, caretakers, nurses, a mechanic, an inmate). Figures 3-6 show the interview situation and some participants.



Figure 3. Interview in Northeast Brazil with a fisherman at the beach.



Figure 4. A small town in Northeast Brazil.



Figure 5. Interview in an Indian fishing village.

Rather than giving the participants certain planning tasks, which may or may not be important for them, we took an approach more from an anthropological tradition. An in-depth interview in a semi-structured format was conducted with each individual in his or her setting. The background of the participant, everyday activities, actual problems, values, objectives, wishes and plans for the future were explored.

The results of this study will be discussed in the following way: According to the ideas of systems-theory and hermeneutics, the meaningful variables and their relations in the planning process are analyzed (Dörner, 1994; Jüttemann & Thomae, 1998). Parts of the interviews are presented and a model is deduced from the interviews.

Predictability of the Environment and Feeling of Control

Mr. S. is 49 years old and lives in a little village in Kerala in South-India. He is married and has four children. Currently he is working 15 days per month on the fields of landowners.

"I am poor. I have only 15 days work. So I don't expect much from the future. Everything will go on like this. What must happen, will happen. If we don't have alternatives we can't think of progress. Work is depending on the seasons. Only in the rainy season there is work on the paddy fields. So in the summer season, in the following four months, there is little work."



Figure 6. Indian workers processing coconut fibers.

If according to religious beliefs, for example, the future is seen as something that is determined by the will of God, fate, or the Hindu Law of Karma. Thus, planning becomes obsolete. A German taxi driver says:

"All is karma, so planning makes no sense."

These two parts of interviews highlight the relationship between predictability of the environment, feelings of control, and planning. The stability of the cultural environment and of the life domains as perceived by the individual influences the planning behavior. As mentioned before, in a relatively stable environment, individuals can predict future developments, develop plans, and predict outcomes of plans. On the other hand, an extremely dynamic environment (e.g., one with catastrophes, hyperinflation) or unpredictable changes in the life domains renders planning superfluous or leads to short plans. In such unpredictable situations, it is not possible to realize plans. Related to the predictability of the environment is the subjective feeling of control. Without a feeling of control over the situation and the feeling that someone can act according to a plan, planning would not make sense.

Religion, Uniform Value System, and Goals

Mrs. K. from Kerala, India shows how different values can coexist, in this case the faith in Jesus and the faith in Hindu Gods.

"I have a hole in my heart... My mother and my brother sold all their property to give me 100.000 Rupees, so that I can be operated. Now they are staying with us... After several appointments with the doctor he said, that an operation would not be helpful. My mother started to cry. Accidentally, we met someone who visited my bed neighbor in the hospital room. This person said, we should believe in Jesus and pray to him. After this meeting several things changed in our lives and now my mother believes in Jesus. Our faith is very strong, because we know several situations in which our faith in Jesus saved us. Now we put a picture of Jesus in our praying room close to the pictures and statues of our other gods."

In the following example, a German mother expresses her values and beliefs. Mrs. G. is 30 years old, living in the city in an apartment with her husband and her 4-year-old child in Bavaria, Germany. She is working part-time as an accountant in a distribution company. In the morning she takes care of the household and plays with her child. In the afternoon she goes to work and her mother looks after her child.

"In the moment I am quite satisfied, because I like to work part time and to take care for my child half a day. If there would come a second child, I will have to stay at home, because I can't give two children to my mother."

According to her, she should be responsible for the education of her child. Therefore, she does not need to develop various options if another child is born. Her values define the goal and the actions that can be derived from that goal.

The next citation of a German administration employee shows that a prerequisite for planning is to have goals.

"I have all that I wanted, husband, child, so why should I plan any more."

Value systems or philosophies of life define proper goals as well as ways to reach these goals (Rokeach, 1973). Many values are based on religious and metaphysical beliefs. A value system, as the sum of values, can be uniform and someone might be highly committed to this value system to the point of intolerance towards other value systems. In this case, values define goals and give strong guidelines for planning. Other value systems, like pluralistic values in postmodern western societies or in India (Sinha & Tripathi, 1994), are characterized by different co-existing value systems, and the person might not feel committed to follow one value system (Beck & Beck-Gernsheim, 1994). In this case, the individual has to define his or her own goals depending on the actual situation. When it comes to important or even critical events, the individual has a choice of rather vague value systems and different strategic possibilities.

Power Distribution, Resources, and Planning Space

Mr. J., a Brazilian fisherman, expects decisions from his boss and only wants to act when his boss does not act. This dependency of Brazilian fishermen from the boat owners is called "dependência" (see e.g., Robben, 1989). But the fishermen expect respect ("respeito", Cordell & McKean, 1992) as a return service according to an unwritten moral code.

"I am not allowed to go fishing right now. My boss has several boats, but he does not give me anyone to go out for fishing. We still have this problem with the bill and therefore I am not allowed to work. If he (the boss) does not do something, I have to go to him, because I can not let my family starve only because of him."

A Brazilian woman working in a textile factory has problems at work and she would like to leave her work. But she is divorced and has to pay for the school of her daughter and has no possibility of finding another job. Due to the economic situation of the country and due to her educational background, she has (or sees) no other options than to stay at work.

"Once I was ill and had an operation. Then I stayed at home. From 35 workers of the company, 10 already gave their notice. The bosses came to my house and wanted me to work, because they needed me. And I also needed the money, because being ill does not earn anything... If I am well or not, I have to go to work."

An Indian mechanic describes how the lack of financial resources restricts his planning. This lack of financial resources makes future developments unpredictable.

"We live day for day, because we do not know if we will have enough work and money tomorrow."

Attempts to plan only make sense when one is given sufficient leeway not only to find a solution but also to bring it to work. The individual needs a certain "planning and action space" to be able to plan. The scope for action is dependent on the individual's position in society and the resources (e.g., financial and social) he or she possesses.

Style of Education and Planning Experience

A further influence on the development of planning skills is the way of teaching and education (Scribner & Cole, 1973). If learning means repetition of prefabricated solutions there will be only limited development of planning abilities.

Miss M. is 46 years old and lives in the little house of her parents together with her daughter in a city in the Northeast of Brazil. She has worked in a textile factory for more than 20 years and is responsible for 25 tailors. She married her first boyfriend but "it did not work". She is divorced. As a child, she studied in a Catholic school of nuns and lived in the school's children's home. She summarizes her education and planning experiences as follows:

"I went to a school of nuns. Before the divorce, I never thought about life. All came like this. Afterwards, I opened my eyes."

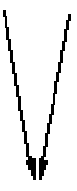
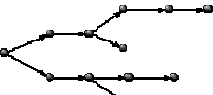
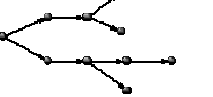
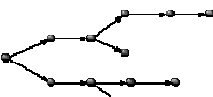
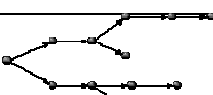
Mr. J., the Brazilian fisherman, said about his education and knowledge:

"The most important thing in my life is fishing. At the age of 8 I started to go fishing. I did not learn to work on the fields, I do not know how to make a business, my thing is fishing. If I could read, then I would have more options, but I cannot read."

If children are allowed to develop plans, come up with solutions for problems, and have the possibilities to act, they are able to develop planning competence. Planning competence is not only knowledge about how to plan and when to plan, but also the individual's confidence in his or her own plans and their realization.

Table 3 summarizes the discussed influences on planning. Macro-variables, such as the political and economical situation, influence cultural variables, such as the power distribution. These cultural variables in turn influence individual psychological variables like planning and action space. The four different planning styles (short and narrow, deep and narrow, short and wide, deep and wide) are a result of the combination of cultural and individual variables. For example, if the perceived planning and action space is great, short and wide or deep and wide planning are more likely than short and narrow or deep and narrow planning.

Table 3
Influences of Macrovariables, Cultural and Individual Variables on Individual Planning Behavior

	Macrovariables →	Political system, economy, climate	Religious and metaphysical assumptions	Political system, economy, laws	Political system
	Cultural influences on planning →	Predictability of environment, and time perspective	Congruent, uniform and reliable value system	Power distribution, social and financial resources	Educational styles, and role expectancies
Plan's structure	Individual influences on planning →	Feeling of control	Clear goals	Planning and action space	Planning experience and competence
Short and narrow		-	+	-	-
Deep and narrow		+	+	-	+
Short and wide		-	-	+	+
Deep and wide		+	-	+	+

Summary and Discussion

The two described studies follow different research traditions and have different strengths and weaknesses. The cross-cultural, etic study sheds light on cross-cultural similarities and differences in planning in Brazil, India, and Germany. Such results are helpful when someone wants to understand people with different cultural backgrounds, but such an approach does not explain why culture influences planning. The cultural psychological (emic) approach produces a broad picture of the living conditions of people. The interview data help to yield a theoretical model of the specific cultural influences on planning. Of course such a model is not complete and there exist more relations between the variables than were shown because these influences are not independent from each other. But such a model is useful in deriving hypotheses in a new research field. Those hypotheses themselves can be the starting point of further cross-cultural studies.

In summary, planning is a process that is embedded in a socio-cultural environment. Personal factors, as well as requirements and limits of the cultural environment influence the planning behavior. Therefore, the analysis of planning makes sense only if both groups of factors are taken into account.

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About the Author

Dominik Güss received his Ph.D. from the University of Bamberg, Germany, in 2000. He worked and did research funded by the National Science Foundation at several universities in Brazil, Germany, India, Philippines, and the United States. Currently he is Associate Professor in the Department of Psychology at University of North Florida, Jacksonville (e-mail: dguess@unf.edu or domgues@yahoo.com). His research interests include culture and decision making, complex problem solving, planning, terrorism, and disaster management.

Questions for Discussion

1. According to which dimensions can plans be differentiated?
2. How can the term culture be defined?
3. What are planning characteristics of Brazilians, Indians, and Germans?
4. In which situations do you plan and how would you describe your planning?
5. What are cultural and individual influences on planning?
6. What are the strengths and weaknesses of **cross-cultural** psychological approaches in the study of psychological phenomena?
7. What are the strengths and weaknesses of **cultural** psychological approaches in the study of psychological phenomena?