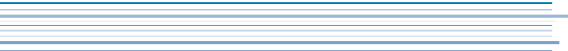




Bva



Management and HR consultants BPI, helped by BVA, conducted an international survey with employees to find out how they assess their direct-report manager.

This original poll helps give greater insights into the specific traits of each country and gives a clearer picture of management models. The findings provide a view of comparative positions from one country to the next and a better understanding of managerial attitudes which combine heavyweight trends with a number of significant national idiosyncrasies.

It was conducted in 10 countries between the 18th and 25th of October of this year with a sample of 500 employees per country, the one exception being the United States, where the number of respondents was raised to 1,000.

The sample meets all criteria of representativity in terms of gender, age and profession for employees working with companies employing 10 and more people in the private and public sectors.

The surveys were conducted with panels questioned regularly via the Internet (except in Morocco, where the survey was made over the phone).

The polled countries were: France, Germany, Italy, Morocco, Poland, Romania, Spain, Switzerland, the UK and the United States.

The survey focused on ten different themes and went looking for 32 replies.

The main body of questions concerned the employee's direct-report manager in a bid to characterize the nature of relationships between employees and immediate superiors, the roles managers play, the image that employees have of their manager, what is expected of them and their legitimacy.

The point and aim of this survey was to draw up a sort of **standard portrait of the modern manager and to highlight the peculiarities of management in each country**. Behind replies that are often similar, there lies a different reality and the repetition of these differences ends up by revealing a number of deep characteristics.

One and the same question, one and the same word may paint a different picture and relate to different realities according to the culture of a country. To get a truly clear understanding, the poll's findings are analysed with experts from each country in order to underline the relevance of interpretations.

Happy reading.

Christophe Bouruet
Director of Management Studies, BVA

Brice Mallié
Director, Management Branch – BPI

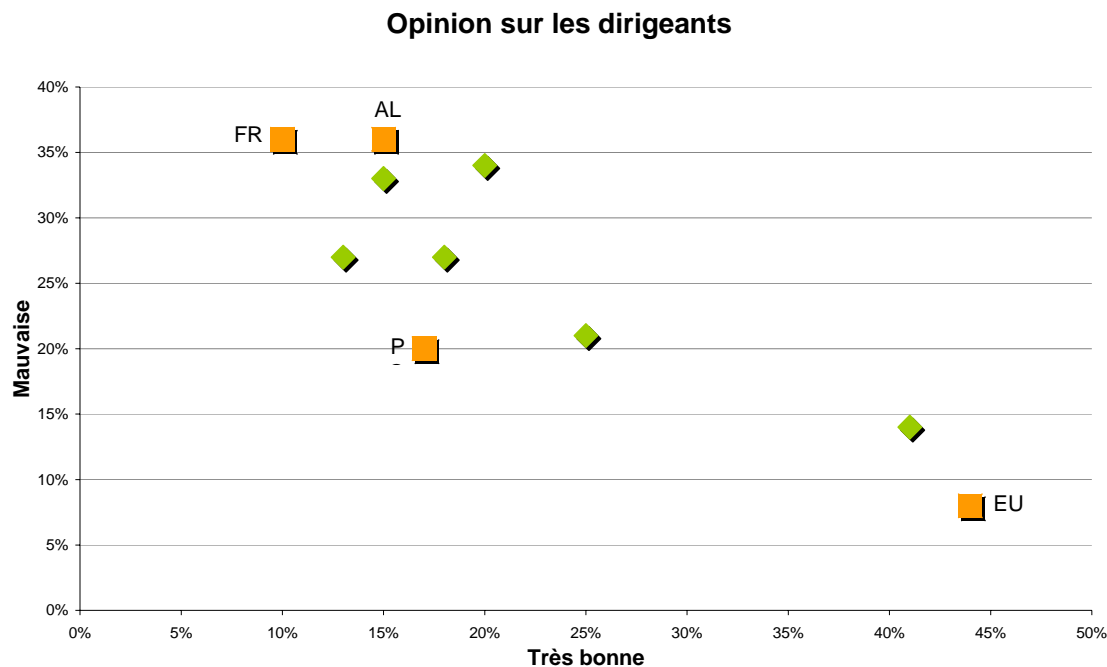
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General Manager - BPI



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1. A good opinion of leaders but with disparities between countries



Graph n°1: "Opinion of Leaders"

The simple question asking employees for their opinion of their leaders already produced results from which much can be learnt.

In each country, at least two-thirds of employees generally speaking have a good opinion of their leaders: from this we might conclude high approval levels from employees. But in their answers there was always a high share (almost 50%) of convenience replies of "rather good". It is therefore more enlightening to focus on the extremes, i.e. the share of people saying they have a very good opinion or, on the contrary, a poor opinion. These findings are portrayed in graph N°1.

We see there are three groups of country:

- > Six countries (top left) where more than one quarter of employees said they have a poor opinion of their leaders and where less than 20% have a very good opinion. They are France, Germany, Italy, Spain, Switzerland and the UK. In this group, the two extremes are

France on the one side, where pessimism is the highest, and Switzerland on the other.

- > Two countries (in the middle) where the proportion of poor opinions is lower than with the previous group but without any much greater enthusiasm. They are Poland and Romania.
- > Two countries (bottom right) that stand out for their very high rates of very good opinions and very low rates of poor opinions. They are the United States and Morocco.

Here, we see characteristics peculiar to European countries, where a certain distance and/or distrust is often seen inside companies. This, of course, appears to varying degrees according to country, with France finding itself in the most negative configuration; we noted however that answers in Germany are rather similar to those seen in France.

At the other end of the scale is the US, where the managing/managed person dichotomy generally is much more low-key. Unemployment is low and job mobility potential is higher, giving such flexibility that if people do not get along, they can go their separate ways more easily.

In all likelihood this is not the case in Morocco, even though results here are similar to those in the US. We will explain this a little later on.

The influence of age

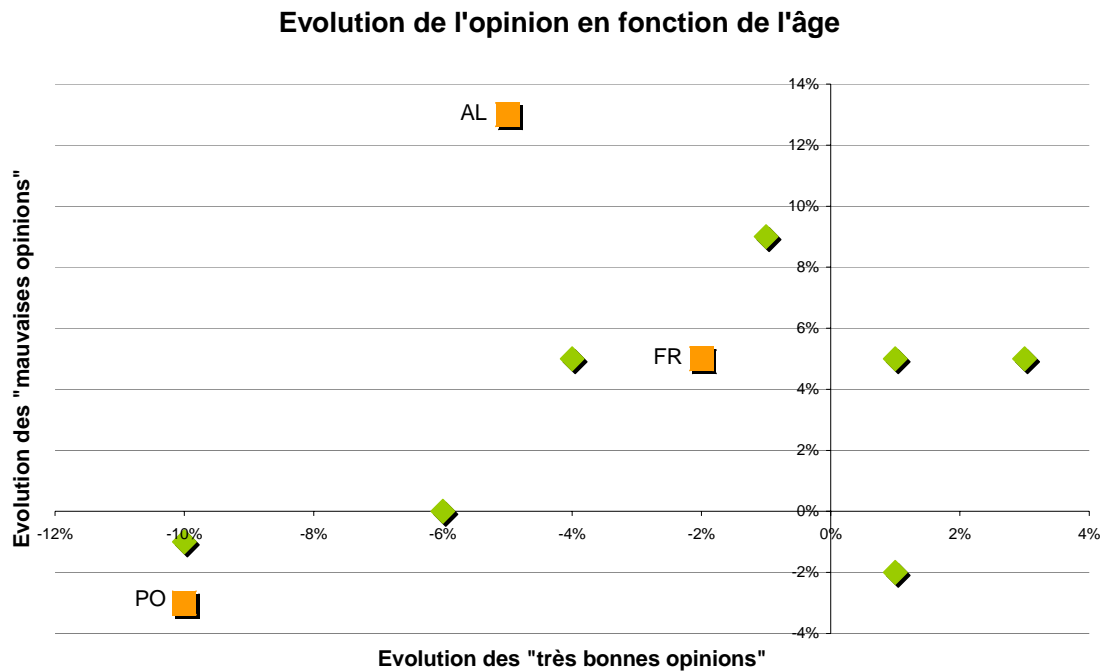
Generally speaking we see that younger employees (under 35s) have a higher opinion than their elder counterparts (over 45s). On average, these younger people are equally split in having a very good or poor opinion of their leaders (23%). The same is not so for older employees, with whom there are 7% more poor opinions than good opinions, a significant difference but not so important (20% of very good, 27% of poor opinions).

As a result, the **proportion of employees having a poor opinion of their leaders grows with age in most countries** but to differing degrees. In correlative fashion, this is generally accompanied by a more or less significant fall, with age, in the proportion of people who have a very good opinion of their leaders. Graph N° 2 measures this, indicating the increase in % of replies for each country:

- > this phenomenon is very significant in Germany (+14%) and, to a lesser extent, in Spain (+9%);
- > four countries show the same growth in poor opinions (over 5%) – the United States, France, Switzerland and Italy. It is a surprise to see the US in this group, especially since as seen earlier this

proportion is generally small; this then corresponds to an increase of 40%;

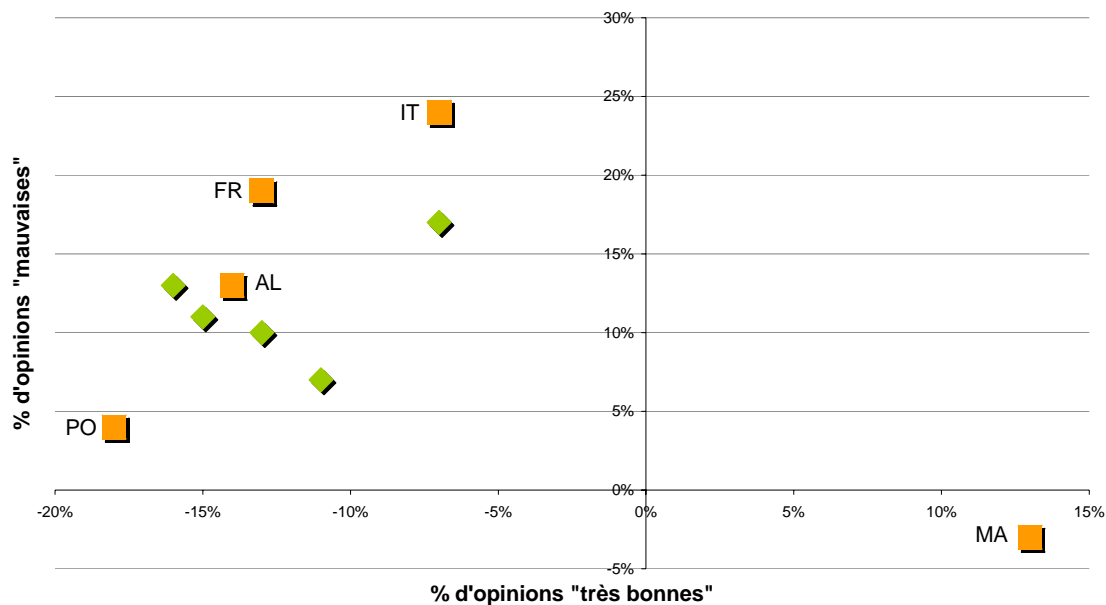
- > in four countries (the UK, Romania, Morocco and Poland), this proportion stays virtually the same, but aside from the UK it is accompanied by a clear drop in the proportion of people having a very good opinion of their leaders. For instance, this drop is 10% in Poland and Morocco.



Graph N°2: how opinions evolve according to age

Influence of the size of a company

Evolution des opinions en fonction de la taille des entreprises



Graph N°3: how opinions evolve according to company size

Overall, opinions of employees grow worse as the company gets larger. For instance, the proportion of people having a very good opinion slips, on average, from 29% to 19% when comparing answers from employees working in small companies (under 50 employees) with those from employees in larger firms (workforce of over 2,000). At the same time, the percentages of “poor opinions” are 19% and 30% respectively.

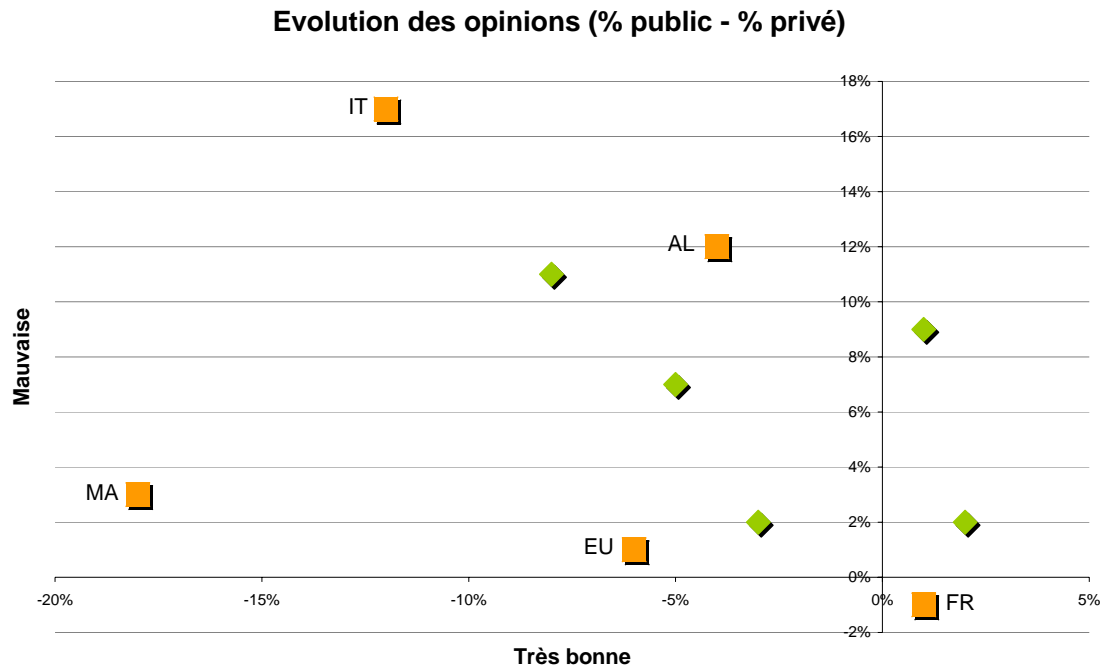
But the extent and size of these differences vary from one country to the next (cf. graph N°3). For Morocco even, the proportion of “very good opinions” rises by 13%.

For the others, we see two extreme situations:

- > Italy, where the proportion of negative opinions rises sharply (over 14%) with a slight dip in “very good opinions”;
- > Poland, where inversely the growth in negative opinions is low (over 4%) but where the number of “very good opinions” falls back sharply (-18%).

Might we conclude that Italian employees have a harder time working in a large firm than their Polish counterparts?

The influence of company status (private/public sector)



Graph N°4: changes in opinions (% public - % private)

On average, there is a divide in the make-up of employee opinions about their leaders depending on whether they work in the public or private sector. **Private-sector employees are more appreciative of their leaders than those in the public sector** (24% of very good opinions and 23% of poor opinions in the private sector as opposed to 19% and 37% respectively).

But again these discrepancies differ according to country as shown by graph N°4, where we have calculated the differences in percentages between the private and public sectors.

The result is a distinction between:

- > a group of countries where appreciation is clearly lower in the public sector: Italy, Germany, Spain, the UK and Poland;
- > and other countries where the gap is low, e.g. France, where judgments are virtually the same between the two sectors.

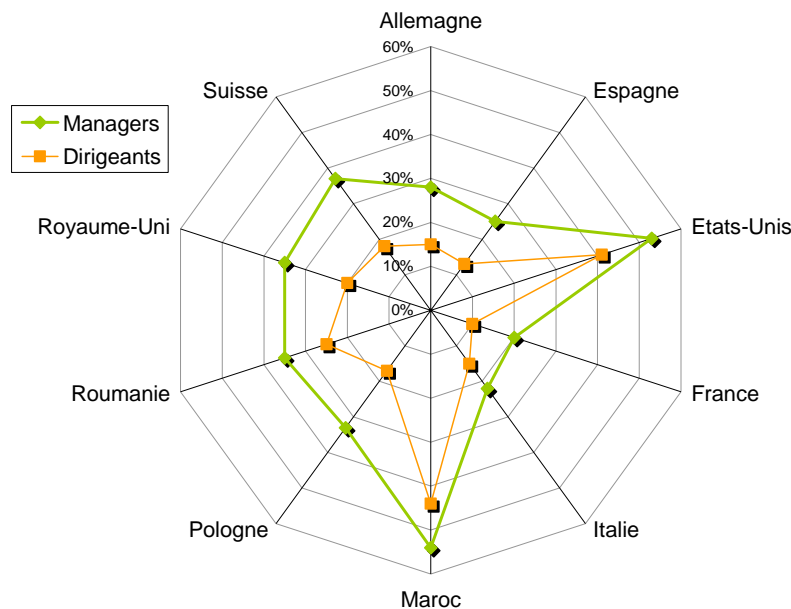
2. Direct-report managers are viewed more positively than top managers

The two graphs 5 & 6 portray side by side opinions of top managers and direct-report managers in each country, bringing out on the first graph the “very good opinions” and on the second the “poor opinions”.

We see how on one side the curve of “very good opinions” of managers envelops those of top execs, and on the other how the “poor opinions” curve for top execs surrounds that of direct-report managers. On average, the “very good opinions” curve grows by 12% and the “poor opinions” curve falls by 7%.

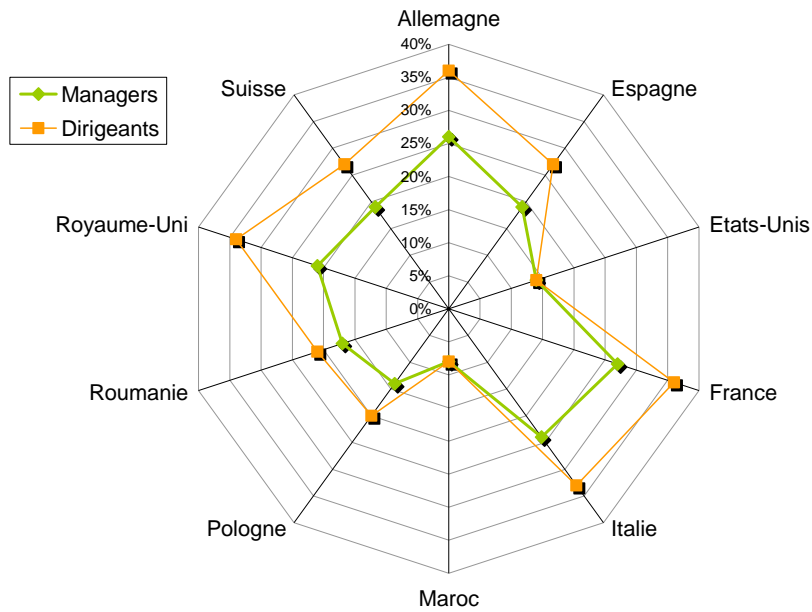
A detailed analysis shows that the level of improvement in opinions when switching from top managers to direct-report managers varies according to country. The highest difference levels are to be seen in the UK and Romania; Germany, too, has a high score here. By contrast, these differences are the lowest in the United States and Italy, but for different reasons. For the US, “poor opinions” remain at the same level, i.e. very poor, and “very good opinions” mark the difference. In Italy, the reverse is true: top managers are very poorly rated while direct-report managers do not pick up that many more very favourable opinions.

Comparaison des % d'opinions "très bonnes"



Graph N°5: comparison of % of “very good” opinions

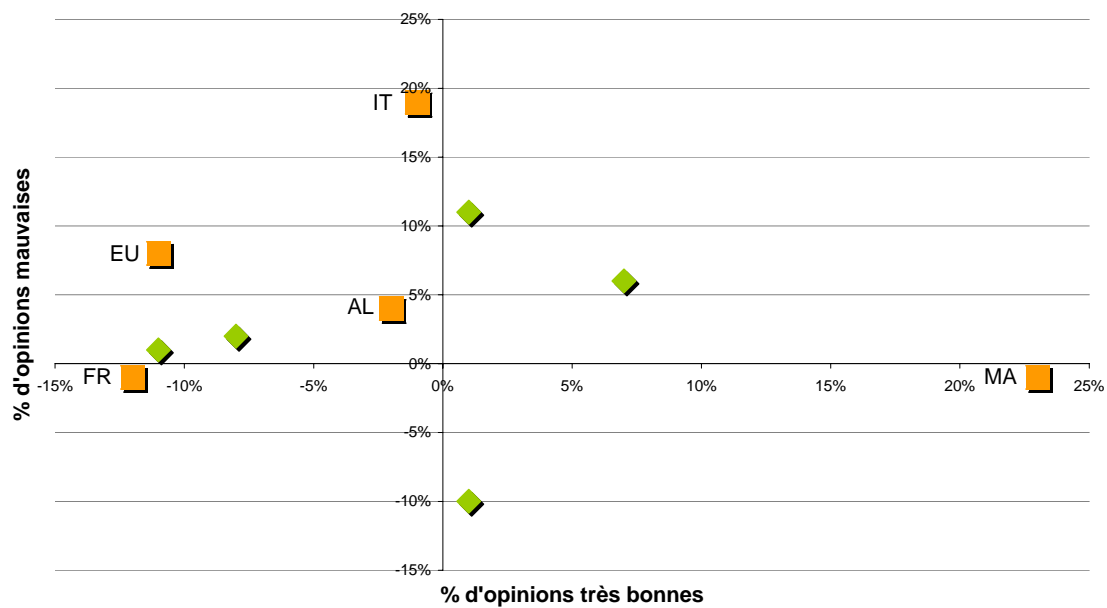
Comparaison des % d'opinions "mauvaises"



Graph N°6: comparison of % of "poor" opinions

The influence of company size

Evolution des opinions en fonction de la taille des entreprises



Graph N°7: how opinions change according to company size

As seen with leaders, opinions tend to deteriorate in line with company size; the percentage of “very good opinions” falls (negative figure) and the percentage of “poor opinions” rises (positive figure). But the relative position of countries is not quite the same; some retain exactly the same positions, like Italy (sharp worsening), Morocco (improvement) and the United States with the same middle position. The major difference concerns France, where “poor” opinions are steady and Germany, where the size of a company is seen to have only very little influence.



3. Two contrasting managerial cultures

To qualify in summary fashion the relationships between the employees we questioned and their immediate superior or direct-report manager, the survey asked them to choose from four items:

- > antagonistic
- > simply professional
- > friendly
- > inexistent

This scale is of particular interest because we are able to appreciate the depth of relations. In this respect, the “friendly” item is instructive because it introduces a relational dimension that brings with it components such as consideration, solidarity, understanding and trust... And we surmise that in opting for this reply, employees wanted to say that their relationship is of a higher order than just a simple business relation. Here, the cultural context of each country played a full role. For example:

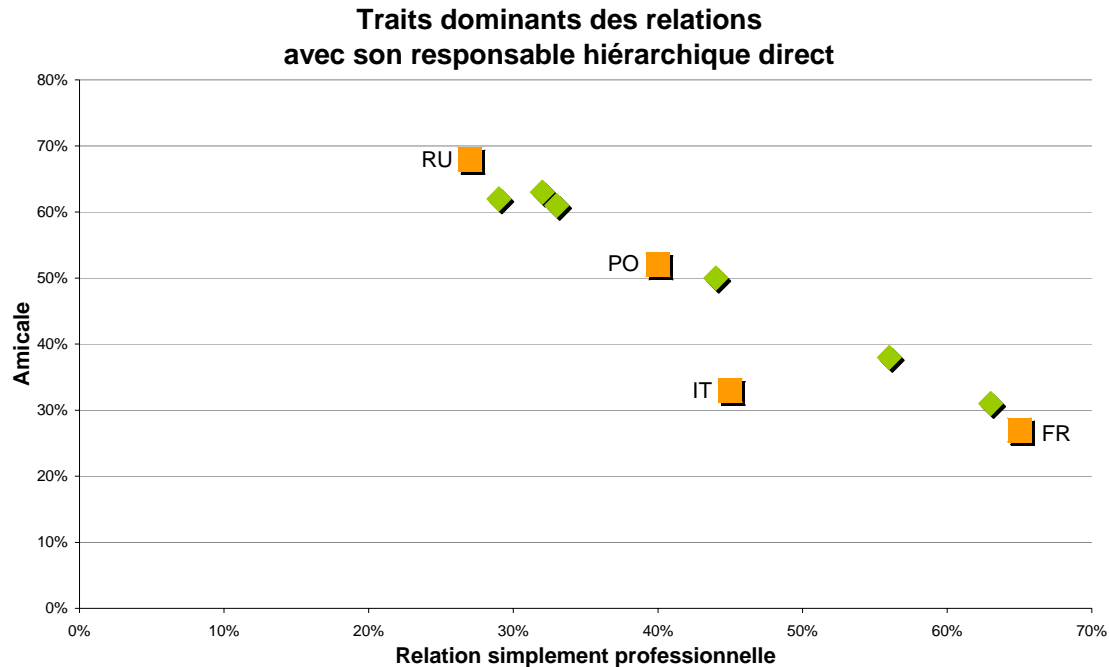
- > in the United States, managers tend to empower and trust their employees more; theirs is a relationship that is not confined only to the business world but deliberately encompasses other areas that some might consider as belonging to personal and private life;
- > in Morocco, this item was rejected because of its “favouritism” connotations;
- > in Romania, friendly means above all else “relaxed” and “informal”.

On average, 49 % of employees said that the relationship with their superior was “friendly” while 43% said “simply professional”. “Antagonistic” relations are rare, around 5%, the one exception being Italy where the rate is particularly high at 16%. On this subject, we note that men tended to choose this item slightly more than women (6% vs. 5%). Very few employees qualified their relationship as “inexistent”.

This leads us to distinguish between two major types of country:

- > countries where friendly relations are dominant (almost two-thirds of replies): **Germany, the United States, the UK and Switzerland** (top left on graph N°8);
- > countries where “simply professional” relations win the day: **France** first of all where we see only 27 % of “friendly” relations as opposed to 65% for “simply professional”. Pretty close are **Italy, Morocco and Romania** (bottom right on the graph).

Spain and Poland are in an interim situation, attracted rather more by the first group.



Graph N°8: dominant traits in relations with one's immediate superior

We can easily verify the link between friendly relationship and very good opinion. **Very good opinion rhymes with friendly relationship**. This truth has no place in France, where the model of professional relations and consequently of distance holds sway. This might explain the poor scores for opinions.

So what is the influence of age?

On average we see a slight drop in friendly relationships with age (50% for the under 35s vs. 47 for the over 45s). This change is not seen in every country in the same way: there is a very sharp drop in Poland (-19%), a distinct drop in France and the UK (-8%). By contrast, we see an increase in the United States (+10%) and in Spain (+7%).

And the influence of company size?

In every country, we see a more or less significant decrease in friendly relationships geared to company size. High in Italy (-17%) and in the US (-16%) but low in France (-2%).



4. The perceived qualities of managers: a real split between countries

The survey asked employees to gauge the level of a certain number of qualities or traits that a manager is likely to possess: competence / talent/ authority / likeability / honesty / responsibility / courage / non-stressful / openness to remarks.

Generally speaking, all these attributes got a high mark (an aggregate of “yes, completely” and “yes, rather”) with a ranking as follows:

Managers were firstly acknowledged to be competent (84%), likeable (83%) and responsible (80%).

Then they were honest (77%), open to remarks (73%) and talented (72%). 57% were non-stressful and 55% had authority.

To fine-tune this analysis, we will use the clearly affirmative replies (i.e. “yes, completely”) that create a consistent scale of qualities.

The question is to ascertain whether there are significant differences in all countries:

- > Even though, as we have seen, managers are considered first and foremost to be competent, appreciations were more or less qualified according to country. It is interesting to see how or if this interferes with the nature and type of relationships employees have with their managers (friendly or professional).

Employees in France and Italy acknowledge less frequently than other countries a very high level of competence in their managers (31% and 36% respectively for an average figure of 45%), while simultaneously their relationship is above all else “professional”.

By contrast, in the United States competence and friendly relations go hand in hand.

For the other countries (the vast majority), the level of competence acknowledged is a little higher than that seen in France and Italy; but the great difference comes from the importance of the friendly relationship.

Inversely we may study the link between professional relationship and competence. It is not direct, for example in France, professional type relations are frequent while the acknowledged level of competence is low.

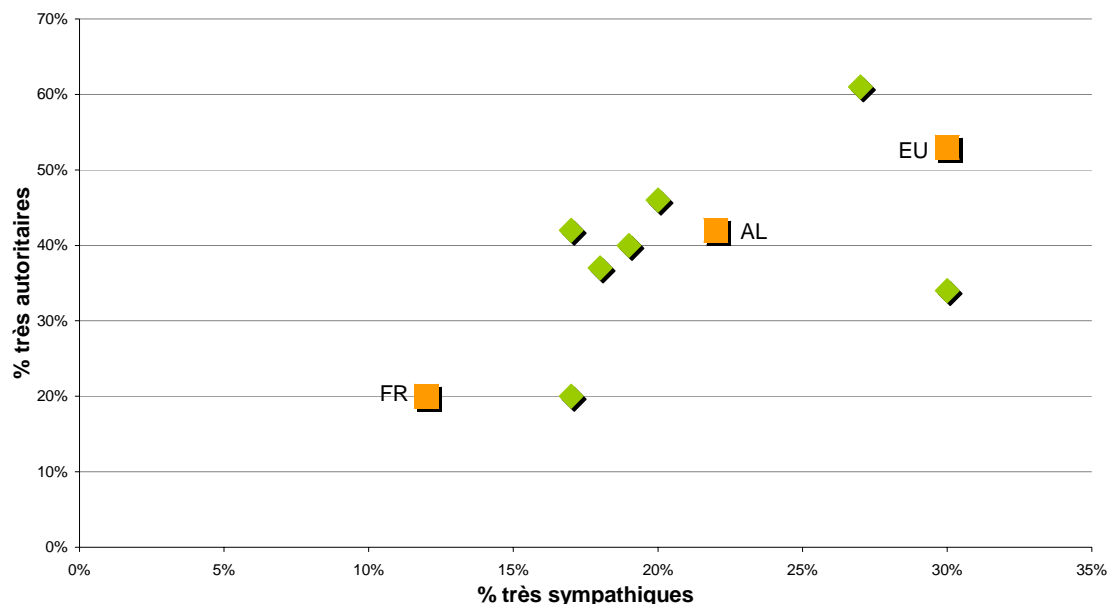
We cannot therefore compare professional relationships with high competence in managers. The example shown by different countries shows that there is nothing in this.

- > What is the relationship between the attributes of “likeable” and “has authority”?

None, on the face of it. We can check to see that the correlation between these two attributes is low, contrary to other pairings such as likeable/honest, likeable/competent or likeable/open to remarks.

It is nonetheless interesting to take a closer look at how things work in different countries.

Relation entre qualités sympathique et autoritaire



Graph N°9: the relationship between likeability and authority

In graph N° 9, we can make out several groups of countries:

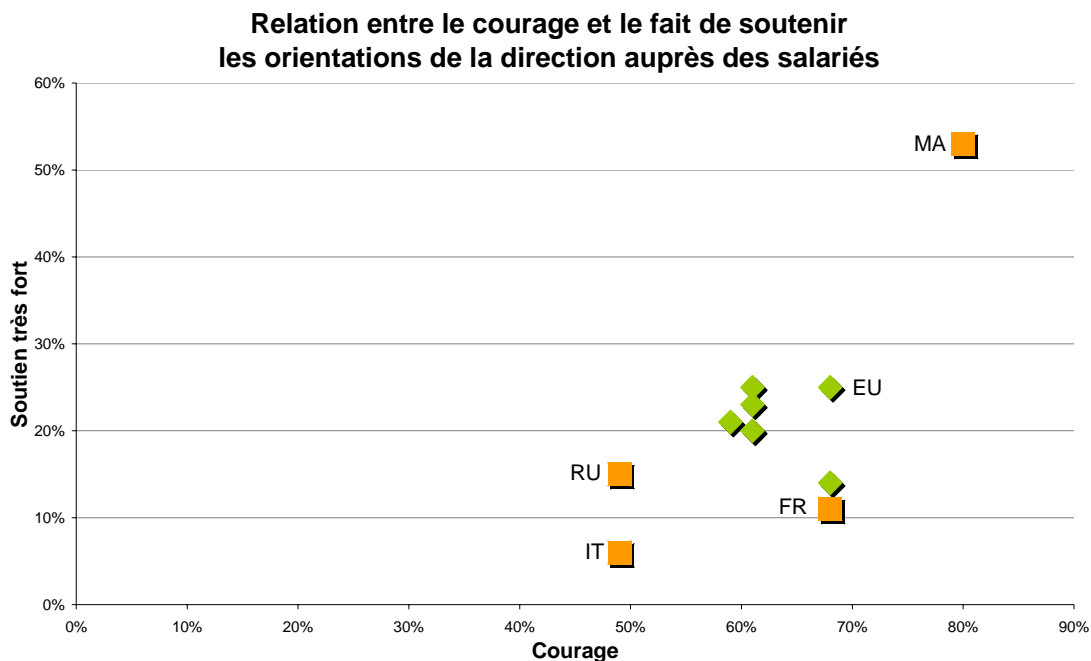
- > at the bottom, the least “authoritarian” countries (20%): France and Italy; for all that, the level of likeability still remains low;
- > in the middle, five countries where the % of “very authoritarian” is at least twice as high: the UK, Spain, Poland, Switzerland and Germany;
- > the US, where the percentages are the highest, thus apparently dovetailing friendly relationships with authority;

- > Morocco, always a little on its own, is close to the United States; Romania rules itself out of the central group on account of a higher proportion of “very likeable”.

This suggests that cultural portrayals in their own specific way create value for certain terms and help to shape differently the expected images of managers.

Authority is thus given very great value in the United States but is understood as leadership and ability to take decisions. In France, there is ready confusion between authority and authoritarianism / a willingness to penalize (negatively)...

The questionnaire helped to go deeper into certain dimensions associated with, for example, courage. So we asked employees whether their immediate superior supported in their presence the directions set by senior management. Graph N°10 clearly evidences the importance of this relationship. This is particularly important for Morocco. Note that France’s position here is very close to that of Germany and rather close to the United States. By contrast, we see that Italy and to a lesser extent the UK deny their immediate superiors this quality.



Graph N°10: relationship between courage and willingness to support senior management’s directions with employees.



5. The roles of managers: a number of paradoxes

The survey moved on to detailed questioning over the role filled by managers; for instance, employees were questioned over the way their manager carries out the following actions:

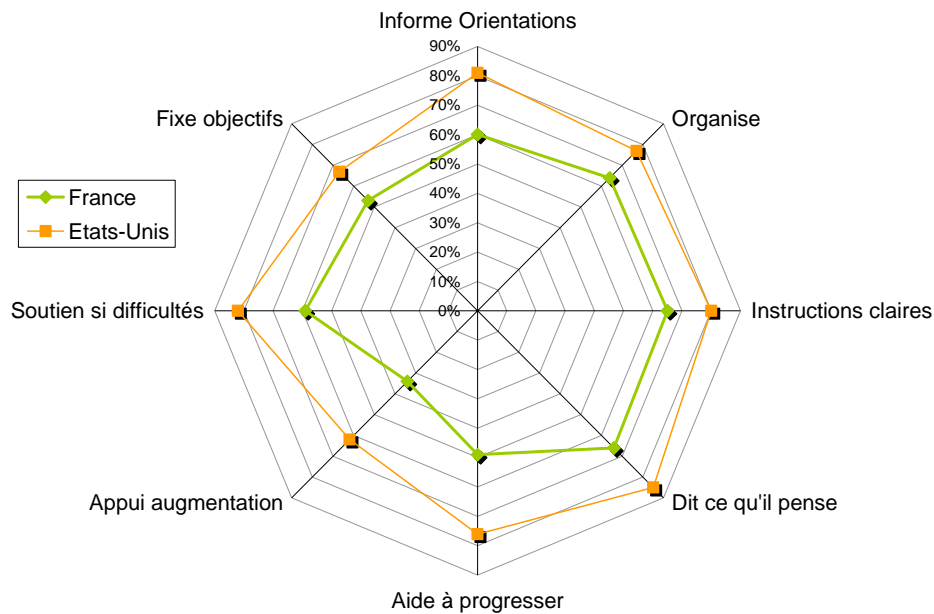
- > he informs you of business directions and of changes within the company
- > he organizes teamwork
- > he gives you clear instructions
- > he tells you sincerely what he thinks of your work
- > he helps you progress in the job
- > he backs you when asking for a pay rise
- > he supports you when you run into in trouble
- > he sets specific annual goals for you.

Overall, the rate of affirmative replies was high and in excess of 70%, except for three items:

- > helps you to progress in the job: 63% (France 49%)
- > sets specific annual goals: 58% (France 53%)
- > backs you when asking for a pay rise: 44 % (France 34%)

Thus, France and often Italy stand out for the lowest rates of positive replies. This should be examined a little more closely by comparing the answers given by employees in the US with those given by their French counterparts.

Comparaison France / Etats-Unis



Graph N°11: comparison between France and the United States

Clearly, American managers in the different roles examined here (*informing of directions / organizing / giving clear instructions / saying what he thinks / helping to progress / backing pay-rises / supporting when in trouble / setting goals*) are systematically given a score that is almost 20% higher than that seen with French managers.

The highest discrepancies relate to two items in particular: “helping to progress if in trouble” (27%) and “backing for a pay-rise” (28%).

The lowest related to “organizing teamwork” (13%) and “setting specific annual goals” (14%).

Discrepancies on this scale raise questions over their significance. Is it that French managers are inefficient? Considering the performance rates of French companies (bearing in mind the very high levels of productivity in France), the answer has to be no.

Consequently, the findings here assume another significance; we would venture the following hypothesis:

In reality French employees make higher demands on their managers (and the reverse must be true) to the extent of creating a gulf between managers and employees, which in turn leads to a relationship of tension and easy disappointment. All of which seemingly translates to a sort of relational immaturity.

One question indirectly confirms this point. Employees were asked whether they thought they could do the same job as their immediate

superior in a more or less shorter time-frame (“yes, as of now”, “yes, after a brief spell in the job”, “no, not before a long spell in the job”, and “no never”). If we examine the relationship between the proportion of people who say they could replace their managers right now and those who feel they work with a very competent manager, we get graph N°12.

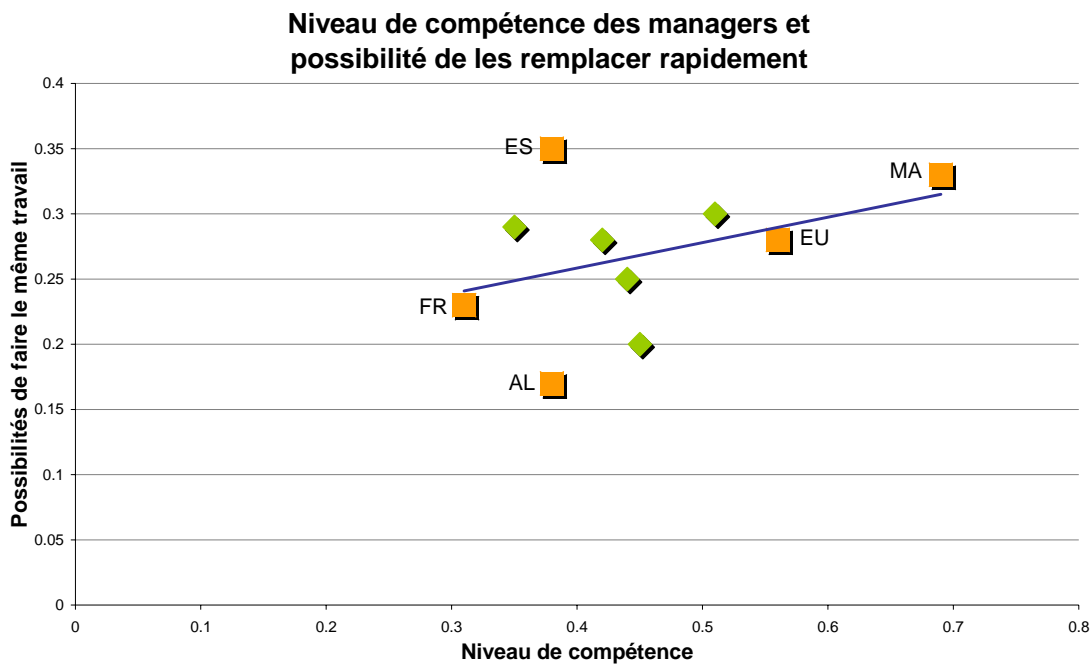
It is surprising to note that the more managers are felt to be competent (in the eyes of employees), the more these employees reckon they could replace them.

Inversely, this possibility is seemingly less likely when managers are felt to be less competent. In this latter case, the countries concerned are France and Germany, countries which do not have the reputation of producing incompetent managers.

This contradiction may come from the fact that the level of demand is so high (an employee expects so much from his or her superior) that he is led to underrate the competence of his manager and to believe himself incapable of holding such a position.

The reverse is found in Romania and in Morocco, where competence is the product of a shorter tradition.

The case of the United States is interesting because it testifies to potential easier movement or to greater potential for climbing the social ladder.



Graph N°12: level of managerial competence and the possibility to quickly step into their shoes



6. High expectations for recognition, but of a different nature

The survey asked employees to cite their three major expectations regarding their immediate superior. They were asked to choose from the following list:

- > better listening ability
- > better organization of team workers
- > better information
- > better support in difficult situations
- > recognition of the work you do
- > more coaching and more advice
- > greater autonomy
- > input to your business career advancement

Recognition of the work they do was unquestionably the number one priority, cited by 45% of employees. **This confirms a heavyweight trend in the working world: recognition has become a priority in professional circles, which increasingly require greater involvement and responsiveness.** Systems of enhancement through organization into skilled professions have lost their relevance. Identities and traditional signs of recognition are no longer benchmarks but the quest for recognition remains.

Graph N°13 shows the differences in priority between countries: they have been arranged geared to the growing importance of the need for recognition. France is the country where this need is expressed the most strongly.

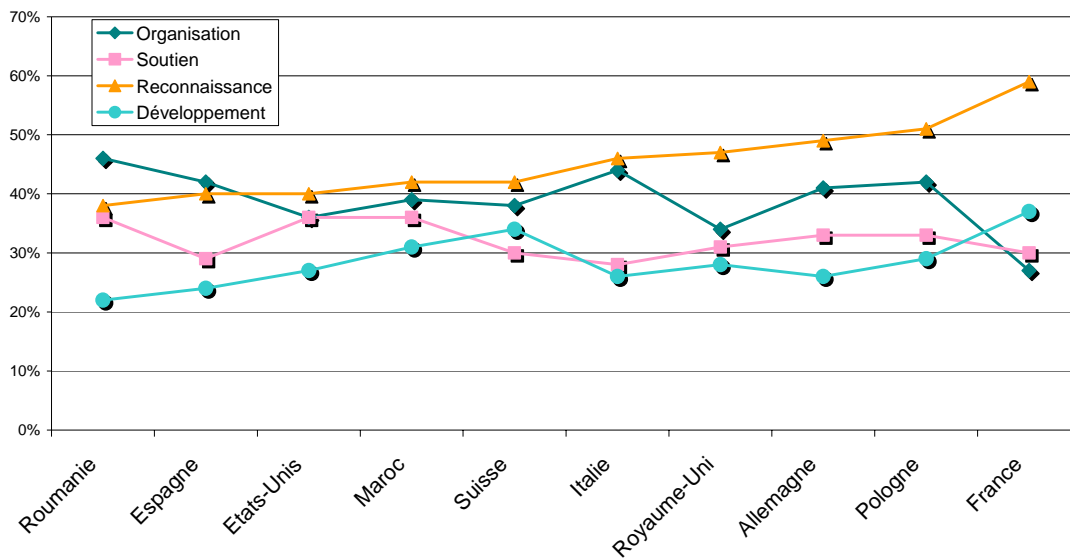
The question of organizing work in teams is also a major concern; in a way, we might even observe that the curve for this demand stands opposed to that for recognition as it runs in the opposite direction. By comparing the discrepancies in replies in each country, we may be able to

measure a certain level of individualism, seemingly particularly significant in the UK and in France.

France is also the only country whose employees attach high value to a demand for input from managers to further their own career advancement.

We may therefore outline two models: the individualistic model (I want to be recognized, I want to be trained, etc.) and the collective model (what matters is my place in a well-organized team with a manager-facilitator).

Principales attentes des salariés

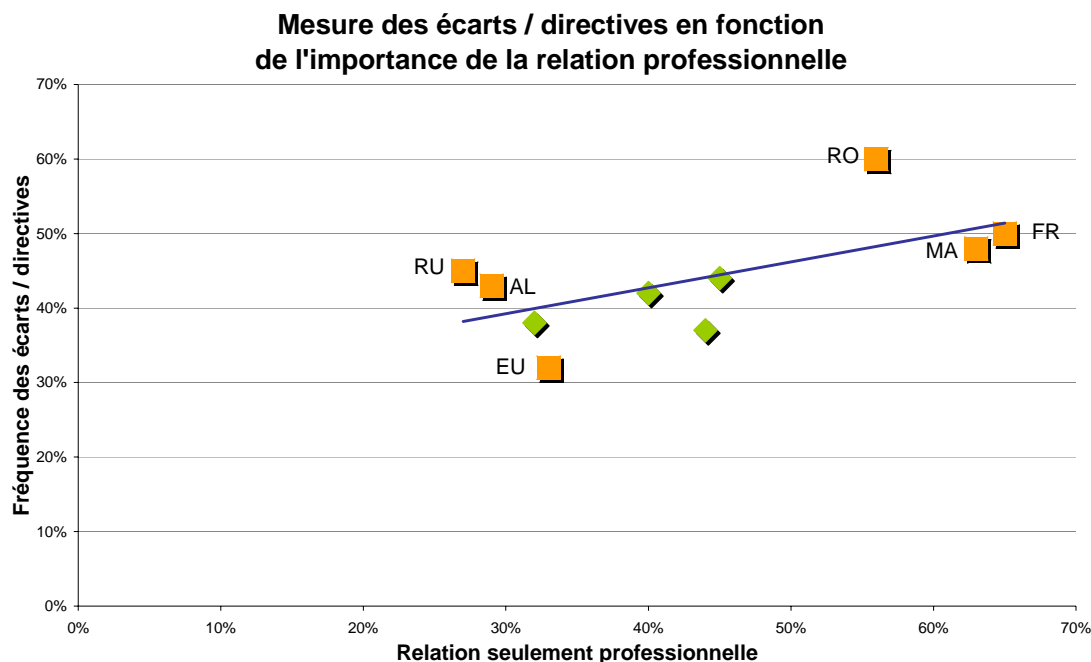


Graph N° 13: employees' main expectations

7. The influence each form of relationship has on behaviour

Employees were asked if sometimes they deliberately did not follow the directives set by their direct-report manager, either on occasions or regularly. A positive reply may be interpreted in several ways: either it testifies to a certain level of autonomy or, on the contrary to a lack of discipline...

To take a deeper look, we cross-referenced the answers they gave with the importance granted to a professional relationship. The results are given in graph N° 14.



Graph N°14: measurement of deviations from directives geared to the importance of a professional relationship

Quite clearly, this correlation does exist. **When the relationship is dominantly professional, employees frequently tend to “do their own thing”**, a fact that may be interpreted in two ways: either they take the liberty to do what they feel is right, believing they master their job well enough, or a relationship in which they do not feel too involved prompts them to deviate.

Inversely, we see that a friendly type of relationship tends to restrict this type of behaviour, but to differing extents: the propensity not to

systematically follow the directives of one's immediate superior is low in the US but high in the UK.



As a conclusion

In modern-day organizations, employees are asked to play the most relevant roles instead of just holding positions. This demands more involvement, autonomy and responsiveness. It means that managers hold a new place in which they have to be able to place their trust in employees and listen to them, but also be able to support them and make decisions...

But in this global environment not all countries come under the same configuration:

- > France stands out as the country where employees are obsessively demanding and impose distance and a certain degree of hardness in relations. There is dedication to professionalism but this is coloured by permanent dissatisfaction. Hence a great need for individual recognition.
- > At the other end, the US manager develops a relationship based on thoroughness, on sociability and transparency, where trust is given and leadership is key. People are less obsessed with skills as a value *per se*.
- > Italy is close to France but with even greater distrust; Germany, the UK and Switzerland are mid-way between France and the United States.
- > Morocco is still very much marked by the status of boss which commands only respect.
- > Transitional countries like Poland and Romania reveal complex profiles which mix modernity with the weightiness inherited from communist regimes.

So finally, in relation to the evolutions of today's companies, a number of countries still have management styles that constitute a more or less significant stumbling block to development.



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